



Microsoft Advertising Insights

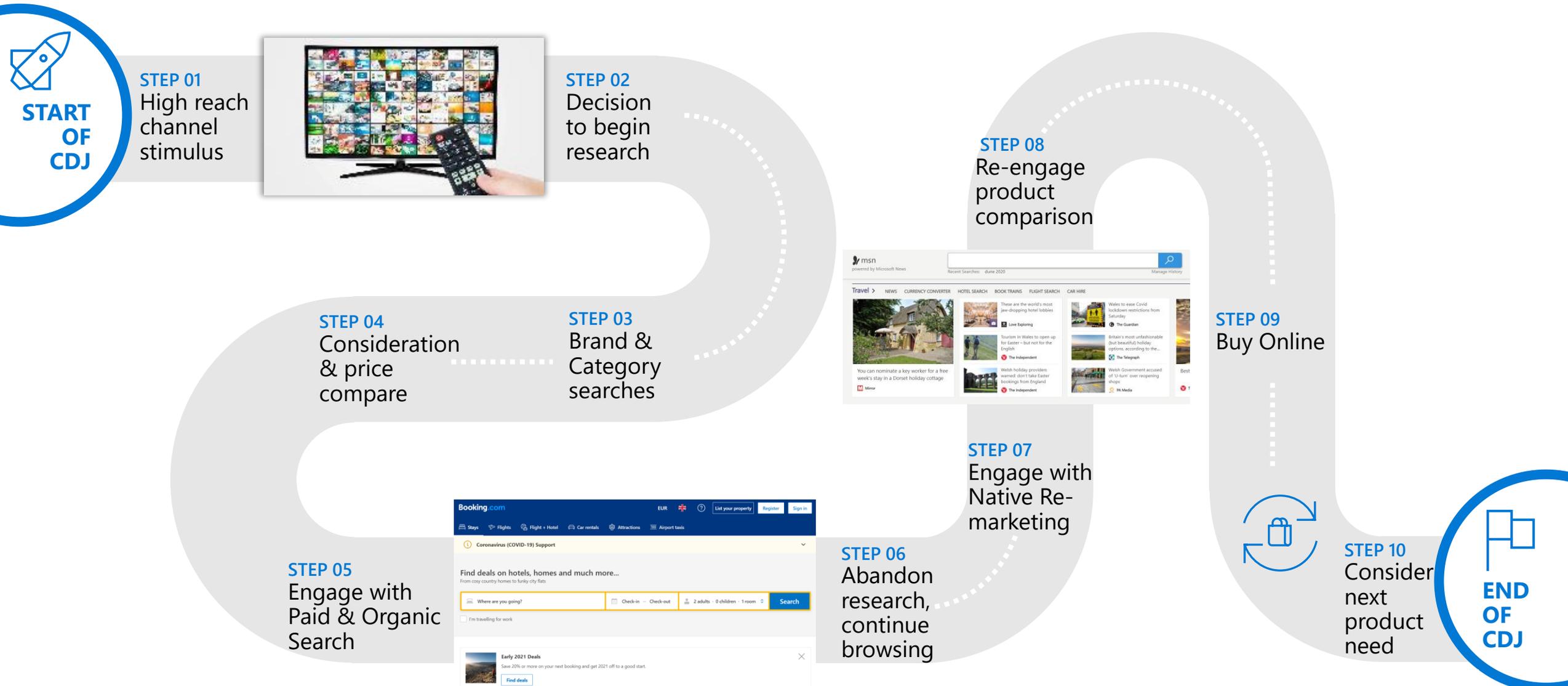
# Connected trips: multi-line travel trends in the US

Microsoft Advertising. Intelligent connections.

US | March 2021



# A detailed look into the Consumer Decision Journey (CDJ)



# Mono-line vs. multi-line customers

How to engage multi-line users in their customer decision journey

## Mono-line customer

Purchases only **one** travel product for their trip



## Multi-line customer

Purchases **multiple** travel products for their trip



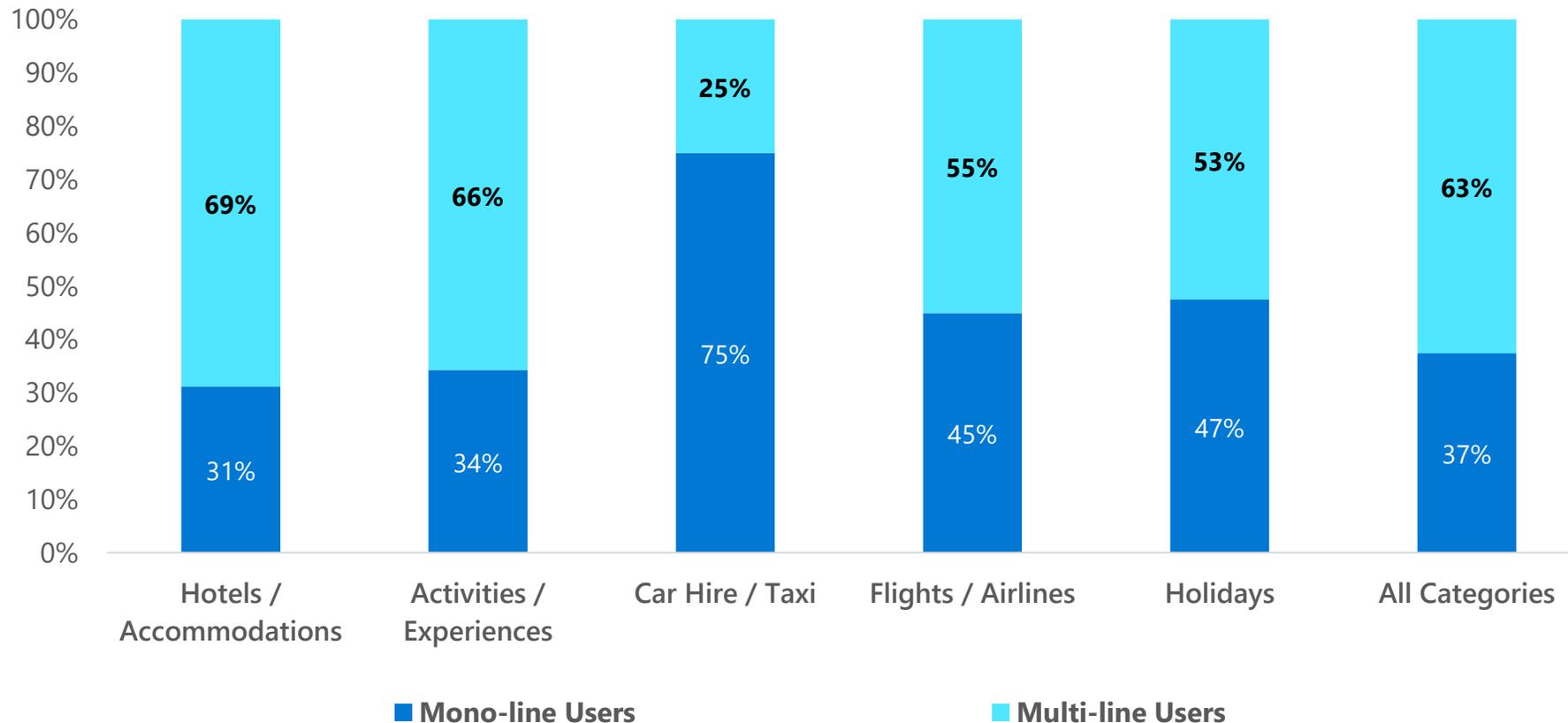
# 63%

of US travel users considered  
multiple lines of business in  
their journey

# More than half of US travelers consider multiple lines of business in the CDJ



% US Travel users by category\*



**63%** of the US travel users shopped for multiple lines of business in their journey

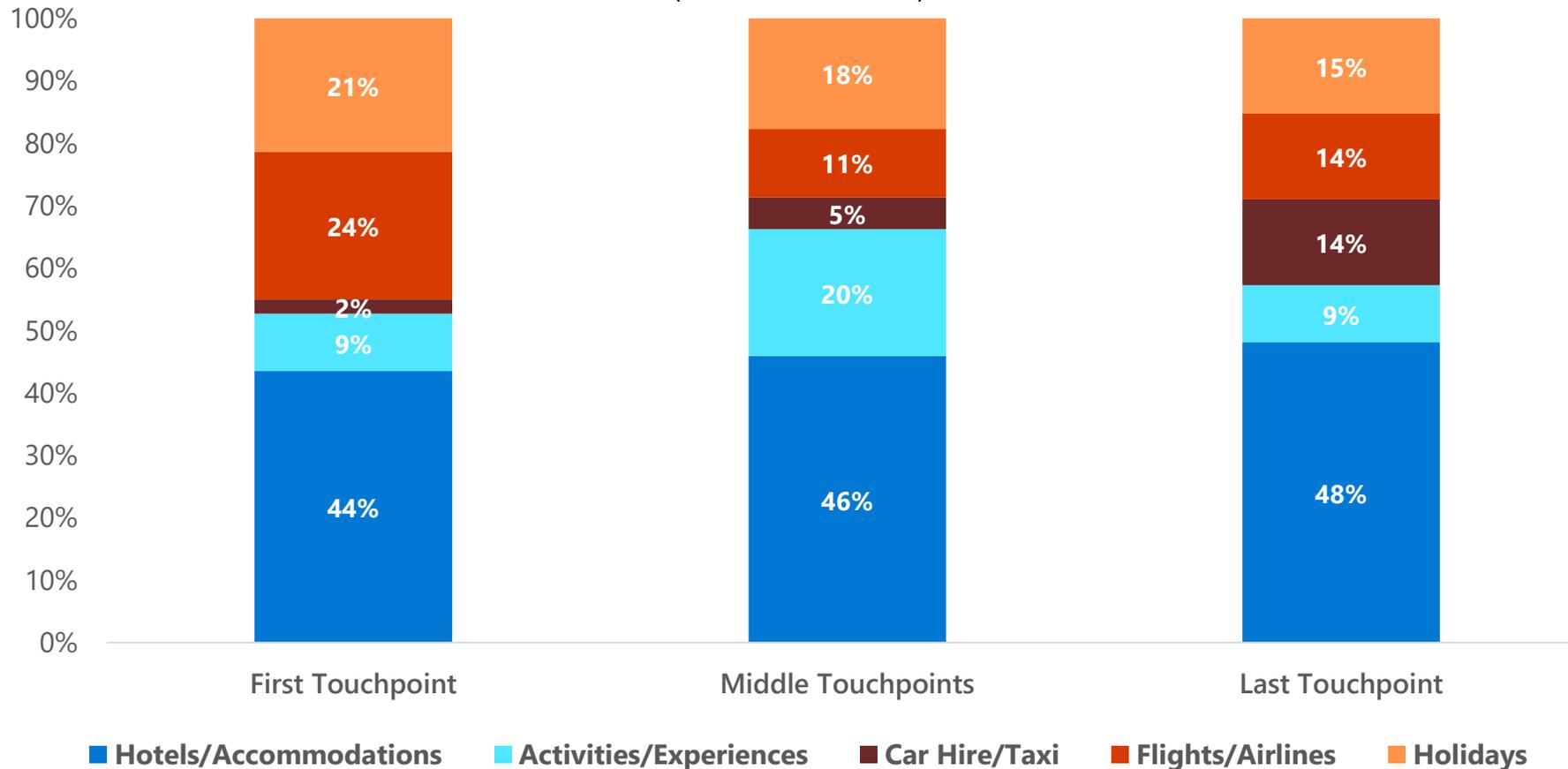
**Hotels and Accommodations** was the category with the highest share of Multi-line users

\* Multi-Line user categorization based on first touch-point to avoid duplications

# Page views by category for multi-line travelers and their CDJ



# Pageviews by touchpoint  
(US Multi-line Users)



**Hotels and Accommodations** accounted for the largest share of page views across all phases of the journey

**Flights and Airlines** were more relevant in the first part of the journey

**Car Hire and Taxis** were mostly searched towards the end of users' journeys

# US multi-line users tend to end their journey with a different category than they started with



Multi-Line Users Page Views %	Last Touchpoint				
	Hotels/ Accommodations	Activities/ Experiences	Car Hire/ Taxi	Flights/ Airlines	Holidays
First Touchpoint	Hotels/ Accommodations	Activities/ Experiences	Car Hire/ Taxi	Flights/ Airlines	Holidays
Hotels/ Accommodations	38%	<b>23%</b>	10%	<b>18%</b>	11%
Activities/ Experiences	<b>41%</b>	42%	0%	9%	11%
Car Hire/ Taxi	<b>24%</b>	8%	60%	6%	2%
Flights/ Airlines	<b>25%</b>	<b>15%</b>	<b>13%</b>	32%	<b>15%</b>
Holidays	<b>31%</b>	3%	1%	<b>14%</b>	51%

Multi-line users starting their journey with Flights tend to end the journey with a different category 68% of the time

**TIP!**

Make sure you touch them across their whole journey for cross-selling opportunities

# Half of users who started with Flights as a first touchpoint considered other travel categories



Multi-Line Users Page Views %	Rest of the journey				
	Hotel/ Accommodations	Activities/ Experiences	Car Hire/ Taxi	Flights/ Airlines	Holidays
Hotel/ Accommodations	62%	8%	6%	11%	12%
Activities/ Experiences	16%	62%	4%	5%	13%
Car Hire/ Taxi	20%	3%	71%	5%	1%
Flights/ Airlines	22%	11%	12%	50%	4%
Holidays	23%	6%	5%	11%	55%

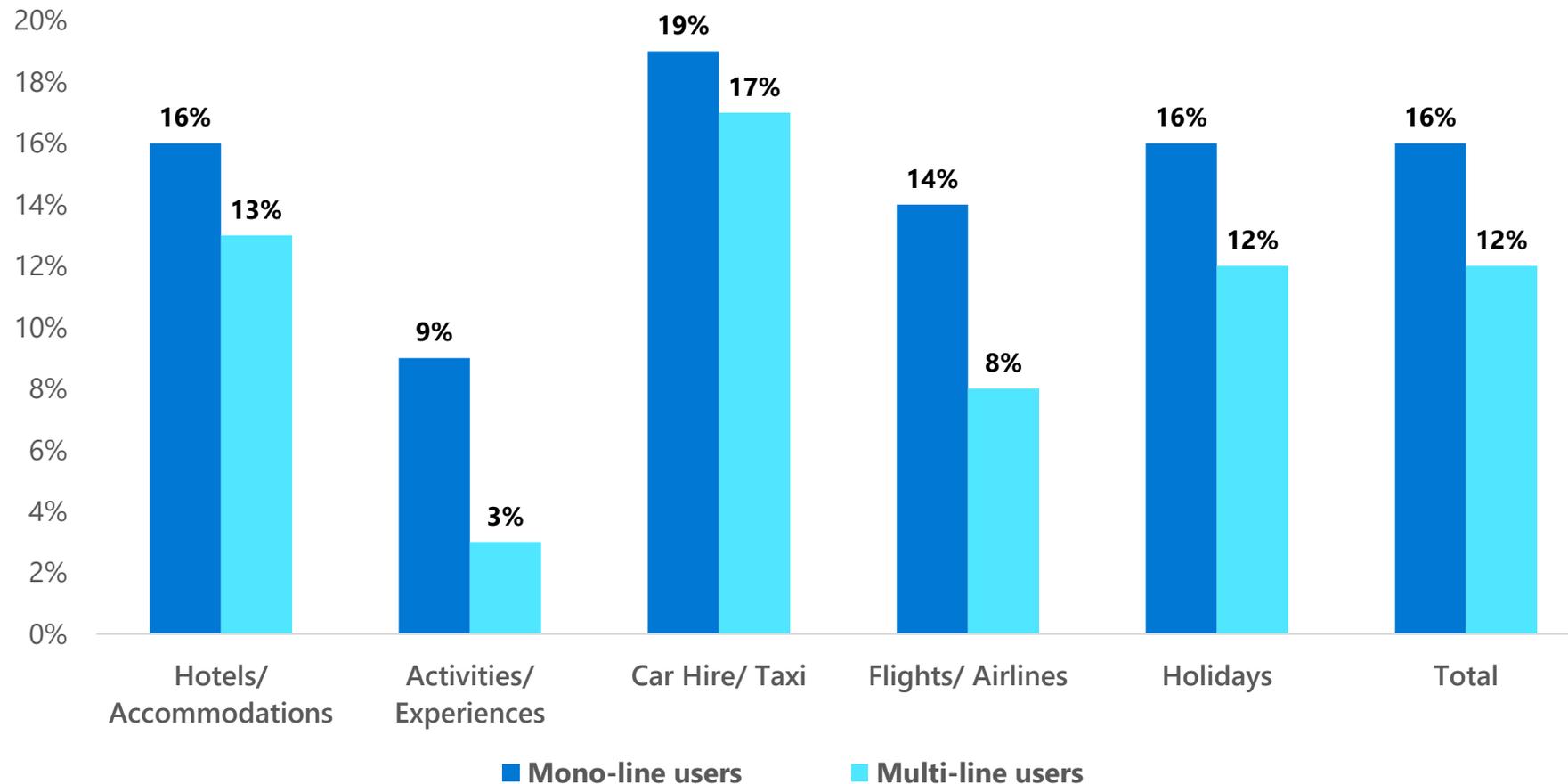
**Flights/Airlines users** (first touch) tend to consider other categories in **50%** of their page views across the journey

**Holidays users** saw a similar trend with 45% of different categories page views

# Branded queries are more common in mono-line users, but generic queries lead overall



% of brand searches by category



When focusing on search only, **users tend to favor generic queries**

**Mono-line** users include a higher % of brand queries in all categories

**TIP!**

Make sure you cover generic traffic to engage users at scale



## Key findings

- **The majority (63%) of US travel users are multi-line consumers**, meaning they consider different travel categories in their journey
- **Car Hires** are typically one of the last components researched in a consumer journey, while **Flights/Airlines** are more commonly thought of at the beginning
- Most users will not end their search journey in the same category which they started in
- Focusing on search patterns (across all search engines), **US users tend to favor generic queries** as opposed to branded terms



## Recommended actions

- **Focus your reach on upper part of the funnel with the [Microsoft Audience Network](#)** to touch users and influence their purchase behavior early in their journeys
- **Activate cross-product campaigns to reach undecided users** in the product consideration phase and attract them to convert on your properties (i.e. Flights -> Hotels; Holidays -> Hotel)
- Make sure you **cover generic search traffic** to engage users at scale
- **Expand your search reach** to hit users across the whole consumer journey with cross-selling opportunities



*"I love PPC because it's attributable. Almost everything we do; we can prove the value it brings in actual revenue."*

*Owen Bickford,  
Paid Search Program Manager, Alaska Airlines*



[VIEW THE CUSTOMER STORY](#)

Average booking value of audience list members increased

+15%



Alaska Airline's Increased ROAS by more than

20%



### Alaska Airlines boosts paid search success & ROAS with Audience Targeting

What began 88 years ago as a small, regional airline, Alaska Airlines has evolved into an international carrier with more than 115 destinations and transporting more than 45 million customers annually. Guided by integrity, care, ingenuity, and professionalism, this Seattle-based company retains its hometown feel and has earned a loyal following of people who know there's something special about an airline that treats its customers as guests.

### Stimulating demand with paid search

"A lot of people outside Seattle don't understand that we fly to more places than just Alaska," says Owen Bickford, Paid Search Program Manager. So, he uses paid search to educate people in different regions who may be searching for flights between Los Angeles and New York, for example, but may not know about Alaska Airlines. When an ad appears, it's an opportunity to inform prospective customers on where Alaska Airlines flies and the value they offer, stimulating demand.

Not only has paid search been a great way for the airline to capture demand, but it's also helping them to generate demand.

As a result of the campaign, audience-generated ROAS increased by more than 20% year over year. Furthermore, the average booking value of audience list members increased by 15% YoY.

Alaska Airlines Internal Data, 2020.

# Content

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The scope of this analysis is to provide insights on how online travel users look at different travel product categories (flights, airlines, hotels etc.)

We have monitored and analyzed the browser activity (IE and Edge) of a sample of travel users (n=1000) and deciphered their interests and behavior across their online journeys

# Methodology

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- **Market:** United States
- **Timeline:** 1<sup>st</sup> September 2020 to 28<sup>th</sup> February 2021
- **Traffic:** All IE and Edge browser activity related to Travel
- **Analysis Dimensions**
  - **Product Categories:** user activity related to travel was (when possible) associated to a product-line for: Hotels/Accommodations, Activities/Experiences (such as city tours, sports etc), Car Hire/Taxi, Flights/Airlines and Holidays (including flight+hotel and any travel packages)
  - **Touchpoints:** for Touchpoints (or intent) we identified any user activity on the browser that we were able to categorize as travel, including search queries (on all engines), portal queries (such as MSN and others) and travel website surfing (only where we were able to identify the page content/category from the URL)
  - **Brand vs Generic:** Search queries split between Brand (when a search query includes the mention of an established brand name/portal) and Generic (no brand mentions)

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