

Travel demand recovery series

Microsoft Advertising Insights

The 2021 travel outlook in Europe

Microsoft Advertising. Intelligent connections.



Key questions

Second lockdowns have resulted in Europeans being subject to travel and mobility restrictions again. As freedom to mobilize increases in some parts of Europe leading up to Christmas, along with recent news about effective vaccines, what effect will this have on consumer demand to travel next year?

- How are '2021' travel searches evolving during this year?
- What travel categories are fueling '2021' travel search interest?
- What are the top '2021' travel destinations?
- How should I evolve my marketing strategy?

Key findings

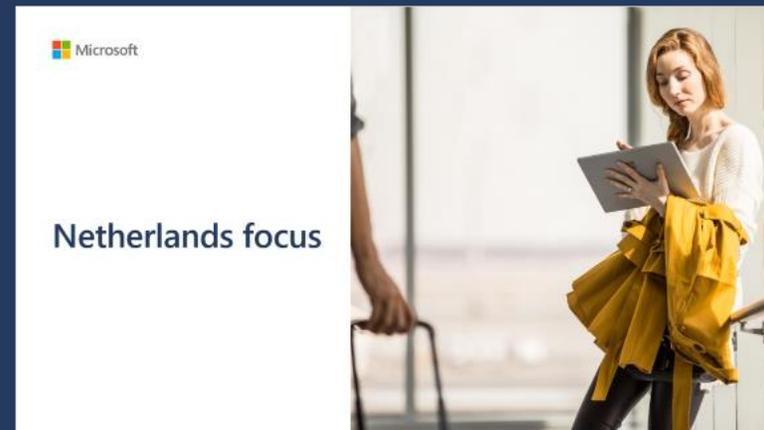
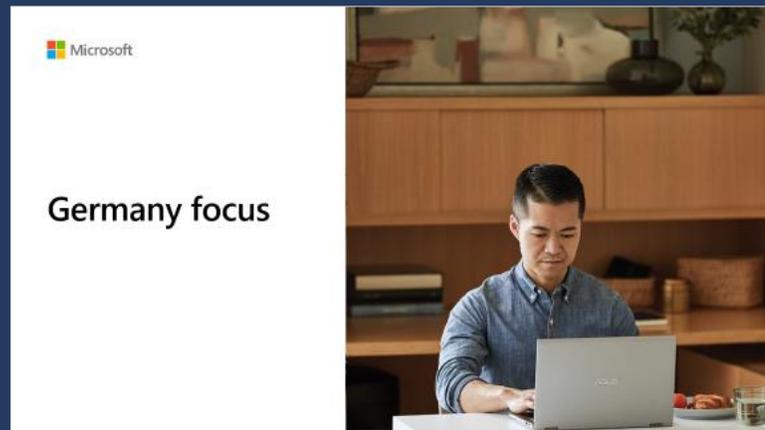
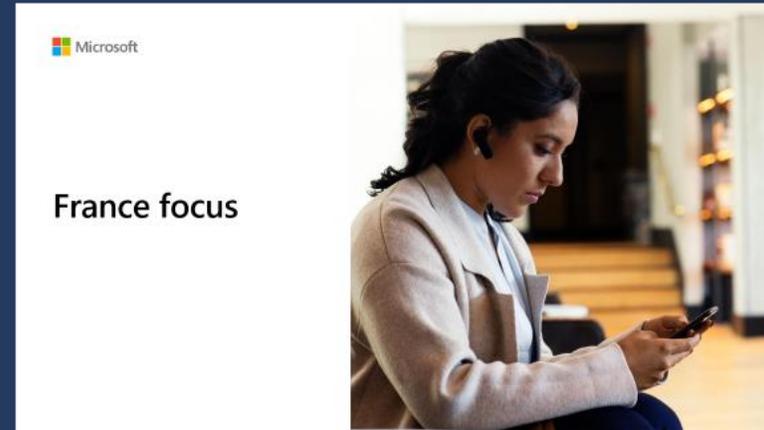
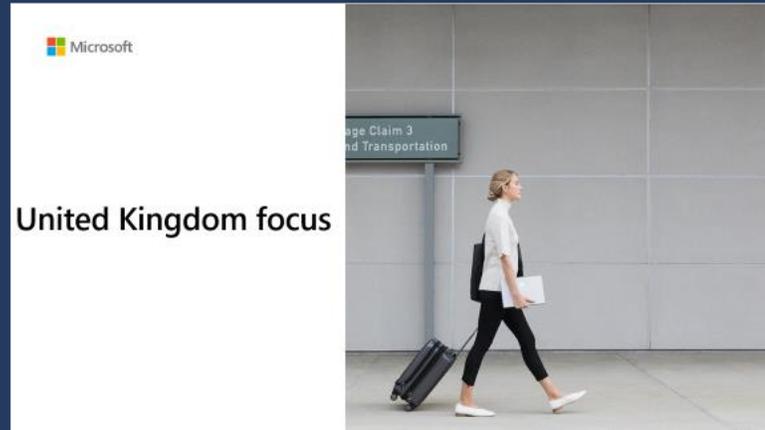
Across markets, second lockdowns in November have prompted a surge in '2021' travel searches progressing into December. News regarding potentially effective vaccines and planned deployment in the coming months could also be bolstering '2021' search interest.

Amongst markets, France and Netherlands show the strongest growth, with '2021' indexed travel search volume exceeding 300% in early December.

Holidays, and to a lesser degree cruises, are key categories across markets fuelling '2021' travel search interest.

From a destination perspective, top '2021' travel destinations are domestic focused in France whilst international destinations are popular in Germany and the UK.

Chapters



Click on a chapter tile to enter a chapter



United Kingdom focus



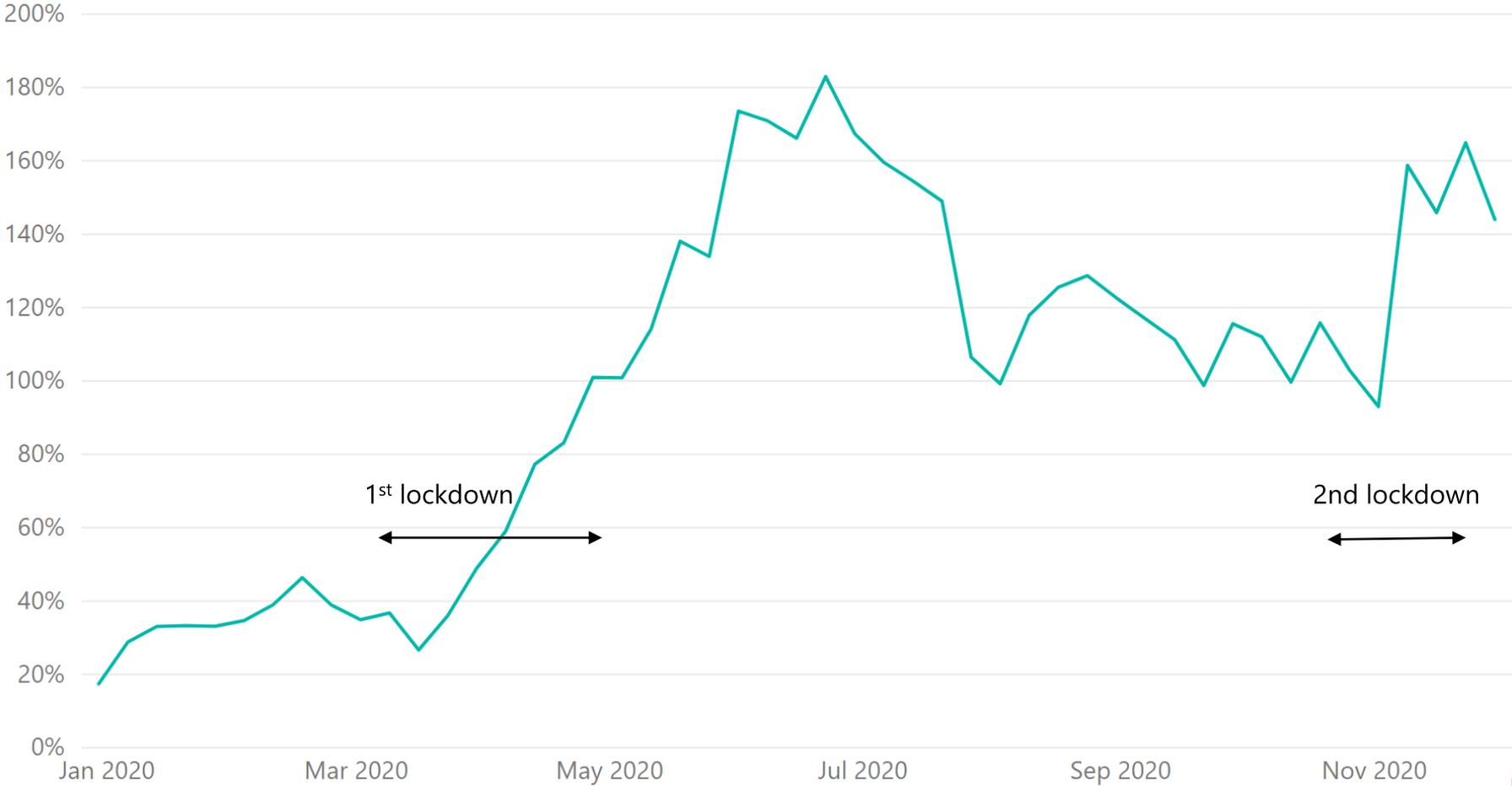
UK summary

- **Second lockdowns alongside the vaccine approval and planned deployment in December** have bolstered search interest in '2021' travel from November onwards
- **Over 90% of '2021' travel searches belong to the holidays or cruise category**
- **Top 10 '2021' travel destinations are all international destinations** with the majority being 'short haul' international destinations
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



The second lockdown prompted a surge in '2021' travel searches

'2021' travel indexed search volume (Jan – Dec 6th, 2020)

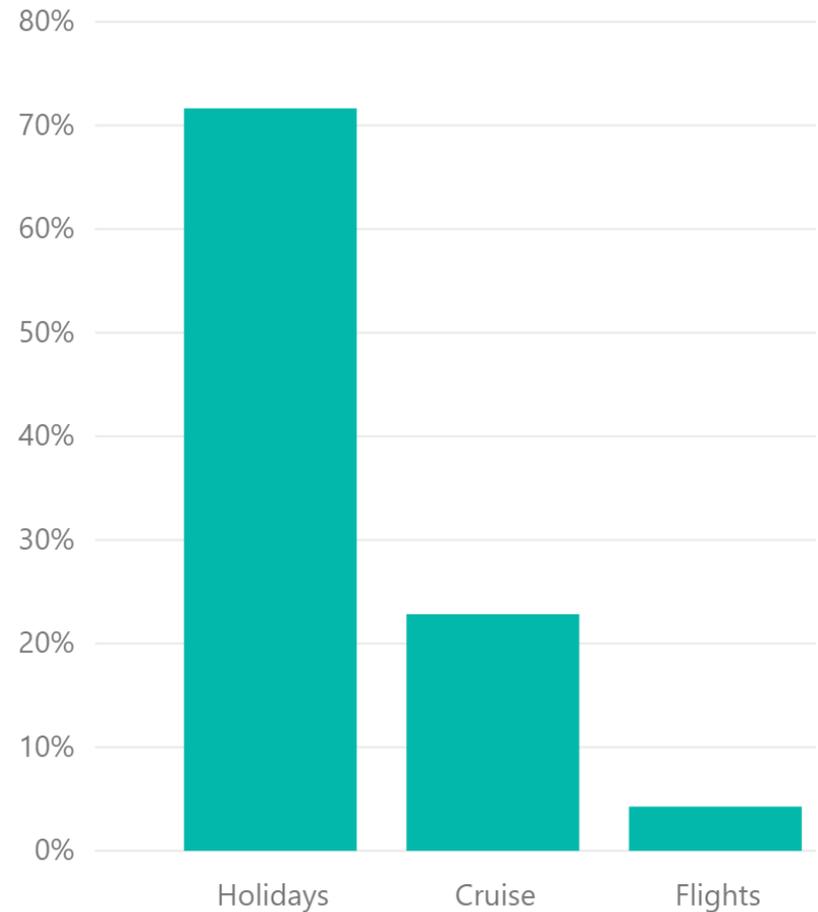


Microsoft Internal Data. Jan 2020 – Dec 6th 2020. '2021' travel searches are defined as searches with travel intent that contain the query token of '2021'



Over 90% of '2021' travel searches belong to the holidays or cruise category

'2021' Travel search volume by category – Top 3 categories



· Microsoft Internal Data. Jan 2020 – Dec 6th 2020.





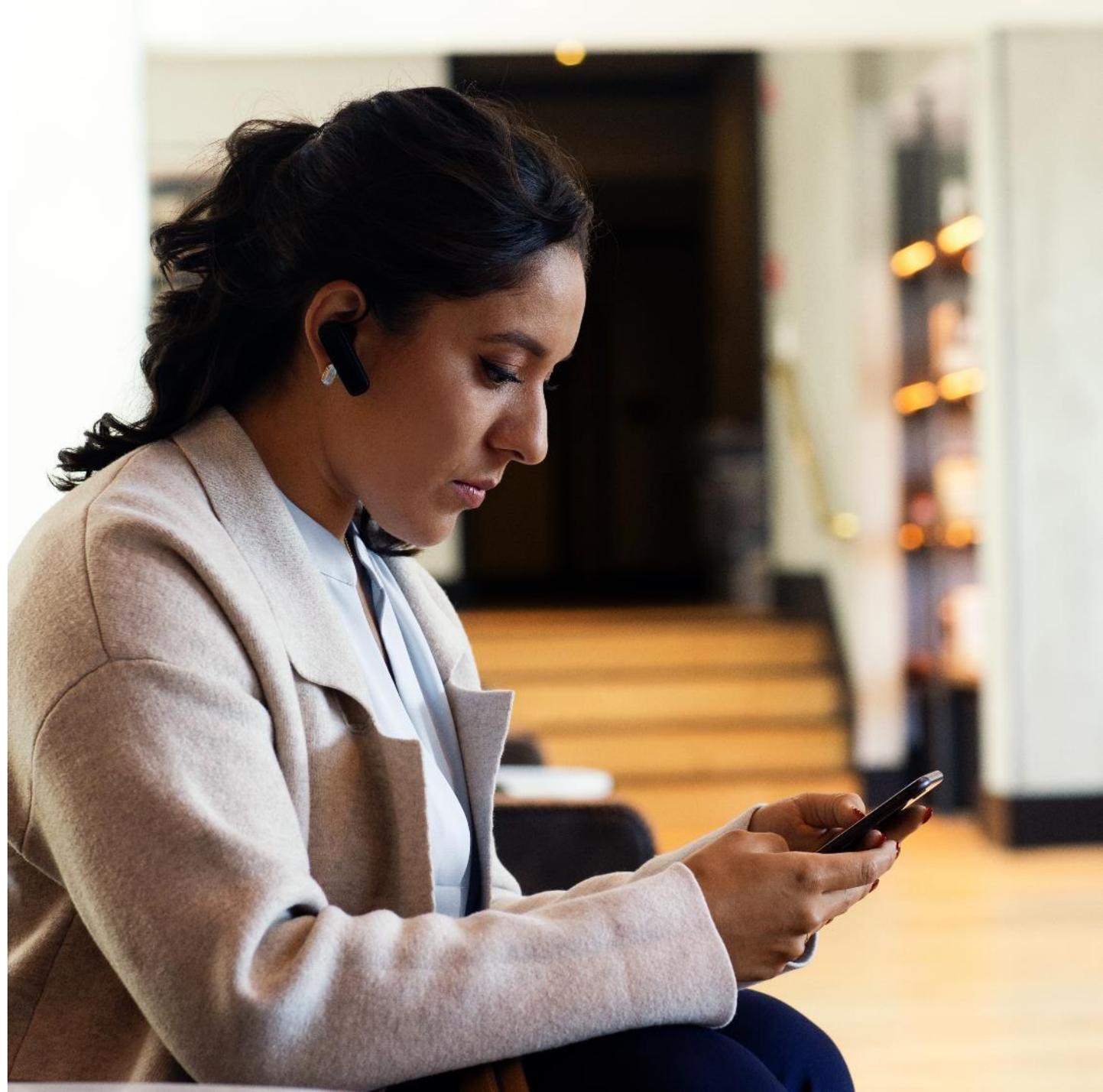
Top 10 '2021' Travel destinations

1. Maldives
2. Dubai
3. Turkey
4. Cyprus
5. New York
6. Tenerife
7. Florida
8. Greece
9. Lanzarote
10. Spain

Top 10 travel destinations extracted from '2021' travel searches occurring in the UK, Nov 9th – Dec 6th 2020



France focus



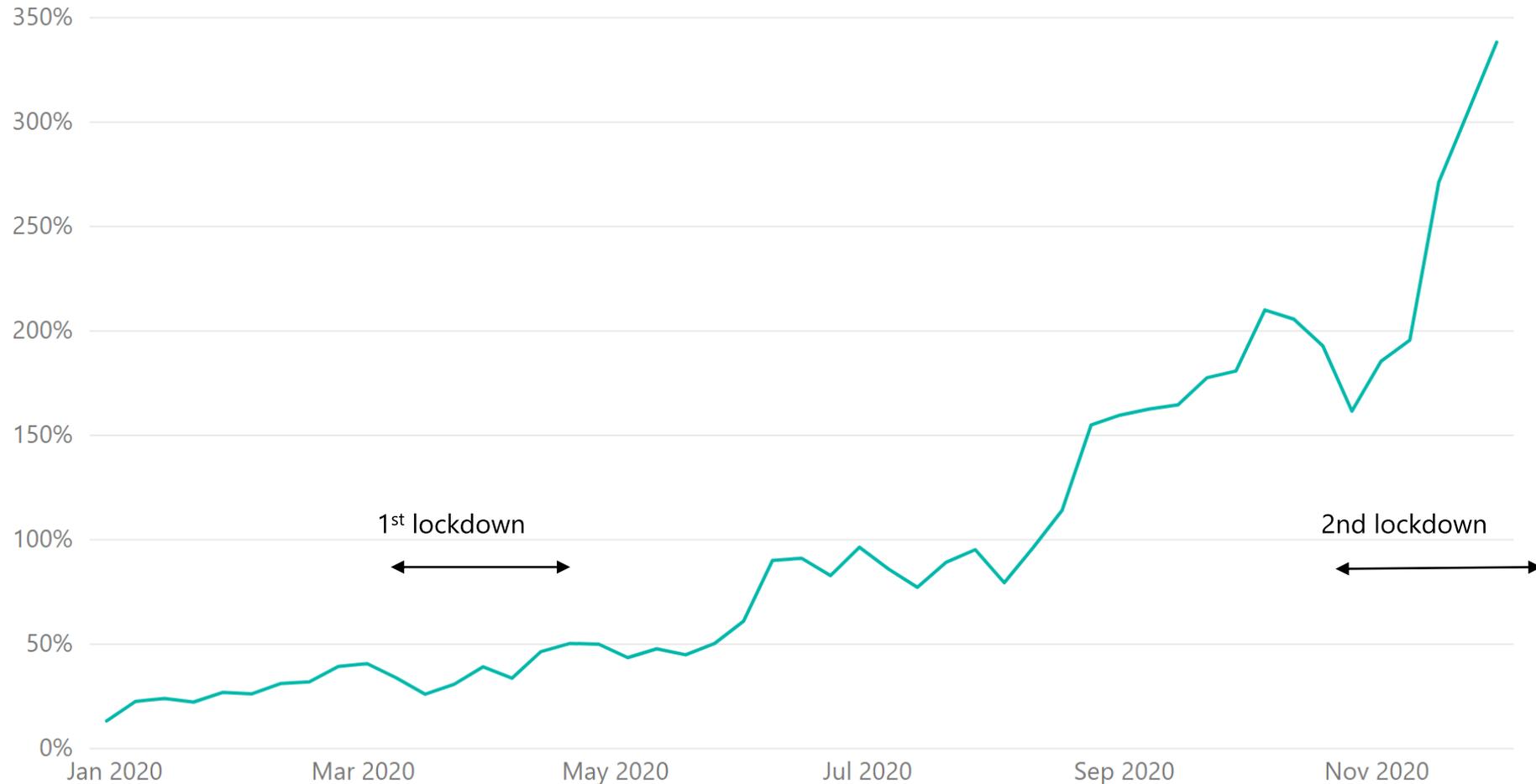
France summary

- **Second lockdowns alongside the news of potentially effective vaccines** have bolstered search interest in '2021' travel from November onwards
- **Over 95% of '2021' travel searches belong to the holidays or cruise category**
- **Top 10 '2021' travel destinations are all domestic destinations** featuring a spread of coastal, rural areas alongside cities
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



The second lockdown prompted a much larger surge in '2021' travel searches than the first lockdown

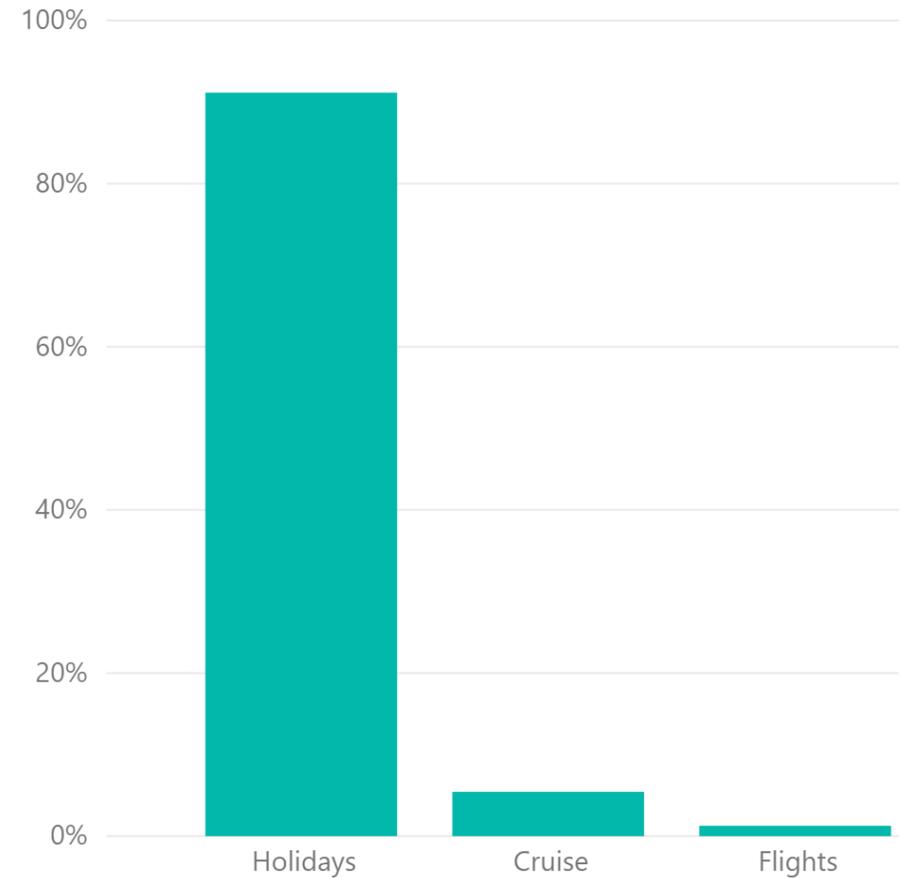
'2021' Travel indexed search volume (Jan – Dec 6th, 2020)





Over 95% of '2021' travel searches belong to the holidays or cruise category

'2021' Travel search volume by category – Top 3 categories





Top 10 '2021' Travel destinations

1. Paris
2. France
3. Bretagne
4. Lyon
5. Nantes
6. Bordeaux
7. Toulouse
8. Alsace
9. Megeve
10. Montpellier

Top 10 travel destinations extracted from '2021' travel searches occurring in FR, Nov 9th – Dec 6th 2020



Germany focus

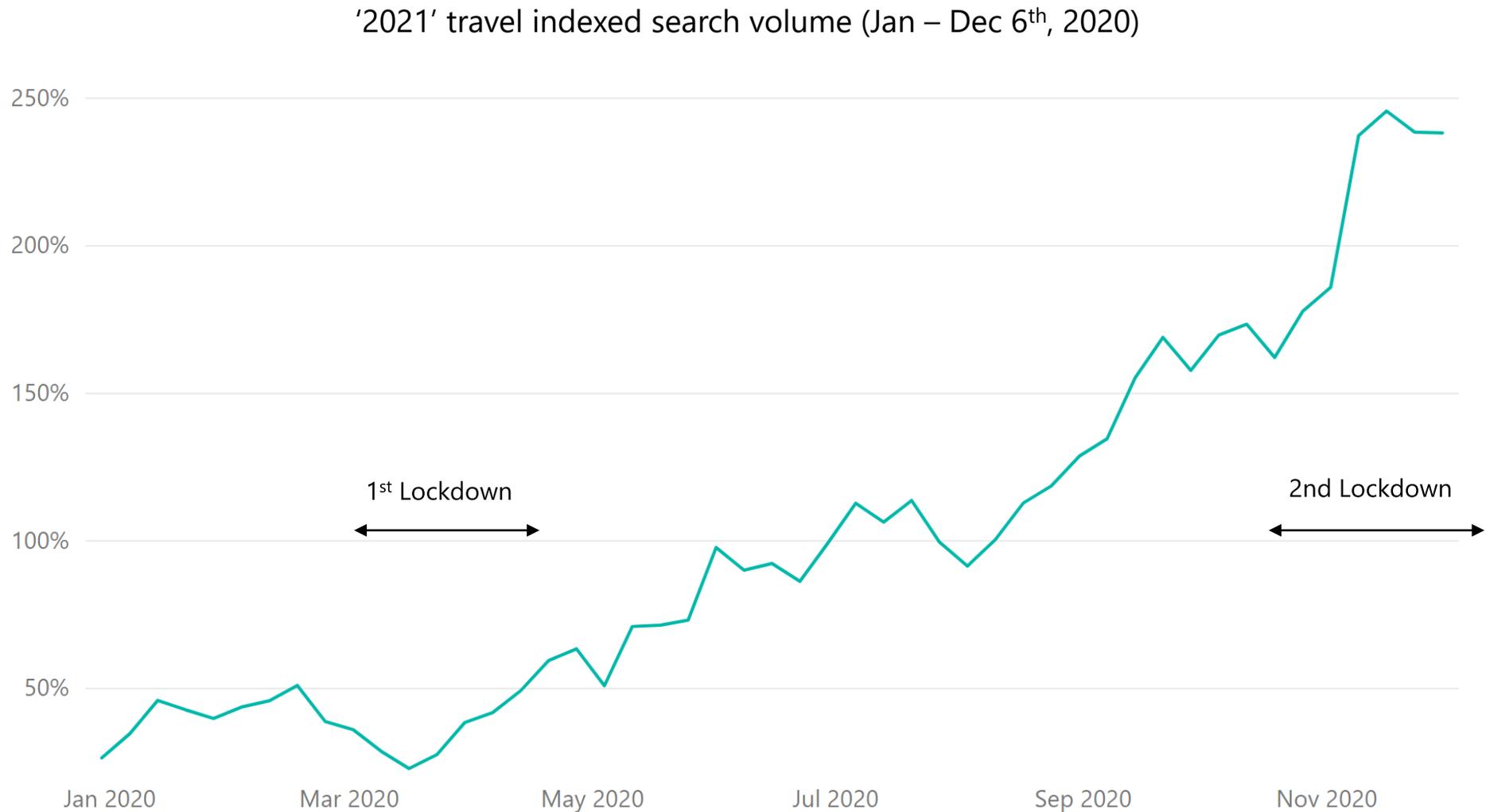


Germany summary

- **Second lockdowns alongside the news of potentially effective vaccines** have bolstered search interest in '2021' travel from November onwards
- **Over 90% of '2021' travel searches belong to the holidays or cruise category**
- **Top 10 '2021' travel destinations are mostly international destinations** featuring a spread of short-haul and long-haul destinations
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



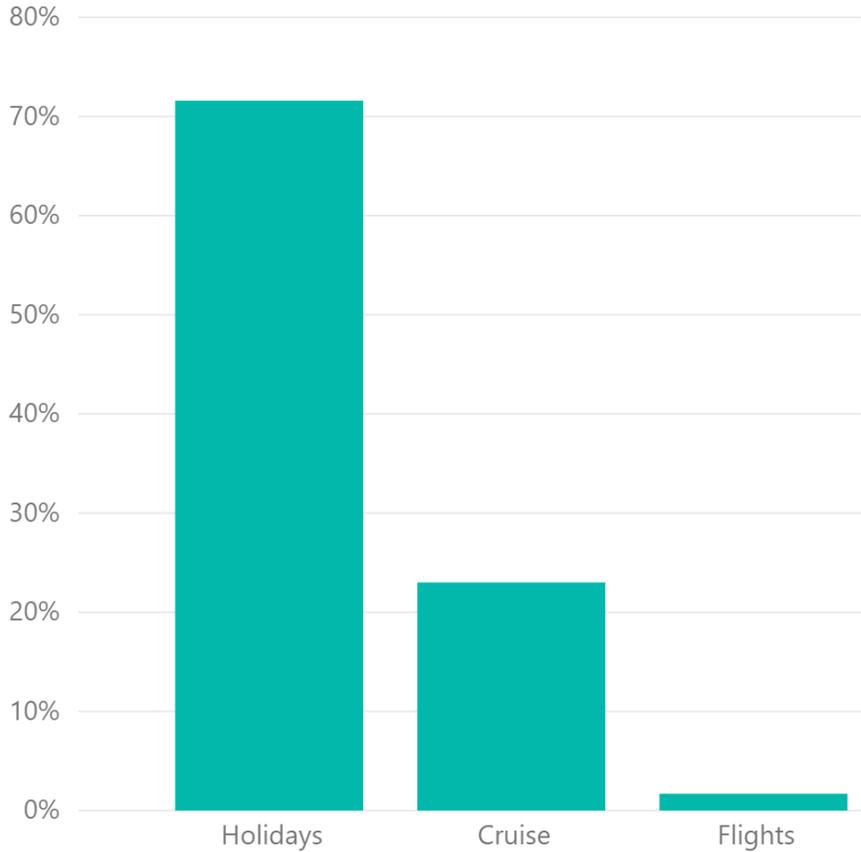
The second lockdown prompted a surge in '2021' travel searches





Over 90% of '2021' travel searches belong to the holidays or cruise category

'2021' Travel Search Volume By Category – Top 3 Categories





Top 10 '2021' Travel destinations

1. Kroatien
2. Island
3. Deutschland
4. Mallorca
5. Thailand
6. Kuba
7. Porec
8. Hamburg
9. Norwegen
10. USA

Top 10 travel destinations extracted from '2021' travel searches occurring in DE, Nov 9th – Dec 6th 2020. **Island is a German translation for Iceland**

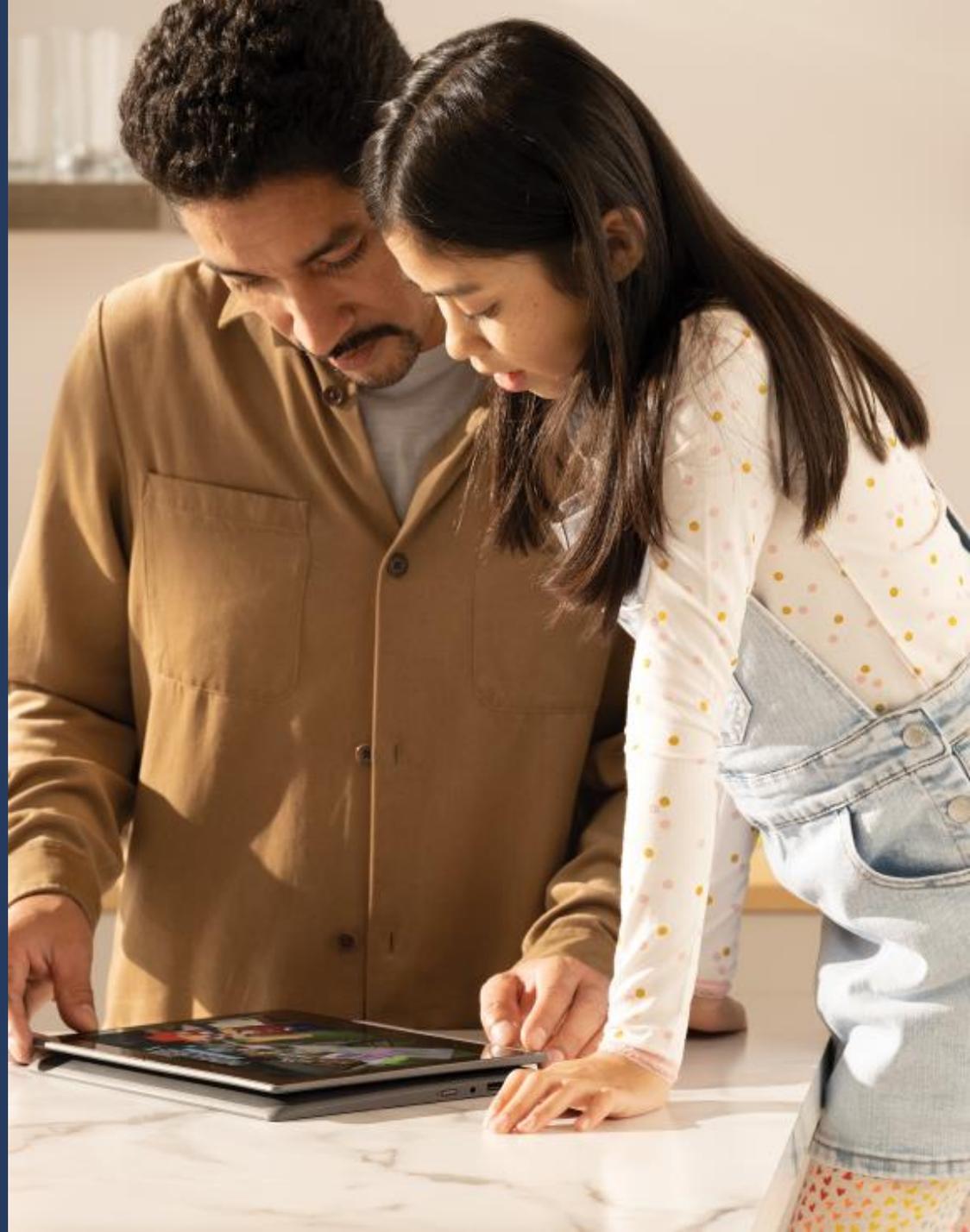


Netherlands focus

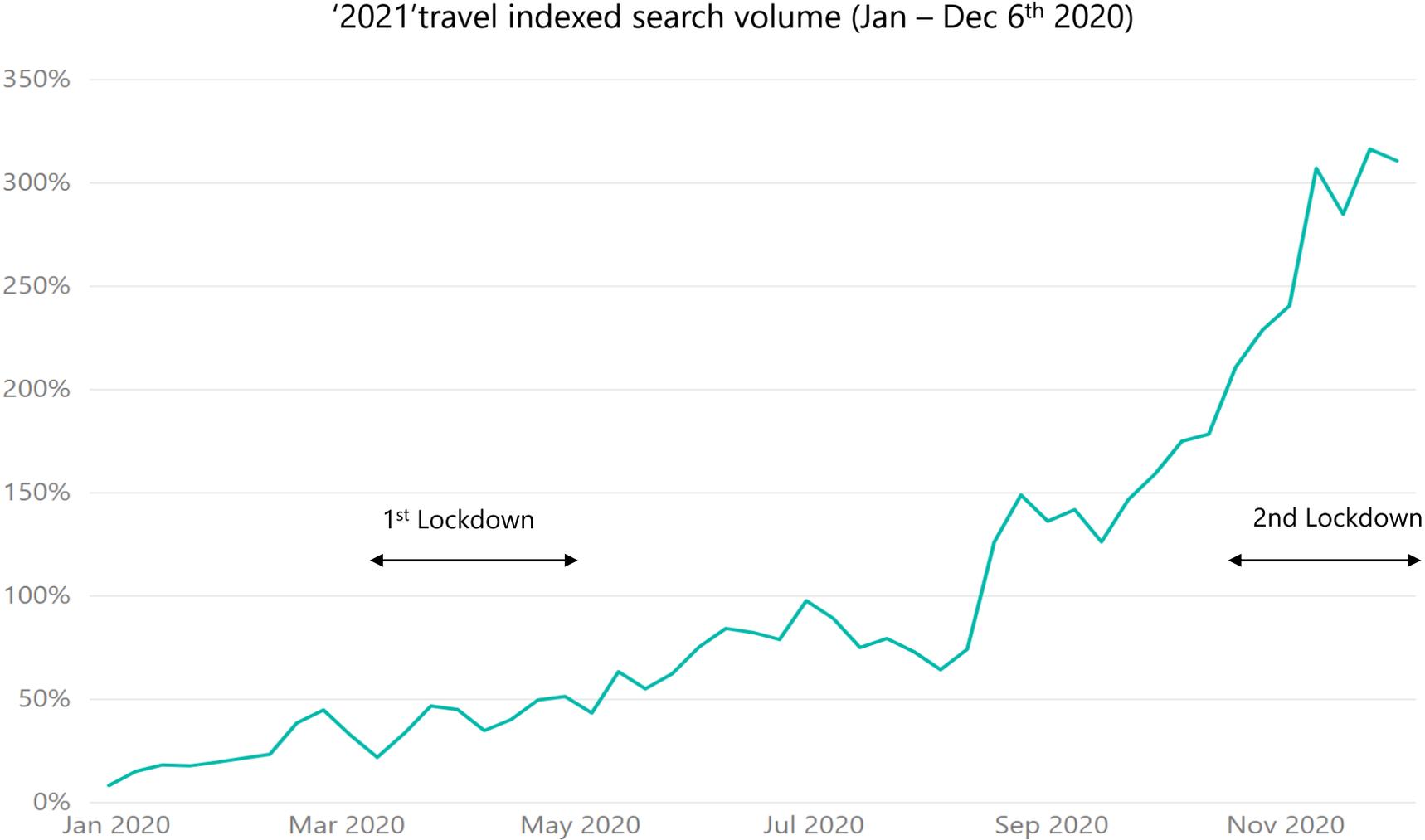


Netherlands summary

- **Second lockdowns alongside news of potentially effective vaccines** have bolstered search interest in '2021' travel from November onwards
- **Over 95% of '2021' travel searches belong to the holidays category**
- **Top 10 '2021' travel destinations are a mix of domestic and international destinations**
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



The second lockdown prompted a surge in '2021' travel searches

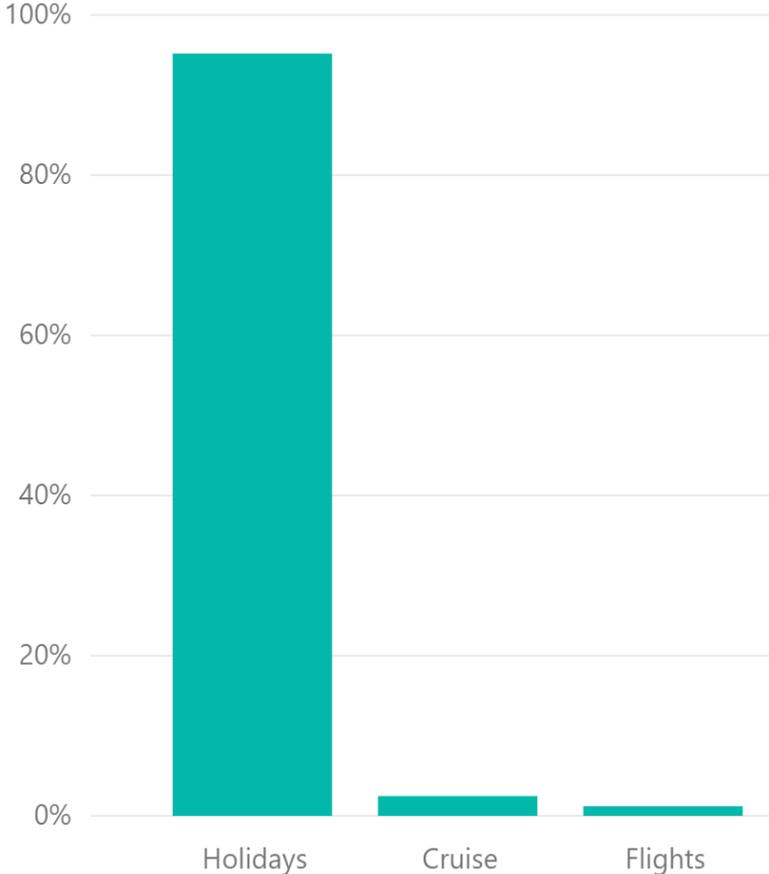


Microsoft Internal Data. Jan 2020 – Dec 6th 2020. '2021' travel searches are defined as searches with travel intent that contain the query token of '2021'



Over 95% of '2021' travel searches belong to the holidays category

'2021' Travel search volume by category – Top 3 categories





Top 10 '2021' Travel destinations

1. Nederland
2. Duitsland
3. Netherlands
4. Griekenland
5. Frankrijk
6. Holland
7. Amsterdam
8. Rotterdam
9. Spanje
10. Zeeland

Action you can take today

- **Use Dynamic Search Ads to capture emerging '2021' travel queries: set up Dynamic Search Ads as a 'catch all' strategy to capture newly emerging queries as consumer search patterns might change**
- **Re-activate campaigns for destinations no longer discouraged:** Letting campaigns run on lower CPCs - yet above first page bids threshold - is a low-risk strategy that allows you to quickly **respond to growing consumer interest** in a low-competition environment
- **Modify messaging:** Check if your ads are addressing time sensitive search interest, leverage **Responsive Search Ads** to adjust to changing consumer preferences
- **Utilize automated bidding strategies:** Automated bidding helps you to stay on top of the dynamic marketplace, use **Enhanced CPC** when minimal threshold conversion volume for **conversion-based strategies** is not met
- **Implement remarketing for recent visitors:** Create remarketing lists with **more recent frequencies** (e.g. 1, 3, 7, 14, 30 days) to target consumers that recently started to investigate holidays and trips
- **Ensure visibility on generic keywords:** Consumers are increasingly relying on generic (non-brand) searches to assess available offerings during a time period of interest

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