

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.



Inspiration



Research and
planning



Post-purchase



Open to destination inspiration

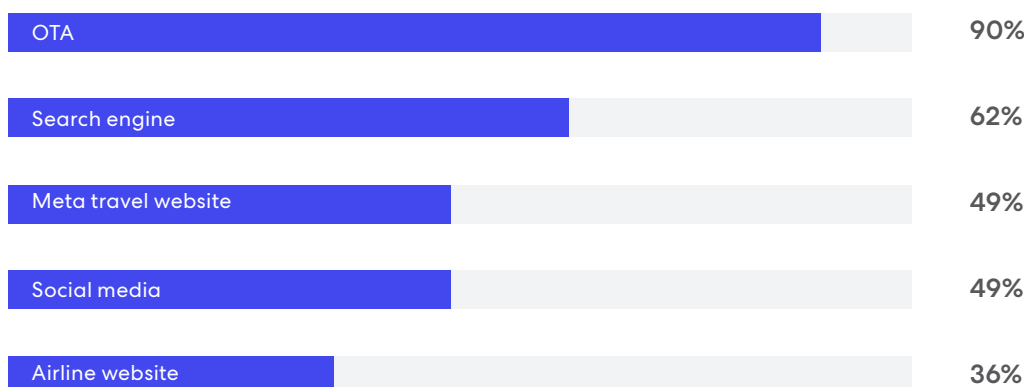


More than

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



90%

of French travellers visit OTAs during their path to purchase

→ versus 80% on average.

Lower content consumption than average in the 45 days before booking



81

pages of travel content viewed

→ versus 141 pages on average.



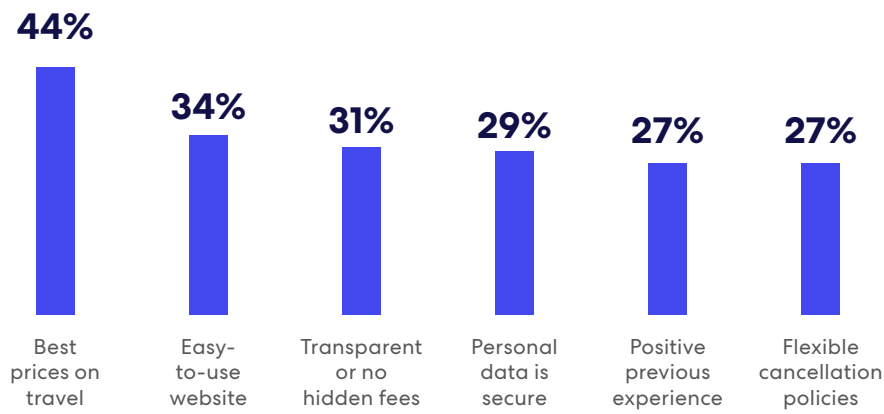
199

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



French travellers are more likely to be influenced by advertising



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

← What they find most influential:



53%
Beautiful images



43%
Promotions or deals



39%
Content highlighting interesting experiences



39%
Inspirational content

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.

↑ Of those members:

- **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.

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.

Luth Research includes Japanese traveller data from:

- 800+ survey respondents.
- A digital data panel with 7,300 members.

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.



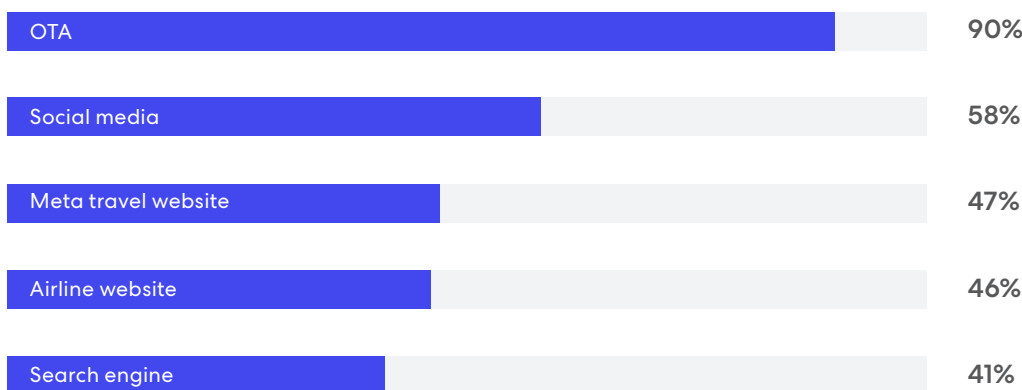
More likely to be set on a destination



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



90%

of Japanese travellers booked their trip on an OTA—more than any other country.

High content consumers over the 45 days before booking



208

pages of travel content viewed

→ versus 141 pages on average.



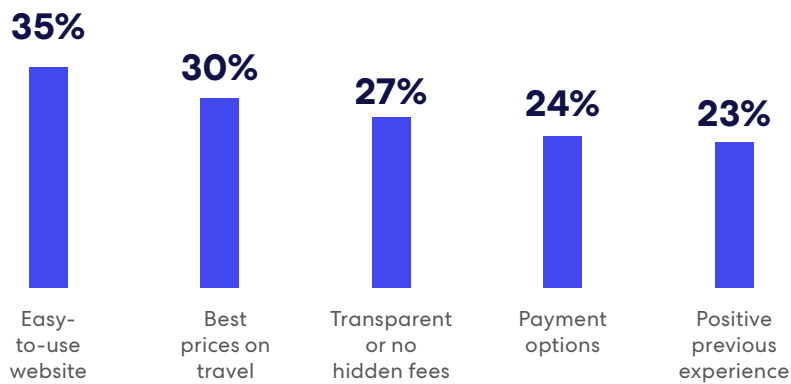
398

minutes spent consuming travel content

→ versus 303 minutes on average.



Easy-to-use websites and price are top factors when choosing where to plan and book



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.

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

Key insights: Mexico



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.



Inspiration



Research and
planning



Post-purchase



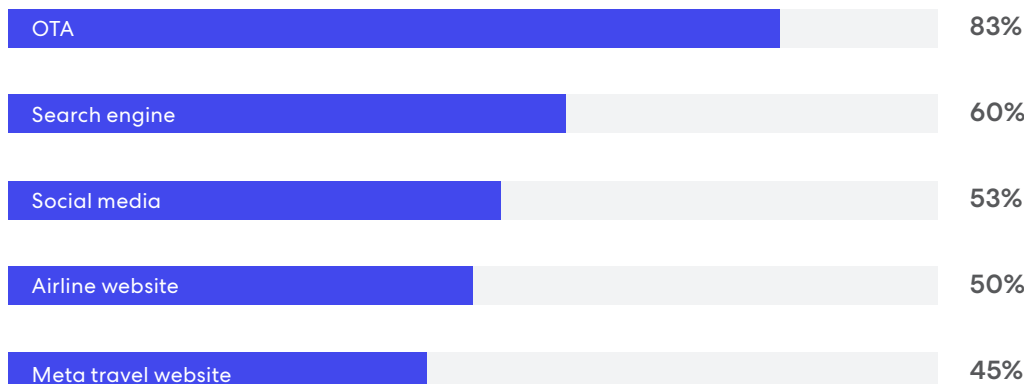
Open to destination inspiration



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



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.



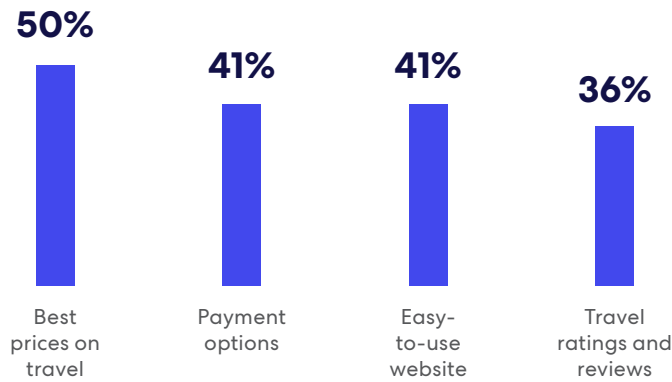
227

minutes spent consuming travel content

→ versus 303 minutes on average.



Price and payment options are most important when deciding where to plan and book



Mexican travellers are the most influenced by advertising



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

← Promotions and deals were most influential



57%
Promotions or deals



54%
Beautiful images

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

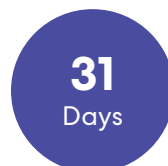


With a complex and multifaceted path to purchase, this research unpacks traveller behaviours in the path to purchase, including the main drivers and resources that influence online travel booking decisions.

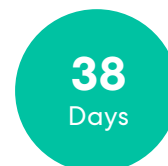
Luth Research includes UK traveller data from:

- 800+ survey respondents.
- A digital panel with 10.5K members.

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.



Inspiration



Research and
planning



Post-purchase



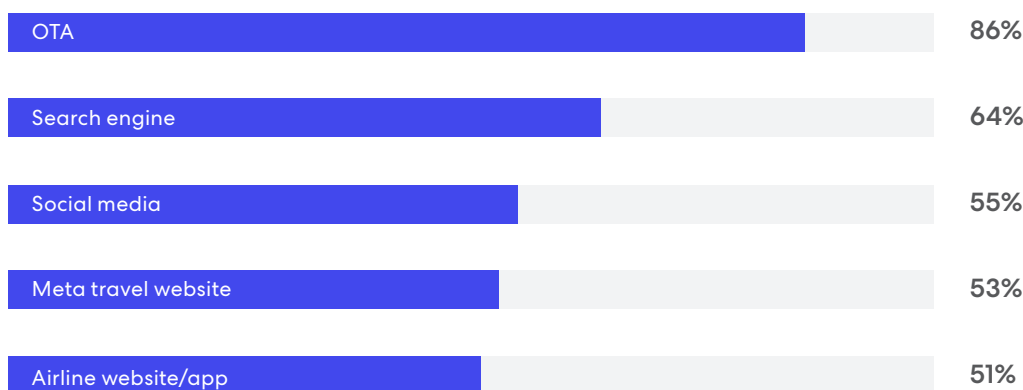
Open to destination inspiration



6 in 10

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

Resources used leading up to a travel purchase



86%

of UK travellers use
online OTAs in their
path to purchase

→ versus 80% on
average.

Lower content consumption than average in the 45 days before booking



88

pages of travel content
viewed

→ versus 141 pages
on average.



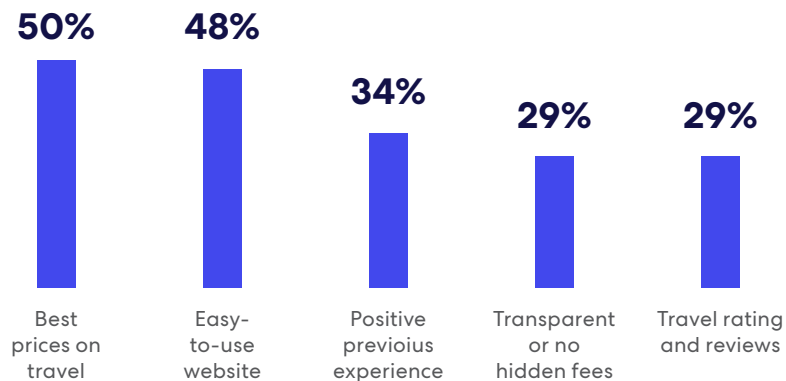
221

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



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.