Microsoft

Microsoft Advertising Insights

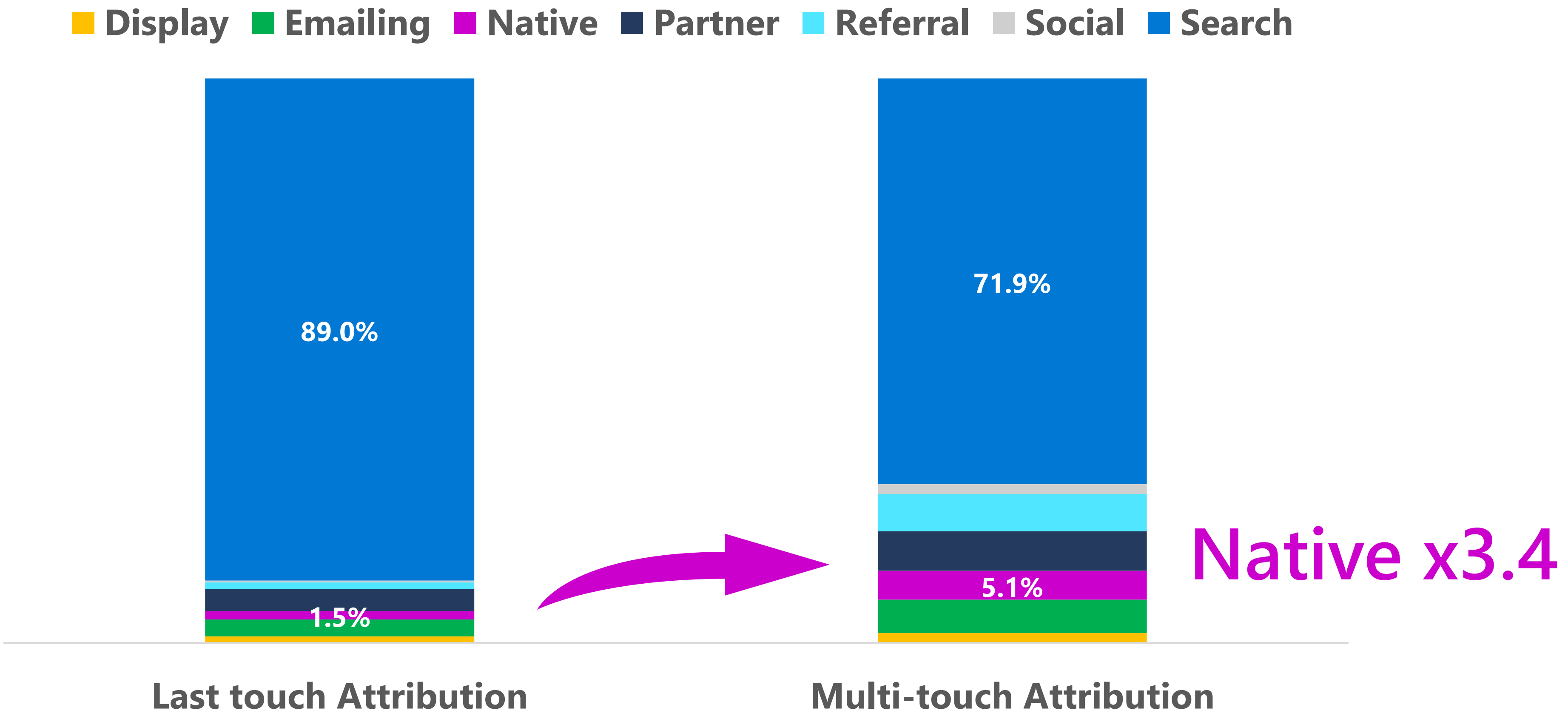
Global apparel insights by region (FR, DE, UK and US)

Microsoft Advertising. Intelligent connections.

Germany insights

Other channels contribution is higher with multi-touch attribution

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

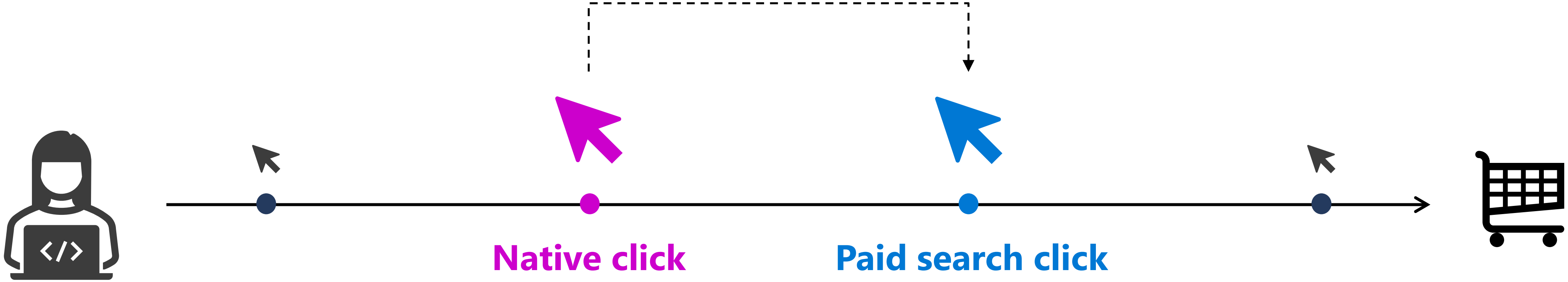


Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: Germany; Period: Nov 2020 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1.000 users; Digital media engagement identified through 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.

Microsoft

How often is native followed by search engine marketing?

For **6/10** users the next touchpoint after native is paid search[1].



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.
(1) 58.3%

Microsoft


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)

Global Web Index interviewed people

All ("average internet user") — 60%

Use **Google ?** — **Yes** — 75%

index 125

(75/60) means **X1.25**

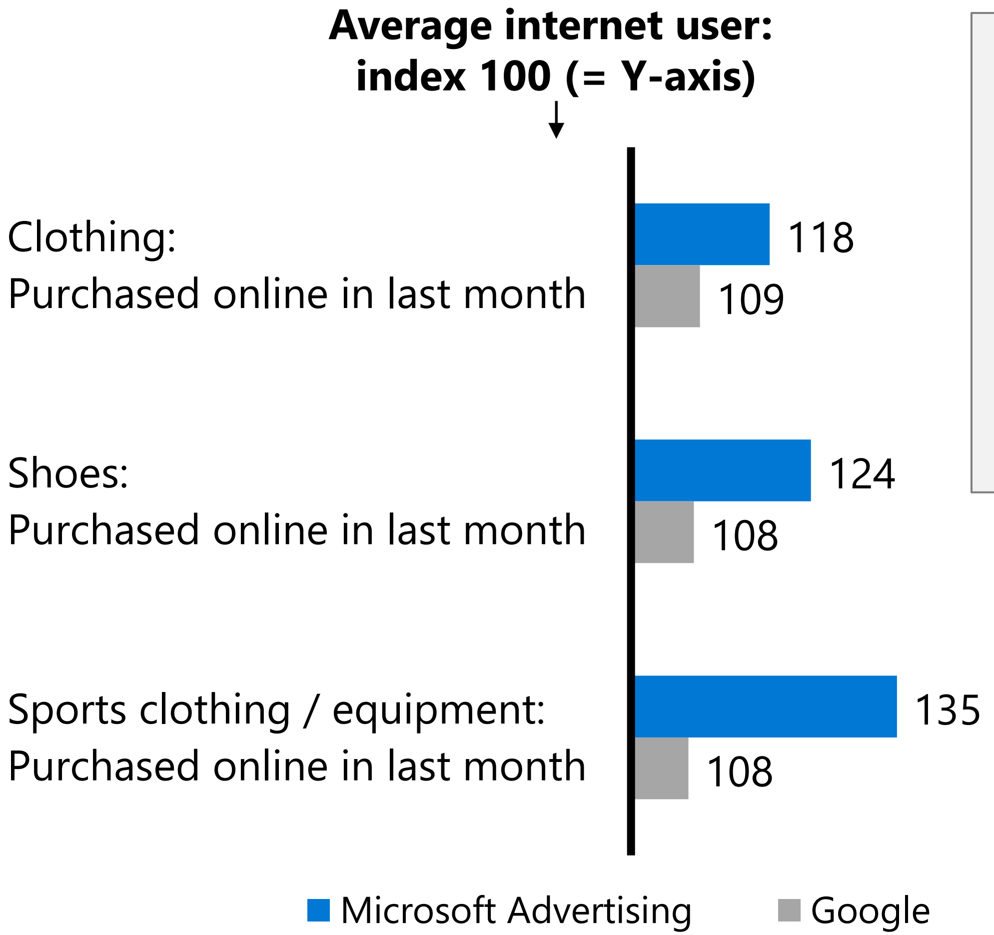
Use **MSN / Outlook.com / Bing / Yahoo ?** — **Yes** — **90%**

index 150

(90/60) means **X1.5**

Microsoft

Germany users over-index on buying general apparel

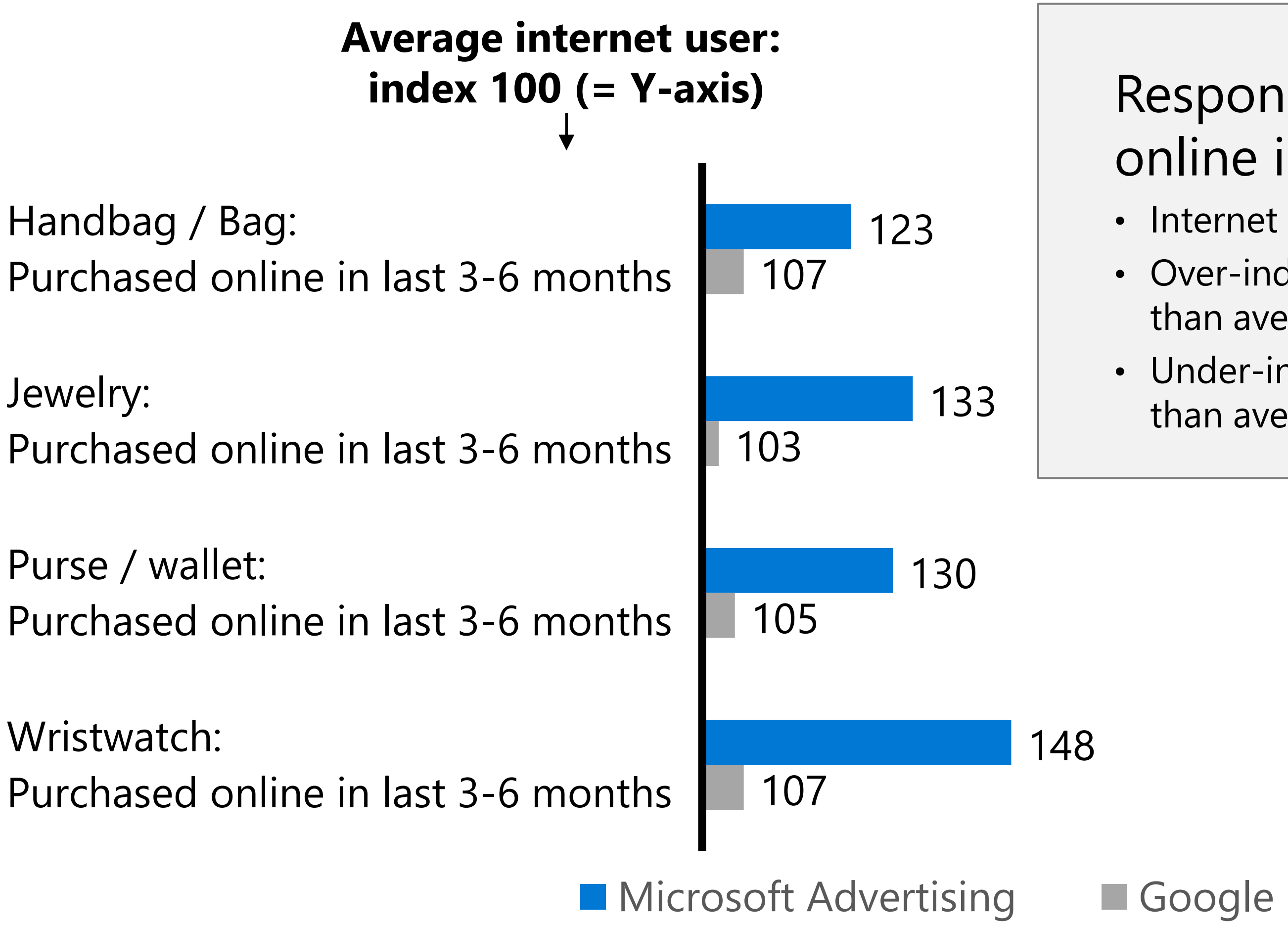


Responses to whether users purchased goods online in the past month

- 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

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

Germans over-index on buying these luxury items

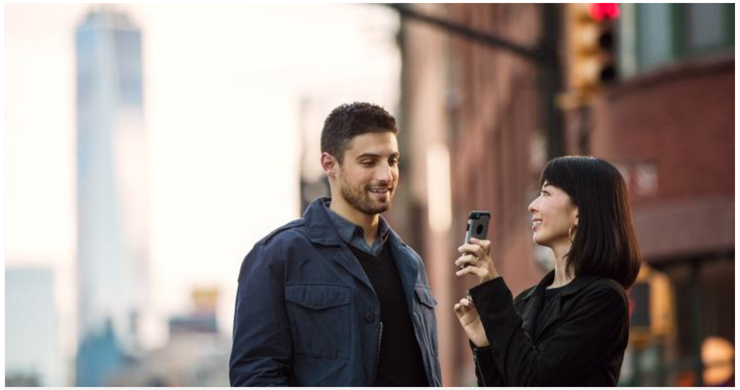


Responses to whether users purchased goods online in the past 3-6 months

- 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

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

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**.

Microsoft

Suggestions

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

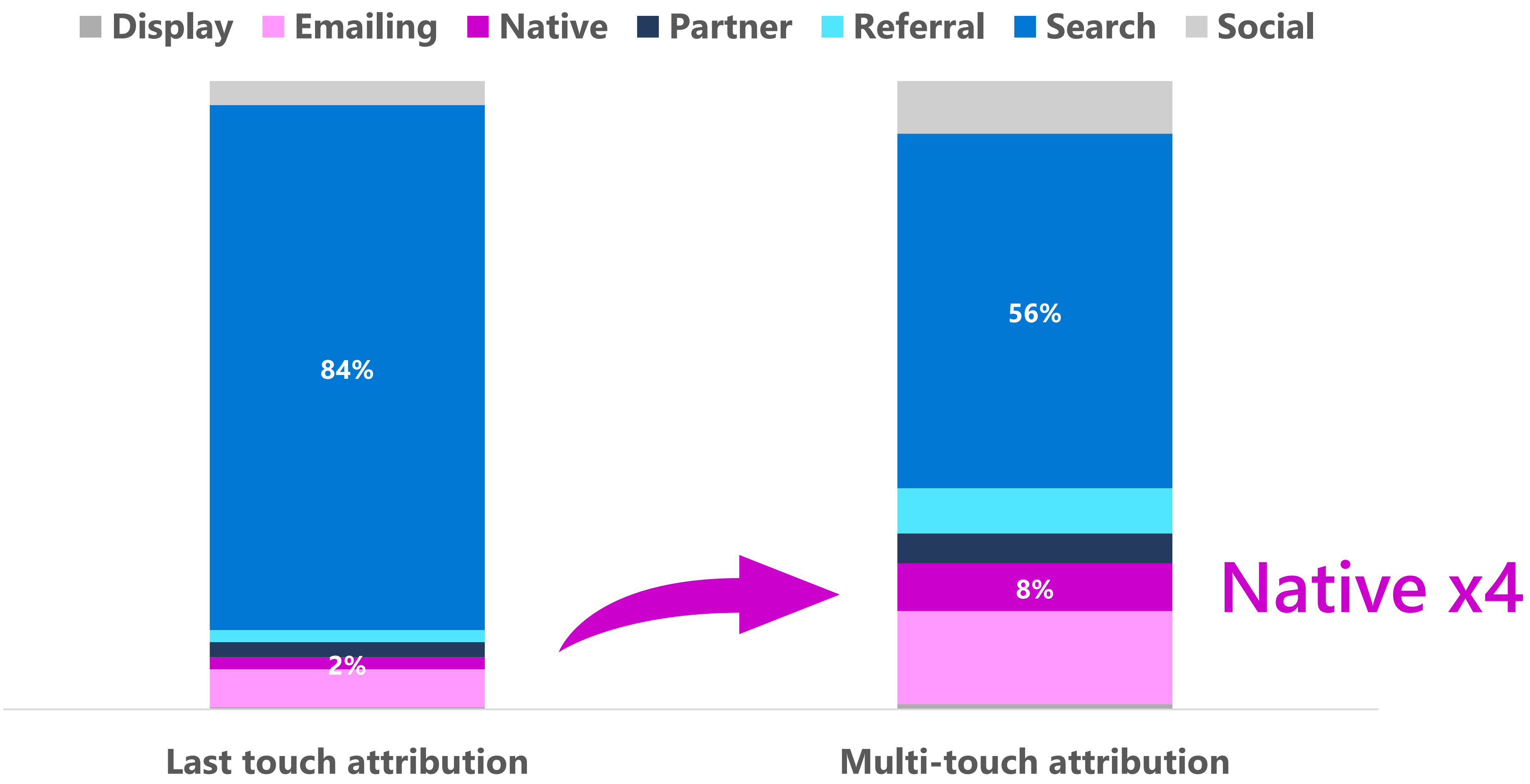
The consumer journey is long and complex, so **Remarketing** is a 'must'.

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

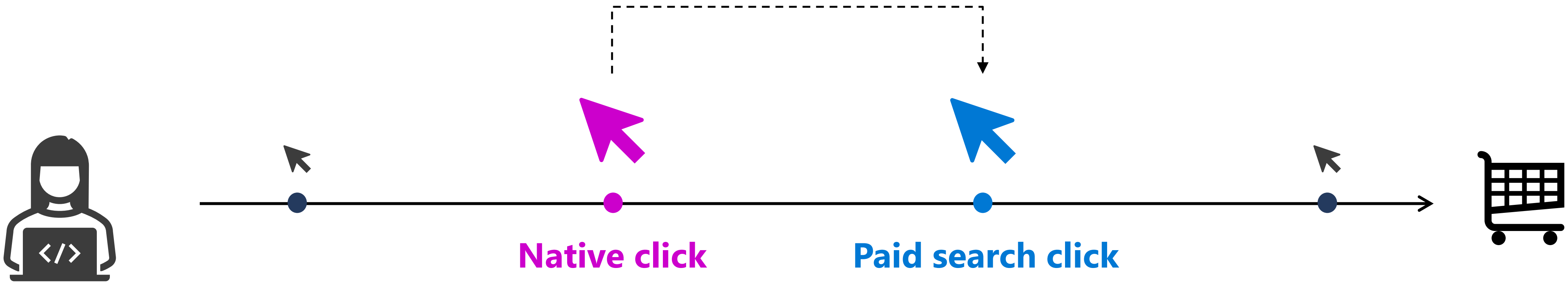


Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: France; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1.000 users; Digital media engagement identified through 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.

Microsoft

How often is native followed by search engine marketing?

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



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.
(1) 68.3%

Microsoft

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 ?

Global Web Index interviewed people

Yes (bought apparel)

All ("average internet user") → 60%

Use **Google ?** — **Yes** → 75%

index 125

(75/60) means **X1.25**

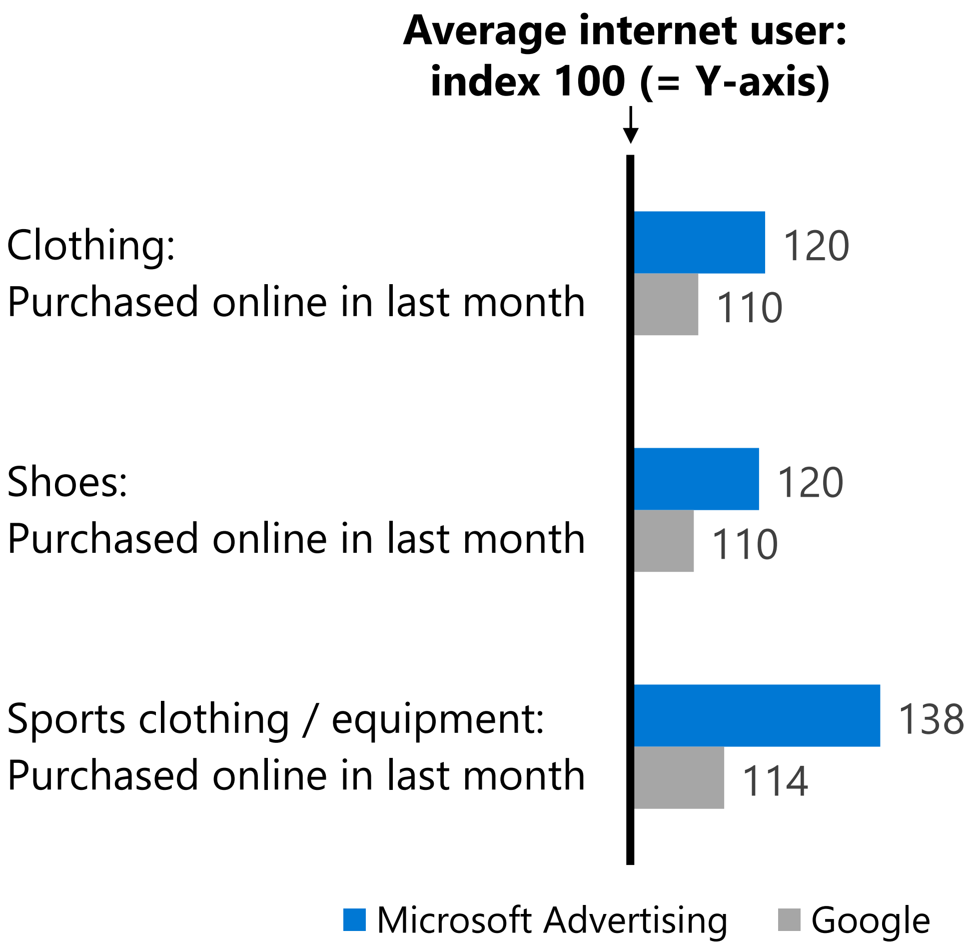
Use **MSN / Outlook.com / Bing / Yahoo ?** — **Yes** → **90%**

index 150

(90/60) means **X1.5**

Microsoft

France users over-index on buying general apparel



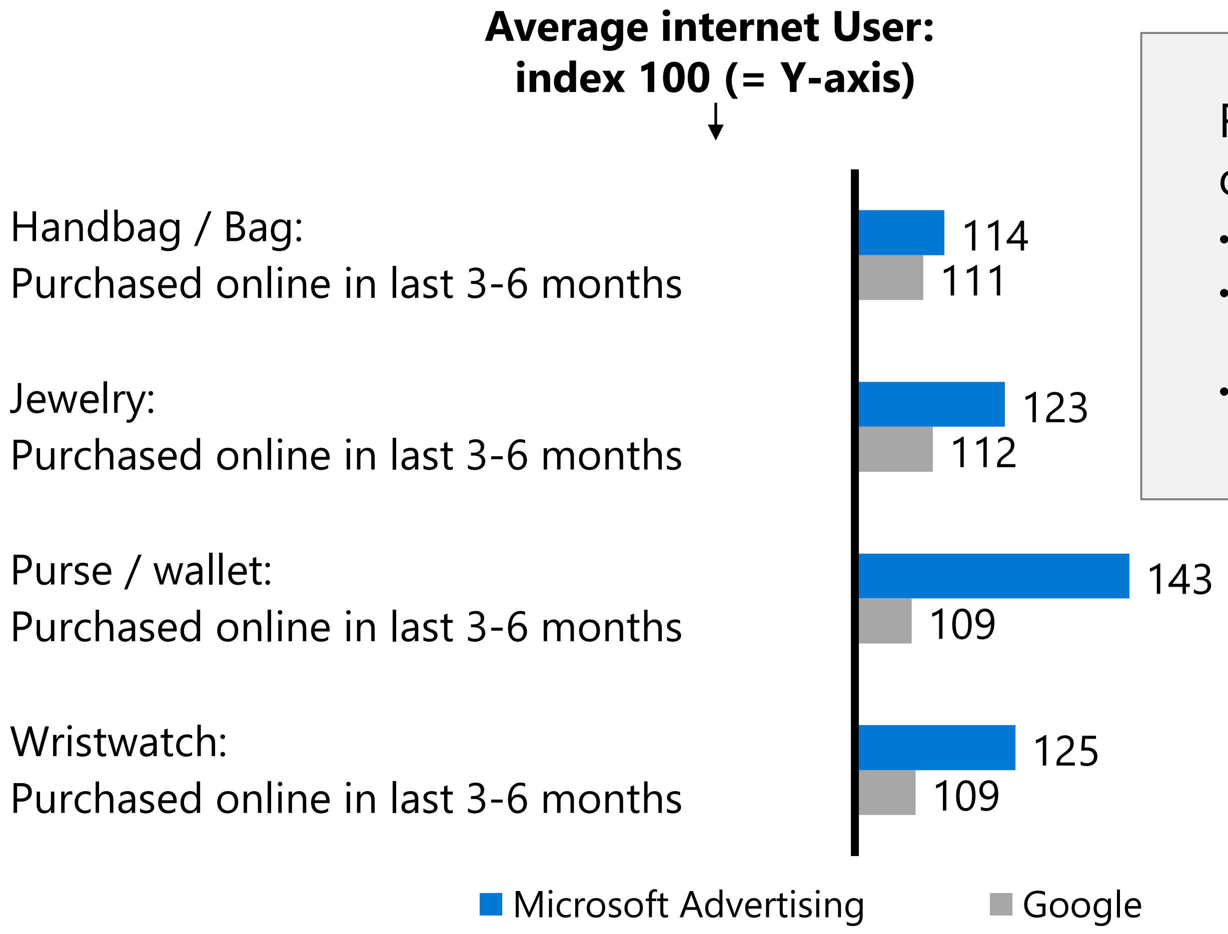
Responses to whether users purchased goods online in the last month

- 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

Microsoft

The French over-index on buying these luxury items



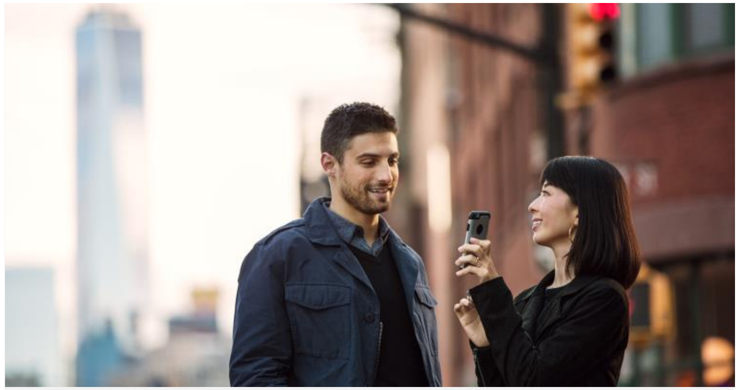
Responses to whether users purchased goods online in the past 3-6 months

- 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

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

Microsoft

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'.

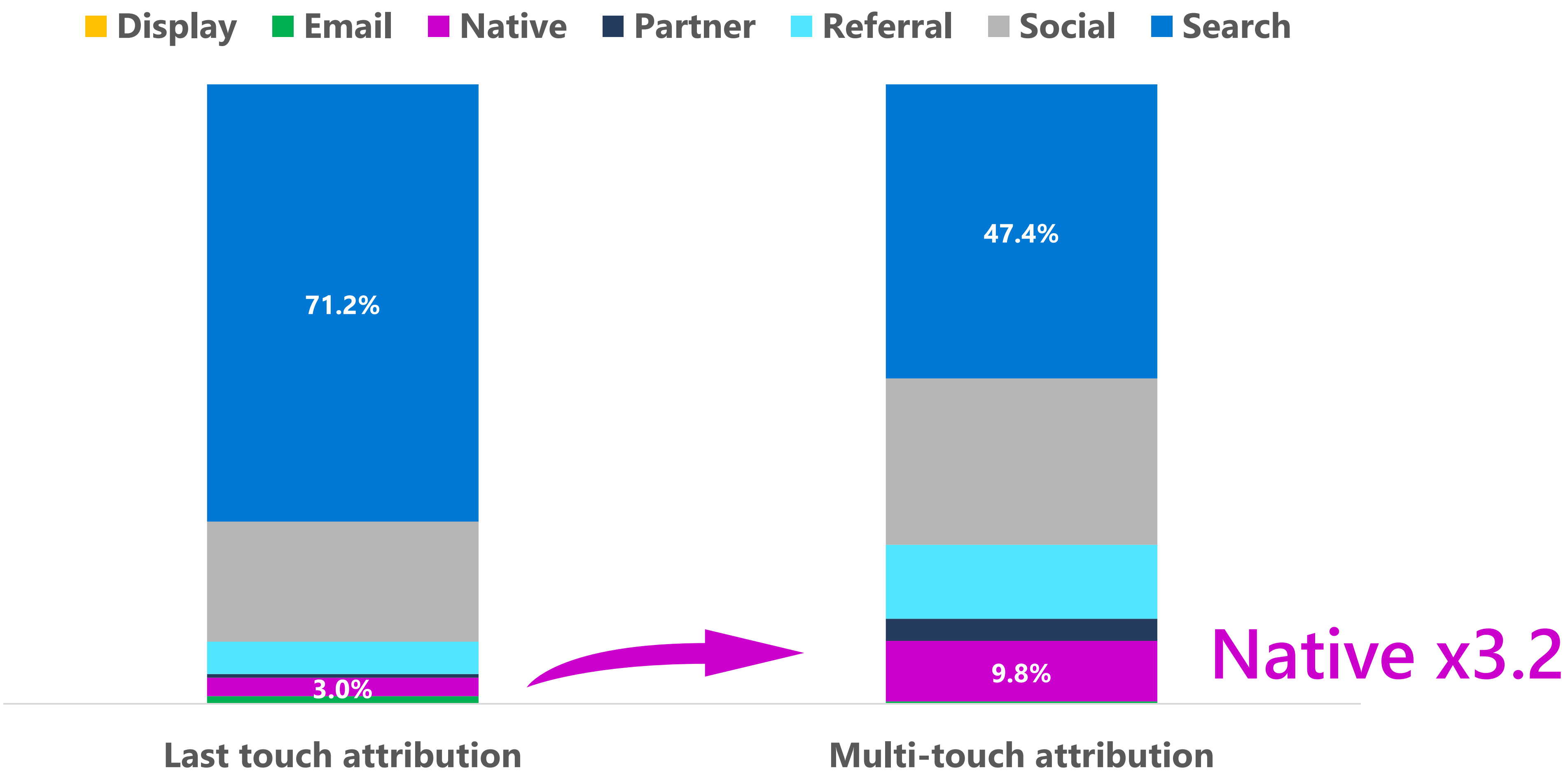
Microsoft Advertising gathers buying intent signals. Leverage them using **in-market audiences**.

Microsoft

United Kingdom insights

Upper funnel activity is more important with multi-touch

Native contribution to conversion 'grows' 3x when we measure 'real' contribution

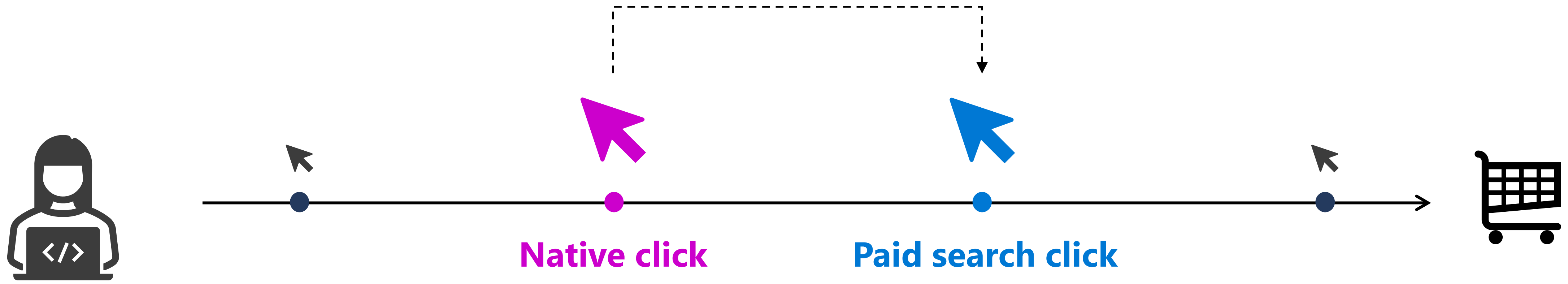


Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: United Kingdom; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1.000 users; Digital media engagement identified 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.

Microsoft

How often is native followed by search engine marketing?

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



Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: United Kingdom; 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) 70.9%

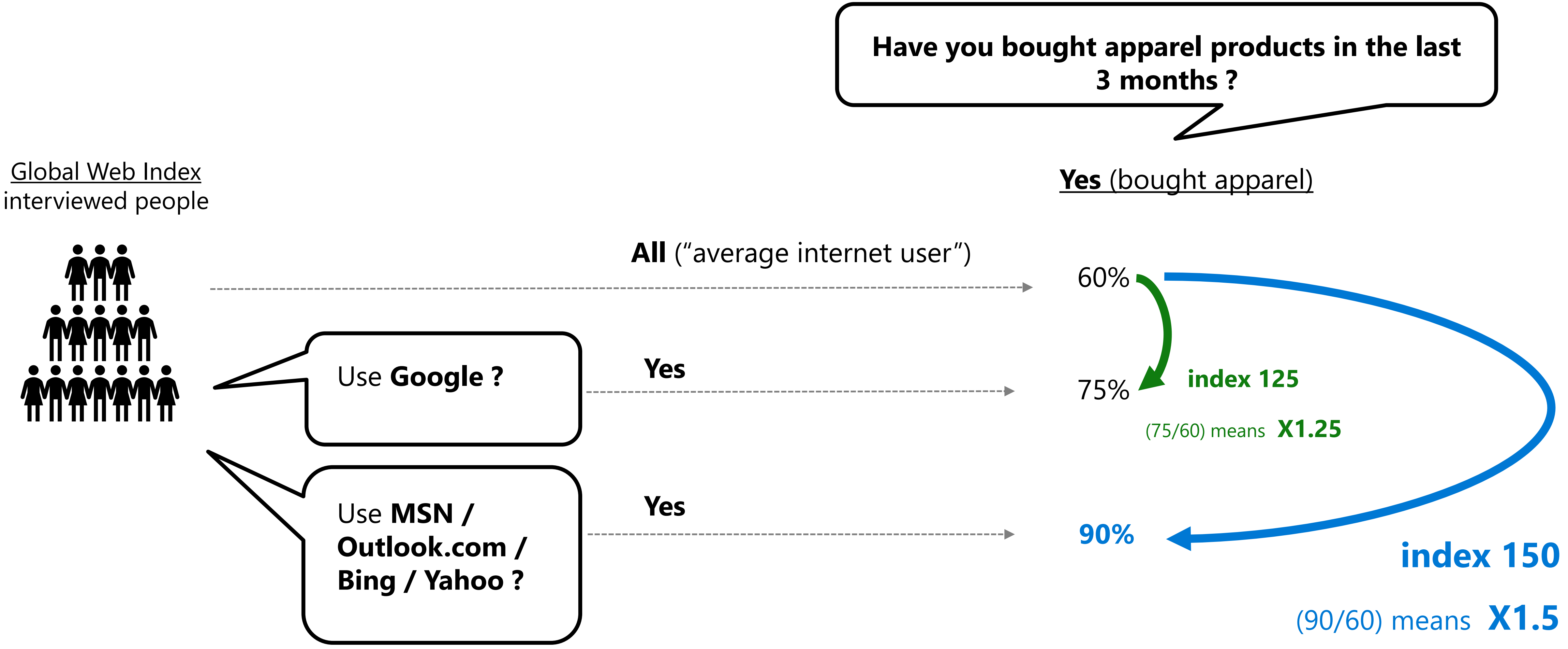
Microsoft

29M

unique visitors per month in UK
for MSN and Outlook.com

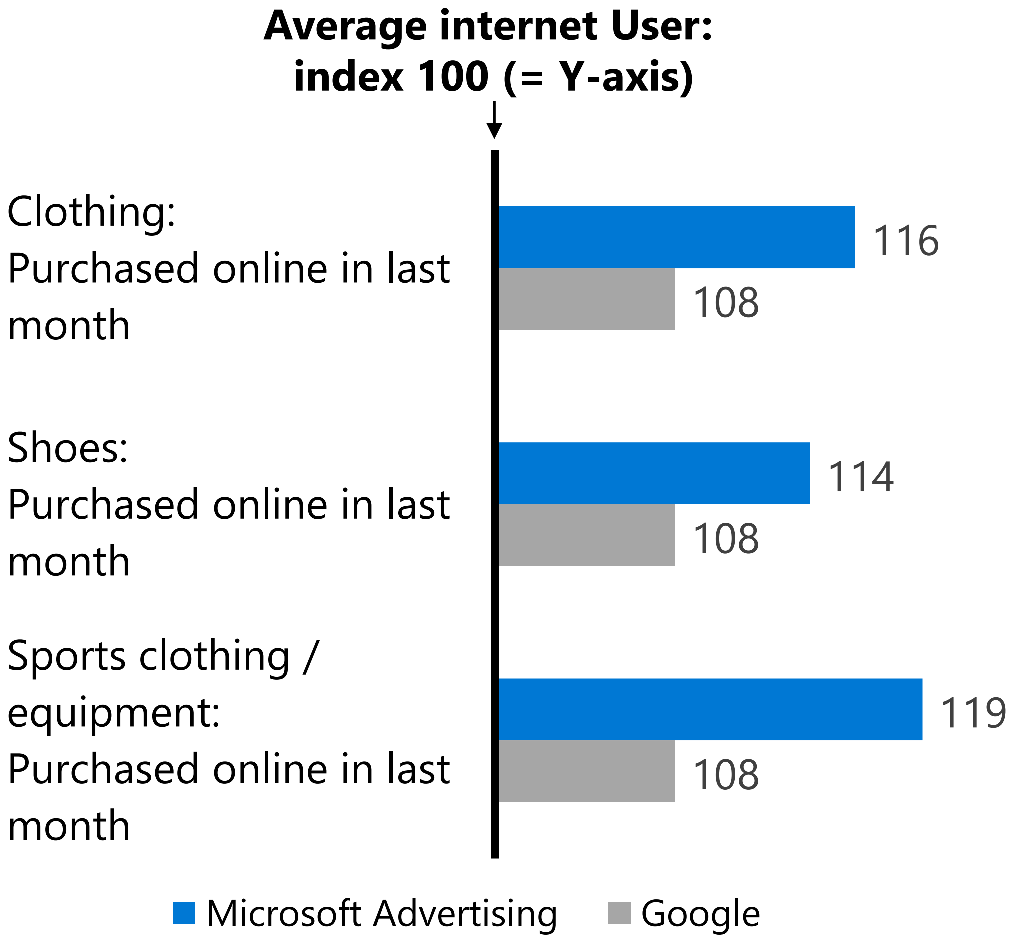
Source: Comscore, Multi-Platform, May 2020

Global Web Index (GWI) data: indexes explained



Microsoft

UK users over-index on buying general apparel

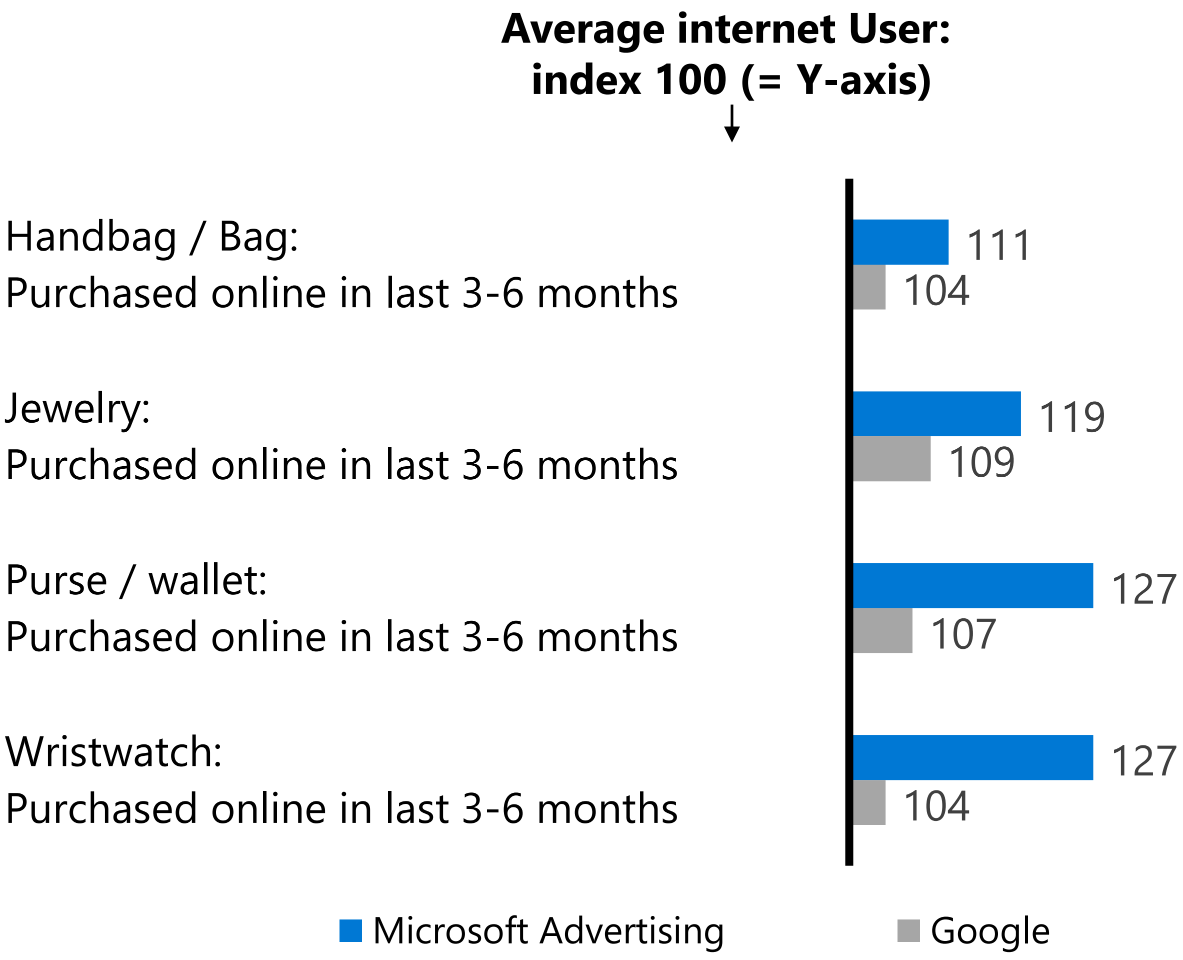


Responding favorably to the question if they purchased these goods online in the past month

- 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 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



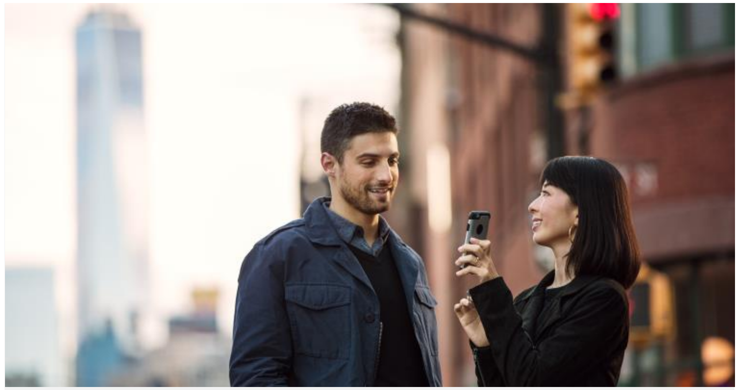
Responding favorably to the question if they purchased these goods online in the past 3-6 months

- 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

Microsoft

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**.

Microsoft

Suggestions

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

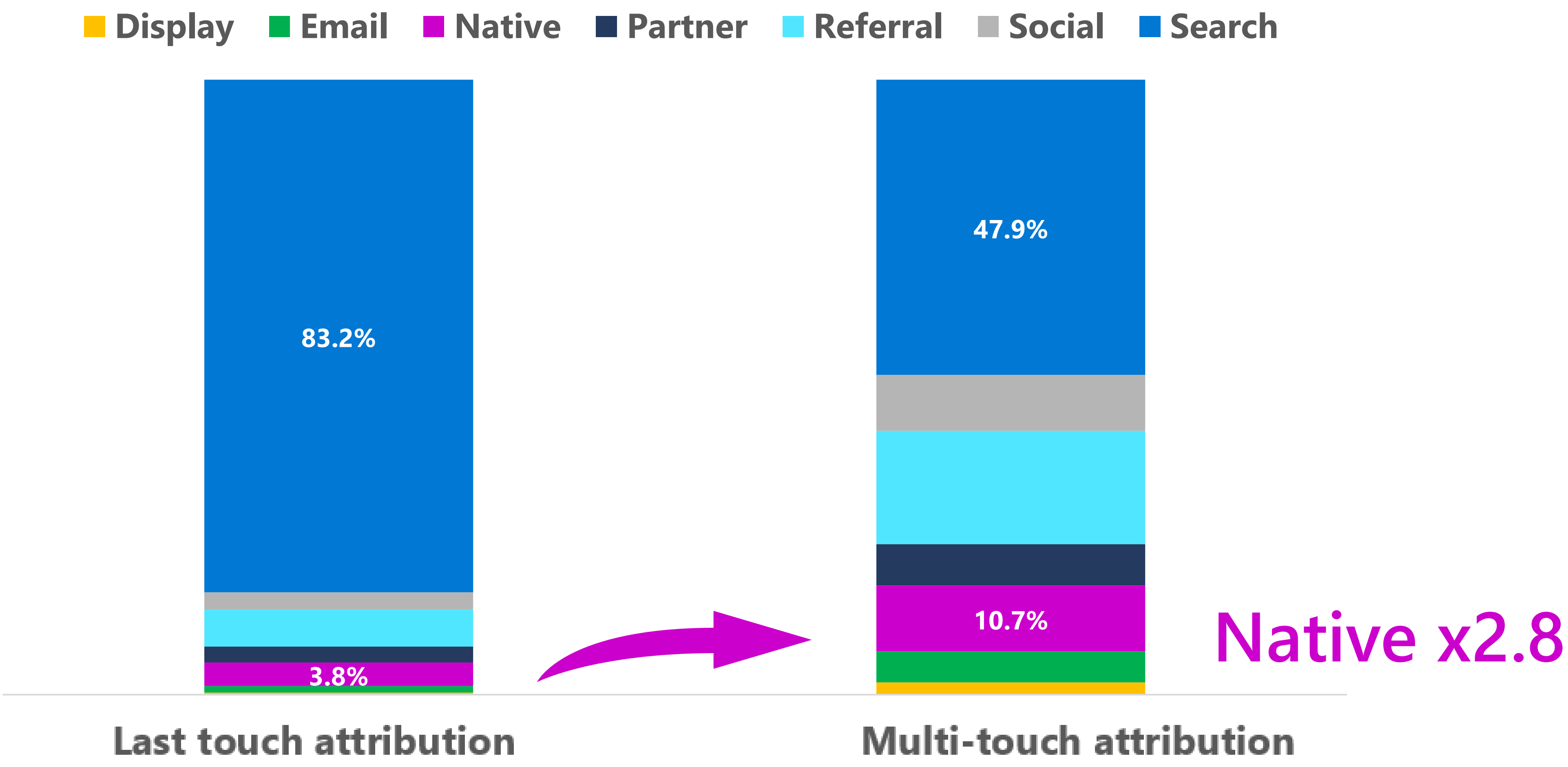
The consumer journey is long and complex, so **Remarketing** is a 'must'.

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

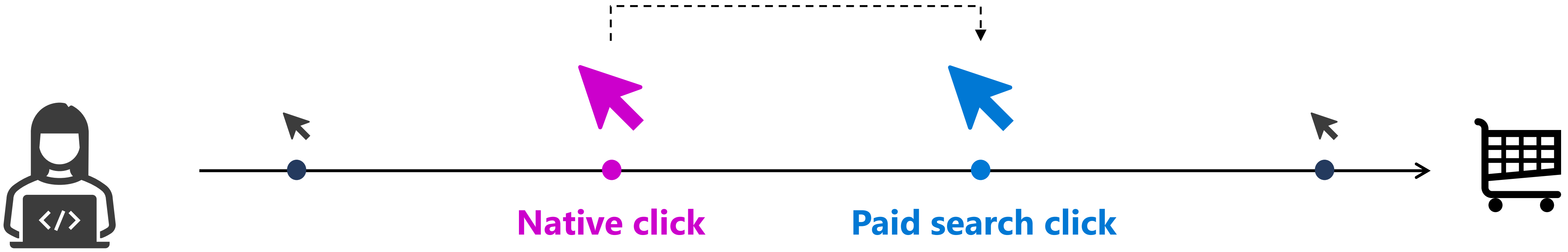


Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: United States; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1.000 users; Digital media engagement identified through 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.

Microsoft

How often is native followed by search engine marketing?

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

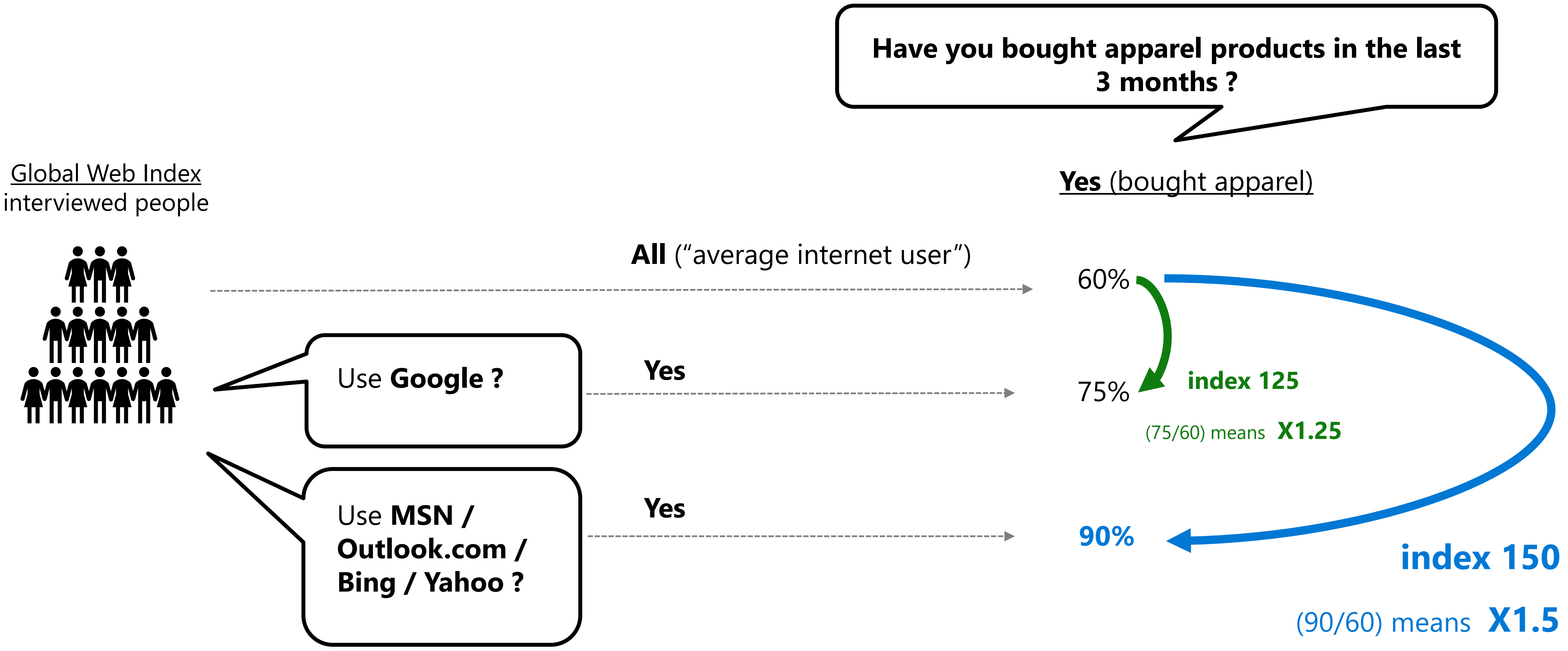


Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: United States; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1.000 users; Digital media engagement identified through 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%

Microsoft

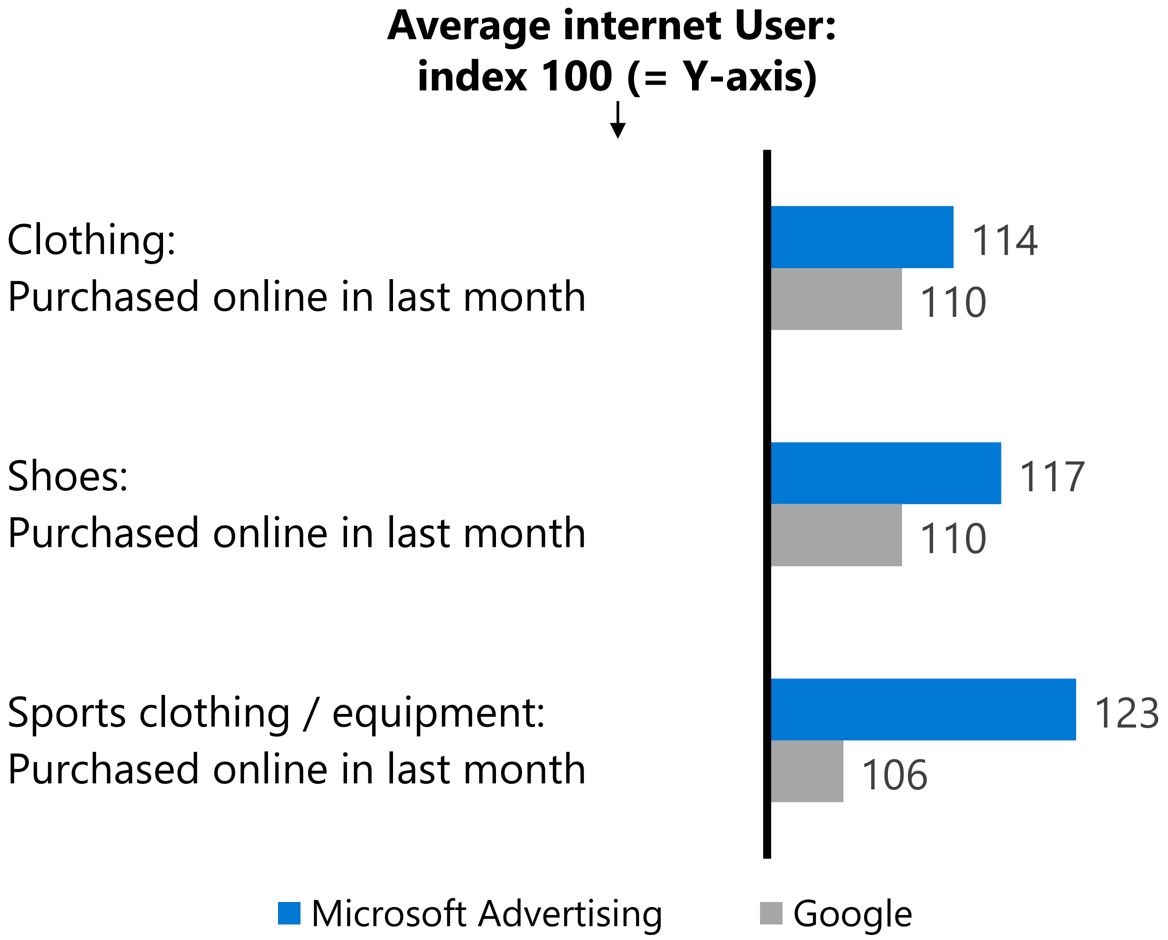

242M
unique visitors per month in USA
for the Microsoft Audience Network
Source: Comscore, Microsoft Audience Platform Report, Dec 2019

Global Web Index (GWI) data: indexes explained



Microsoft

UK users over-index on buying general apparel



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

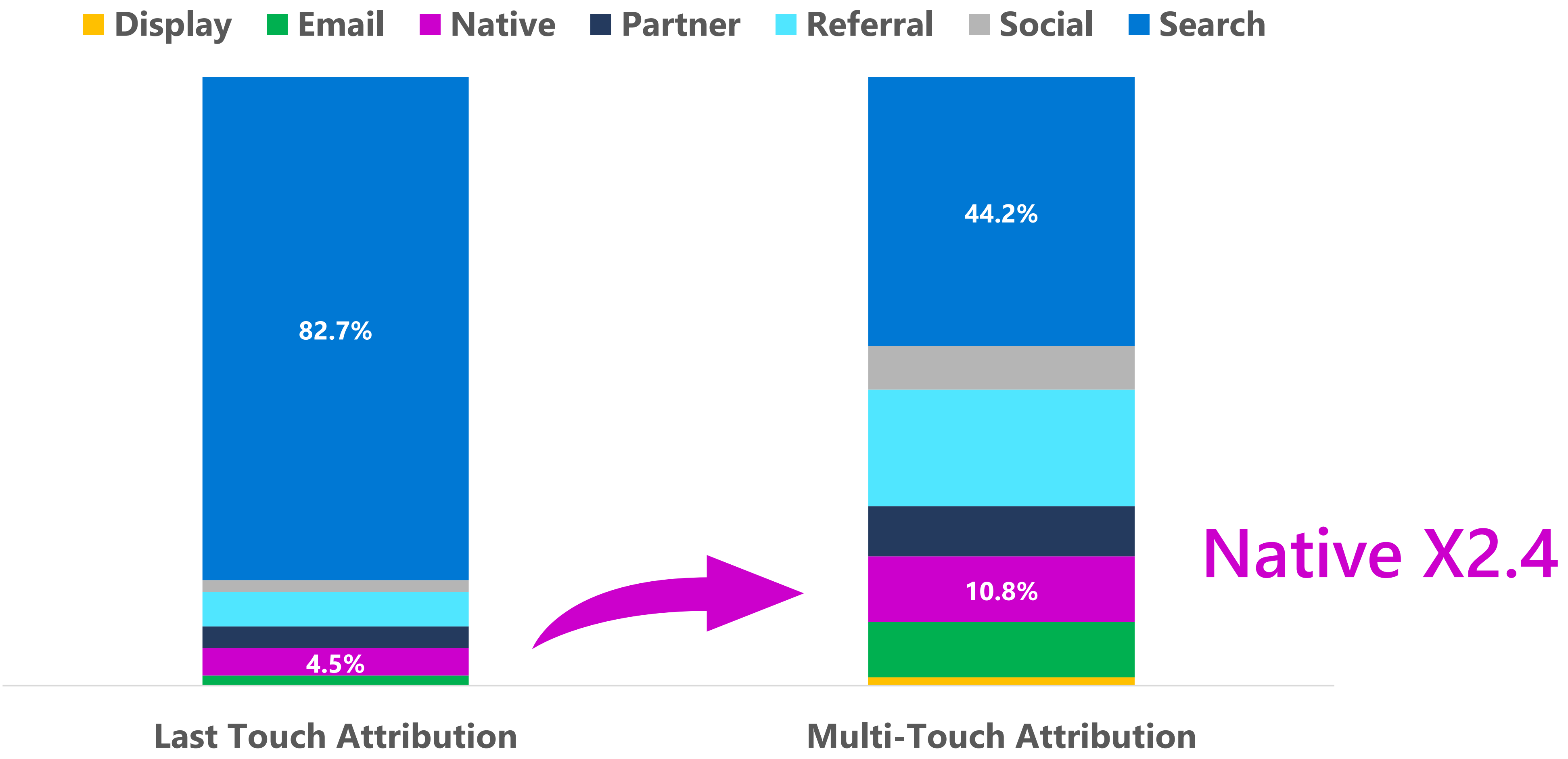
- Internet user average indexed at 100
- Over-indexing (>100) implies relatively more favorable responses than average
- Under-indexing (<100) implies relatively less favorable responses than average

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

Microsoft

Multi touchpoint: other channels have more importance with this lens

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



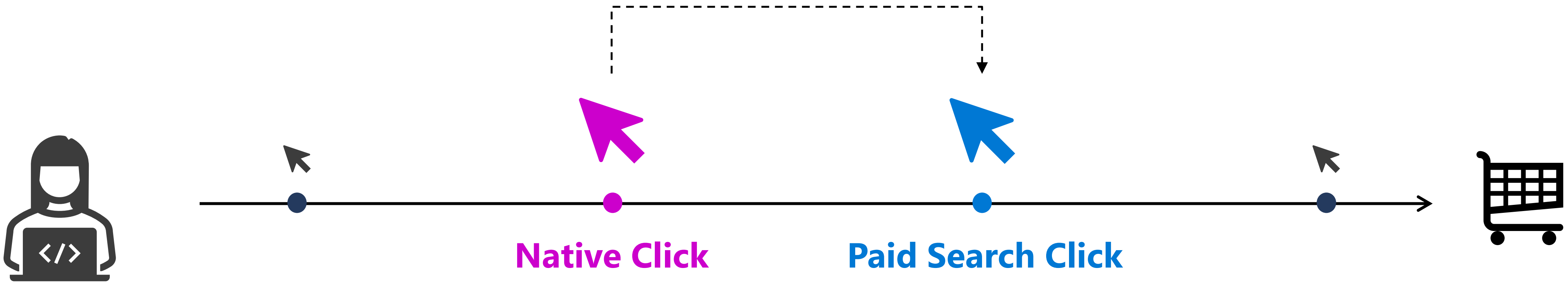
Microsoft Internal Data - Consumer Decision Journey (CDJ) methodology and scope = Market: States; Period: Jan 2021 - Feb 2021; Devices: Desktop & laptop; Publisher agnostic: Any domain visited on Edge & Internet Explorer; CDJ using a sample of 1.000 users; Digital media engagement identified through 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.

Microsoft

How often is native followed by search engine marketing?

Whatever the position in the journey

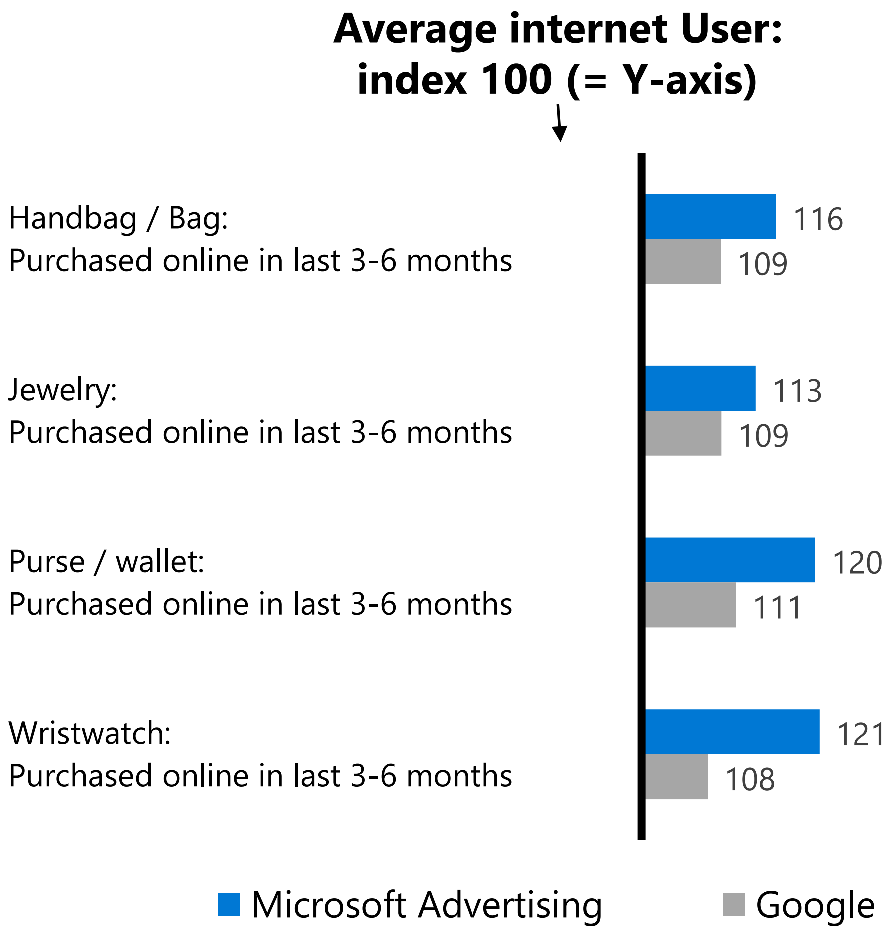
For **7/10** of the users the next touchpoint after Native is Search[1].



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) 68%

Microsoft

US - Our users over-index on buying these luxury items

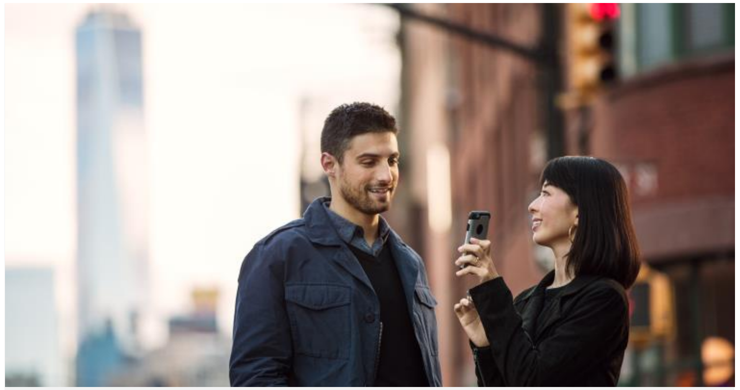


Responding favorably to the question if they purchased these goods online in the past 3-6 months

- 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**.

Microsoft

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**.