Brand Search Evolution in Travel

Global
Methodology & Notes

• In this research, we benchmark search volume movements for travel queries with commercial intent in the current climate vs a pre coronavirus healthy period (Jan 2020) to better understand consumer demand recovery in travel.

• This analysis examines queries with ‘commercial intent’ (queries that have displayed at least 30 cumulative Mainline Ad Impressions during the two weeks from 6th to 19th of Jan 2020, a pre-coronavirus healthy period).

• We take the search volume for the stated set of queries with commercial intent (from the stated period above) from Jan 2020 to create a baseline for comparison.

• The analysis compares the search volume for the stated set of queries with commercial intent every week to the Jan 2020, pre coronavirus period, baseline. Additionally a YoY benchmark is also provided to analyse if the same pattern was observed weekly last year when comparing to the Jan 2019 benchmark.

• Through this comparison, the analysis highlights the percentage deltas of the search volume that exist between our current time frame (weekly) to a pre corona virus period whilst contextualising performance with a YoY benchmark.

• This enables us to understand how far off we are from a ‘normal’ or pre coronavirus period whilst also being able to assess the evolution of consumer search demand via queries with commercial intent, that will naturally be of high interest to advertisers.
FAQs

1.) How are you defining ‘commercial intent’?
We have compiled a list of queries that have displayed at least 30 cumulative Mainline (ML) Ad Impressions during the two weeks from 6th to 19th of Jan 2020, a pre-coronavirus healthy period. We assume queries that have accumulated at least 30 ML impressions during this period illustrate commercial intent and are queries of interest to our advertisers.

2.) Why is commercial intent important?
We are treating commercial intent as a demand signal to allow us to track consumer demand and its recovery in travel.

3.) How many travel queries are being captured in this analysis?
Of all travel searches where we showed at least an ad during 6-19th Jan 2020, 60-70% of these searches are accounted for in this analysis. The rest are left out as they didn't have adequate ad impressions to qualify as having commercial intent.

4.) Why compare to a Jan 2020 baseline?
We have chosen to use a Jan 2020 baseline because we wanted to establish queries of commercial intent from a recent pre coronavirus period to ensure we are targeting queries that are relevant to consumers this year and avoid capturing any now irrelevant terms that could exist if the baseline was a considerably older period.

5.) How are you facilitating a YoY comparison?
As our methodology is based on comparing the current climate to a pre coronavirus healthy period (Jan 2020), in order to facilitate a YoY analysis, we need to conduct the same analysis with 2019 data to see if the same patterns emerge. Hence the last year or YoY benchmark = An examination of the performance of travel queries with commercial intent during the same weeks of the study period but in 2019, compared to a benchmark of equivalent weeks in Jan 2019.
Key Findings and Actions

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?

• How are travel searches with commercial intent evolving during this time period?
• How does this play out from a brand/non brand perspective?

Key Findings

Across markets, travel searches with commercial intent show different stages of recovery. Across all, generic searches are displaying faster recovery relative to brand searches

• Travel searches with commercial intent are nearly closing the year-on-year volume recovery gap in France, Netherlands and Germany, driven by lockdown easing and virus containment
• Brand searches display more reactivity to events/lockdown easing in the US, Spain, France. The opposite is true for the UK
• Generally across markets, brand and generic searches have been amplified amidst lockdown easing

Recommended Actions

Growing advertiser opportunity across all markets as all show growth in travel queries with commercial intent amidst lockdown easing but particularly strongly for France, Netherlands and Germany.

We advise advertisers to:

▪ **Consider re-activation or amplification** of your campaigns to reach consumers with potential purchase intent
▪ Invest in **generic searches** with commercial intent traffic to build trust with potential customers
▪ Maximise coverage on often reactive **brand searches** to engage and educate consumers about your current offering
▪ **Consider DSA and broad match** to pick up new brand and generic queries emerging amidst lockdown easing
US Focus
Branded searches are recovering at a slower pace compared to generic but appear to be more reactive to events-based travel as they experienced a more dramatic uptick than generic in the lead up to the memorial day public holiday weekend. **Advertisers should maintain strong brand coverage complimented by non brand to tap into event-based demand upticks**

Travel queries with commercial intent current week-on-week search volume trend (compared to Jan 2020 baseline) with a year-on-year comparison

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**US WoW Search Volume % Change**

- % Change Search Volume
- % Change Search Volume Last Year

-20%
-40%
-60%

1. 19th Apr
2. 26th Apr
3. 03rd May
4. 10th May
5. 17th May
6. 24th May
7. 31st May
8. 07th June

**US WoW Search Volume % Change - Brand vs Non Brand**

- BrandFlag
  - Contains Brand
  - Generic
  - Pure Brand

-40%
-60%
-80%

1. 19th Apr
2. 26th Apr
3. 03rd May
4. 10th May
5. 17th May
6. 24th May
7. 31st May
8. 07th June

Microsoft Internal Data. % Change Search Volume (green line) = performance of travel queries with commercial intent each week compared to equivalent weeks in Jan 2020, the most recent healthy pre-coronavirus period on record. % Change Search Volume Last Year (purple line) = This last year benchmark is an examination of the performance of travel queries with commercial intent during the equivalents weeks listed on the graph but in 2019 in comparison to a benchmark of equivalent weeks in Jan 2019, essentially the same analysis of the green line but with last years data. WoW is a reference to week on week
UK Focus
Branded searches are recovering beneath generic searches with the gap widening, with lockdown easing going into June. The lag in brand search recovery is also dragging down overall search volume recovery with a notable current year-on-year gap of -40%+. **Advertisers should invest in generic coverage as it appears to be emerging strongly post COVID-19 peak**

Travel queries with commercial intent current week-on-week search volume trend (compared to Jan 2020 baseline) with a year-on-year comparison

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Generic searches display the best recovery, but branded searches display the best growth (35% points+) to date. Brand/generic recovery has been amplified amidst lockdown easing in mid May and sustained by effective virus containment enabling France to nearly close the year-on-year gap. Advertisers should invest in generic coverage alongside brand coverage as they both show strong recovery.

Travel queries with commercial intent current week-on-week search volume trend (compared to Jan 2020 baseline) with a year-on-year comparison.

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DE Focus
Generic searches have maintained a consistent lead on brand in terms of recovery, but both have been amplified by falling daily cases and gradual lockdown easing in May. This has enabled Germany to nearly close the year-on-year gap. Advertisers should invest in generic coverage alongside brand coverage as they both show continuous recovery.

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NL Focus
Generic searches maintains a consistent lead on brand in terms of recovery, but both display the same growth (approx. 22% points+), enabling the Netherlands to nearly close the year-on-year gap. As borders re-open and travel restrictions lift in the Netherlands throughout June and July, Advertisers should invest in generic coverage alongside brand coverage as both show similar continuous recovery.

Travel queries with commercial intent current week-on-week search volume trend (compared to Jan 2020 baseline) with a year-on-year comparison.

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ES Focus
Generic searches have maintained stability to date and appear to be at similar levels to the Jan 2020 benchmark currently. However, brand searches appear to be more reactive to lockdown easing, increasing week-on-week in late May following announcements to reopen borders in June/July. **Advertisers should invest in generic coverage and maximise brand coverage amidst growing brand searches.**

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