Sojern Uncovers the Modern Traveler’s Paths to Purchase
Introduction

Engaging with travelers as they plan and book their travel is an increasingly uphill challenge—as today's modern consumers jump across websites, devices, and verticals at a rapid clip. At Sojern, we've spent over a decade understanding travelers and know what makes them tick. We have unique insights into their travel behavior and we specialize in using predictive data science and travel data to help our clients find and engage consumers before, during, and after their trips—across all their devices. And, thanks to our rich data science and industry-leading knowledge of the travel industry, Sojern delivers world-class marketing solutions across display, search, Facebook, video, and more to build brand awareness and deliver more direct demand to our clients.

In this report we offer a look at eight paths to purchase spanning verticals, regions, and trip motivations. What emerges is a greater understanding of just how unique each traveler and trip is—and the importance of having the insights and marketing acumen to speak to travelers as individuals.

This path to purchase report, instead of focusing on website visits, looks at travel touchpoints: every time a traveler hits a new page online—whether on mobile or desktop—including searches, bookings, IP hits, as well as homepage visits. This provides a clearer picture of the path to purchase as someone may visit a website only once, but perform multiple searches once there. The travelers we see in this project are real and so are their actions. Their names, however, are pseudonyms as Sojern's data is anonymized.

This report does not purport to offer the average experience of the modern traveler—instead, it works to dismiss the myth that there is an average traveler. It embraces complexity, offers deep insights into the path to purchase, and demonstrates the need for data-driven marketing at a personal level to engage travel consumers and deliver meaningful results for the travel industry.
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In North America, amusement parks welcome 375 million guests annually. But planning an amusement park vacation is definitely no ‘walk in the park,’ as it can involve flight, hotel, car rental, and ensuring the whole family can get time away from work and school to hit the coasters. The path to purchase for an amusement park vacation is, therefore, complex. But because these travelers often spend a great deal of time and money across a number of travel and non-travel verticals as they plan and enjoy their amusement park adventure, they are a prized but elusive audience for marketers around the world.

Our first path to purchase sees “Eric,” a Florida resident who plans an amusement park adventure for his family of four, almost entirely on his mobile phone and around his kids’ holiday schedule.
"Eric’s” Path to Purchase

"Eric“ plans his perfect family amusement park vacation from dreaming through planning to booking.

**Dreaming**

*Apr 25*  
Hits Amusement Park A homepage four times on mobile

*Aug 2*  
Searches for Amusement Park A on mobile for seven-day trip on Nov 6

**Planning**

*May 26*  
One month later, narrows travel dates with 10x mobile searches

*Jul 23*  
Converts for Amusement Park B on mobile

*Aug 6*  
Four days later, converts for Nov 6 trip on desktop

*Sept 1*  
Converts on mobile for a one-day trip to Amusement Park A for Sept 4

**Booking**

*May 29–30*  
Continues with 14x mobile searches on Amusement Park B’s homepage

*Jul 9*  
Two months after planning starts, books different Christmas trip with Amusement Park A on mobile

*Jun 13–Jul 9*  
On mobile, compares Amusement Park A’s Hotel with upper-upsacle and luxury hotel brands

*Sep 6–Oct 1*  
Searches for flights from NYC to Orlando for six people for Nov 6

*Oct 1–3*  
Searches and books a car from airport for Nov 6 trip
“Eric’s” Path to Purchase

“Eric’s” path to purchase starts a full five months before his trip, as he bounces across verticals and websites. Because “Eric” is loyal to Amusement Park A, we see “Eric” book four trips across his five plus months. What’s interesting is each trip has radically different lead times—demonstrating the importance of knowing your traveler and their behavior to most effectively reach them at the right time.

As he moves from dreaming to searching, it takes him nearly a full month to narrow down his travel dates. He then hesitates to pull the trigger for a summer vacation and changes his dates to a Christmas trip—the next window where all the kids are out of school.

Conversion Lead Time

<table>
<thead>
<tr>
<th>Trip</th>
<th>Days</th>
</tr>
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<tbody>
<tr>
<td>Trip 1</td>
<td>167</td>
</tr>
<tr>
<td>Trip 2</td>
<td>0</td>
</tr>
<tr>
<td>Trip 3</td>
<td>93</td>
</tr>
<tr>
<td>Trip 4</td>
<td>3</td>
</tr>
</tbody>
</table>

Once he settles on his date and location, he books in quick succession. What’s also interesting to note is that as soon as he returns from his trip, he immediately starts dreaming of his next trip—indicating the path to purchase never truly ends.
"Eric's" path to purchase highlights the importance of building brand awareness and engagement early on so that you can reach travelers before, during, and after their trip. We also see with “Eric” that travelers start dreaming of their next trip as soon as they return and it’s the perfect time to retarget them to build loyalty with your brand.

What's more, “Eric” demonstrates the importance of knowing the particular motivation and behavior of individual travelers, rather than aiming for the average. For example, “Eric” travels frequently for both business and leisure, but depending on his motivation, he has varying price points for hotels: economy for business and luxury for leisure. If you know the motivation of your travelers, you can better target them with ads for the kind of hotel and amenities they are likely to book.

Additionally, “Eric” does the majority of his travel planning and booking on his mobile phone: he has 445 mobile touchpoints and three mobile bookings, and only 6 desktop touchpoints and one desktop booking. While our work with Google continually shows mobile searching as popular, mobile bookings aren't performed in the same numbers. However, travelers like “Eric” are huge smartphone searchers and planners, moving across devices in their path to purchase—and in this case, booking almost exclusively on his mobile.

Knowing “Eric's” travel planning behaviors and motivations are only done through big data, but it’s the data science combined with industry expertise that allow travel brands to understand and engage with him as he plans and books his ultimate family vacation.

### Device Usage for Travel Planning and Booking

<table>
<thead>
<tr>
<th>Device</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td>99%</td>
</tr>
<tr>
<td>Desktop</td>
<td>1%</td>
</tr>
</tbody>
</table>
“Tony” An Anonymous Skier Planning a Couple’s Getaway

Who is “Tony”?
- Primary travel origin is New York
- Books for a couple
- Skier searcher
- Upper-upscale hotel traveler
- Frequent traveler
- Desktop searcher

How does “Tony” plan travel?
- Travels domestically for business
- International leisure traveler

States like Colorado derive a significant portion of their tourism and economic growth from their reputation as ski havens. The state’s 2015-16 ski season, for example, saw an all time high of 13 million travelers, with 2016-2017 looking to break records yet again. Because of the wealth of skiers—both in terms of their number and their spending power—there is stiff competition in the travel industry to find and convert skiers to a state, city, or resort.

Let’s look at a skier on such a path and offer insights as to how you can think more strategically about your marketing to ensure the right travel consumers rush to you.

Inspired by a business trip, “Tony’s” fear of missing out brings him across competitors, and websites to plan his seasonal vacation.
“Tony’s” Path to Purchase

“Tony” traverses devices and destinations to plan a couple’s ski getaway from dreaming through planning to booking and into in-destination searching.

- **Oct 6**: While searching for a business trip to Denver, “Tony” is inspired to look for flights to Vail.
- **Dec 10**: Conducts five flight searches to Aspen in March alongside Ski Resort A. Books a trip to Denver for Jan 12 for two shortly after.
- **Nov 17–Dec 9**: Narrows down dates as well as origin and destination airports for January alongside visits to Ski Resort A’s site.
- **Jan 12–23**: Tony flies into Denver, bringing his device and visits Vail two days later. While in Vail visits Ski Resort A’s homepage.
- **Nov 6–9**: Visits Ski Resort A’s homepage.
- **Jan 23**: While in-destination, he searches for his flight back to New York City on Jan 25.
- **Feb 10**: While searching for a business trip, he searches for flights to Vail in March.
- **Oct 27**: Four days after returning from Denver, hits Ski Resort A’s homepage twice.
- **Oct 31**: Compares flights on OTA to Denver and Vail for a two-week trip in January.
- **Oct 6**: While searching for a business trip to Denver, “Tony” is inspired to look for flights to Vail.
- **Dec 10**: Conducts five flight searches to Aspen in March alongside Ski Resort A. Books a trip to Denver for Jan 12 for two shortly after.
- **Nov 17–Dec 9**: Narrows down dates as well as origin and destination airports for January alongside visits to Ski Resort A’s site.
- **Jan 12–23**: Tony flies into Denver, bringing his device and visits Vail two days later. While in Vail visits Ski Resort A’s homepage.
- **Nov 6–9**: Visits Ski Resort A’s homepage.
- **Jan 23**: While in-destination, he searches for his flight back to New York City on Jan 25.
- **Feb 10**: While searching for a business trip, he searches for flights to Vail in March.
“Tony’s” Path to Purchase

Inspiration for travel can strike at any time. As “Tony’s” path illustrates—his business travel to the state seems to get him dreaming about a ski getaway. After he visits Denver, he’s fired up about the trip and his researching begins in earnest. But, like many travelers, he’s uncertain about his final destination. As Henry Harteveldt notes, 1 in 5 travelers are destination agnostic when they begin their searching.4

“Tony” has an extended planning phase and narrows down his destination and dates over the course of a month. But he also has his anchor—a brand page for resorts that made such an impression that he continues to visit it alongside all his other planning. And even after he’s completed his ski getaway, he’s itching for more: as soon as he returns from his trip, he’s looking to come back.
**Turn Insights into Marketing Actions**

“Tony” spends much of his path to purchase in the planning phase narrowing down destinations, time frames, hotels, flights, and more. His path certainly illuminates much of the growing complexity in travel planning that’s become the norm.

Cutting through all that noise can be a serious challenge for travel marketers. For engaging with travelers like “Tony,” native ads can offer a successful strategy. They’re highly effective for nurturing brand awareness and engagement—and they have an 18% higher lift for purchase intent responses than traditional banner ads. By seamlessly integrating quality content and information on websites that “Tony” visits, native ads offer value to travelers in a non-intrusive manner. “Tony,” then, is reminded of your brand, destination, or offering as he visits sites unrelated to his travel searching, keeping you top-of-mind.

“Tony” also illustrates the importance of having access to real-time data about your travelers. Knowing he is on his mobile device while traveling makes him an attractive prospect for tailored offers and relevant local marketing experiences related to skiing, local activities, dining, shopping, hotel/resort upgrades, and more.

**Use a combination of geofencing and proximity targeting with rich mobile ads to reach people near you, like “Tony”—presenting them with relevant local offers while they’re in-destination and looking to buy.**

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**Type of In-Destination Touchpoints**

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Flight Search</td>
<td>50%</td>
</tr>
<tr>
<td>Ski Site</td>
<td>35%</td>
</tr>
<tr>
<td>Misc</td>
<td>15%</td>
</tr>
</tbody>
</table>
Cruise vacations offer a unique vacation experience—beautiful ocean views, new destinations every few days, and all-inclusive offerings. With over 20 million annual passengers having an average household income of $109,000—it’s no wonder the Cruise industry is booming.6

Capturing the hearts, minds, and dollars of potential Cruiser Travelers requires knowing when they’re dreaming and planning their next getaway and ensuring your beautiful vistas and abundant amenities are front and center as they shop. Let’s look at one travel consumer in order to understand how she’s inspired to plan and book her cruise vacation.

“Isabel” dreams of a cruise to anywhere in the world, stocks up on vacation supplies, and books her dream Caribbean cruise. Marketers better be ready to act quickly though—“Isabel” makes her decision and books in just one day!
“Isabel’s” Path to Purchase

“Isabel” moves across devices and destinations to plan a cruise vacation from dreaming through planning to booking.

Oct 16
While searching for a business trip to New York City for Nov 6, “Isabel” visits a travel research site.

She is inspired to visit Cruise Brand A’s homepage and conducts a cruise search for all regions from November 2016–2018.

Oct 28–30
Shops for midscale hotels for a business trip.

Searches and books a flight from Philadelphia to San Juan for Feb 17–25.

Conducts seven searches for cruises out of San Juan and converts for Cruise Brand A.

Considers Cruise Brand B and conducts a search.

Nov 3
Hits Cruise Brand A’s page and narrows search to a February cruise to Caribbean.

Jan 5
Visits a retail site 44 days before her trip.

Jan 30
Hits Cruise Line A’s homepage 2.5 weeks before sail date.

Feb 14
Searches for a upper-upscale hotel in San Juan for Feb 17.

Feb 17
Accesses a boarding pass for four from Philadelphia to San Juan.
“Isabel’s” Path to Purchase

“Isabel” is the ultimate dreamer—but a highly efficient dreamer at that! She begins her search by looking for a cruise to anywhere in the world for anytime in the next two years. She then narrows down her choices and selects a Caribbean cruise for February.

With an 18 day search to conversion window, she dreams big but plans and books quickly. And she makes multiple purchases back-to-back on the same day. It’s only after she completes her larger purchases of cruise and flight, that she goes into a traditional researching phase, this time shopping for brands and vacation supplies, and making a last-minute hotel booking. Depending on the vertical, her lead time varies wildly, demonstrating the importance of using real-time intent data to better understand consumer motivations and reach them with relevant offers at the right time.

Booked Lead Time by Vertical

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Lead Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise</td>
<td>107 days</td>
</tr>
<tr>
<td>Air</td>
<td>106 days</td>
</tr>
<tr>
<td>Retail</td>
<td>44 days</td>
</tr>
<tr>
<td>Hotel</td>
<td>3 days</td>
</tr>
</tbody>
</table>

Touchpoints Over 4+ Months

- Cruise: 30 days
- Air: 14 days
- Hotel: 8 days
- Retail: 8 days
"Isabel's" path to purchase illustrates the importance of not shooting for the average when it comes to reaching travelers. If, for example, you wanted to advertise to "Isabel" based on average lead times, most brands would miss the chance to engage with her. Instead, "Isabel" demonstrates a wide variety of lead times, dependent on her vertical, going from days to minutes. It is only through rich data and finely-tuned data science that a travel brand can understand and engage with "Isabel" in a timely and effective manner.

From Dreaming to Booking in 18 Days

Additionally, "Isabel" offers us great insight into the dreaming and decision-making process of a traveler. She begins a sweeping search for any location over the course of two years—she is looking to be inspired. Getting in front of "Isabel" early on, when she is really open to exploring, is key to finding and engaging with travelers who may be unfamiliar with, or at least not yet won over by, your brand.

Consider, then, utilizing dynamic creative ads to engage with travelers in a way that leaves a lasting impression: according to one report, personalized travel ads have click-through and interaction rates over four times higher than traditional rich media. By utilizing real-time information, such as room prices or weather, you can offer a personalized and value-driven experience for your traveler.

For instance, targeting "Isabel" with the local, real-time temperature of your Caribbean destination or prices for the different room types on your cruise can be the information she needs to be inspired to book with you. Especially, since we know she's searching in late October in upstate New York—warm weather ads are just the thing to engage someone searching for a February getaway. It's all about knowing your traveler and reaching them with the right message at the right time—and dynamic creative ads can do just that.

An additional tip would be to use dynamic creatives as an overlay to brand videos you may already be using—to retarget travelers and further nurture them through to a decision for your cruise line, destination, or brand.

Turn Insights into Marketing Actions
“Paul” An Anonymous Spring Break Road Tripper

Who is “Paul”?
• Primary travel origin is Sacramento
• Baseball enthusiast
• Solo traveler
• Budget conscious

How does “Paul” plan travel?
• Domestic leisure traveler
• Heavy travel researcher
• Mid-range hotel shopper
• Mobile-only searcher

Spring Break is synonymous with travel—whether it’s students heading to the beach, families off to amusement parks, or road trips across the US. And travel spend is substantial: college students alone spend $1 billion every year on Spring Break.6

In order to get a fresh look at the Spring Break vacation, we looked at one person on their road trip to Arizona Spring Training, revealing how a multi-vertical vacation is planned, and how a unique trip motivation—baseball Spring Training—impacts one person’s travel planning.

Heading to Arizona for Spring Training, “Paul” has it all: car, flight, hotel, and a last-minute booking that may make you feel a little anxious for him—and all searched and booked on his mobile phone.
"Paul’s” Path to Purchase

“Paul” hits the road for a solo Spring Training trip from dreaming through planning to booking and into in-destination searching.

Feb 2
Searches for hotels in Glendale, AZ for a trip in March

Feb 3
Conducts flight searches from Sacramento to Phoenix, narrowing travel dates to March 10–13

Feb 4
Books an upscale hotel in Peoria, Arizona for March

Feb 5
Starts searching for car rentals from Phoenix airport

Mar 3–6
Shops for hotels again alongside visits to the tourism site

Feb 23–28
Researches on tourism site, watching videos and discovering food and hotel options

Feb 6–21
Searches airlines and two different car brands all on mobile

Mar 7
Three days before trip, still searching for flights and car rental

March 10
Morning of his trip, “Paul” still shops for flights. Converts shortly after and takes off same day

March 11–13
Accesses tourism, hotel, flight, and car sites all from his mobile while in-destination, looking at activities, maps, attractions, city info, and more
“Paul’s” Path to Purchase

“Paul” quickly moves from dreaming about a trip to Arizona for Spring Training into full-fledge planning, with only a day separating the two stages. And just one day later, he books his hotel. It may seem that “Paul’s” path, then, is going to be short and rather straightforward. But that’s not the case.

Timing of Online Events

<table>
<thead>
<tr>
<th>Early Searches</th>
<th>Last-Minute Searches</th>
</tr>
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<tbody>
<tr>
<td>79%</td>
<td>21%</td>
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</table>

Over the month of February, “Paul” searches, but doesn't purchase, his flight and car rental. At the end of February, he goes back to looking at hotels and local attractions courtesy of the local tourism page. This behavior continues. Three days before it's time to depart for his trip, he still doesn’t have a plane ticket in hand and is still searching for flights and car rentals.

The morning of his departure, “Paul” finally books his flight! While in destination, the local tourism site serves as his travel anchor—he uses it to find places to eat, things to do, and maps of the local area to navigate.
“Paul’s” path to purchase underscores the importance of how tourist boards connect to the nearby travel and tourism offers. In this case, “Paul” is a heavy researcher and uses the state’s tourism website as his touchstone for his food, attractions, and accommodations. He does so both before his trip as well as in-destination—once he finds a helpful, informative, and trustworthy tool he doesn’t abandon it.

Tourist boards need to invest in their mobile and desktop web experiences to offer a one-stop-shop for travelers’ research needs, no matter the vertical. And other local businesses and brands have an opportunity to partner with tourism boards to reach mobile-savvy travelers like “Paul”—as 79% of mobile travelers say they are looking for the most relevant information available, regardless of where it comes from.

“Paul’s” path also demonstrates just how search-heavy the modern traveler can be. Plagued by the fear of missing out (FOMO), “Paul” struggles to book his flight, instead searching until the very last minute to book. However, his FOMO even impacts decisions he’s already made. He continues to search for hotels as well, even after he’s booked his. It’s important for travel marketers to ensure they engage with their travelers even after they’ve completed their purchase. Perhaps reassure them they’ve got the best deal, or just how centrally located you are, with relevant local offers and upgrades to assuage their FOMO.

“Paul’s” exclusive mobile search and conversion behavior underscores the importance of having a friction-free mobile experience when engaging with travelers. Think with Google found that conversion rates have grown nearly 10% on mobile travel sites, while the length of those mobile visits has shrunk by 5%, indicating more people are finding what they need in shorter sessions. Being able to target and retarget consumers with relevant information and offers on their mobile devices is essential to engaging them and driving them to conversion.

<table>
<thead>
<tr>
<th>Share of Hotel Touchpoints</th>
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<tbody>
<tr>
<td><strong>Before Booking</strong></td>
</tr>
<tr>
<td>57%</td>
</tr>
</tbody>
</table>
“Leslie” An Anonymous European Boutique Hotel Shopper

Who is “Leslie”?
- Primary travel origin: Glasgow, UK
- Domestic business traveler

How does “Leslie” plan travel?
- Budget/meta/OTA airline shopper
- Boutique hotel shopper
- Books in a pair
- Budget differs depending on travel vertical
- Train & car traveler
- Desktop searcher

Direct hotel bookings, on average, drive nearly double the value for hoteliers as those received through OTAs.\(^{10}\) It’s no surprise, then, that 91% of hoteliers agree that driving direct bookings is key to the future of the industry.\(^{11}\) Our next path offers further proof points to the importance of driving direct bookings by analyzing one traveler on his journey to book a boutique hotel. Not only do we get unique insight into his path to purchase and how you can influence it, but we also reveal how valuable a direct booking can be for those looking to upsell and cross sell guests.

From Scotland to NYC, boutique hotel shopper, “Leslie,” is a budget-conscious flight shopper, but looking to splurge on amenities and upsells on his hotel.
We look at “Leslie” as he scours the cheapest flights and most amenity-rich boutique hotels to plan his Big Apple trip from dreaming through planning to booking.

**Sep 26**
Conducts an economy flight search for two on an OTA for a March trip from Glasgow to NYC

**Converting on Boutique Hotel Brand A**
Converts on Boutique Hotel Brand A for five-day trip

**Oct 20**
One month later, shops travel dates and destination airports on a different OTA for the same trip

**Oct 25**
Narrows down trip dates to March 21-26 while conducting flight searches

**Oct 24**
Comparison shops for hotels by conducting two midscale hotel chain, eight Boutique Hotel Brand A, two upper-upsacle hotel, and two Boutique Hotel Brand B searches

**Jan 24**
Returns to Boutique Hotel Brand A's site & conducts eight searches for food, amenities, breakfast, room upgrades, and information about the local area

**Mar 7**
Returns to Boutique Brand A's site and searches information and then converts for a tourist attraction

**Mar 10**
Again turns to Boutique Brand A's site, searches 9x for information on concierge, room upgrades, and brunch
"Leslie’s” Path to Purchase

“Leslie” begins his dreaming on an OTA site, just looking at what the cost of his international trip might be. It takes him nearly a month, though, to get serious about his travel planning. He is clearly open to dates and airports as he looks for the cheapest flight option.

It is hotel searching where he spends the majority of his time and energy—in one day conducting 18 hotel searches. While he narrows down his searches, he hones in on a few boutique brands. But, it’s really the amenities pages that seem to drive his decision making, as he returns there again and again.

Only five days after he started his flight searching in earnest, “Leslie” books his hotel. But his hotel searching doesn’t stop there. He continuously hits various amenities pages of his hotel, looking for bigger rooms, brunch and dining options. A few days before his trip, he books an attraction through his hotel. For “Leslie,” his hotel’s homepage becomes the anchor for all his travel planning while in-destination.
At Sojern, we work closely with thousands of boutique hotels all over the world to improve their digital marketing services. So, we understand the importance of driving direct hotel bookings—our whole model is built around doing just that without any upfront costs to our clients. What our fifth path to purchase demonstrates is just how important having that direct relationship with the guest can be for hoteliers.

“Leslie” visits the website of his boutique hotel nearly as many times before he books as after. When he hits the website after, he is looking for room upgrades, brunch spots, activities, and more. If the booking wasn’t done directly, but instead through a third party, they would own “Leslie’s” contact info, the relationship, and be the source for information. **By driving a direct booking, the hotel has an engaged and actively interested guest to whom they can upsell to make his stay memorable and build brand loyalty.**

Reach travelers like “Leslie” with a mix of display ads and Search Engine Marketing (SEM) to nurture him from planning to booking, and after into upselling. Start by prospecting—finding travelers who look like your ideal guest—and reach them with relevant ads featuring your property. After the traveler visits your website, retarget them with display ads that highlight your unique features, offerings, or prices. As the traveler moves across websites and devices, these display ads can keep your property top of mind with your in-market travelers. Then, when they are ready to book and they turn to search engines to do more research, use SEM ads to ensure that your property appears at the top of the Search Engine Result Pages (SERPs), driving them back to your website to book directly with you.

### Share of Boutique Brand Touchpoints
- **Before Booking:** 51%
- **After Booking:** 49%

### Share of Amenities and Information Touchpoints
- **Before Booking:** 33%
- **After Booking:** 66%
Mixing a leisure trip with a bit of business is growing in popularity—up by 17% from last year.¹² This is essentially two trips mixed into one, often with varying price points and activities in mind. Because it’s a newer, growing market, knowing how this kind of trip is planned and marketing to these travelers is a new challenge for the travel industry. In order to shed some light, we analyzed one traveler on his path to purchase as he is inspired to tag some extra leisure time onto a business trip.

From Dallas to Singapore, sports enthusiast “Michael” moves through 162 travel touchpoints on his business-that-turns-leisure trip.
"Michael’s” Path to Purchase

"Michael" jet setting for business inspires a leisure getaway from dreaming through planning to booking.

**Dreaming**

- **Sep 1**
  While in Singapore for business, he is inspired to look for travel for a local sporting event and hits Luxury Hotel Brand A’s homepage.

- **Dec 21**
  Arrives in Singapore, he searches for a trip to Kuala Lumpur for January 7–11.

**Planning**

- **Nov 11**
  Back home in Dallas and planning his next business trip to Singapore, he hits Luxury Hotel Brand A’s homepage.

- **Dec 22**
  Searches hotels in Kuala Lumpur on Luxury Hotel Brand A and competing segments, conducting 15 searches in 24 hours.

- **Dec 25**
  Books Luxury Hotel Brand A for his Kuala Lumpur trip on Jan 7–11.

**Booking**

- **Dec 1**
  Books an upscale hotel catering to business travelers for a stay from Dec 21–Jan 12.

- **Dec 22–Dec 24**
  While in-destination, simultaneously searches for Luxury Brand A hotels and flights to Kuala Lumpur.

- **Dec 26–Jan 1**
  After booking, continues to visit Luxury Brand A’s page while also visiting tourism site.

- **Jan 2**
  Compares different amenities on Luxury Hotel Brand A’s site, including their health club and spa.

- **Jan 6**
  A day before his trip, he downloads a Kuala Lumpur travel guide.
"Michael’s” Path to Purchase

“Michael’s” dreaming for his leisure getaway begins in-destination on a business trip. His love of sports, regardless of the location, gets him looking for accommodations nearby and it’s there he is first introduced to a specific luxury hotel brand. This luxury hotel brand makes such an impression, he returns to it once back home.

Early in December, with another business trip approaching, he books an upscale hotel. A few weeks later, while in-destination, his leisure planning returns and he looks specifically to head to Kuala Lumpur, a short journey away from Singapore. It is that luxury hotel brand that continues to be the focus of his travel planning, and ultimately, after a month of searching, he converts with them.

With his hotel picked out, it’s a tourism page that serves as his main research method. He even searches travel information there to ensure he hits all the must-see sites.
"MICHAEL": AN INTERNATIONAL BLEISURE TRAVELER

Turn Insights into Marketing Actions

“Michael,” like many travelers, is worried about missing out on the best deal—hence conducting multiple hotel searches before and after he books. Assuage “Michael’s” fear of missing out via Facebook Dynamic Ads for Travel (DAT). You can easily load your entire catalogue of properties and display exact room rates and dates to travelers who’ve already engaged with your brand. This way, you can ensure “Michael” knows that the price he saw earlier for his dates is still a great price, while he checks his newsfeed or browses his friends’ vacation photos.

DAT isn’t the only way to engage with travelers like “Michael” on Facebook. In fact, thanks to a catalogue of different ad types and objectives, you can use Facebook to nurture travelers throughout the funnel. And with 2 billion active users on the site every month, you can engage with just about every traveler you want.13

For example, we know “Michael” is seriously into research given the number of searches he does and his download of a travel guide. Indulge “Michael’s” research tendencies with Facebook Carousel. This ad format allows you to link multiple images and videos into one, quick-loading ad format. Travelers then get to swipe through the different creatives to learn more about your brand or offering. Because the format is interactive and image-heavy, it scratches the itch of all researchers to learn about multiple offerings or activities, while saving travel marketers time because you can advertise multiple products or services at once, without creating additional ads. Here, you could use Facebook Carousel to tell “Michael” the story of a day-trip through Kuala Lumpur, engaging him with content he’s interested in, while selling him on multiple activities and attractions.

Hotel Touchpoints Before/After Booking

<table>
<thead>
<tr>
<th>Before Booking</th>
<th>After Booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>72%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Before Booking orange
After Booking yellow
“Felicia” An Anonymous Asian Luxury Traveler

Who is “Felicia”? 
- Primary travel origin is Singapore  
- Books travel for a partner and 2 children  
- Travels in APAC for business  
- Uses luxury credit cards

How does “Felicia” plan travel? 
- Frequent traveler  
- Beach/resort leisure traveler  
- Upper-upscale business traveler  
- Heavy desktop searcher

A beautiful sandy beach, perfect weather, and high-touch amenities—luxury getaways are what dreams are made of. But deciding on an expensive, relaxing vacation takes time and assurance that the price is right and the amenities are worth it. Our recent report with Google revealed that, on average, the more luxurious hotel segment, the more searches conducted. In order to understand how the most luxurious destinations and locations pull at the heart—and purse—strings of travelers, we see one Singapore resident as she dreams of her ultimate beach getaway.

Video of a specific brand’s offering gets Singapore resident “Felicia” dreaming of her ultimate APAC resort getaway. But will this luxury leisure and business traveler convert?
“Felicia’s” Path to Purchase

“Felicia” dreams of the ultimate luxury Singapore vacation from dreaming through planning to booking.

Dec 12
Converts on desktop for a three-day business trip to Taipei for Luxury Brand A in January

Sep 2
Dreams about a Mauritius Beach trip and visits Luxury Brand A’s Resort site, repeatedly watching their homepage video

Oct 7
Hits numerous amenities pages and room rates over and over on Luxury Brand A’s Resort site

Nov 1
Searches hotels for a Taipei business trip in January

Dec 6
Hits Luxury Brand A’s Resort site 16 times, considering a staycation in Singapore over the holidays

Nov 10–21
Makes searches on competitive Luxury Brand Resorts for a holiday in China

Jan 17–19
Visits Taipei for business and stays at Luxury Brand A

Jan 31
After her business trip, she searches for Mauritius beach trip on Luxury Brand A’s Resort site again

Dec 12
Converts on desktop for a three-day business trip to Taipei for Luxury Brand A in January

Sep 2
Dreams about a Mauritius Beach trip and visits Luxury Brand A’s Resort site, repeatedly watching their homepage video

Oct 7
Hits numerous amenities pages and room rates over and over on Luxury Brand A’s Resort site

Nov 1
Searches hotels for a Taipei business trip in January

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Jan 17–19
Visits Taipei for business and stays at Luxury Brand A

Jan 31
After her business trip, she searches for Mauritius beach trip on Luxury Brand A’s Resort site again

“A LUXURY TRAVELER NAME”
“Felicia’s” Path to Purchase

“Felicia” begins her dreaming with a destination in mind and is immediately drawn to a specific brand. In particular, a video of their offerings, showcasing a lavish resort full of amenities provides inspiration. This video stays with her and she continually returns to it as her travel cornerstone.

Though “Felicia” has a luxury stay on her mind, it’s business that ultimately catches up with her and monopolizes her travel planning. However, the original luxury leisure brand now bleeds into her business planning as she considers, and ultimately books with, the brand for her business trip.

As soon as her business trip is booked, she’s back to planning her leisure trip—performing 34 visits to that original site in 24 hours. And upon her return from her business trip, she’s back to planning her beach getaway with the same brand, a now brand-loyal guest.

Share of Touchpoints by Hotel Destination

<table>
<thead>
<tr>
<th>Hotel</th>
<th>56%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air</td>
<td>44%</td>
</tr>
<tr>
<td>Brand &amp; Misc</td>
<td>1%</td>
</tr>
</tbody>
</table>
Turn Insights into Marketing Actions

As the ultimate luxury travel dreamer, “Felicia” offers marketers a few interesting insights into travel planning. Her video consumption is in line with the travel dreaming masses: 66% of whom say video inspires them to visit a new place. For “Felicia,” it is the brand’s organic video that first inspires her travel planning and to which she returns again and again. This underscores how knowing who you want to target with video, and ensuring your video is replete with high-quality visuals of your destination, nearby attractions, or in this case, beaches, is key to capturing the imagination of travelers early on in the funnel.

“Felicia’s” path also demonstrates the importance of having a holistic, cross-channel brand awareness strategy. While she starts dreaming of her vacation with one particular property and destination, this luxury hotel brand could have gone a step further in winning over the “Felicias” of the world. They could repurpose this same video asset across multiple channels to build awareness with new customers at a larger scale, and to retarget people like “Felicia” who have visited their site but still haven’t committed. They could also build video into their Facebook marketing strategy—one survey discovered that 53% of respondents found ideas for their most recent trip on the social media platform.

“Felicia’s” story absolutely highlights the power of a solid brand video and the value of getting your brand in front of travelers early on—when they’re still brand and destination agnostic. But, her story also presents another cross-intent marketing takeaway. While “Felicia” doesn’t convert for the original Mauritius dream vacation, research for her leisure trip spills over into her business trip. Once she’s been won over by the image, amenities, and overall brand of one hotel, she demonstrates commitment to staying with the hotel brand regardless of trip motivation.

<table>
<thead>
<tr>
<th>Share of Touchpoints Brand vs Competitive Set</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Brand Booked</strong></td>
</tr>
<tr>
<td>92%</td>
</tr>
</tbody>
</table>
In 2016, domestic and international leisure travelers spent $683.1 billion dollars in the US. Moving the needle on this spending are families—buying flights, hotels, and attractions for multiple people is no chump change. And international travelers are particularly big visitors and spenders in the US: Accounting for roughly 18.4 million visitors in a year, Mexico is America’s second-largest inbound tourism market. In order to understand the unique value of international families for travel marketers, we investigate one such path to purchase in order to see how a head of the household plans, books, and spends for a large family vacation.

**“Alexandra” An Anonymous Mexican Amusement Park Adventurer**

**Who is “Alexandra”?**
- Primary travel origin is Mexico
- Books travel for a partner and 4 children

**How does “Alexandra” plan travel?**
- Upper-midscale or higher hotel traveler
- Frequent traveler
- Travels domestically and internationally for leisure and business, mostly to the US, Colombia, Argentina, and Spain
- Desktop searcher

This high-powered Latin American businesswoman plans an international Christmas getaway for her large family. Price and lead time are not an issue, as “Alexandra” takes her family on the ultimate amusement park adventure.
“Alexandra’s” Path to Purchase

“Alexandra” takes the whole family on the ultimate international amusement park vacation from dreaming through planning to booking.

- **Dec 4**: While visiting a Financial Brand page, which has a relationship with an Airline, she is inspired to search for a family holiday. She looks for flights from Mexico to Orlando for a Dec 26–Jan 1 trip for six people.

- **Dec 12–13**: Still open to destination, she compares hotels in Los Angeles and Orlando.

- **Dec 18**: Searches Orlando Hotels for Dec 31–Jan 7.

- **Dec 20**: Visits Amusement Park A’s California Park homepage.

- **Dec 30**: Converts for Amusement Park B.

- **Dec 18**: Searches Orlando Hotels for Dec 31–Jan 7.

- **Dec 29**: Hits Car Rental Brand A’s site 23x and books a car for her Orlando trip.

- **Dec 21**: Conducts flight & hotel searches to Orlando for eight days for six people. Books both shortly after.

- **Dec 31**: Converts for Amusement Park D.

- **Dec 31–Jan 7**: Leaving her device at home, she and her family travel to Orlando and visit three amusement parks.

- **Jan 11**: After her trip, she hits Amusement Park E’s homepage.
“Alexandra’s” Path to Purchase

Inspiration for leisure trips aren’t confined to any one realm—here we see “Alexandra” inspired by a financial brand associated with an airline. She knows right away she wants to take all six members of her family on an amusement park-rich vacation. She begins her planning by narrowing down her options to California or Florida—both serving as hubs for amusement parks.

“Alexandra” doesn’t mess around when it comes time for planning—a necessary trait for a mother of four and business woman—and shortly after her search begins, she books her flights and hotel back to back. Only a few days later, she locks down her car rental. Now the real fun begins.

Not content with a single amusement park, “Alexandra” looks at four different amusement park adventures for her family. The trip must have been a success because upon her return, she starts looking again at a fifth, unvisited, amusement park—you have to scratch them all off your bucket list.
"Alexandra's" path to purchase reiterates the idea that aiming for an average with your travel marketing campaign will leave you missing out—here on a big spender. Because “Alexandra’s” lead time varies depending on the vertical, using an average lead time to engage her with relevant messaging would fall on deaf ears. **She splits her decision making fairly evenly between last-minute and more planned out purchases and only through rich, real-time data would you know when to engage with “Alexandra” in a way that would be most effective.**

"Alexandra” also demonstrates the importance of knowing when the decision-making process for a traveler occurs. Here we see “Alexandra” deciding between a California and a Florida getaway. Knowing where a traveler is in their path to purchase is key to engaging with them at the right time—what's equally important is engaging with travelers on the right channel and with the right message.

Video, for example, is an effective way to influence travelers in the early stages: 60% use video to narrow down their destination, brand, and activities.²⁰ Serving video ads to “Alexandra” for a Florida or California amusement park, as she is deciding between the two, is a strategic way to influence her decision-making process and offer her the information she needs to make her decision. **Then nurture travelers from dreaming to purchase using native ads that fit the form and function of any page while offering a 25% lift in engagement—followed by standard display ads deployed with real-time intent data and optimization algorithms that are tuned for travel objectives—to reach and convert highly-engaged audiences.**

### Timing of Online Events

<table>
<thead>
<tr>
<th>Timing of Online Events</th>
<th>More Planned</th>
<th>Last Minute</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>57%</strong></td>
<td><strong>43%</strong></td>
<td></td>
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</table>

**More Planned**  **Last Minute**
Conclusion

Marketers have always known that no two consumers are alike. As such, basing your marketing strategies on simple averages, or the lowest common denominator will almost certainly result in missing the mark entirely as our eight paths to purchase demonstrate. The technology is now available to allow brands to have deep one-to-one and one-to-many marketing conversations with your ideal consumers. You can now target effectively, based on a consumer’s intent signals no matter where they are along their divergent paths to purchase.

Despite the differences we see across the eight paths we analyzed here, there are a few points of commonality:

• For many of our travelers, they found a planning anchor: that one website, brand, guide, or video that they continued to come back to throughout their path to purchase. Seeing how travelers pivot around these touchpoints should inspire marketers to think of their offerings beyond the single amenities page, for instance. Work to be the central point of information and inspiration from dreaming through planning to booking and even in-destination.

• The path to purchase is often cyclical, with a number of the travelers we observed returning to planning either back to the destination they just left or ready to look for another adventure. Thinking about the path as not something that ends, but that renews and repeats, should inspire you to think of your marketing differently. It doesn’t end with a booking, but continues even after they depart.

• Without a data-driven, omni-channel approach, you are marketing in the dark. Our report demonstrates just how complex a traveler’s path to purchase is. They visit multiple websites, conduct competing searches, and move between devices. Even after booking, they continue to search to ensure they got the best deal, or to look for upgrades. If you don’t know what travelers are doing and when, and if you aren’t where they are, with messaging tailored to them, you can’t guarantee effective ad spend or positive ROI.

Whether you’re looking to inspire new travelers to your destination or brand or turn existing fans into loyalty members, Sojern has the travel intent data, data science team, and travel expertise to deliver your brand awareness or direct revenue objectives. We can reach your travelers with the right message at the right time on the right device along their path to purchase.
Endnotes

1. IAAPA. “Amusement Park and Attractions Industry Statistics.”
4. Proceviat, Ashley. Sojern Blog. “4 Ways to Tackle Your Travel Marketing Objectives.”
10. Siteminder. 2016. “SiteMinder report: Average booking value on direct hotel websites nearly double than on third-party channels.”
17. US Travel Association. “US Travel Answer Sheet.”
Methodology

For this analysis, Sojern analyzes travel preferences and patterns by utilizing billions of search and booking intent, and real-time analysis of anonymous, global traveler profiles. The analysis is based off of travel events conducted by users Sojern sees through our data partnerships with travel brands worldwide.

The report includes user search and conversion activity across cruise, flight, hotel, car, OTAs, meta, and brand sites including traveler metrics from real, online transactions, such as travel dates, brand selection, device of choice, and user origination. Singular user-pathing is filtered via a unique Sojern profile identifier, providing a detailed deep-dive into the hundreds of touchpoints a single user conducts as he/she searches, converts, and plans their travel.

Sojern data does not include personally identifiable information, but is able to discern the unique shopping and preferential habits of travelers gleaned from their real-time travel intent data.
Specializing in traveler path-to-purchase data for over a decade, Sojern is travel's direct demand engine for thousands of brands—from global enterprises to boutique operators—across the hotel, airline, cruise, transportation, tourism industries and more. Analyzing the world's travel intent signals with its proprietary data science methods, the company generated $10B in generated bookings for its clients to date by activating multi-channel branding and performance solutions on the Sojern Traveler Platform.

Recognized on the Top Company Cultures list by Entrepreneur Magazine, Sojern is headquartered in San Francisco, with teams based in Dubai, Dublin, Hong Kong, London, Mexico City, New York, Omaha, Paris, Singapore, and Sydney.

www.sojern.com