

WHITE PAPER:

# The Traveler's Path to Purchase

A glimpse into the purchase journey of American, Canadian  
and British travel consumers



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## FROM INSPIRATION TO BOOKING: Consumers' complex travel purchase journey

Consumers today are inundated with choices, information, opinions and comparisons — whether shopping for a pair of shoes or a first home. The same holds true for travel purchases.

The digital landscape for travel shoppers is vast. Those considering a travel purchase have a wealth of knowledge and resources at their fingertips, and most consumers take advantage of them.

As a result, travelers rarely follow a straightforward path. Instead, the planning and booking process is intricate — and far from linear. When contemplating a vacation or trip, many travelers start with an open mind. They don't have an exact idea of where they want to go, how they want to get there, where they want to stay or what they want to do when they arrive. Often, the booking journey begins with questions: Where are the best beaches? What's the most family-friendly destination? Where are there adrenaline-pumping outdoor activities?

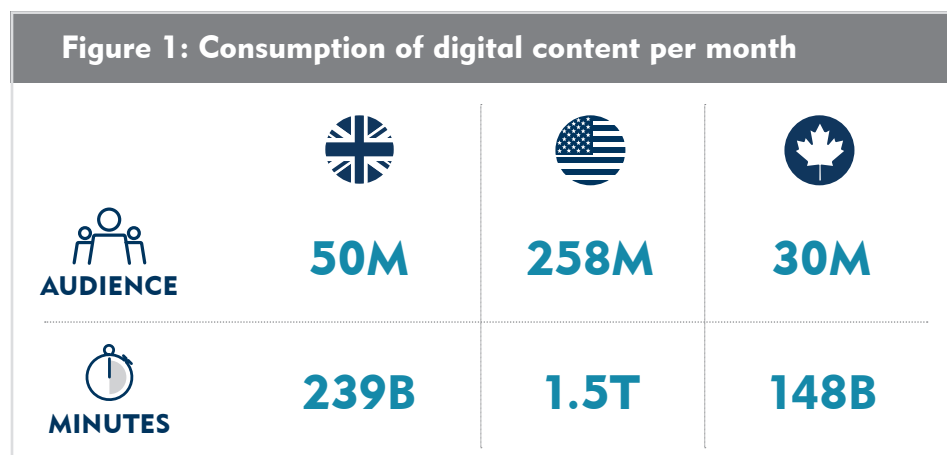
Once they find inspiration, travelers typically spend several weeks researching options. As travel bookers move between travel sites, they are exposed to an enormous amount of content. During this time, they are actively seeking travel content and are receptive to new information.

Considering the complexity of travelers' purchase behaviors, brands have multiple opportunities to connect with — and ultimately influence — consumers at touchpoints along the way.

## DIGITAL USERS CONSUME MORE TRAVEL CONTENT THAN EVER

Consumers in the UK, U.S. and Canada are highly engaged with digital content in general, including travel content, but a closer look at the shopping habits of these consumers reveals valuable insights, especially as they move from inspiration to purchase.

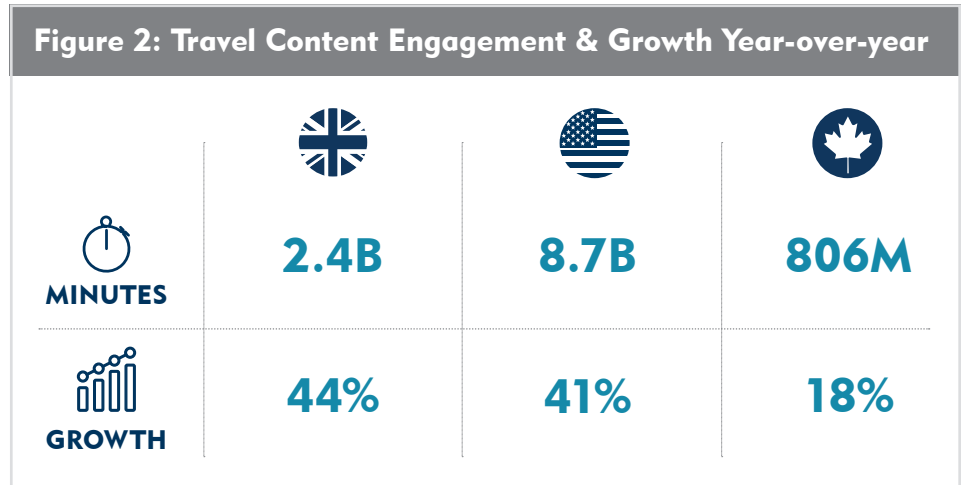
These consumers digest digital content with a voracious appetite (see Figure 1). In fact, digital users spend what equates to **three to four days per month** engaging with digital content on their desktops, phones and tablets.



Source: comScore Media Metrix Multi-Platform Media Trend Reporting, UK, US, CA, January 2015 – April 2016 data, Total Minutes.

## Digital users consume more travel content than ever (continued)

Consumers are also spending more and more time engaging with online travel content. Looking at 2015 to 2016, the UK, U.S. and Canada experienced **double digit increases year over year** in travel content consumption. Canada's growth is roughly half that of the UK and U.S., though it still represents a notable increase.



Source: comScore Media Metrix Multi-Platform Media Trend Reporting, UK, US, CA, January 2015 – April 2016 data, Total Minutes.

As more aspects of consumers' lives continue to shift online, this growth in online travel consumption is no surprise. For travel marketers, it's crucial to understand the idiosyncrasies of how and where travelers plan trips, in order to connect with and influence qualified audiences.

## TRAVEL ENGAGEMENT DURING THE PATH TO PURCHASE

Travel continues to be a highly considered purchase, one that shoppers spend a significant amount of time researching before booking.

Examining the travel journey — more specifically, consumers' tracked or identified behavior in the 45 days prior to booking a hotel, flight or package — shows how and when British, American and Canadian shoppers engage with different sources.

During the 45 days prior to booking, travel shoppers spend a considerable amount of time interacting with online travel content. They also make a staggering number of visits to travel sites during that time (see Figure 3).

## TRAVEL ENGAGEMENT DURING THE PATH TO PURCHASE (continued)

Figure 3: Travel Site Visits in the 45-day Path to Purchase



Source: comScore UK, US and Canada Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Visits per User, Dec '15 - Feb '16.

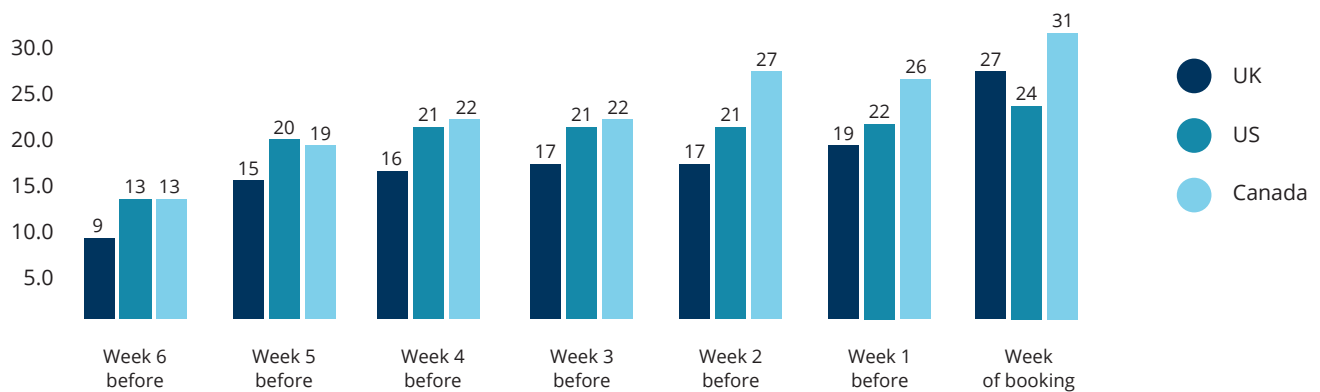
Across the board, online engagement with travel content intensifies immediately before bookers make a purchase decision.

In the UK, shoppers consistently visit travel sites in the first six weeks of their journey — 17 times per week on average. This engagement jumps significantly — up to 26 times — during the week of purchase (see Figure 4).

Similarly, U.S. consumers steadily engage with travel sites week by week. During the initial stages, they visit travel sites an average of 20 times per week. When it comes to decision time, site visits intensify. During the week of booking, U.S. travelers go to online travel sites 23 times on average.

Of the three countries, travel shoppers from Canada are the most engaged at the start of the purchase path, and their reliance on travel sites holds strong. Visiting travel sites 23 times per week leading up to purchase, Canadians' visitation spikes two weeks before booking, and remains high. In the week of booking, they visit travel sites more than 31 times (see Figure 4).

Figure 4: Average Travel Site Visits per Week



Source: comScore UK, US and Canada Desktop Panel, Custom Path to Booking Visitation Analysis, Weekly Visits per User, Dec '15 - Feb '16.

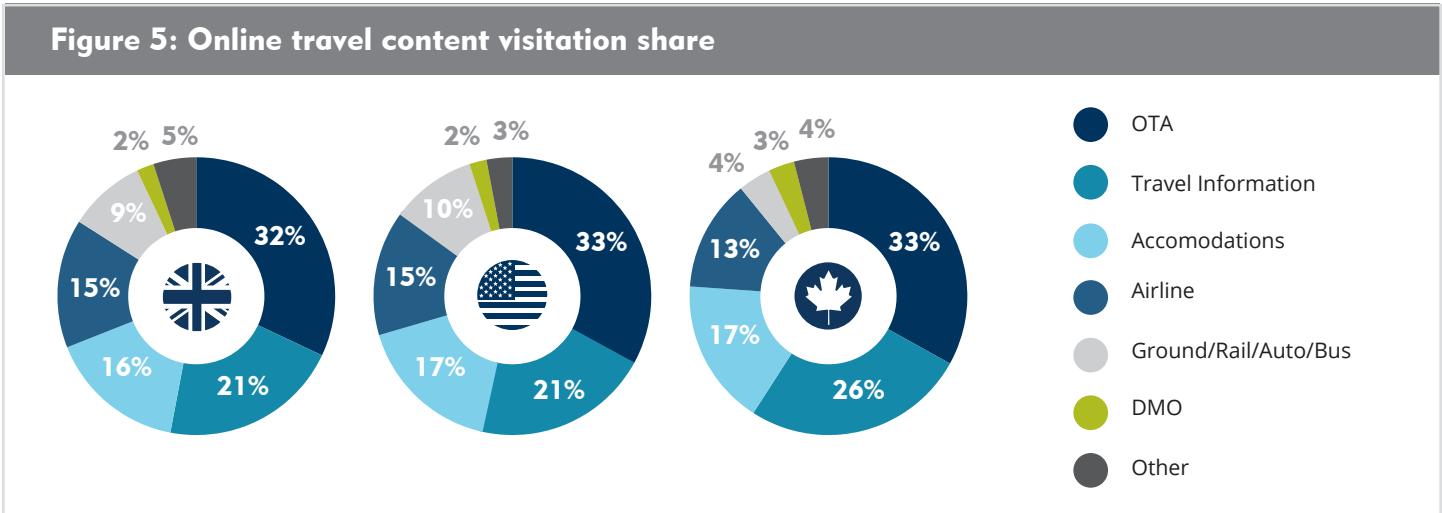
# ONLINE TRAVEL SITE VISITATION SHARE

Consumers are engaging with numerous travel sites, but where specifically are they looking for information that impacts what and how they buy? Looking across the entire path to purchase, online travel agencies (OTAs) and travel information sites (such as Tripadvisor.com and Nationalgeographic.com) have the most significant reach, and therefore, ability to influence. Together, they claim more than half of site visitation share during the 45-day booking path (see Figure 5).

Accounting for around one third of site visits for the UK, U.S. and Canada, OTAs have the greatest share of visitation when looking at the booking journey as a whole.

Travel information sites claim the second highest share across the board. These resources account for 21% of site visits in the UK and U.S. Their penetration is even higher — 26% — in Canada.

Following OTAs and travel information sites, consumers turn next to hotel and airline sites. Hotel sites claim 16% of share in the UK, 17% in the U.S. and 17% in Canada. Airline sites are close behind at 15% in the UK, 15% in the U.S. and 13% in Canada.

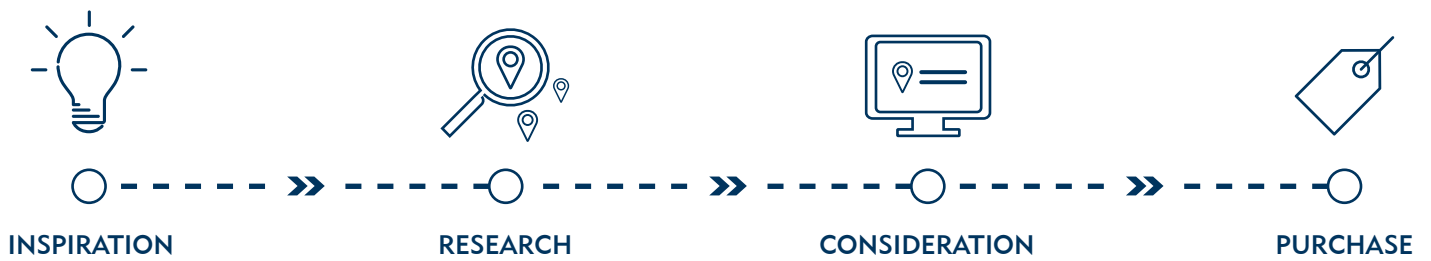


Source: comScore UK, US and CA Desktop Panels, Custom Path to Booking Visitation Analysis & Categorization, Share of Total Visits per User Across 45 Day Path, Dec '15 – Feb '16, Custom Travel Booker Audience Segment.

Additional resources for travelers include transportation sites (ground/rail/ auto/bus), destination marketing organization (DMO) sites and others. As seen in Figure 5, travelers’ frequent use of travel information sites in Canada results in a smaller site visitation market share of other types of resources.

# INFLUENCERS ALONG THE PATH TO PURCHASE

Looking at the stages of the path to purchase — from inspiration to research to consideration, and finally, to purchase — underscores the complexity of travel shoppers’ buying behavior. While there are many similarities among online bookers in the UK, U.S. and Canada, there are also differences in how shoppers approach a travel purchase.

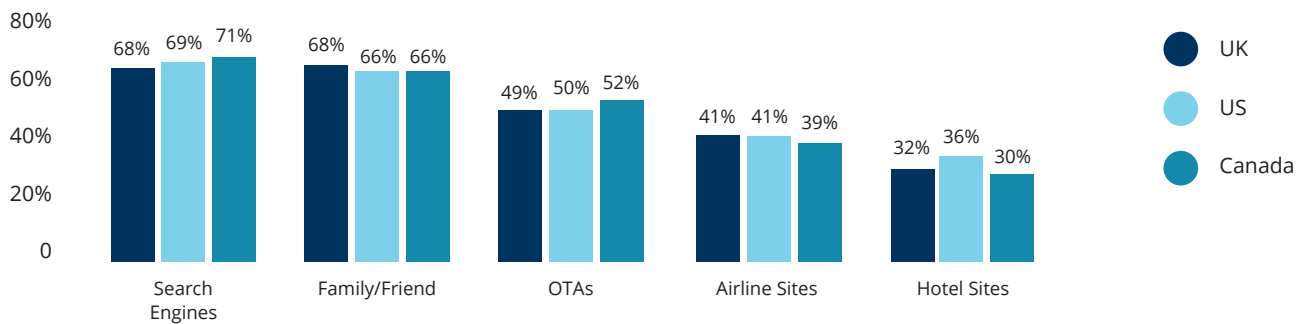


## ► Inspiration



The travel purchase journey begins with travelers searching for inspiration. To gather ideas during the earliest stage of travel planning, they use both online and offline resources. At this stage, travel shoppers rely most heavily on search engines, as well as recommendations from family and friends, followed by OTAs (see Figure 6). Airline sites are referenced next in the hierarchy, followed by hotel sites.

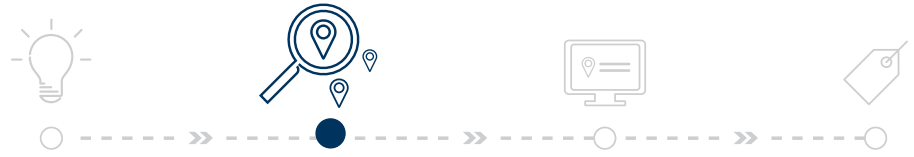
**Figure 6: Influencers on the Inspiration Stage**



Source: comScore Survey, 2016

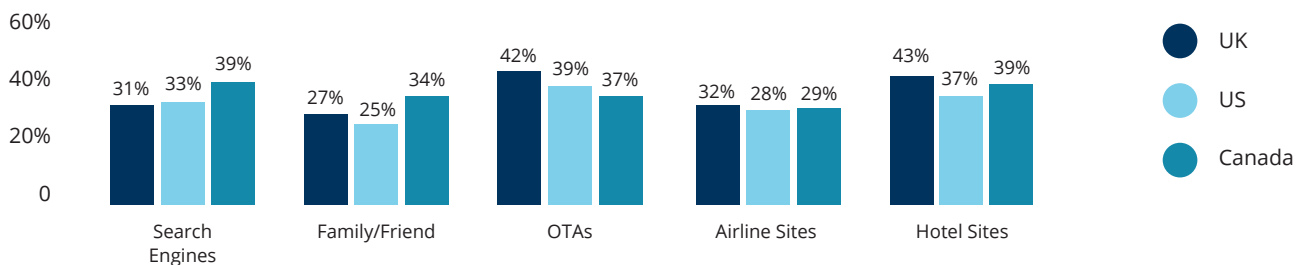
## Influencers Along the Path to Purchase – Research (continued)

### ► Research



As travel consumers in the UK, U.S. and Canada move down the purchase funnel, they begin to conduct research and narrow their options. At this point, they depend less on search engines and recommendations from family and friends — both are used roughly half as much (or even less) as they were during the initial inspiration phase. The share of influence held by search engines drops on average around 30% between the inspiration and research phases across, all three regions (see Figure 7). However, Canadian travelers continue to rely more heavily on family and friend recommendations than their British and American counterparts, with personal recommendations still accounting for around one third of influential resources. At this stage, airline sites and hotel sites reverse in their influence. Whereas more travelers rely on airline sites during the inspiration-seeking phase, hotel sites take precedence over airlines as travelers conduct research. Share of influence spreads out more evenly across categories during the research stage, compared to the point of inspiration.

**Figure 7: Influencers on the Research Stage**



Source: comScore Survey, 2016

Source 5: comScore Survey

## Consideration

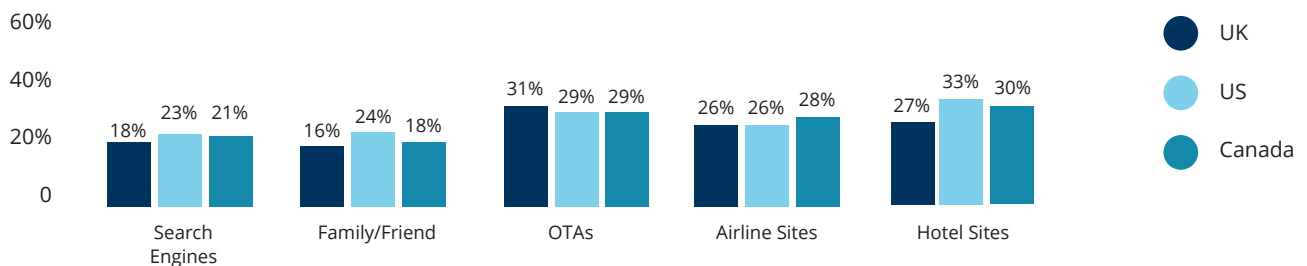


During the consideration stage, travel shoppers have narrowed their options through research and come closer to making a purchase decision.

At this stage there is a decrease in usage across all sources. The sharpest decline across the journey for all three locations is with search engines and personal recommendations. Both decrease most drastically at the consideration stage. For example, Canadian travel consumers start the booking process highly attuned to their family and friends. This influence plummets from 68% at the inspiration stage to just 18% at the final stage before booking. In a similar pattern, British travel shoppers' reliance on search engines goes from 71% at the inspiration stage to just 21% in the consideration stage (see Figure 8).

For travel shoppers on either side of the pond, OTAs, airline sites and hotel sites have the highest influence in the consideration stage, prior to purchase.

**Figure 8: Influencers on the Consideration Stage**



Source: comScore Survey, 2016

## Influencers Along the Path to Purchase – Purchase (continued)

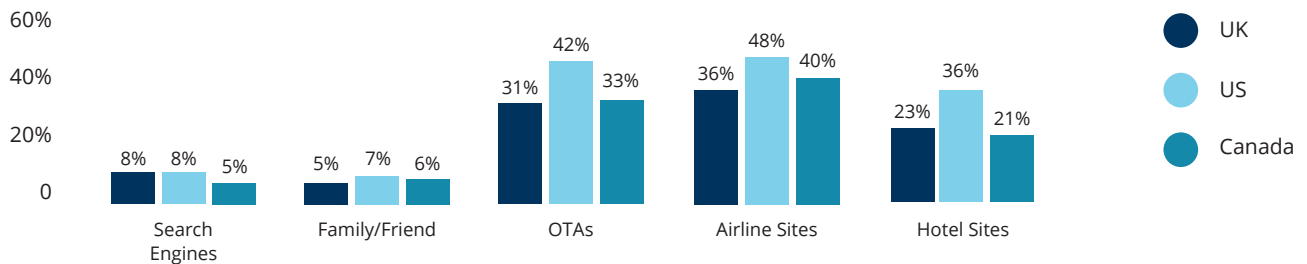
### Purchase



Not surprisingly, online rather than offline sources are the most influential when it comes to converting travel shoppers into travel bookers. Whereas friends and family impact travelers' initial ideas, their influence wanes at the booking stage. The share of influence held by friends and family recommendations drops by 59 % in the U.S., 63% in the UK and 60% in Canada from the inspiration to purchase phase (see Figure 9).

Airline sites exert the strongest influence on the final stage in the path to purchase. Close to half of U.S. travel shoppers, or 48%, rely on airline sites to book. OTAs have the second strongest influence on travel shoppers in the U.S. at 42%, followed by 33% of shoppers in Canada and 31% of those in the UK. Following airlines and OTAs, hotel sites are the third most influential in all countries — they are used by 36% of U.S. shoppers, 23% of UK shoppers and 21% of Canadian travel shoppers when they reach the final booking stage.<sup>1</sup>

Figure 9: Influences on the Purchase Stage



Source: comScore Survey, 2016

Source 1: comScore Survey

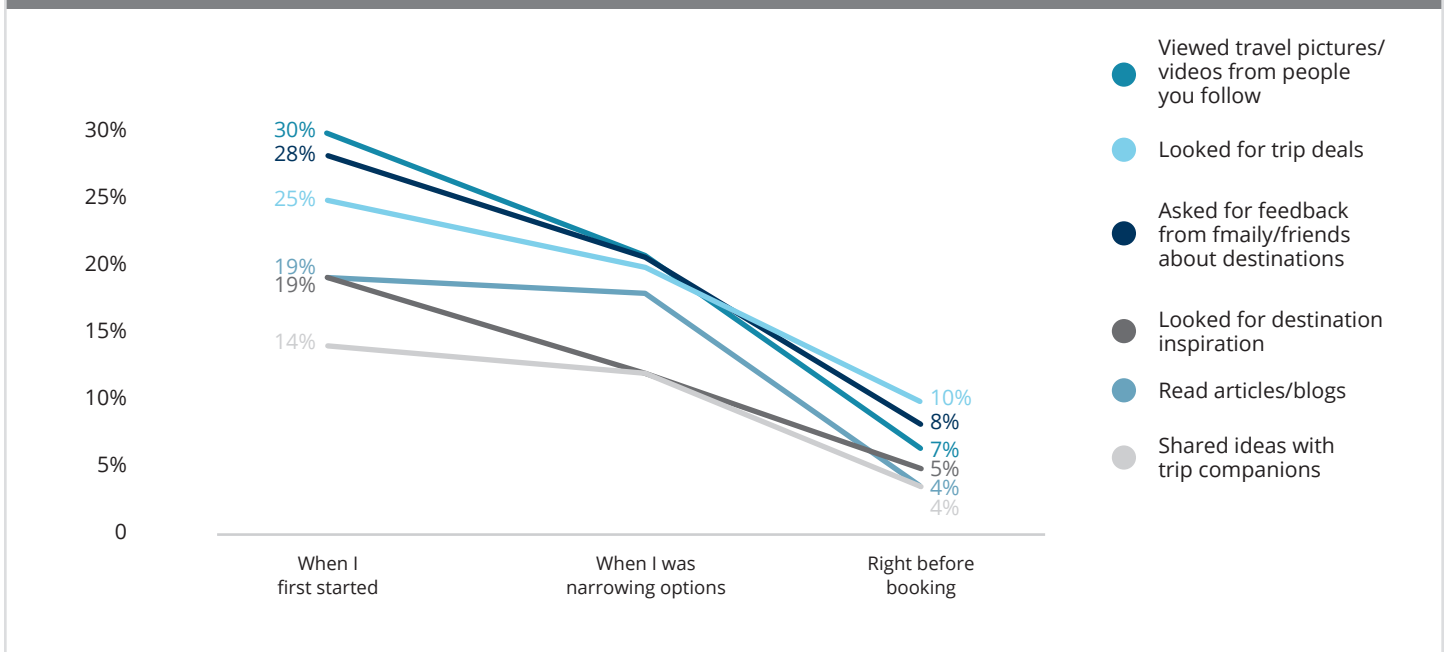
## Social media's impact

Social media is another source of influence for travel shoppers, and a heavily-used channel for travel marketers. Looking at its impact and relevancy on the path to purchase as a whole, however, reveals surprising insights.

On average in the UK, U.S. and Canada, only 11% of online travel bookers report using social media as part of their travel research process.<sup>2</sup>

Figure 10, examines how those 11% actually use social media in the travel planning process. These three markets use social media to view travel pictures and videos, look for trip deals, search for destination inspiration, read articles and blogs, share ideas and more. Digital users interact with social media throughout the travel decision-making process, but it plays the strongest role in the beginning of consumers' purchase journey — during the inspiration phase. At this stage, the most influential social media source consumers engage with is pictures and videos from friends and people they follow. They also solicit feedback about potential destinations. This reinforces the valuable influences of family and friends' recommendations early in the purchase cycle.

Figure 10: Social media travel content usage



Source: comScore Survey, 2016

Source 2: comScore Survey

## KEY FINDINGS

To recap, the research on the path to purchase for digital travel consumers in the UK, U.S. and Canada reveals that:

- Travel content consumption increased by double digits in the UK, U.S. and Canada from 2015 to 2016. The UK claims the most growth with a 44% increase year over year. The U.S. experienced 41% year-over-year growth, and Canada 18%.
- There is high engagement with travel content throughout the entire path to purchase for all three countries. In the 45 days before making a purchase, bookers in the UK visit travel sites 121 times, U.S. shoppers 140 times and Canadian shoppers 161 times on average. Engagement jumps during the final week before purchase.
- Online travel agencies play a consistent role throughout the 45-day booking journey. Visitation share for OTAs across the entire purchase journey is 32 to 33%. In contrast to other resources, which fluctuate in their influence, OTAs hold steady. For instance, OTAs account for 50% of share for U.S. shoppers at the inspiration stage. At the end of the journey, they remain strong with 42% of U.S. travel shoppers turning to OTAs at the conversion stage.
- Search engines and recommendations from family and friends are highly influential in the early stages of the path to purchase, but their impact declines as the journey advances. While 68% of UK travel shoppers use search engines while gathering ideas and inspiration, only 8% use them at the conversion stage. Similarly, while 68% of UK bookers initially rely on personal recommendations, this percentage drops to just 5% at the point of purchase.

## CONCLUSION

Today's digital landscape is crowded — but it's also full of opportunities to connect with a tuned-in audience of travel consumers. With double-digit growth in travel content consumption year over year across the UK, U.S. and Canada, it's apparent that there are opportunities for travel marketers to impact purchase decisions at multiple touchpoints with a robust, integrated digital presence.

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