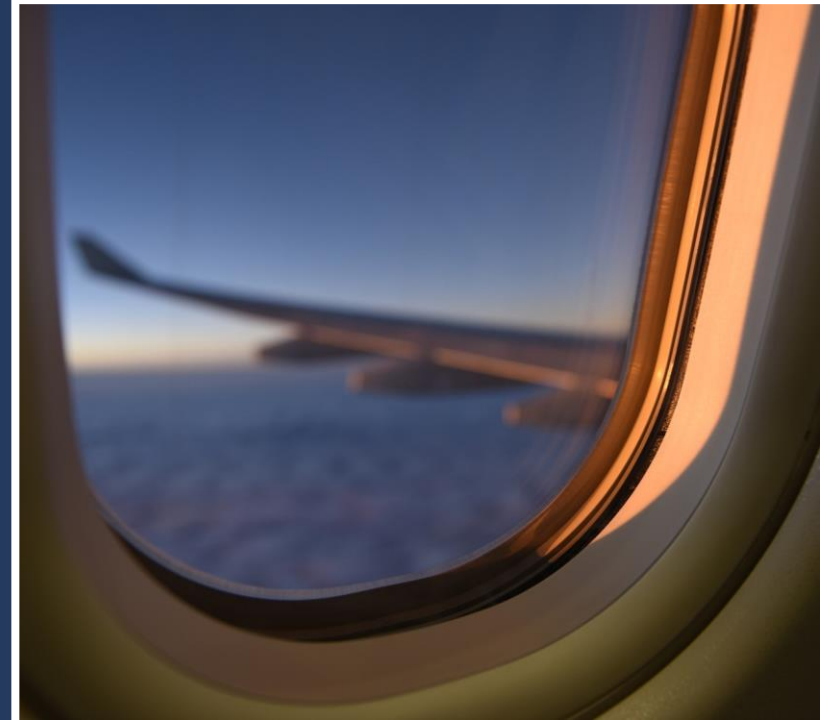




Microsoft Advertising Insights
Travel paid media attribution
September 2020

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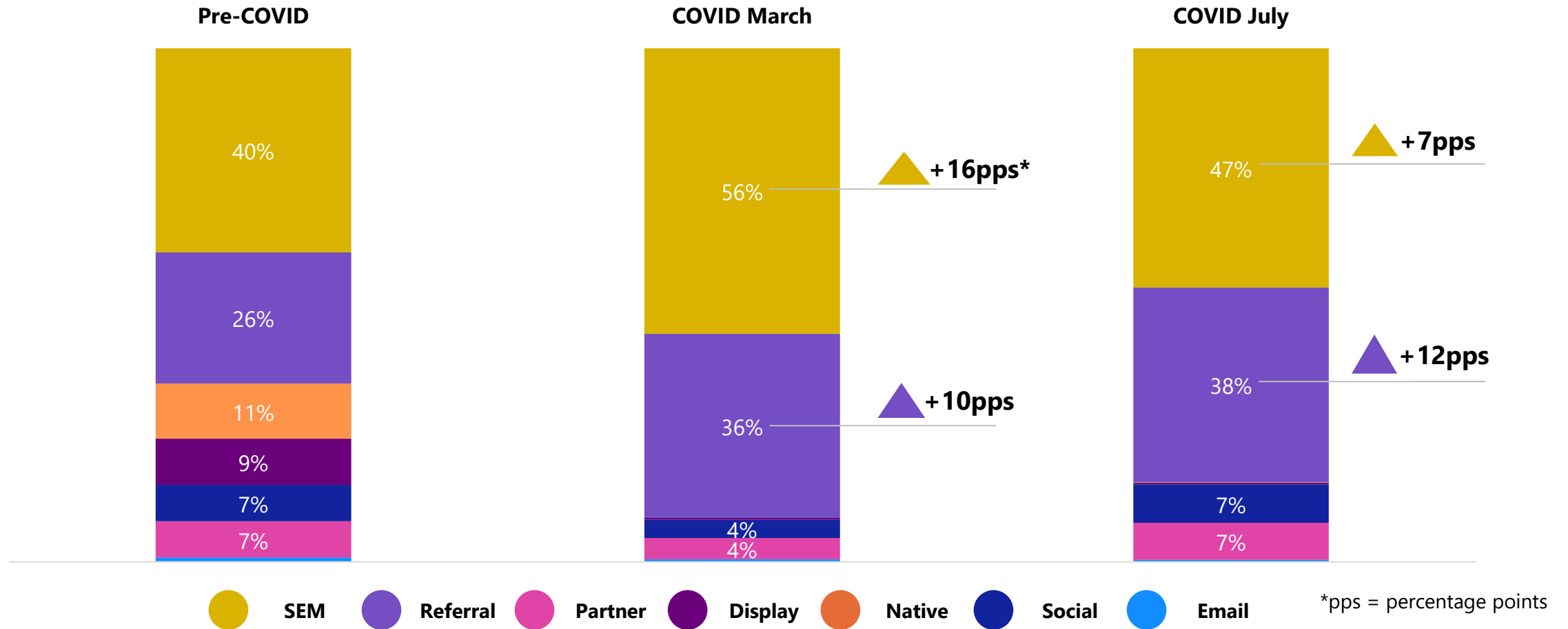


This study is meant to answer how attribution between paid media channels has changed since the onset of COVID-19

Search engine marketing (SEM) grows in prominence since March

As potential travelers spend more time indoors, we see search driving a higher % of attribution alongside a growth in referral channels. Cuts in upper funnel tactics like native are also seen, but illustrate that opportunity still exists, given its value pre-COVID-19.

Ad channel attribution



Microsoft internal data. Click based attribution (impression ad exposure is not considered). N = 1000 users per time frame. Pre Covid: Feb. 15, 2020 – Mar. 15, 2020. COVID March: Mar. 16, 2020 – Apr. 15, 2020. COVID July: Jun. 16, 2020 – Jul. 15, 2020. US and PC only. Analysis of paid media only. Publisher and platform agnostic. Multiple paid digital media click touchpoints required for analysis inclusion. Markov chains methodology for incrementality measurement.

Looking within Travel journeys prior to COVID-19, SEM was the channel most likely to be clicked following an ad on a different channel

Pre-COVID-19

		Channel to							
Channel from	(conversion)	display	email	native	partner	referral	sem	social	
	(start)		2%	0.4%	2%	2%	12%	80%	2%
	display	8%		0.4%	33%	1%	15%	42%	0.4%
	email	12%			6%			82%	
	native	9%	6%			7%	22%	52%	4%
	partner	6%	4%	1%	7%		22%	58%	2%
	referral	4%	1%	0.3%	2%	2%		89%	2%
	sem	32%	8%	0.4%	7%	4%	42%		6%
	social	12%	8%		6%	4%	19%	52%	

Microsoft internal data. Click based attribution (impression ad exposure is not considered). N = 1000 users per time frame. Pre Covid: Feb. 15, 2020 – Mar. 15, 2020. COVID March: Mar. 16, 2020 – Apr. 15, 2020. COVID July: Jun. 16, 2020 – Jul. 15, 2020. US and PC only. Analysis of paid media only. Publisher and platform agnostic. Multiple paid digital media click touchpoints required for analysis inclusion. Markov chains methodology for incrementality measurement. SEM->SEM->SEM is not present nor relevant here because this methodology quantifies the hypothetical removal of SEM from the path, how likely that would “break the chain break”, and therefore attributing the MTA conversion value to a channel.

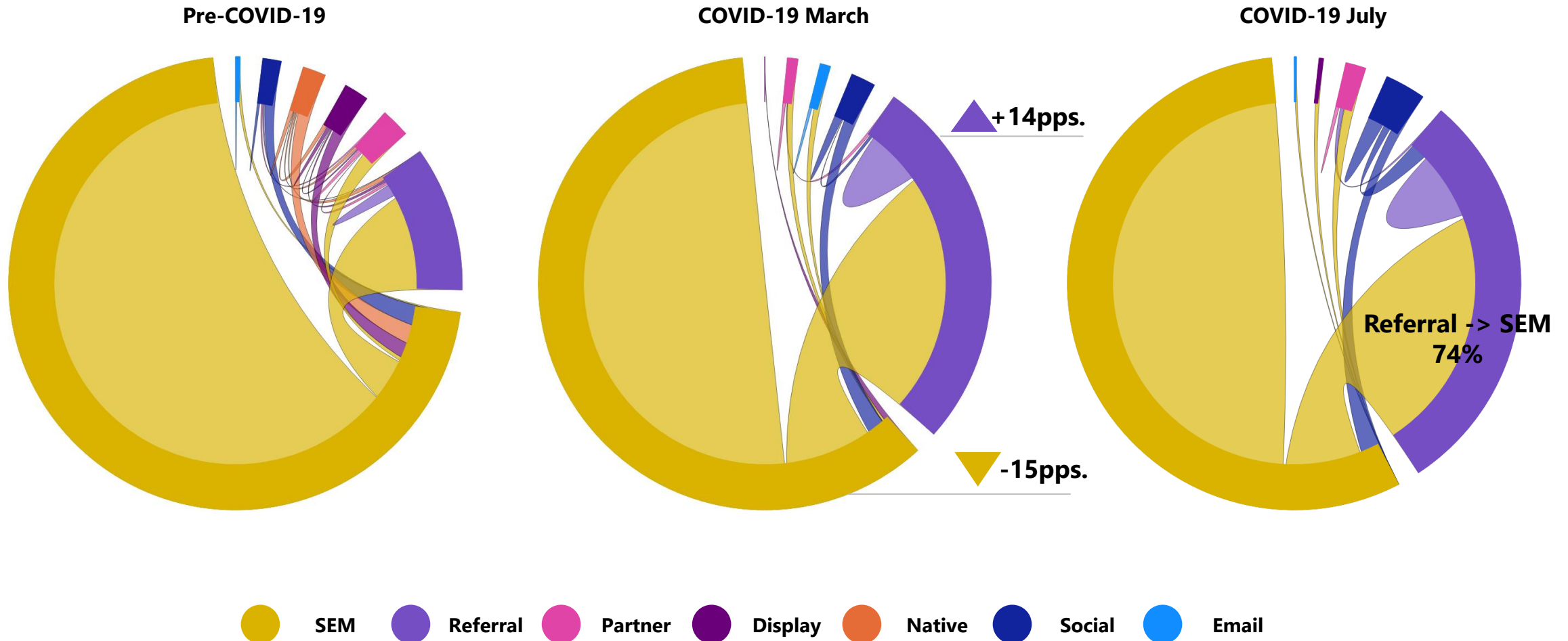
Since COVID-19, users are still highly likely to click on an SEM ad immediately after other channels, and in some cases, SEM has become the only other channel clicked (e.g. after display or native)

COVID-19 July

		Channel to							
		(conversion)	display	email	native	partner	referral	sem	social
Channel from	(start)		0.4%	0.2%		2%	33%	62%	3%
	display							100%	
	email					25%		75%	
	native							100%	
	partner	3%					54%	41%	2%
	referral	7%			0.1%	3%		87%	2%
	sem	30%	0.1%	0.2%		3%	64%		3%
	social	31%	1.1%			4%	21%	43%	

First to last channel combinations

The user journey has changed somewhat, with a shift to more paths starting on referral, but 3 out of 4 of those users still convert via SEM. Journeys starting from social also grew from February to July, coming at the expense of other channels.



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Search remains a critical channel in the digital marketing mix, and especially so after the onset of COVID-19, showing up prominently in every stage of the user journey

To get more actionable data, insights and best practices to help make decisions and grow your business, visit aka.ms/MicrosoftAdvertisingInsights



THANK YOU

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