



# Time Sensitivity In Travel

Travel Demand Recovery  
Series





## Key Questions

Lockdown has resulted in consumers being subject to travel and mobility restrictions. As borders begin to reopen and personal freedoms to mobilize increase, what effect will this have on consumer demand to travel this year and beyond?

- **How are time sensitive travel searches evolving during this year?**
- **How does travel time sensitivity vary among different travel categories?**
- **How should I evolve my marketing strategy?**



## Key Findings

Across markets, lockdown easing and air bridge agreements permitting borders to reopen has dialled down momentum for '2021' searches in late June

Summer travel search interest is popular across many categories in FR, IT and NL. DE and UK display strong '2020' search interest across many categories

Accommodation verticals such as hotels and vacation rentals display particularly strong summer travel search interest in many markets such as FR, DE, IT and NL

Markets with greater virus containment such as DE, FR and NL are displaying the weakest time sensitivity with all time sensitive search categories falling towards late June suggesting consumers are more open minded about when they might travel

# Smart actions you can start with today

- **Use Dynamic Search Ads to capture emerging time sensitive 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

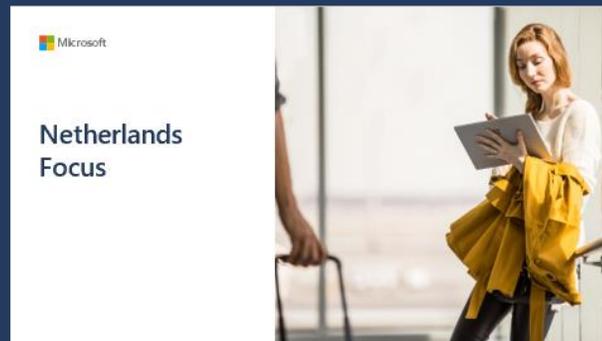
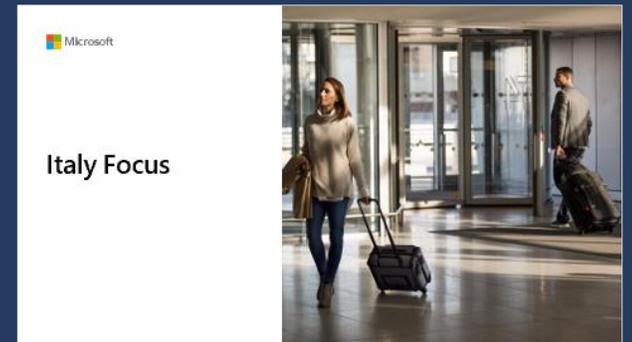
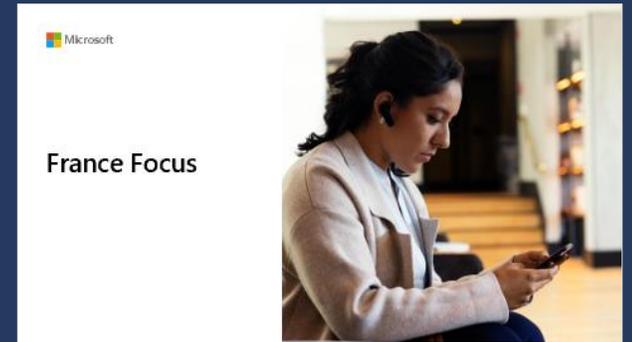
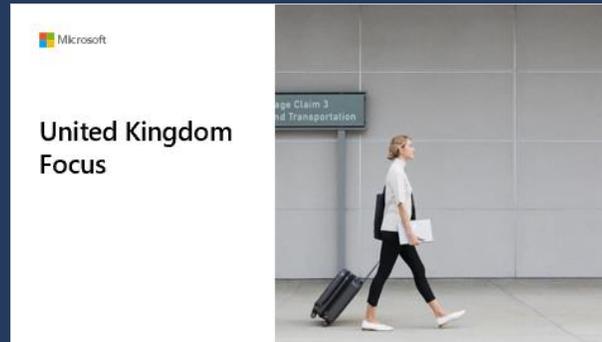
# Methodology & Notes

- In this research, we focus on understanding what time period consumers are interested in travelling again through an analysis of time tokens featured in travel queries. This research features five time token categories:

Time Token Category	Definition
2020	Travel searches containing '2020' as a time preference
2021	Travel searches containing '2021' as a time preference
Jun - Aug	Travel searches containing names of months and seasons within June – August. '2020' searches containing month or season names relating to June - August are classified under this category to avoid overlap
Sept - Dec	Travel searches containing names of months and seasons within Sept – Dec. '2020' searches containing month or season names relating to Sept - Dec are classified under this category to avoid overlap
Jan - May	Travel searches containing names of months and seasons within Jan – May. '2020' searches containing month or season names relating to Jan – May are classified under this category to avoid overlap. Searches containing '2021' and also containing month or season names relating to Jan – May are classified under the 2021 category to avoid overlap

# Chapters

Click on a chapter tile to enter a chapter





# United Kingdom Focus



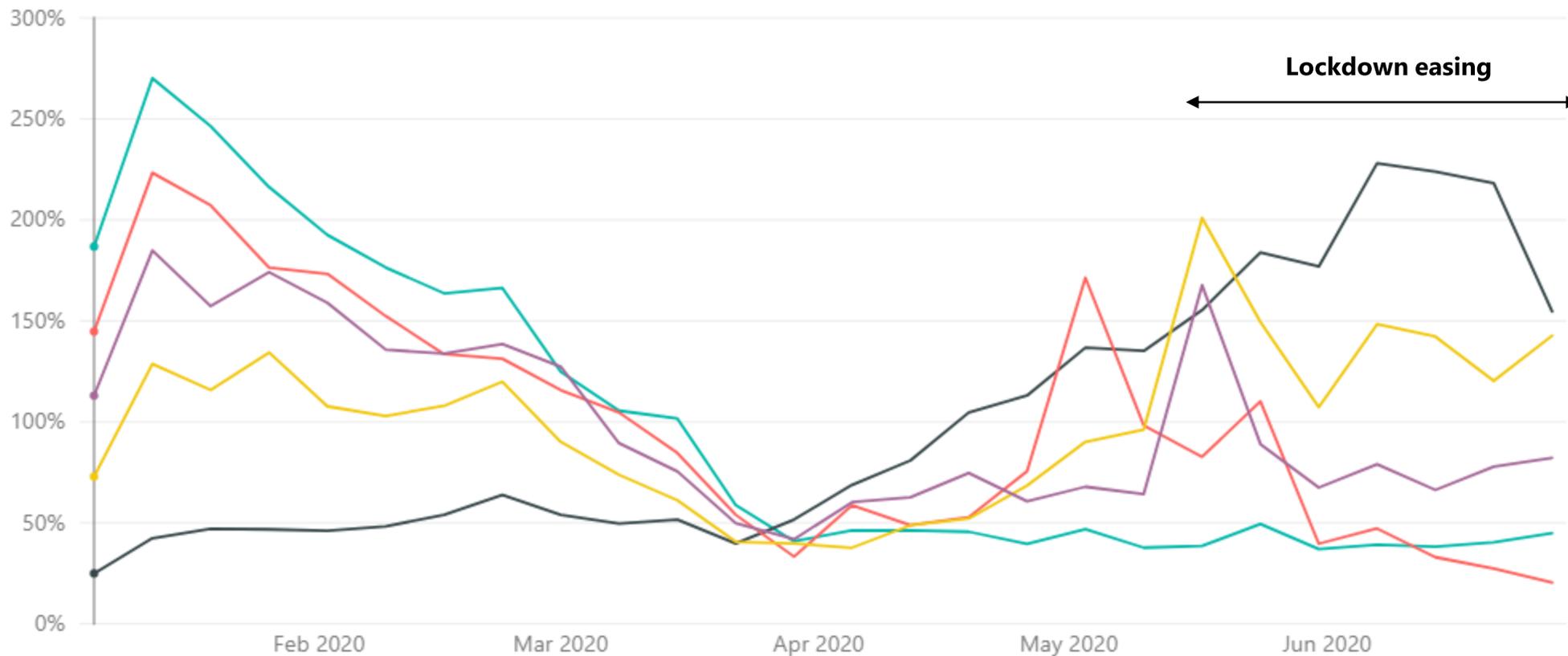
# UK Summary

- **Air bridge announcements in late June have driven down momentum for '2021' searches. Whilst summer travel searches have gained a notable uplift from mid May**
- **'2020' and/or '2021' searches form the bulk of time sensitive searches for most categories post lockdown easing (June 2020 data)**
- **Camping, followed by hotels and vacation rentals are displaying the strongest summer travel search interest in June**
- **Leverage campaign automation strategies for optimal performance in a fast-changing environment**



Lockdown easing and virus containment from mid May has uplifted 'Jun-Aug' travel searches with momentum continuing throughout June. '2021' searches have grown throughout lockdown and it's easing but are displaying a pronounced slump in late June following air bridge announcements

Time sensitive travel indexed search volume split by time token category (Jan – June 28<sup>th</sup>) ● 2020 ● 2021 ● Jan - May ● Jun - Aug ● Sept - Dec



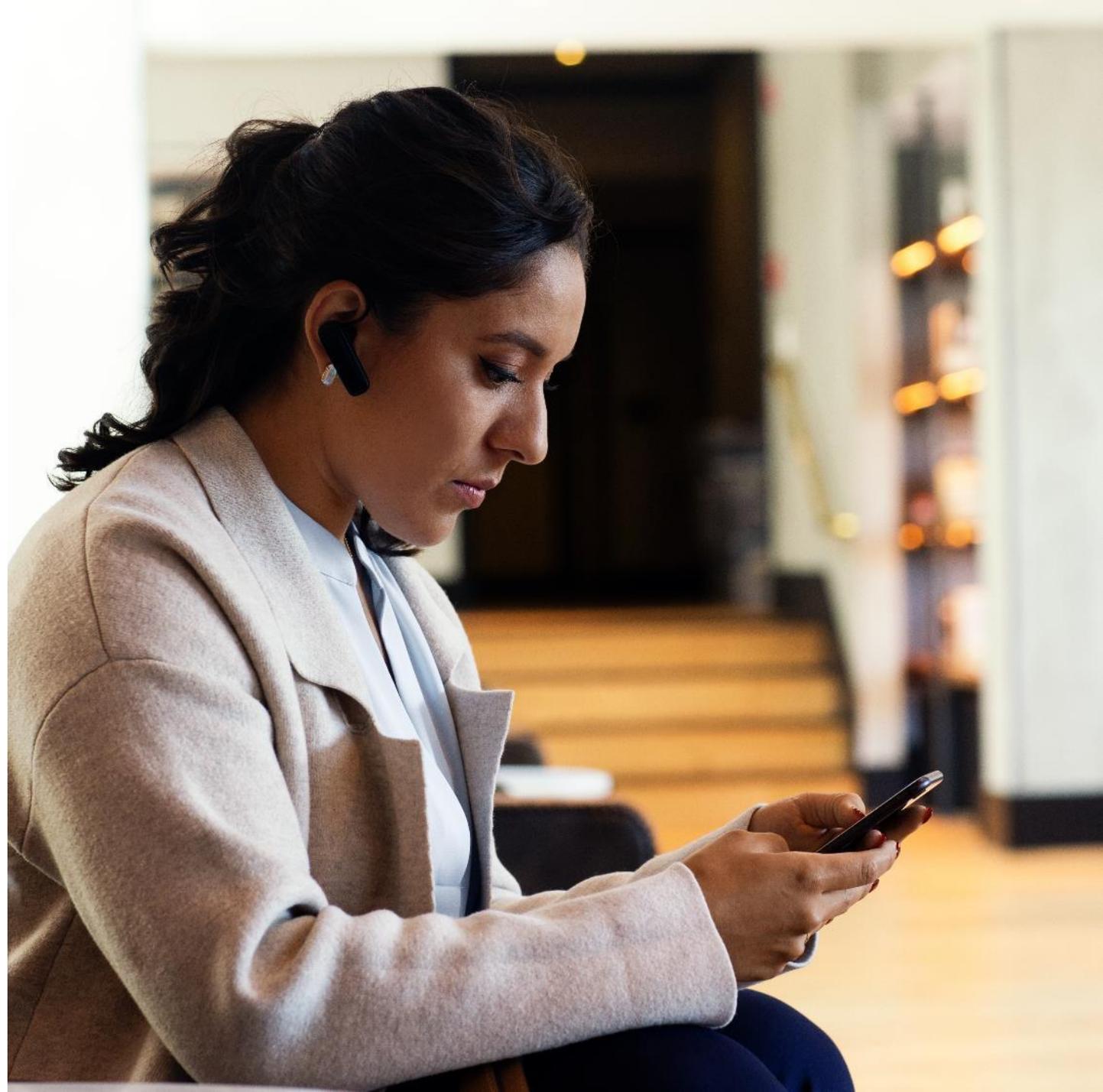
Advertisers should tap into short term demand in key verticals where '2020' and/or 'June – Dec' searches are prevalent such as camping, hotels and holidays. Advertisers should build '2021' search coverage in key verticals where these searches are prevalent such as cruises, vacation rentals, flights and holidays.

Travel search volume by vertical split by time token category (June 1<sup>st</sup> - 28<sup>th</sup>)





# France Focus



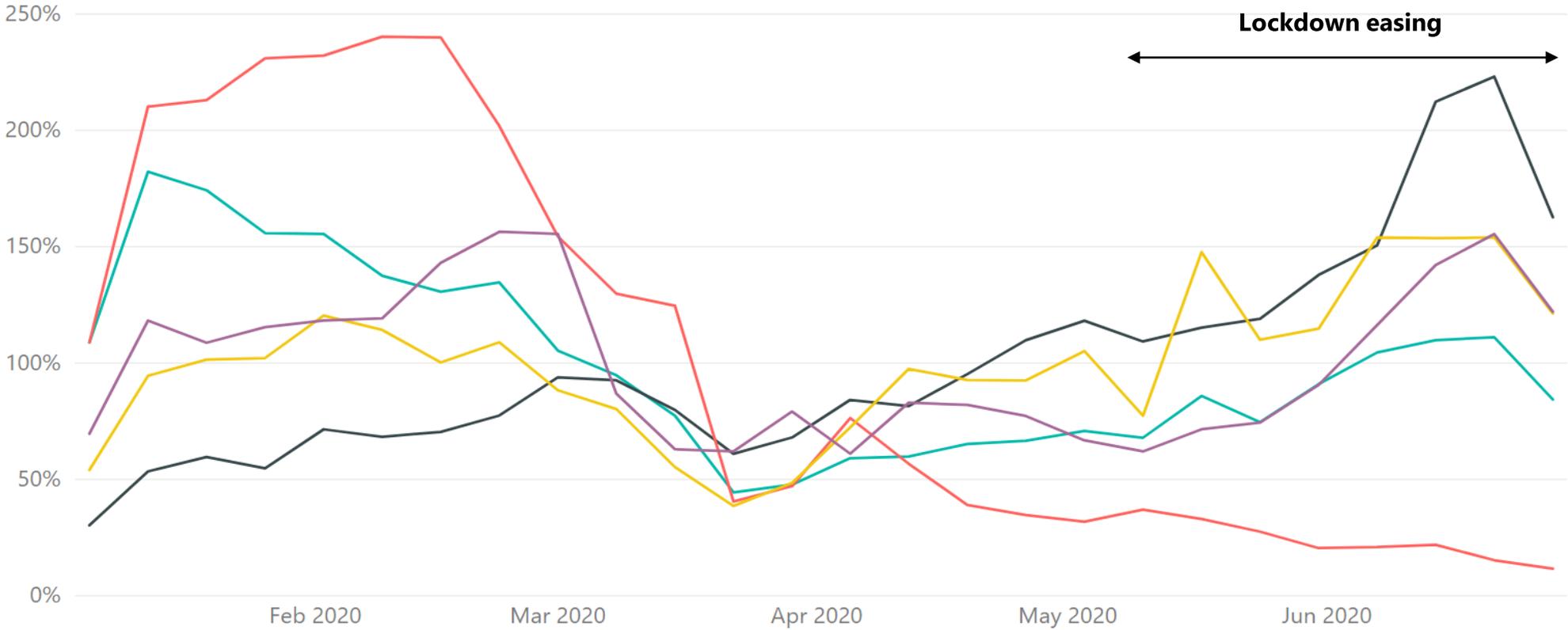
# FR Summary

- **Reopening borders from mid June has notably driven down momentum for '2021' searches. Overall, momentum for travel time sensitivity is weakening in France,** suggesting consumers might be more open minded about when they might wish to travel
- **'2020' searches form the bulk of time sensitive searches for most categories** post lockdown (June 2020 data)
- **Vacation rentals, flights and hotels show strong summer travel volume share** amongst time sensitive searches within the category
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



Lockdown easing and virus containment has boosted '2020', 'Jun-Aug' and 'Sept-Dec' travel searches although all time sensitive search categories are displaying a fall towards late June suggesting weakening time sensitivity. '2021' searches display the most pronounced slump in late June after borders were reopened from mid June

Time sensitive travel indexed search volume split by time token category (Jan – June 28<sup>th</sup>) ● 2020 ● 2021 ● Jan - May ● Jun - Aug ● Sept - Dec

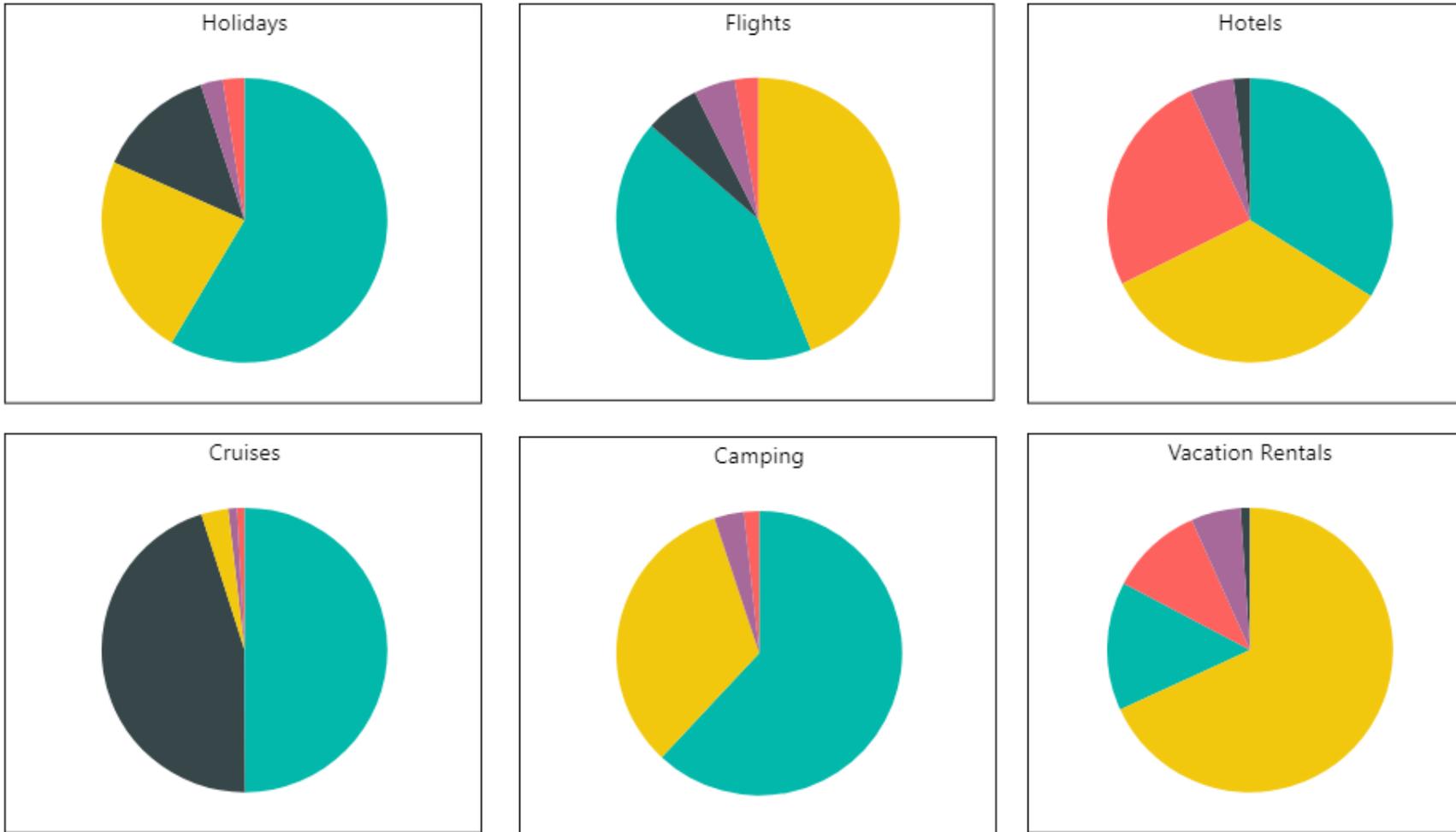


Microsoft Internal Data. Jan 2020 – June 28<sup>th</sup> 2020. MoM = Month on Month 100% = average search volume for category during the time period of study

Advertisers should consider amplifying marketing to tap into immediate short term summer travel interest in many verticals as well as maintaining strong '2020' coverage to catch demand to travel this year generally

Travel search volume by vertical split by time token category (June 1<sup>st</sup> - 28<sup>th</sup>)

● 2020 ● Jan - May ● 2021 ● Jun - Aug ● Sept - Dec





# Germany Focus



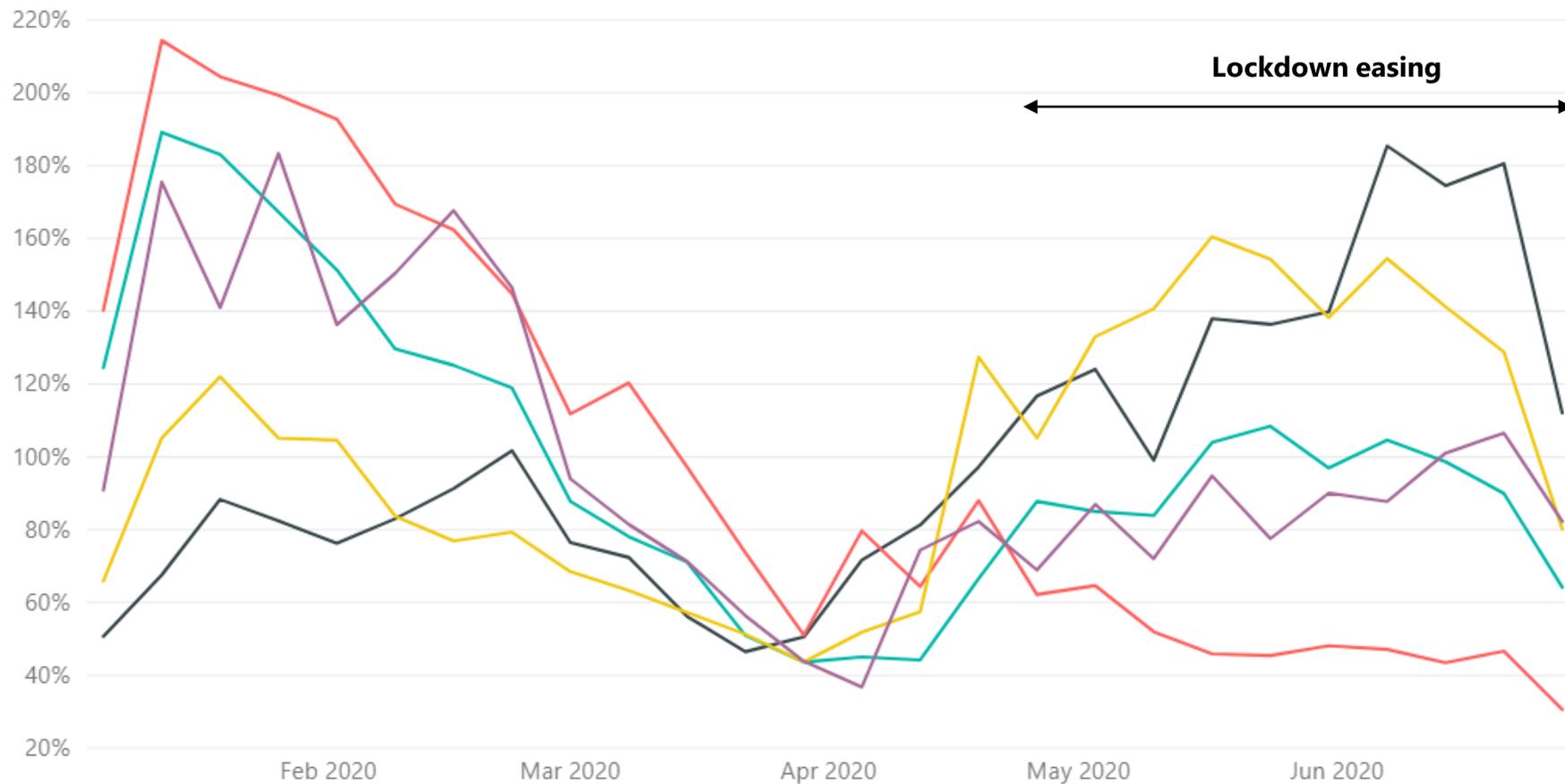
# DE Summary

- **Reopening borders from mid June has notably driven down momentum for '2021' searches. Overall, momentum for travel time sensitivity is weakening in Germany,** suggesting consumers might be more open minded about when they might wish to travel
- **'2020' searches form the bulk of time sensitive searches for most categories** post lockdown (June 2020 data)
- **Hotels, flights and vacation rentals show strong summer travel volume share** amongst time sensitive searches within the category
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



Lockdown easing has provided a lift to '2020', 'Jun-Aug' and 'Sept-Dec' travel searches although all time sensitive search categories are displaying a fall towards late June suggesting weakening time sensitivity. '2021' searches display the most pronounced slump in late June after borders were reopened from mid June

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Advertisers should consider amplifying marketing to tap into immediate short term summer travel interest in verticals such as hotels, vacation rentals and flights. Advertisers should consider building strong '2020' coverage as these searches are prevalent for most verticals.

Travel search volume by vertical split by time token category (June 1<sup>st</sup> - 28<sup>th</sup>)

● 2020 ● Jan - May ● 2021 ● Jun - Aug ● Sept - Dec





# Italy Focus



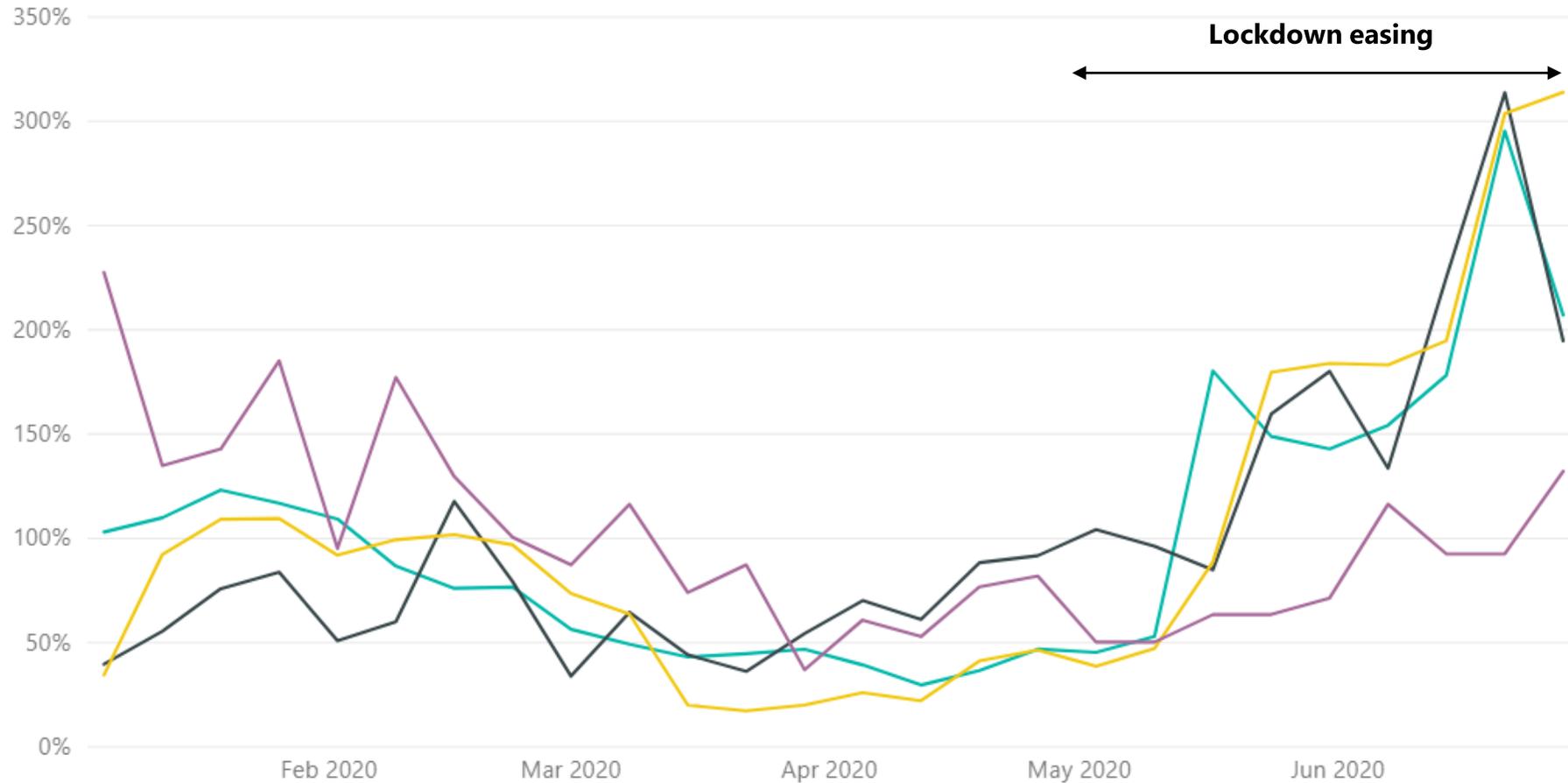
# IT Summary

- **Reopening borders from mid June has notably dampened momentum for '2021' and '2020' searches. In contrast, summer and autumn travel searches are displaying a notable MoM boost in June following lockdown easing**
- **'2020' and summer travel searches form the bulk of time sensitive searches for most categories post lockdown (June 2020 data)**
- **Vacation rentals, followed by flights, camping and hotels are displaying the strongest summer travel search interest in June**
- **Leverage campaign automation strategies for optimal performance in a fast-changing environment**



Lockdown easing has provided a lift to all time token categories however '2020' and '2021' searches have fallen notably in late June. 'Jun-Aug' searches have soared in June and 'Sept-Dec' searches also show slower but steady growth suggesting growing consumer sensitivity towards these time periods

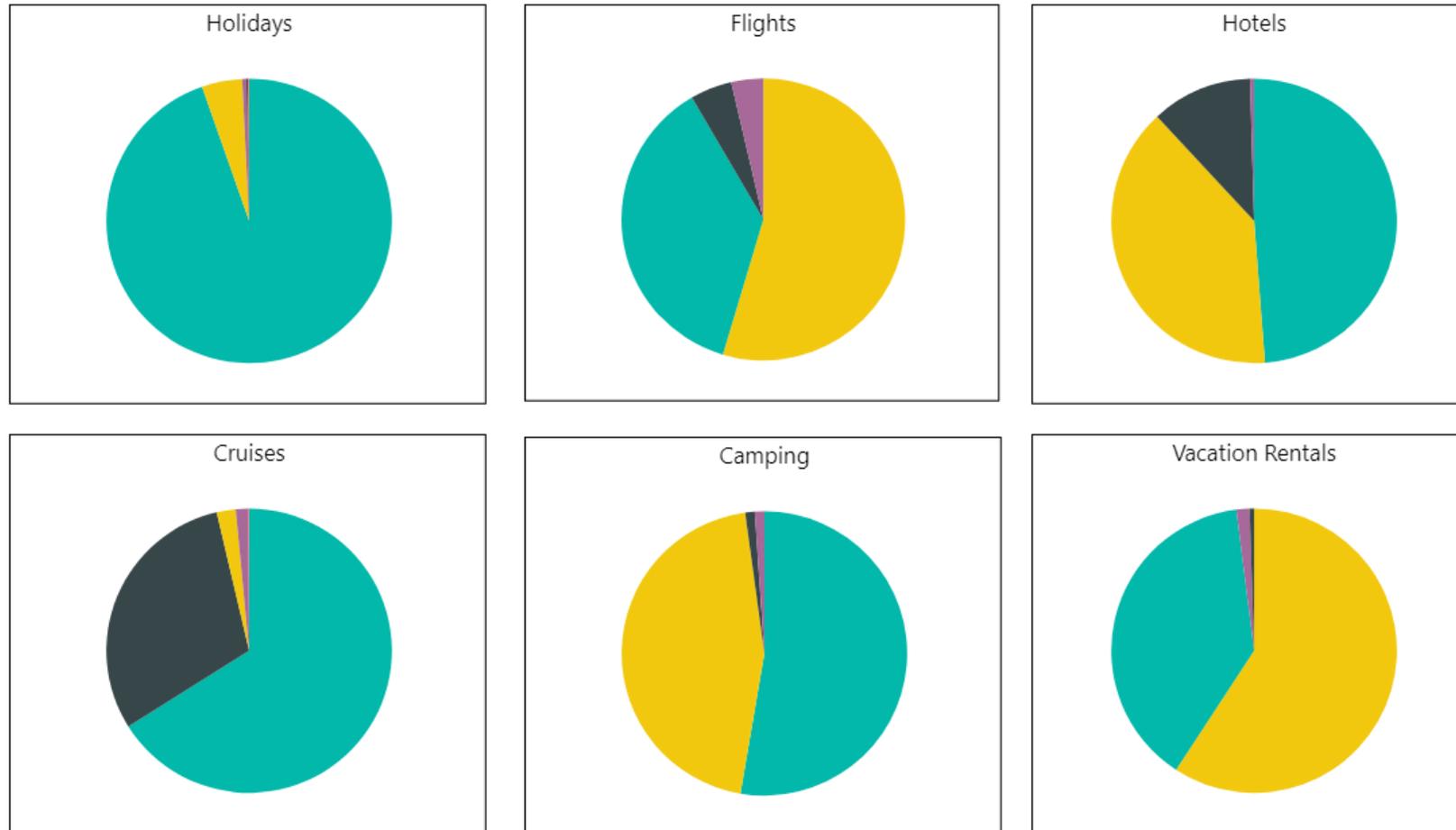
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Travel search volume by vertical split by time token category (June 1<sup>st</sup> - 28<sup>th</sup>)

● 2020 ● 2021 ● Jun - Aug ● Sept - Dec





# Netherlands Focus



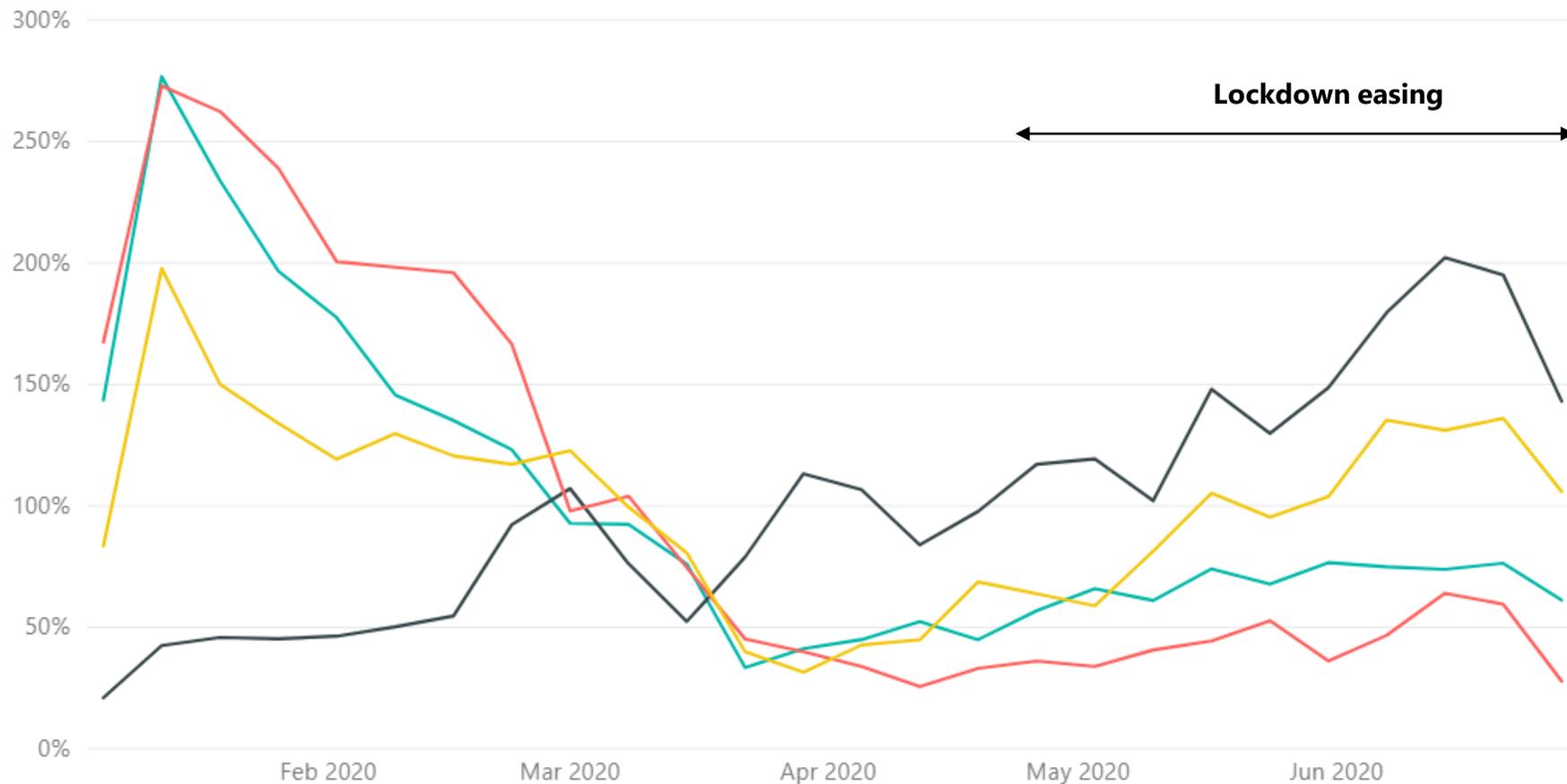
# NL Summary

- **Reopening borders from mid June has notably driven down momentum for '2021' searches. Overall, momentum for travel time sensitivity is weakening in the Netherlands,** suggesting consumers might be more open minded about when they might wish to travel
- **'2020' and/or summer travel searches form the bulk of time sensitive searches for all categories** post lockdown (June 2020 data)
- **Vacation rentals followed by hotels, flights and camping show strong summer travel volume share** amongst time sensitive searches within the category
- **Leverage campaign automation strategies** for optimal performance in a fast-changing environment



Lockdown easing has provided a lift to '2021' and 'Jun-Aug' travel searches although all time sensitive search categories are displaying a fall towards late June suggesting weakening time sensitivity. '2021' searches display the most pronounced slump in late June after borders were reopened from mid June

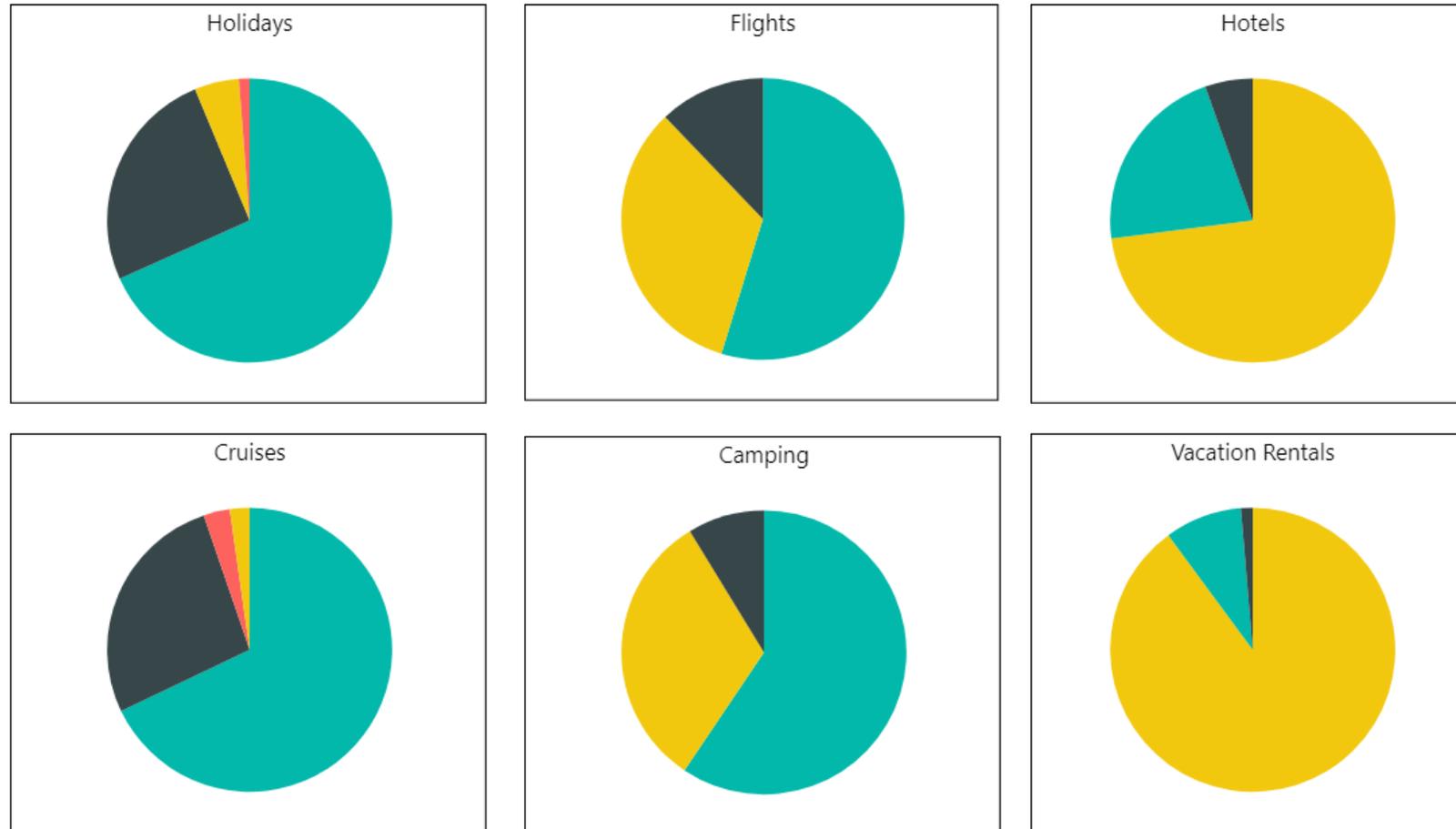
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Advertisers should consider amplifying marketing to tap into immediate short term summer travel interest in verticals such as vacation rentals, hotels, flights and camping. Advertisers should consider building strong '2020' coverage as these searches are prevalent for most verticals.

Travel search volume by vertical split by time token category (June 1<sup>st</sup> - 28<sup>th</sup>)

● 2020 ● Jan - May ● 2021 ● Jun - Aug





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