

# Global Trends in Native Advertising for Travel in 2018

# TABOOLA'S DATA-DRIVEN GUIDE TO DISCOVERY



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# Travel Brands and the Current Discovery Landscape

# Travel is one of the leading industries in digital advertising, with substantial growth predicted in ad spend in the coming years, according to eMarketer.

Taboola has seen similar trends—data from the Taboola network shows a **21.97% increase in travel-related impressions** from 2016 to 2017 from advertisers like TUI Group, Secret Escapes, Austria Tourism and more.

For the purposes of this report, travel marketers come from all types of businesses including international airlines, vacation sites, travel products and more.

This report is packed with data to help travel marketers understand their competitive advantage and opportunities on the open web, based on over **8 billion impressions** and exactly **7,842,454 clicks**.

Data includes an assessment of market opportunity, and industry benchmarks on campaign insights and user behavior—opportunities that can be capitalized on through the use of tools like Taboola Backstage, Data Marketplace, Retargeting, Campaign Scheduler, Geotargeting tactics and more.

Throughout our report you'll see references to 'spend percentage,' indicating supply, and both click-through-rate 'CTR' and 'calibrated CTR,' indicating demand. 'Spend percentage' is the percentage of all spend promoting travel content on the open web, 'CTR' is the ratio of clicks to views on a specific content recommendation, and 'calibrated CTR' is the same ratio, though calculations are made to eliminate the effect of placement location.

#### Digital Ad Spending by Industry, 2016 to 2021

US, Billions and % of Total, Source: eMarketer

23.10	\$25.73	\$28.30
1.90%	21.90%	21.90%
13.96	\$15.80	\$17.45
3.20%	13.40%	13.50%
12.60	\$13.90	\$15.12
1.90%	11.80%	11.70%
11.23	\$12.41	\$13.57
0.70%	10.60%	10.50%
9.45	\$10.65	\$11.89
.00%	9.10%	9.20%
8.40	\$9.25	\$10.08
.00%	7.90%	7.80%
7.98	\$8.89	\$9.78
.60%	7.60%	7.60%
6.09	\$6.79	\$7.47
.80%	5.80%	5.80%
5.35	\$6.09	\$6.85
.10%	5.20%	5.30%
3.06	\$3.47	\$3.81
.90%	3.00%	3.00%
4.22	\$4.56	\$4.93
.00%	3.90%	3.80%
105.44	\$117.53	\$129.26
	1.90%         13.96         3.20%         12.60         1.90%         11.23         0.70%         9.45         00%         3.40         00%         5.35         10%         3.06         90%         4.22         00%	1.90%       21.90%         13.96       \$15.80         3.20%       13.40%         12.60       \$13.90         1.90%       11.80%         12.60       \$13.90         1.90%       11.80%         11.23       \$12.41         0.70%       10.60%         9.45       \$10.65         90%       9.10%         8.40       \$9.25         00%       7.90%         7.98       \$8.89         60%       7.60%         5.09       \$6.79         80%       5.80%         5.35       \$6.09         10%       5.20%         3.06       \$3.47         90%       3.00%         4.22       \$4.56         00%       3.90%

# MARKET OPPORTUNITY Worldwide Trends: Opportunity by Time of Year

# Travel Content Supply vs. Demand by Month, Worldwide

Data from travel campaigns on the open web worldwide indicate a month over month (MoM) change in both brand and consumer behavior. Throughout the year, supply of travel content is highest between June and July—with a notable **31%** increase in campaign spend.

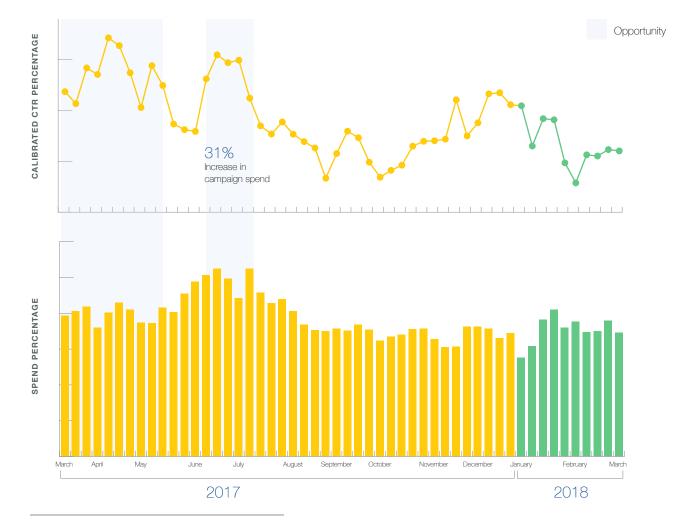
Supply trends don't always match consumer demand—travel marketers aren't taking advantage of high engagement between March and May, specifically in April, where there is less supply and high consumer demand, indicated by a CTR that's even higher than the CTR in June and July.



Test expanding your budget between March and May, and especially during April.

#### Discovery Market Opportunity by Time of Year for the Travel Vertical Worldwide, 2017

Month over Month Supply of Travel Content\* vs. Consumer Demand\*\*, 2017



<sup>\*</sup>Supply is indicated by the percentage a market spends on travel content.

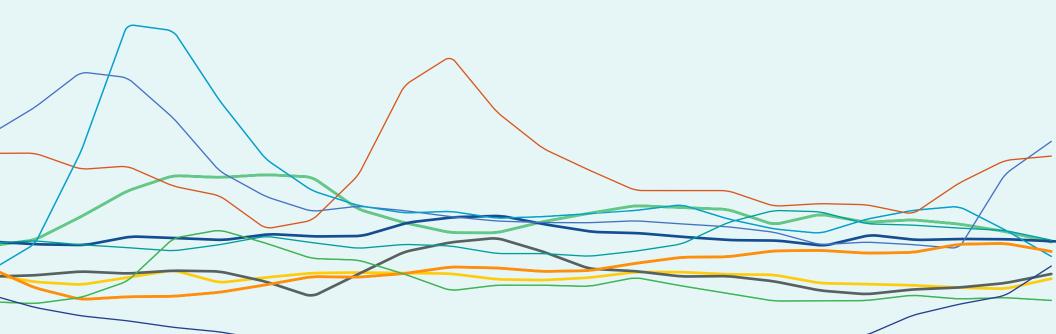
\*\*Consumer demand is indicated by the average calibrated CTR for travel content.

4



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# MARKET OPPORTUNITY Worldwide Trends: Opportunity by Supply vs. Demand

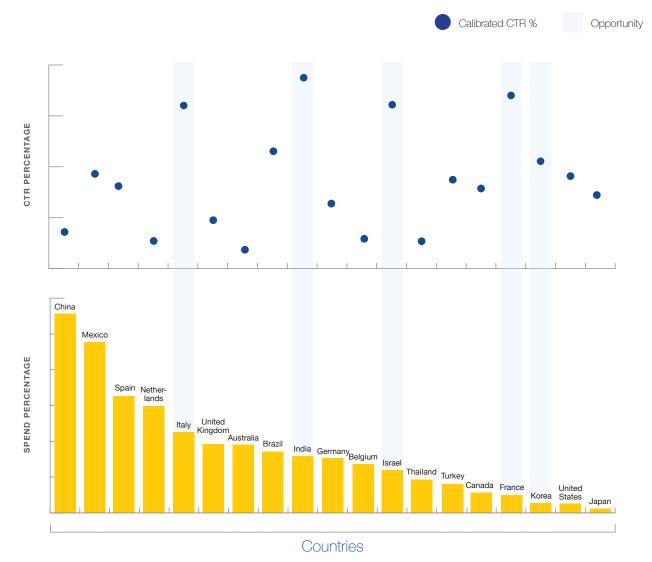
# Travel Content Supply vs. Consumer Demand by Country

Various countries have different market opportunity for discovery and native advertising. Market opportunity is defined here by the relationship between content supply and consumer demand for travel content in each country.

Countries with a low supply of travel content and a high demand have a large market opportunity, whereas the alternative scenario means travel marketers may face more competition in the market.

#### Discovery Market Opportunity for the Travel Vertical by Country, 2017

Supply\* of Travel Content vs. Consumer Demand\*\*, 2017



\*Supply is indicated by the percentage a market spends on travel content. \*\*Consumer demand is indicated by the average calibrated CTR for travel content

# Notable Trends in Market Opportunity by Country

Average demand, indicated by CTR, for travel content was average of **0.09%**. Spain had the most demand for travel content in 2017, with an average CTR of **0.15%**.

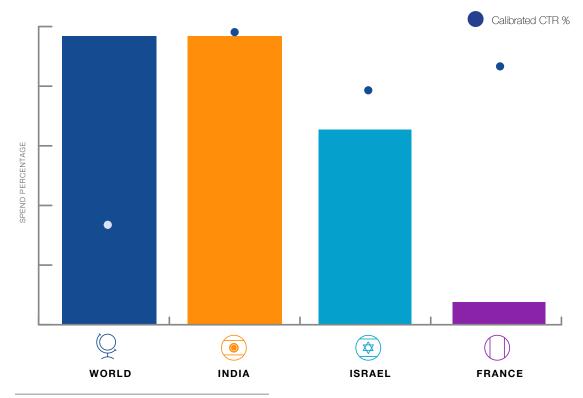
Taboola data predicts great potential for travel content growth in India, France and Israel—the countries with the highest demand and relatively low supply. Currently, less than **4%** of discovery content in these countries is in the travel vertical, though all three boast CTRs similar to, or higher than the worldwide average at **0.09%**.



Travel advertisers looking to expand globally, should test campaigns in India, France and Israel.

#### Discovery Market Opportunity for the Travel Vertical by Country, 2017

Supply\* of Travel Content vs. Consumer Demand\*\*, 2017



<sup>\*</sup>Supply is indicated by the percentage a market spends on travel content. \*\*Consumer demand is indicated by the average calibrated CTR for travel content.

#### CAMPAIGN INSIGHTS

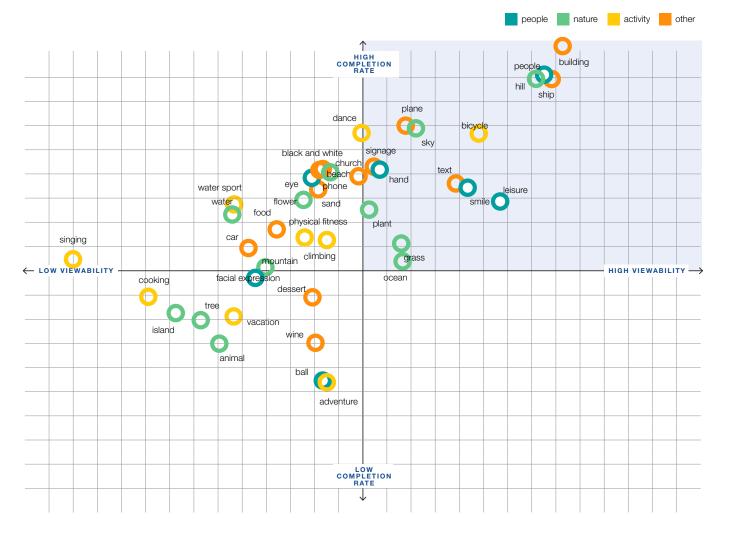
# Worldwide Trends: Top Video Characteristics by Viewability and Completion Rate

# Video Characteristics by CTR, Worldwide

More and more advertisers are capitalizing on video, and adapting videos for a variety of channels. As of now, Taboola is running about 12 million videos a day—based on those that were a part of travel campaigns, we've identified some common characteristics of videos that performed best on the open web.

Most notably, and similar to common static image trends, there's nothing more engaging than people, especially smiling people. Winter scenes have been more engaging than summer scenes, though, and if you are focusing on sunshine, be sure to include natural scenes. Visuals of islands and beaches where sand is visible are effective.

Finally, keep it active. Bicycles, physical fitness shots, dancing and water sports all performed extremely well when compared to cooking and singing.



#### Video Characteristics by Viewability and Completion Rate for the Travel Vertical Worldwide, 2017

# Purchase, Lead Generation and Pageview Goals

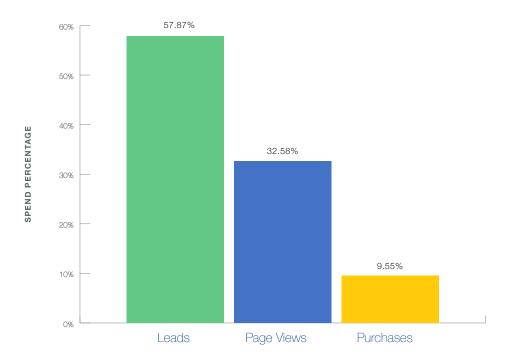
Travel marketers differ when it comes to their main key performance indicators (KPIs) or goals for native advertising campaigns. Campaigns range from the top of the funnel to the bottom, and on a high level, look for three types of actions — website visits, form fills for lead generation, and purchases.

Travel marketers are choosing to use the open web top of the funnel strategy. **57%** have identified lead generation as their main goal. As a next step, **32%** are nurturing leads with page views and later retargeting their potential buyers until their decision to purchase.



Focus on the upper funnel early on, and later retarget consumers who've engaged.

#### Supply\* of Content by KPI for the Travel Vertical Worldwide, 2017



Purchase, Lead Generation, Website Visits

\*Supply is indicated by the percentage a market spends on travel content.



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### Travel Content Supply vs. Demand by Desktop, Mobile and Tablet Devices, Worldwide

Across all device types—desktop, mobile and tablet supply of travel content is the highest on desktop devices as opposed to mobile and tablet devices, but mobile campaigns are showing the highest potential for engagement.

Consumers worldwide are most likely to engage with travel content on mobile devices, which is in line with eMarketer's prediction\* that travel bookings would increase via mobile.

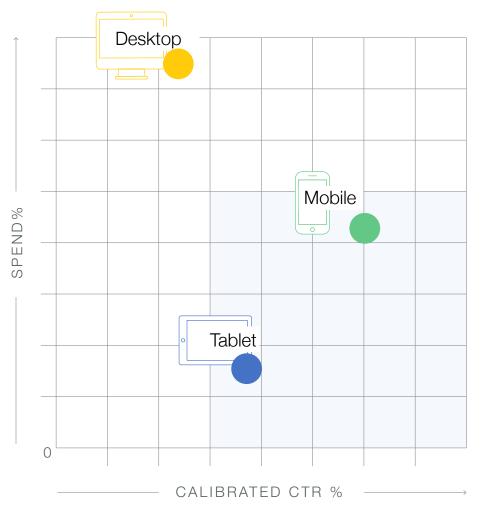
\*Source: eMarketer



Consider testing tablet and mobile device targeting.

#### **Device Performance for the Travel Vertical Worldwide, 2017**

Supply\* of Travel Content vs. Consumer Demand\*\* by Device, 2017



\*Supply is indicated by the percentage a market spends on travel content. \*\*Consumer demand is indicated by the average calibrated CTR for travel content

# Country-Specific Trends: Device Performance

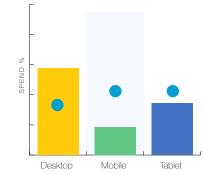
# Desktop, Mobile and Tablet Device Performance, by Country

These country-specific trends provide a benchmark for travel advertisers looking to allocate spend by device in specific countries.

For example, a travel advertiser in the UK running desktop or mobile campaign should test tablet devices, as they're high in demand and low in supply.

Or, a travel advertiser in Germany running a campaign on desktop devices should consider testing mobile devices, as the demand is similar to desktop and the supply is less competitive.



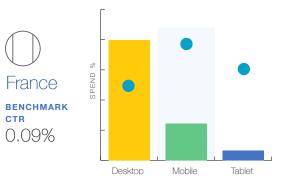


Mobile

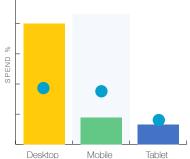
Tablet

Desktop



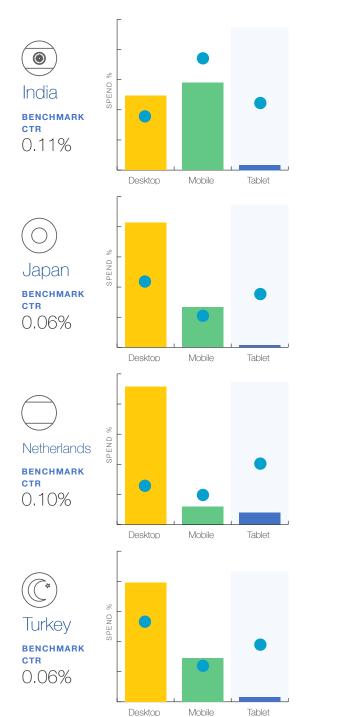


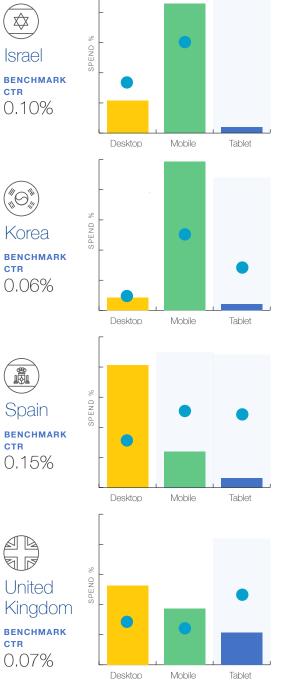


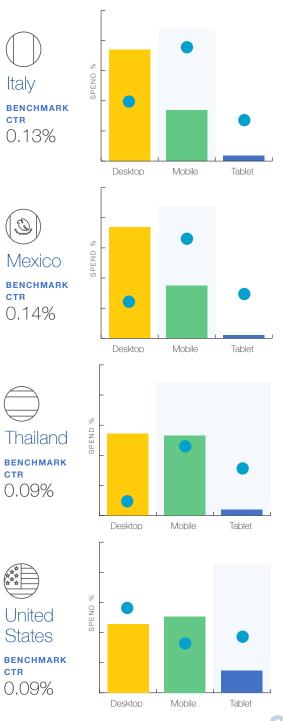


#### Desktop, Mobile and Tablet Device Performance, by Country

Calibrated CTR %







# Travel Content Supply vs. Demand by Photo, Text and Video Campaigns, Worldwide

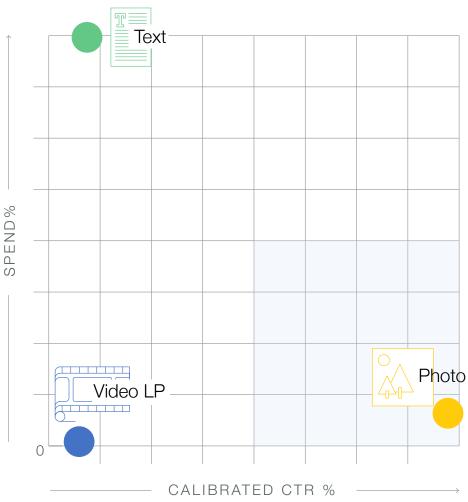
Sponsoring articles like branded blog posts and media coverage is a well-known tactic for travel marketers running native advertising campaigns on the open web, but it's not the only effective option—leading consumers to pages containing photo galleries and videos also performs well.

A worldwide comparison of supply vs. demand of travel content by post-click content type shows that while supply of text articles is high, marketers should also promote more photo galleries to succeed.



Consider testing photo galleries to inspire your audience in your next sponsored content campaign.

#### Discovery Content Type Performance for the Travel Vertical Worldwide, 2017



Supply\* of Travel Content vs. Consumer Demand\*\* by Content Type, 2017

\*Supply is indicated by the percentage a market spends on travel content. \*\*Consumer demand is indicated by the average calibrated CTR for travel content

# Country-Specific Trends: Opportunity by Post-Click Content Type

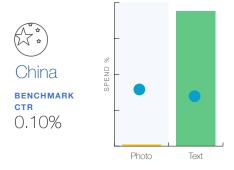
### Photo, Text and Video Campaign Performance, by Country

These country-specific trends provide a benchmark for advertisers looking to allocate spend by post-click content type in specific countries.

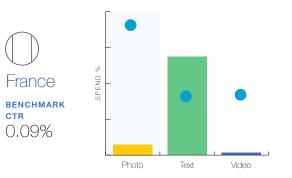
For example, a travel advertiser in the United States running to a travel article should consider testing photo galleries in their sponsored content campaigns as the demand is the highest and supply is very low.

Or, a travel advertiser in Spain running an article postclick should test driving to a video, as the demand is very high and the supply is very low.

Calibrated CTR %
Opportunity









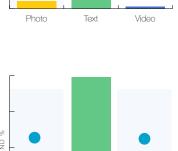
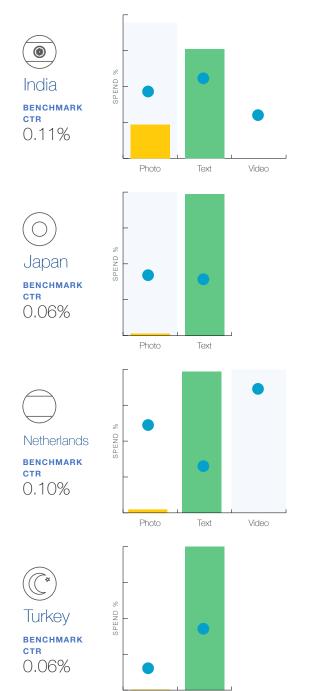


Photo Text Video

Video

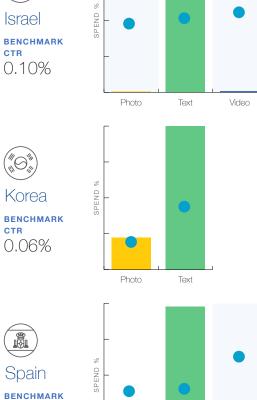
### Photo, Text and Video Campaign Performance, by Country

Calibrated CTR %



Photo

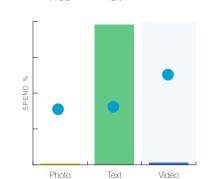
Text

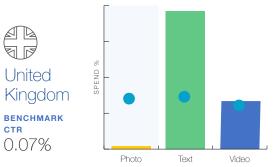


 $\Diamond$ 

CTR

0.15%







BENCHMARK CTR 0.14%

Thailand

BENCHMARK

0.09%

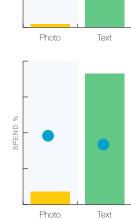
United

States

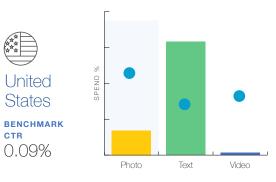
0.09%

CTR

CTR



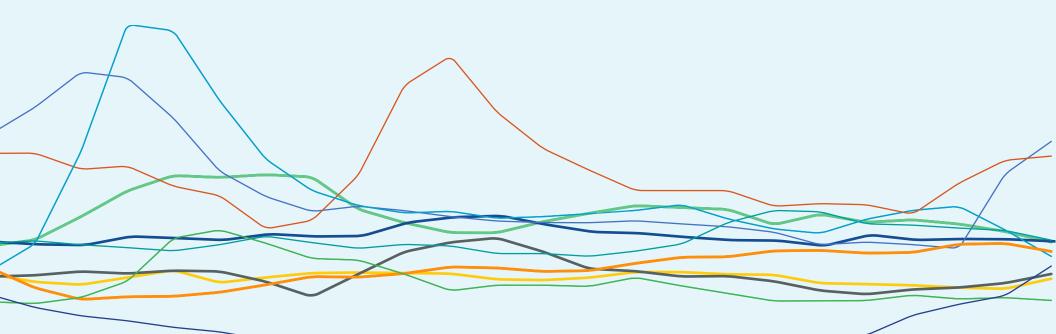




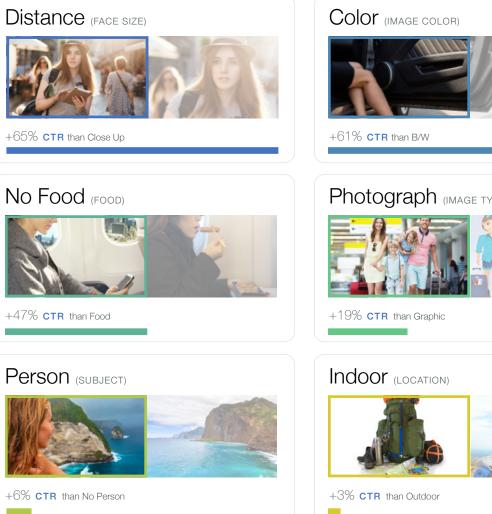


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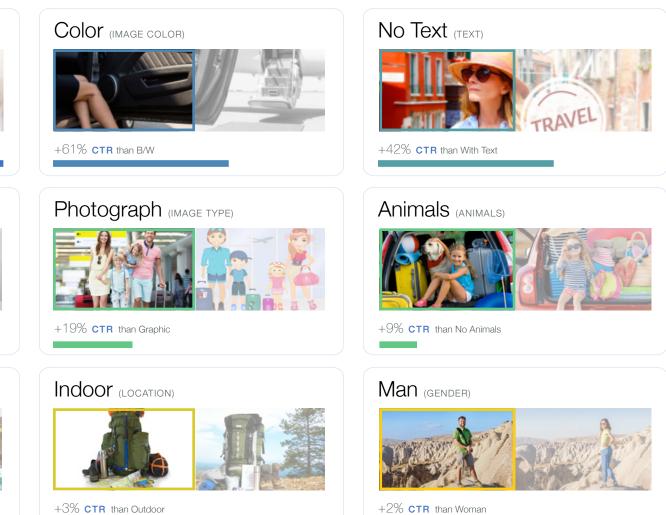


# самраїди insights Worldwide Trends: Image Performance



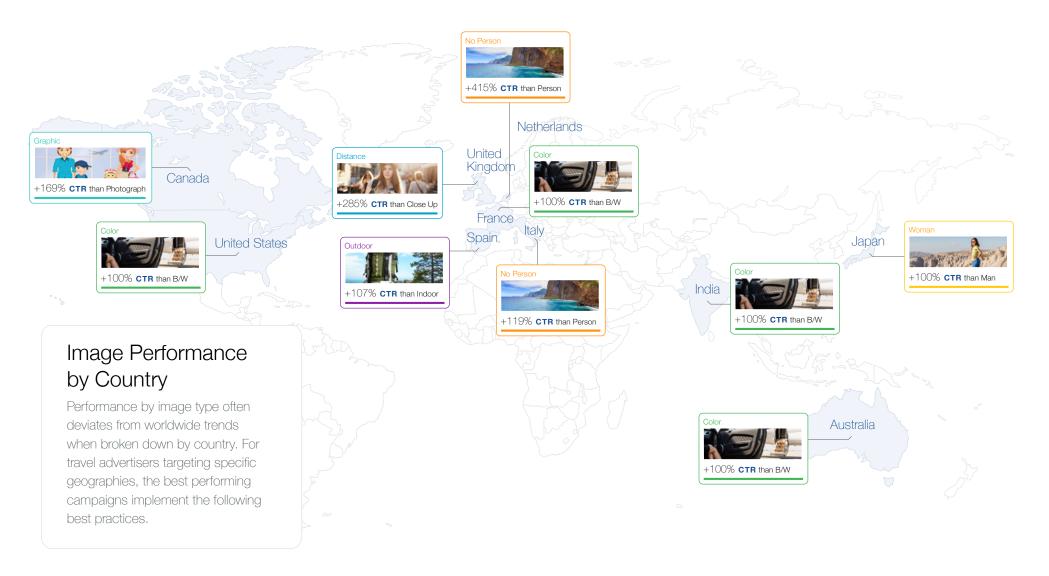
# Image Performance by Engagement, Worldwide

The performance of a discovery campaign, indicated here by consumer engagement, or CTR, often hinges on the images a travel advertiser chooses for his or her creatives. Based on data from Taboola Trends, here are the types of images that receive the highest CTR.



\*Data from Taboola Trends (trends.taboola.com)

# Country-Specific Trends: Image Performance by Country



<sup>\*</sup>Data from Taboola Trends (trends.taboola.com)

# CAMPAIGN INSIGHTS Worldwide Trends: Top Travel Keyword Performance

# Performance for the World's Top Travel Keywords, Worldwide

Headlines are another extremely important aspect of campaign performance for all native advertisers. The chart indicates performance for the most popular keywords worldwide.

Naturally for this type of content, we're seeing location specific words and especially dynamic keyword insertions in the high opportunity list.

Dynamic keyword insertions are keywords that are automatically replaced with dynamic values (city, region, country, platform and dayofweek). These appear on the list in this form: {Redioncapitalized}.

Jet	(
Private	(
Rates	_
May	F
{REGIONCAPITALIZED}	[
Surprise	(
Hotel	(
You	(
Photos	ŀ
Live	(

Strong Engagement Keywords

(Keywords with high demand)

Strong Competition Keywords
(Keywords with low demand)

Card
Green
Trip
Free
Destinations
Out
Check
One
Find
Get

(Keywords with low supply and high demand)
Malta
Sailing
Load
Seat
Loophole
Babies
Before
Hill
Stations
Thought

**Opportunity Keywords** 

<sup>\*</sup>Data from Taboola Trends (trends.taboola.com)

# Country-Specific Trends: Travel Keyword Opportunity in the Americas

These tables indicate the top ten opportunity keywords for travel brands in the Americas for each country.\*

\*Opportunity keywords are in low supply and high demand.

United States
Load
Seat
Loophole
Class
World
Who
Island
Finally
Pairing
Suites

Canada	
You	
Amazing	
Canada	
Visit	
See	
Wanderlust	
Travel	
Have	
Offer	
You're	

#### CAMPAIGN INSIGHTS

# Country-Specific Trends: Travel Keyword Opportunity in EMEA

These tables indicate the top ten opportunity keywords for travel brands in EMEA for each country.

\*Opportunity keywords are in low supply and high demand.

### United Kingdom

Pool
France
Lines
Berlin
Shouldn't
Say
Phrases
Palms
Sunshine
Waiting

Transo
Тор
Flights
For
Low
{COUNTRYCAPITALIZED}
Ridiculously
Prices
Cities
Suites
World's

France

# Germany

Highways
Roads
Retirement
Cities
Expensive
Tours
Trips
Cruise
Ocean
Liners

### Belgium

Exotic	
Liners	
Tours	
Trips	
Cruise	
Expensive	
Can	
For	
Watch	
After	

### Italy

Have
Recently
Dangerous
Incredible
Countries
Entitled
Travel
Flights
Secret
You're

### Netherlands

Retirement
Drone
Photos
What
The
Destinations
Greatest
Shots
Aerial
You've

### Spain

Secret	
Destinations	
ourist	
Cruise	
or	
<i>í</i> ou	
Safest	
Ridiculously	
OW	
COUNTRYCAPITALIZED}	

22

\*Data from Taboola Trends (trends.taboola.com)

#### CAMPAIGN INSIGHTS

# Country-Specific Trends: Travel Keyword Opportunity in APAC

These tables indicate the top ten opportunity keywords for travel brands in APAC for each country.

\*Opportunity keywords are in low supply and high demand.

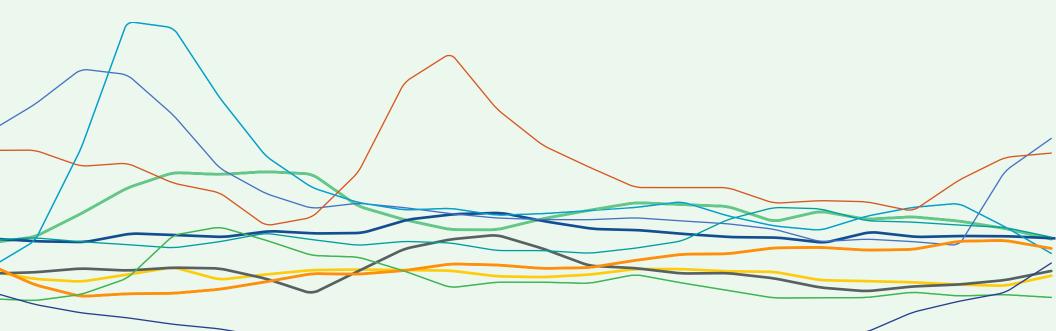
Australia	India	Japan	Thailand
Cottages	Surprisingly	Beautiful	Beautiful
Shocks	Around	World	Dangerous
Five	Pinterest	You	Rushing
Culture	Place	Eligible	You're
Pay	Deal	These	Countries
Registration	Parks	{REGIONCAPITALIZED}	Travel
Journey	America	Beaches	Safest
Centre	For		Crazy
Red	Offers		Going
Wonders	Hotel		Who

#### \*Data from Taboola Trends (trends.taboola.com)



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# USER INSIGHTS Worldwide Trends: Opportunity by Day of Week

Travel Content Supply vs. Demand by Day of Week, Worldwide

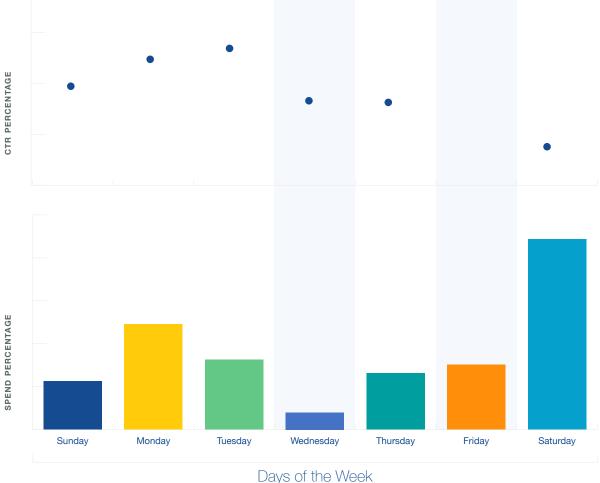
Recent data shows which day of the week the open web has the highest supply of travel content, and which days represent the most consumer demand, indicated by engagement.

Supply of travel content is high on Saturdays, whereas the highest consumer demand occurs on Friday. Wednesdays and Fridays are the days with highest demand and lowest competition.



Consider testing additional campaigns on Wednesdays and Fridays.

# Day of Week Performance for the Travel Vertical Worldwide, 2017 Supply\* of Travel Content vs. Consumer Demand\*\* by Day of Week, 2017 Calibrated CTR %



\*Supply is indicated by the percentage a market spends on travel content. \*\*Consumer demand is indicated by the average calibrated CTR for travel content. Opportunity

# Country-Specific Trends: Opportunity by Day of Week

Travel Content Supply vs. Demand by Day of Week, by Country

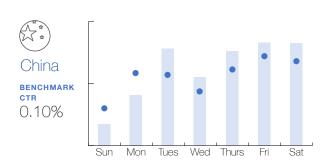
In France, Sundays are the day with the highest potential, as demand for travel content is very high and supply is very low.

Japan stands out, as Fridays and Saturdays are the days with the highest potential—the demand is high and the supply is less competitive.

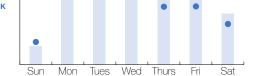
Calibrated CTR %

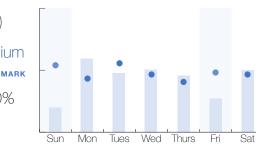
Spend %

Opportunity

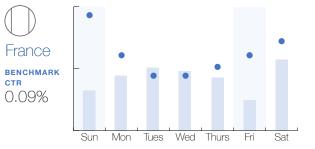


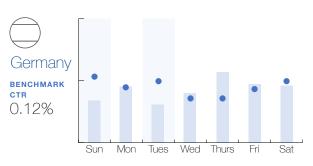






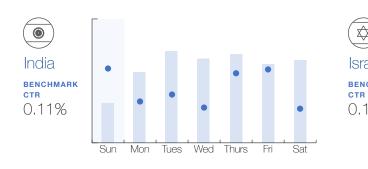


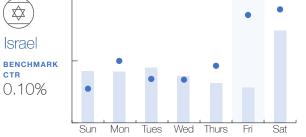


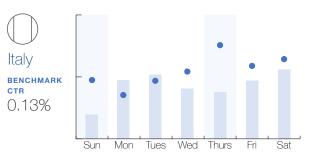


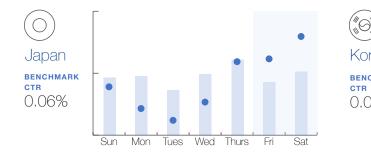


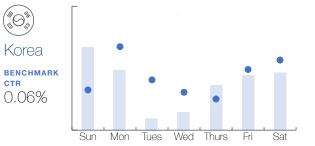
Calibrated CTR % Spend %





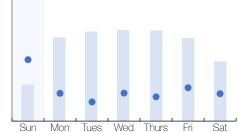


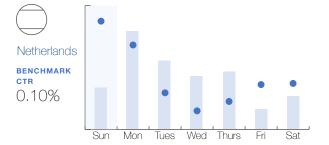


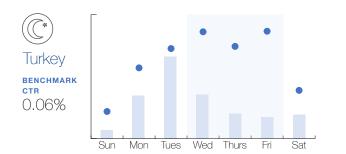


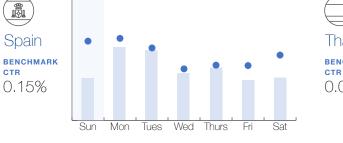


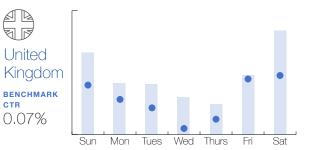
CTR

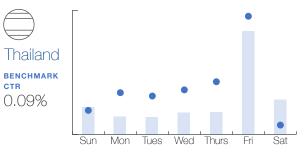


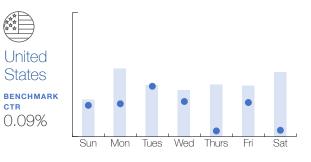












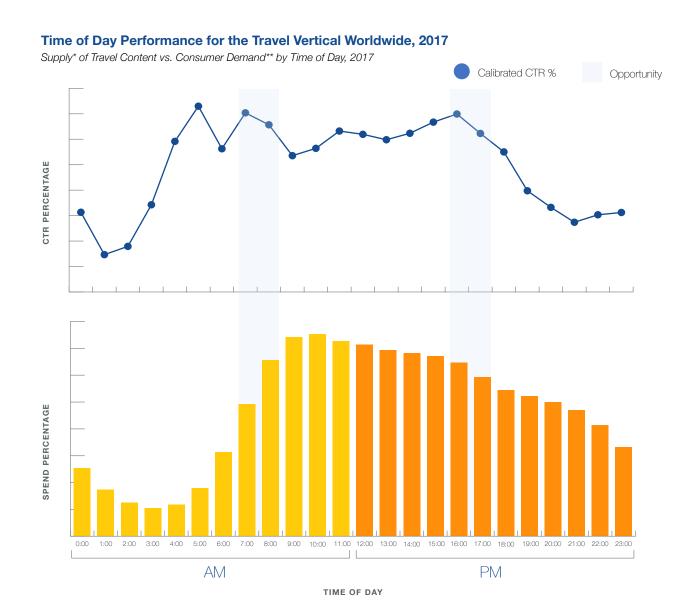
# USER INSIGHTS Worldwide Trends: Opportunity by Time of Day

Travel Content Supply vs. Demand by Time of Day, Worldwide

Recent data shows which time of day the open web has the highest supply of travel content, and which times represent the most consumer demand, indicated by engagement.

Supply of travel content is high between 9AM and 3PM local time, whereas the highest consumer demand starts earlier and ends later, occurring between 7AM and 5PM local time.

Consider testing a new campaign targeting early morning hours and later in the afternoon.



\*Supply is indicated by the percentage a market spends on travel content.

\*\*Consumer demand is indicated by the average calibrated CTR for travel content.

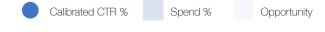
28

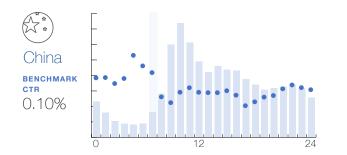
# Country-Specific Trends: Opportunity by Time of Day

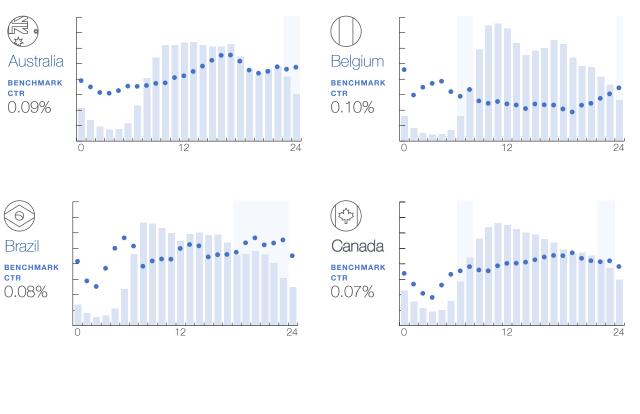
# Travel Content Supply vs. Demand by Time of Day, Worldwide

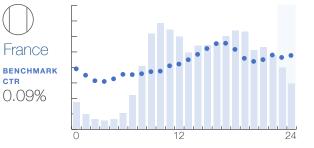
Various countries see more engagement with travel content during work hours, and some before and after work. Either way, take into consideration the gap between the demand for travel content and the supply to identify the times of day with highest potential by region.

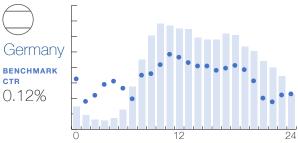
For example, in India, travel content seems to be high in demand and low in supply in the late afternoon, but in the United States, early mornings have the highest in potential.









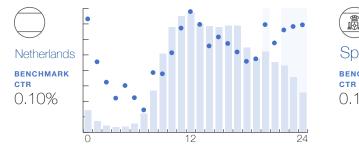


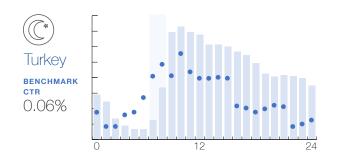
#### Travel Content Supply vs. Demand by Time of Day, Worldwide

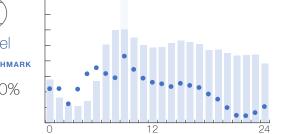
Calibrated CTR % Spend %

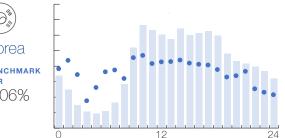
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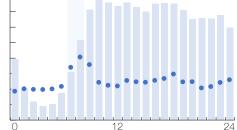


Italy

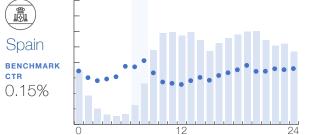
CTR

BENCHMARK

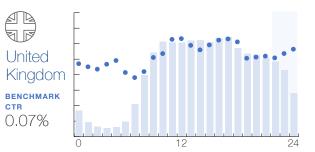
0.13%



12

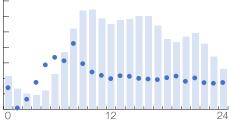


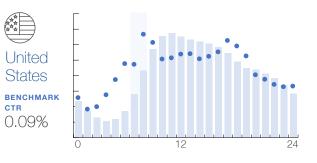
**B** 





CTR





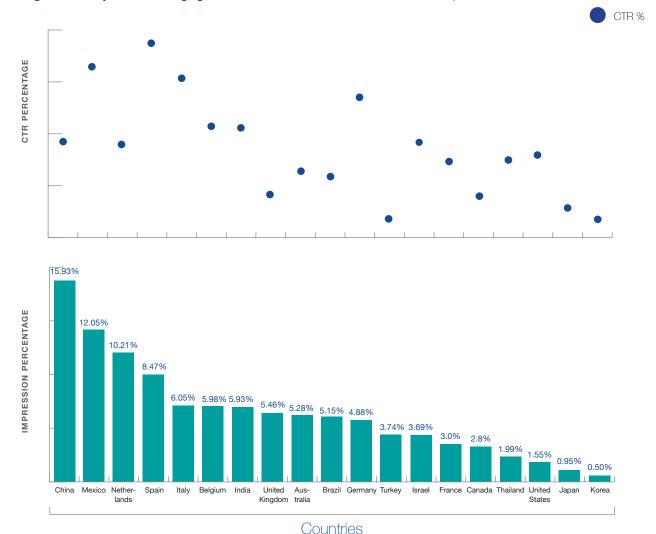
#### USER INSIGHTS

# Country-Specific Trends: Digital Touchpoints vs. Engagement by Country

# Travel Content Impressions vs. CTR, by Country

China deviates from the patterns we see worldwide, as users from China are being exposed to the most travel content.

Mexico, the Netherlands and Spain are next in line in regards to being exposed to travel content.

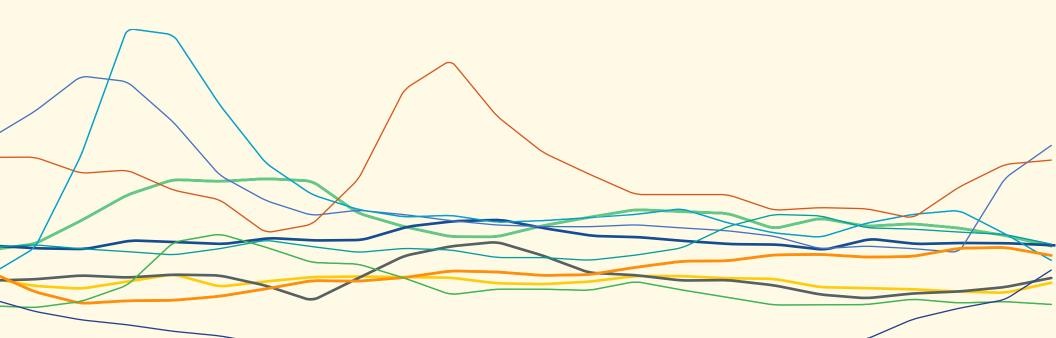


Digital Touchpoints vs Engagement for the Travel Vertical Worldwide, 2017



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