Global apparel insights by region (FR, DE, UK and US)
Germany insights
Other channels contribution is higher with multi-touch attribution

Native contribution to conversion 'grows' as we measure 'real' contribution

Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: Germany; Period: Nov 2020 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1,000 users; Digital media engagement identified through clicks trackers available in URL (UTM); Not included: impression-level data, unpaid touchpoints (SEO) and single touchpoint 'journeys'; Conversions: 'inferred' conversions, based on at least two weeks without relevant browsing/search activity, after a period of intense engagement of the user.
How often is native followed by search engine marketing?

For \textit{6/10} users the next touchpoint after native is paid search\textsuperscript{(1)}.

\begin{itemize}
  \item **Native click**
  \item **Paid search click**
\end{itemize}

\textsuperscript{(1)} 58.3%
31M unique visitors per month in Germany for MSN and Outlook.com
Source: Comscore, Multi-Platform, May 2020.
Global Web Index (GWI) data: indexes explained

Have you bought apparel products in the last 3 months?

Yes (bought apparel)

60%

75%

90%

index 125

(75/60) means X1.25

index 150

(90/60) means X1.5

Global Web Index interviewed people

All ("average internet user")

Use Google?

Yes

Use MSN / Outlook.com / Bing / Yahoo?

Yes

Microsoft
Germany users over-index on buying general apparel

Source: Global Web Index - Wave: Q4 2020 – Germany
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google

Responses to whether users purchased goods online in the past month:
- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average
Germans over-index on buying these luxury items

Source: Global Web Index – Wave: Q4 2020 – Germany
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google

Responses to whether users purchased goods online in the past 3-6 months

- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average
Germany recap

With a multi-touch lens, **native plays a bigger role** in the consumer journey than last-touch attribution.

MSN and Outlook.com reach **31M unique users** per month in **Germany** according to Comscore.

According to a GWI survey, Microsoft users **over-index on purchasing apparel products**.
Suggestions

Leverage the **Microsoft Audience Network** using our **Native Ads solution** to have your paid channels investments meet the consumer journey.

The consumer journey is long and complex, so **Remarketing** is a ‘must’.

Microsoft Advertising gathers buying intent signals. Leverage them using **in-market audiences**.
France insights
Other channels contribution is higher with multi-touch attribution

Native contribution to conversion 'grows' as we measure 'real' contribution

Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: France; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1,000 users; Digital media engagement identified through clicks trackers available in URL (UTM); Not included: impression-level data, unpaid touchpoints (SEO) and single touchpoint 'journeys'; Conversions: 'inferred' conversions, based on at least two weeks without relevant browsing/search activity, after a period of intense engagement of the user.
How often is native followed by search engine marketing?

For **7/10** of the users the next touchpoint after native is paid search\(^{(1)}\).

(1) 68.3%
26M unique visitors per month in France for MSN and Outlook.com

Source: Comscore, Multi-Platform, May 2020.
Global Web Index (GWI) data: indexes explained

Have you bought apparel products in the last 3 months?

All ("average internet user")

Use Google?
Yes

Use MSN / Outlook.com / Bing / Yahoo?
Yes

60%

75%

(75/60) means X1.25

90%

(90/60) means X1.5

GWI data: indexes explained

Global Web Index interviewed people

Yes (bought apparel)
France users over-index on buying general apparel

Responses to whether users purchased goods online in the last month

- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average

Source: Global Web Index - Wave: Q4 2020 – France
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google
The French over-index on buying these luxury items

Source: Global Web Index - Wave: Q4 2020 – France
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google
France recap

With a multi-touch lens, native plays a bigger role in the consumer journey than last-touch attribution.

MSN and Outlook.com reach 26M unique users per month in France according to Comscore.

According to a GWI survey, Microsoft users over-index on purchasing apparel products.
Suggestions

Leverage the **Microsoft Audience Network** using our **Native Ads solution** to have your paid channels investments meet the consumer journey.

The consumer journey is long and complex, so **Remarketing** is a ‘must’.

Microsoft Advertising gathers buying intent signals. Leverage them using **in-market audiences**.
United Kingdom insights
Upper funnel activity is more important with multi-touch attribution.

Native contribution to conversion ‘grows’ 3x when we measure ‘real’ contribution.
How often is native followed by search engine marketing?

For **7/10** of the users the next touchpoint after native is paid search\(^1\).
29M unique visitors per month in UK for MSN and Outlook.com
Source: Comscore, Multi-Platform, May 2020
Have you bought apparel products in the last 3 months?

Yes (bought apparel)

Global Web Index (GWI) interviewed people

Use Google?
Yes

Use MSN / Outlook.com / Bing / Yahoo?
Yes

All ("average internet user")

60%

75%

90%

(75/60) means X1.25

(90/60) means X1.5

Index 125

Index 150

Global Web Index (GWI) data: indexes explained
UK users over-index on buying general apparel

Responding favorably to the question if they purchased these goods online in the past month

- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average

<table>
<thead>
<tr>
<th>Category</th>
<th>Microsoft Advertising</th>
<th>Google</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing: Purchased online in last month</td>
<td>116</td>
<td>108</td>
<td></td>
</tr>
<tr>
<td>Shoes: Purchased online in last month</td>
<td>114</td>
<td>108</td>
<td></td>
</tr>
<tr>
<td>Sports clothing / equipment: Purchased online in last month</td>
<td>119</td>
<td>108</td>
<td></td>
</tr>
</tbody>
</table>

Source: Global Web Index - Wave: Q4 2020 – United Kingdom
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google
The English over-index on buying these luxury items

<table>
<thead>
<tr>
<th>Item</th>
<th>Microsoft Advertising</th>
<th>Google</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handbag / Bag</td>
<td>111</td>
<td>104</td>
</tr>
<tr>
<td>Jewelry</td>
<td>119</td>
<td>109</td>
</tr>
<tr>
<td>Purse / wallet</td>
<td>127</td>
<td>107</td>
</tr>
<tr>
<td>Wristwatch</td>
<td>127</td>
<td>104</td>
</tr>
</tbody>
</table>

Responding favorably to the question if they purchased these goods online in the past 3-6 months:
- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average

Source: Global Web Index - Wave: Q4 2020 – United Kingdom
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google
United Kingdom recap

With a multi-touch lens, native plays a bigger role in the consumer journey than last-touch attribution.

MSN and Outlook.com reach 29M unique users per month in United Kingdom according to Comscore.

According to a GWI survey, Microsoft users over-index on purchasing apparel products.
Suggestions

Leverage the **Microsoft Audience Network** using our **Native Ads solution** to have your paid channels investments meet the consumer journey.

The consumer journey is long and complex, so **Remarketing** is a ‘must’.

Microsoft Advertising gathers buying intent signals. Leverage them using **in-market audiences**.
United States insights
Upper funnel activity is more important with multi-touch
Native contribution to conversion 'grows' 3x when we measure 'real' contribution
How often is native followed by search engine marketing?

For 7/10 of the users the next touchpoint after native is paid search. 

Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope: Market: United States; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1,000 users; Digital media engagement identified through clicks trackers available in URL (UTM); Not included: impression-level data, unpaid touchpoints (SEO) and single touchpoint ‘journeys'; Conversions: ‘inferred’ conversions, based on at least two weeks without relevant browsing/search activity, after a period of intense engagement of the user. 

(1) 67.8%
242M unique visitors per month in USA for the Microsoft Audience Network
Source: Comscore, Microsoft Audience Platform Report, Dec 2019
Global Web Index (GWI) data: indexes explained

Have you bought apparel products in the last 3 months?

- Yes (bought apparel)

All ("average internet user")

Use Google?
- Yes

Use MSN / Outlook.com / Bing / Yahoo?
- Yes

index 150
\[(90/60) \text{ means } X1.5\]

index 125
\[(75/60) \text{ means } X1.25\]

Global Web Index interviewed people
UK users over-index on buying general apparel

Responding favorably to the question if they purchased these goods online in the past month

- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average

Source: Global Web Index - Wave: Q4 2020 – United States
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google
Multi touchpoint: other channels have more importance with this lens

Native contribution to conversions 'grows' 2.4x when we measure 'real' contribution

Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: States; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1,000 users; Digital media engagement identified through clicks trackers available in URL (UTM); Not included: impression-level data, unpaid touchpoints (SEO) and single touchpoint 'journeys'; Conversions: 'inferred' conversions, based on at least two weeks without relevant browsing/search activity, after a period of intense engagement of the user.
How often is native followed by search engine marketing?

Whatever the position in the journey

For 7/10 of the users the next touchpoint after Native is Search\(^1\).

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(1) 68%

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Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: United States; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1,000 users; Digital media engagement identified through clicks trackers available in URL (UTM); Not included: impression-level data, unpaid touchpoints (SEO) and single touchpoint 'journeys'; Conversions: ‘inferred’ conversions, based on at least two weeks without relevant browsing/search activity, after a period of intense engagement of the user.
US - Our users over-index on buying these luxury items

Responding favorably to the question if they purchased these goods online in the past 3-6 months

- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average

Source: Global Web Index - Wave: Q4 2020 – United States
Audiences: individuals that have stated they have used a given web brand in the last month i.e., self-identified users of Bing, Yahoo, MSN, Outlook (Microsoft Advertising) vs. Google
Recap

With a multi-touch lens **native plays a bigger role** in the consumer journey (compared to last-touch attribution).

**242M unique visitors** per month in **USA** for the Microsoft Audience Network according to Comscore.

According to GWI survey, Microsoft users **over-index on purchasing apparel products**.
Suggestions

Leverage the **Microsoft Audience Network** using our **Native Ads solution** to have your paid channels investments meet the consumer journey.

The consumer journey is long and complex, so **Remarketing** is a ‘must’.

Microsoft Advertising gathers buying intent signals. Leverage them using **in-market audiences**.