

YAHOO!

ADVERTISING

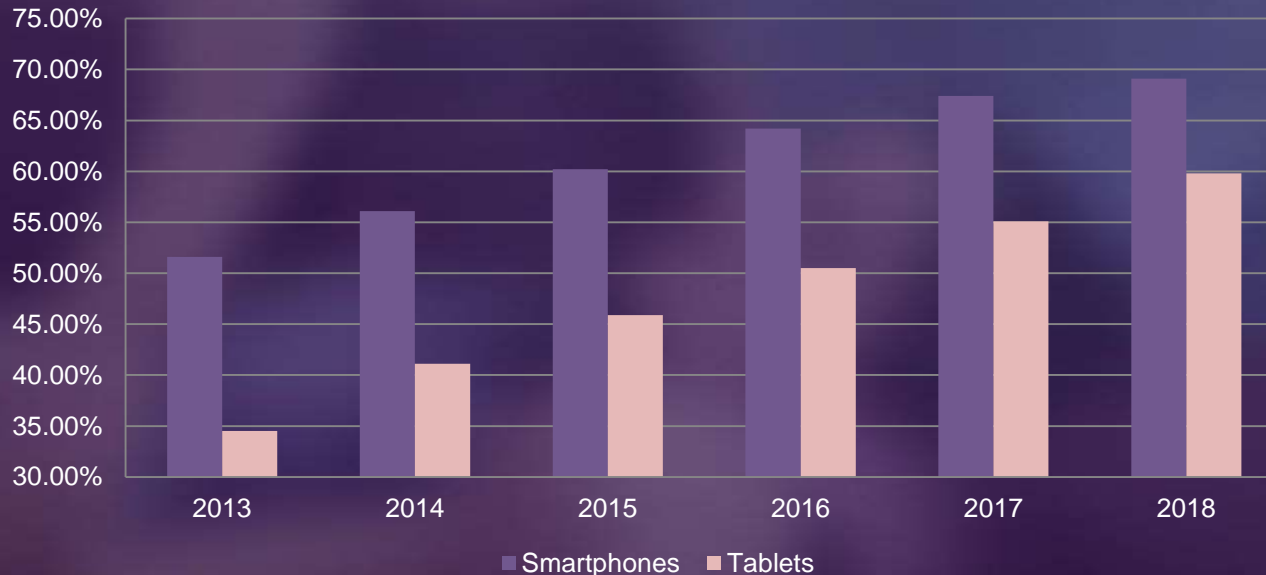
Mobile and Travel

Andy Jones – November 4th 2014



The Year of Mobile (finally)

% of UK Population

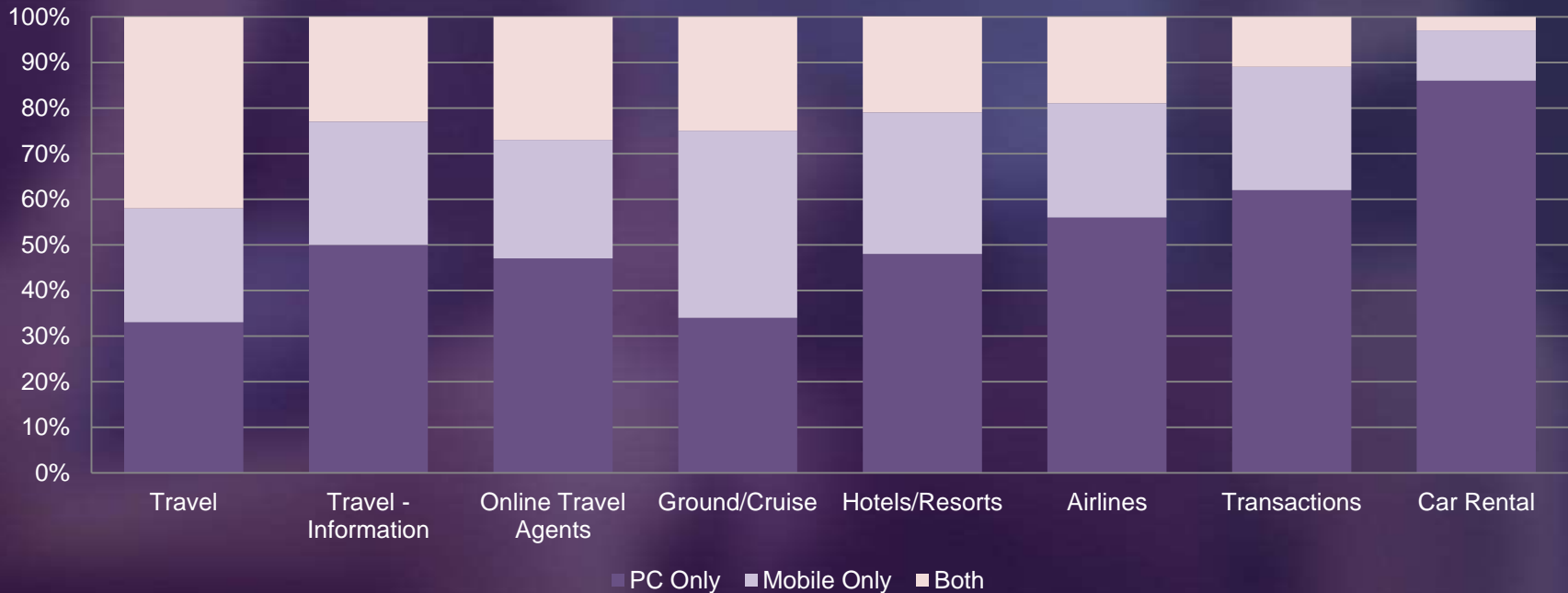


Penetration of most digital technologies is high in the UK.

Smartphone and tablet usage, especially, will climb rapidly in 2014 and 2015

Two-thirds of visitors access UK travel content via mobile

Share of UK Site Visitors



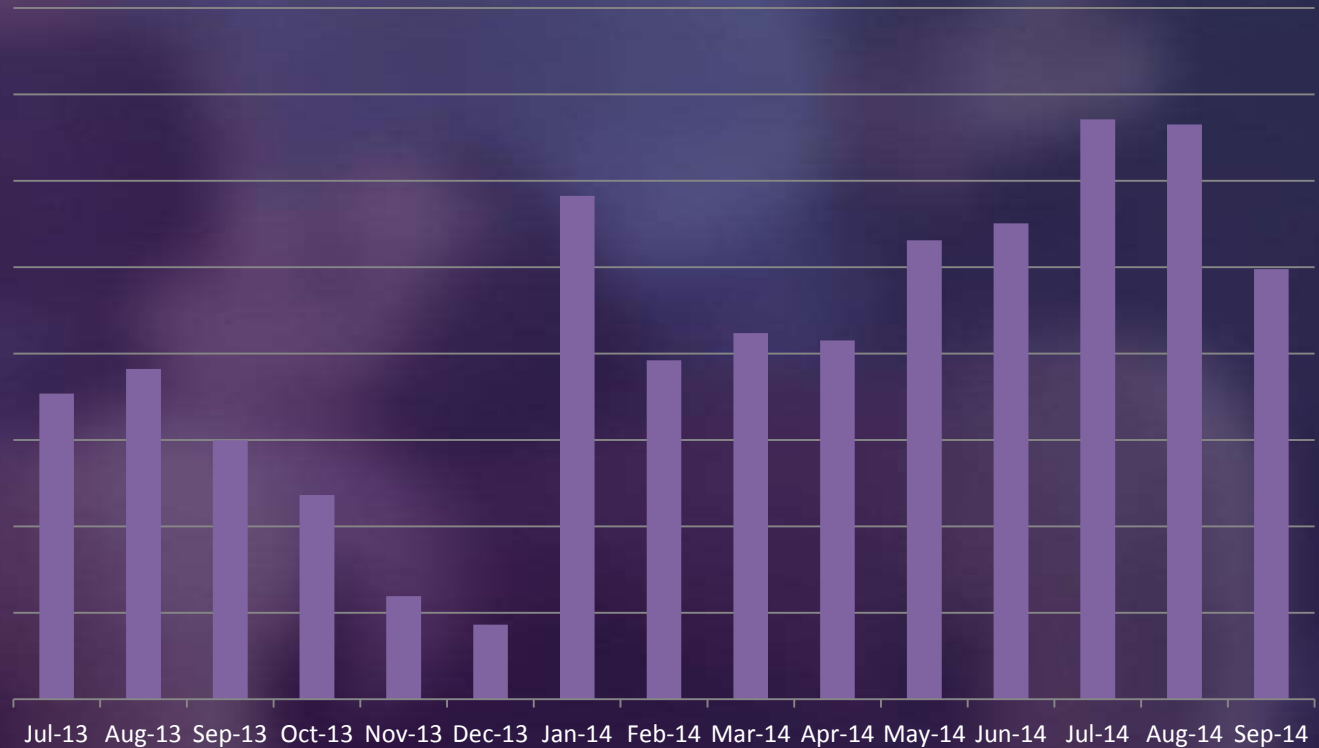
Source: Expedia Media Solutions – comScore multi-platform
UK January 2014

Travel growth on the Yahoo Bing Network

Smartphone's and tablets have been responsible for the growth across Travel throughout 2014, with both devices combined driving 33% of clicks for the vertical in September.

Smartphone clicks for Q3 YoY increased by 127.5%, whilst Tablet clicks grew by 77%.

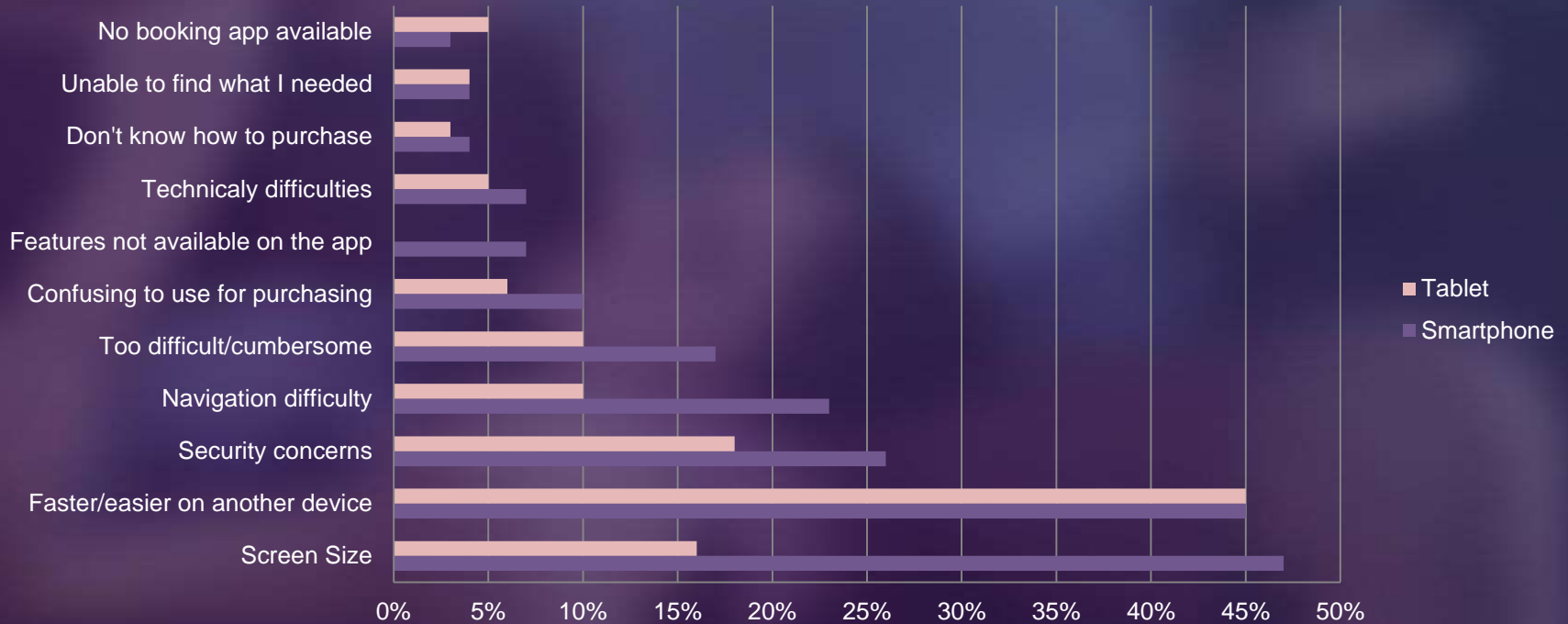
UK Travel Clicks



Source: Yahoo internal data – October 2014

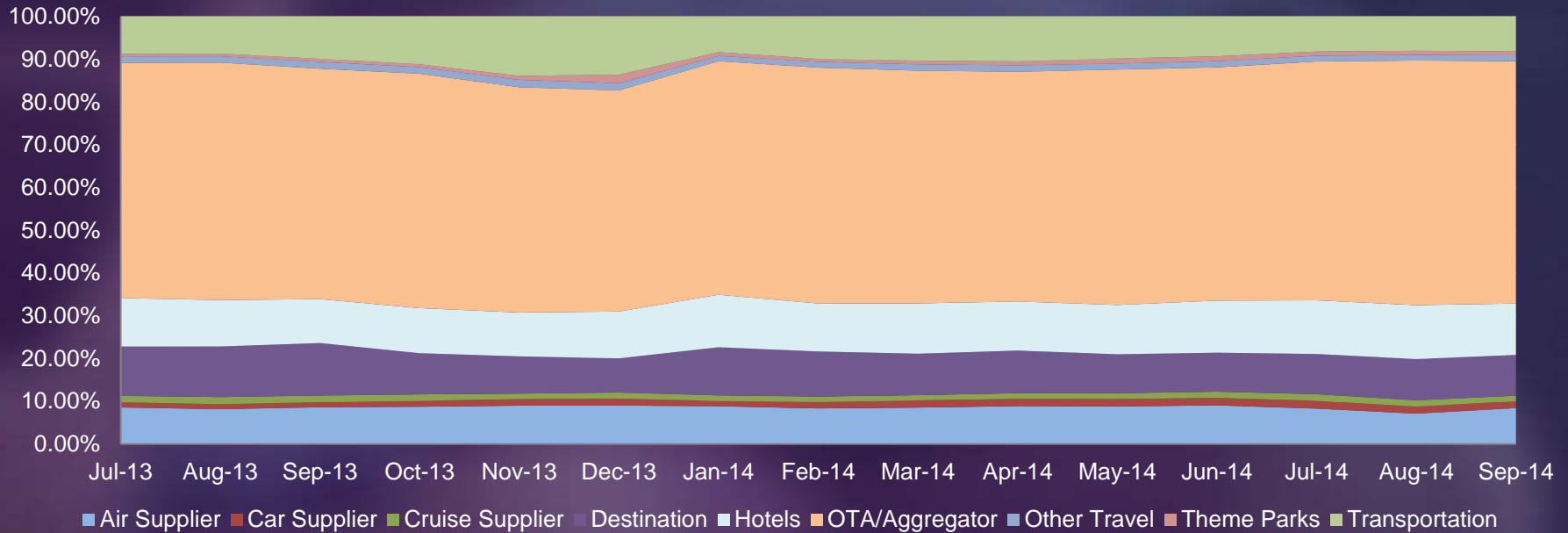
Mobile challenges

Booking Barriers



OTA/Aggregator Dominance

Breakdown of Travel Vertical

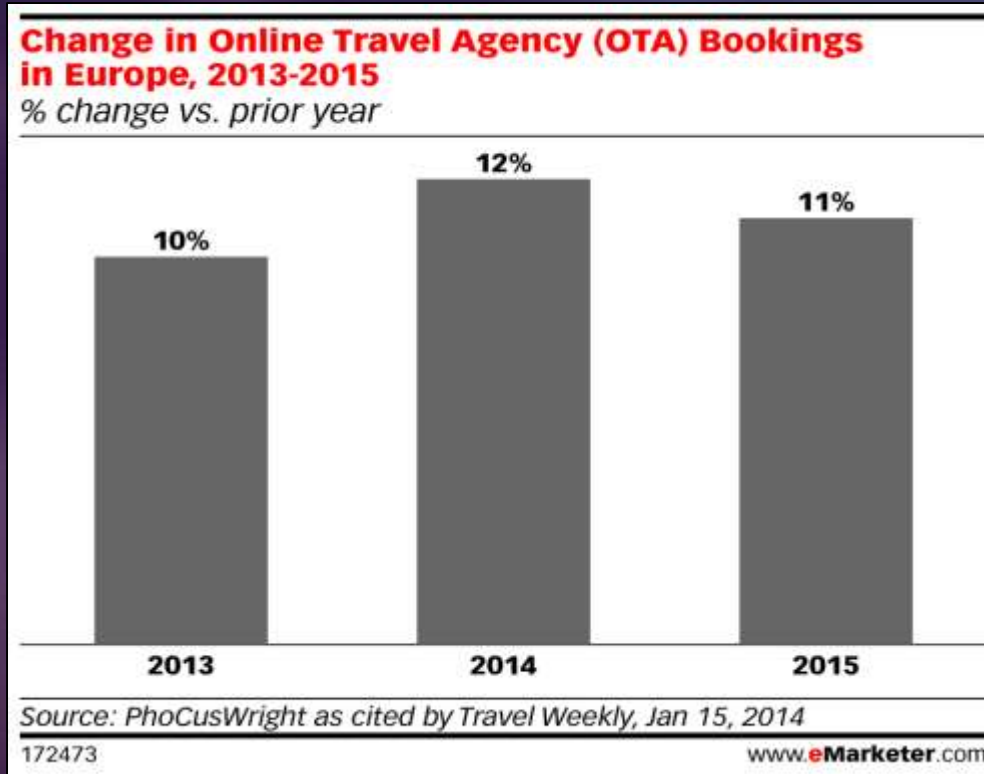


OTAs and Aggregators continue to dominate the Travel vertical, being responsible for around 55% of total clicks.

Additional tactics (besides PPC) are needed to increase share of voice.

Source: Yahoo internal data – October 2014

OTA/Aggregator Dominance



OTA bookings in Europe will also continue growing by double digits through 2015.

By comparison, overall European travel bookings are forecast to grow by just 3.6% and 3.8% during the same two-year period.

What is native?

na-tive ad-ver-tis-ing

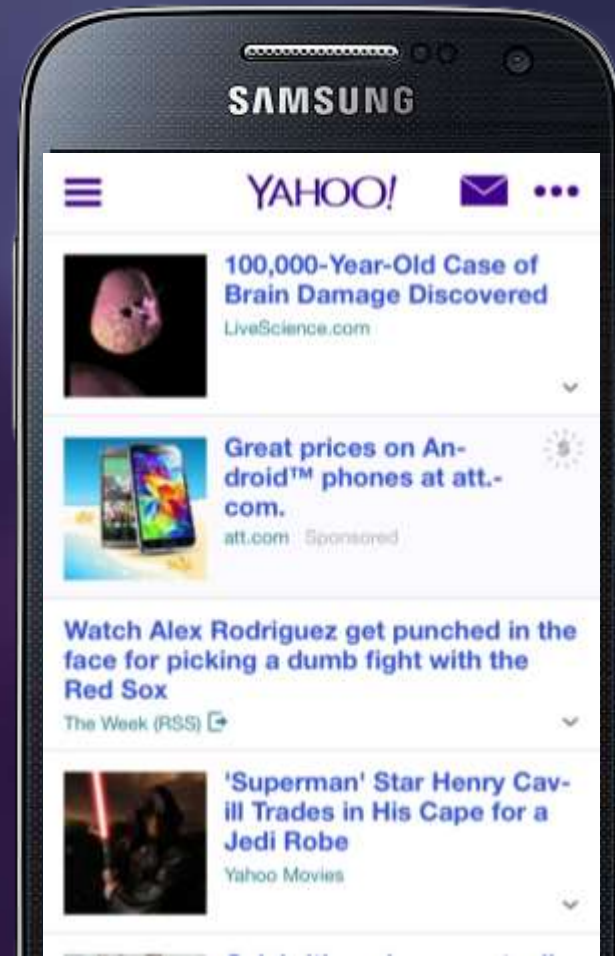
n. A form of paid media where the ad experience follows the natural form and function of the user experience in which it is placed.

FORM

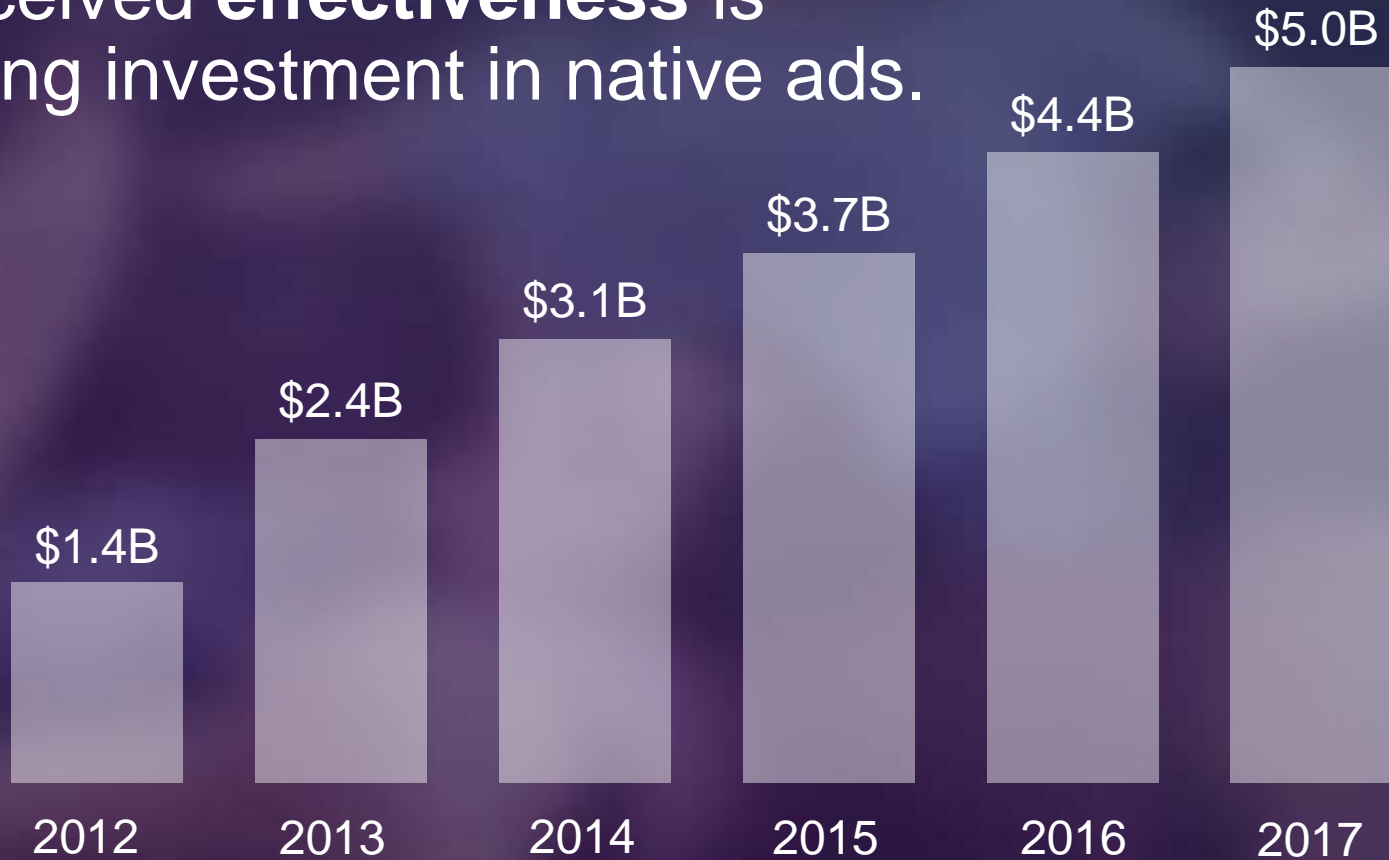
Native ads match the visual design of the experience they live within, and look & feel like natural content.

FUNCTION

Native ads behave consistently with the native user experience.



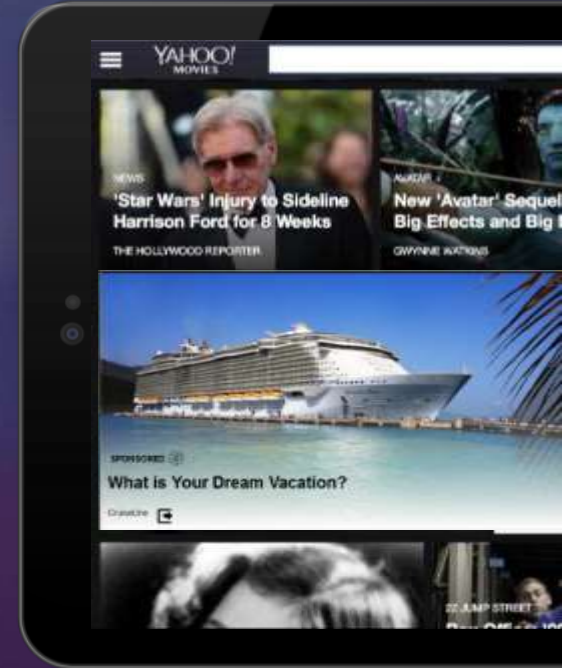
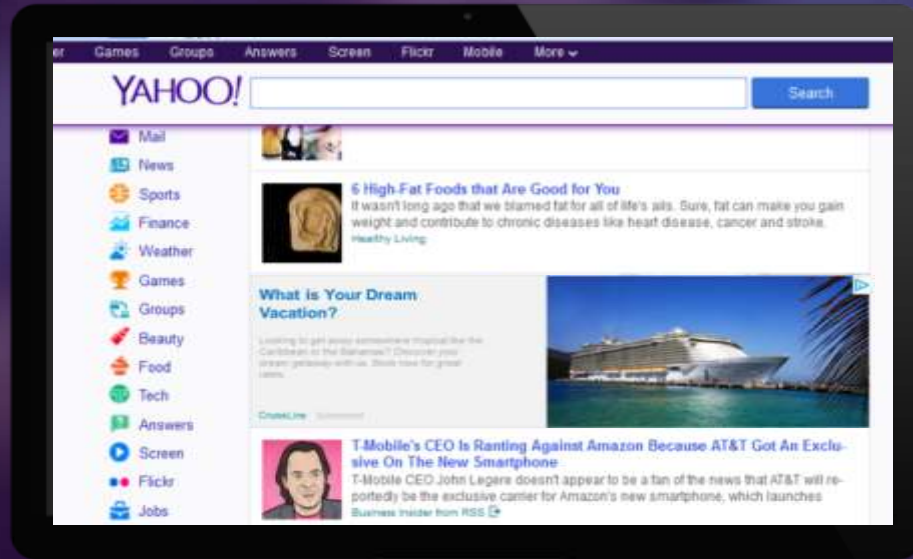
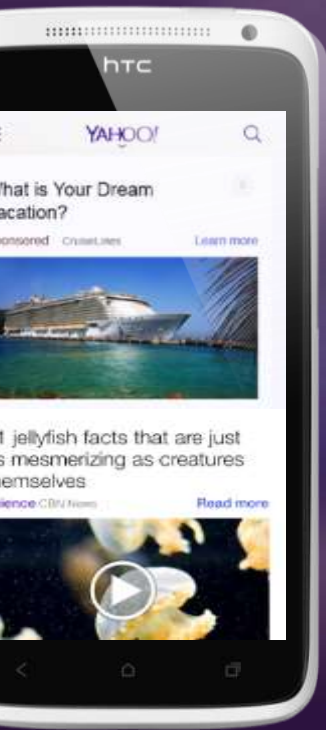
Perceived **effectiveness** is fueling investment in native ads.



Source: eMarketer, March 2014

Yahoo Gemini Native Ads






A single set of creative assets will dynamically assemble to create native ad experiences that integrate into Yahoo's content.



NEW! In Stream Case Studies: Travel Vertical

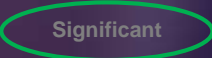
% Lifts Among Overall | Travel Brand

Every metric for the Travel brand increased with ad exposure, especially to the stream ad alone and to search and stream combined. The search ad saw a significant lift in Unaided Awareness

Travel Brand Metrics (Among Total)	Mobile Search	Mobile Content Stream	Mobile Search+ Stream
	Overall	Overall	Overall
 Top of Mind First travel brand that comes to mind after exposure	236%	114%	279%
 Total Unaided Sum of 1 st travel brand that comes to mind and any other mentions of the brand	80%	80%	192%
 Purchase Intent T2B How likely to purchase a trip with that travel brand	7%	16%	28%
 Recommend T2B How likely to recommend that travel Brand to others	4%	33%	27%
 Favorability T2B How much they like the brand	10%	33%	31%

Source: Yahoo/Ipsos Gemini Mobile AdFx Study, May 2014

Circle indicates statistical difference at 90% level of confidence



Future Ad Formats – App Installs

When advertising appears seamlessly and naturally, it creates a more enjoyable experience for users, increases engagement, and improves performance for advertisers. That's why you'll see us adding new native ad units moving forward.

Appear Front and Center

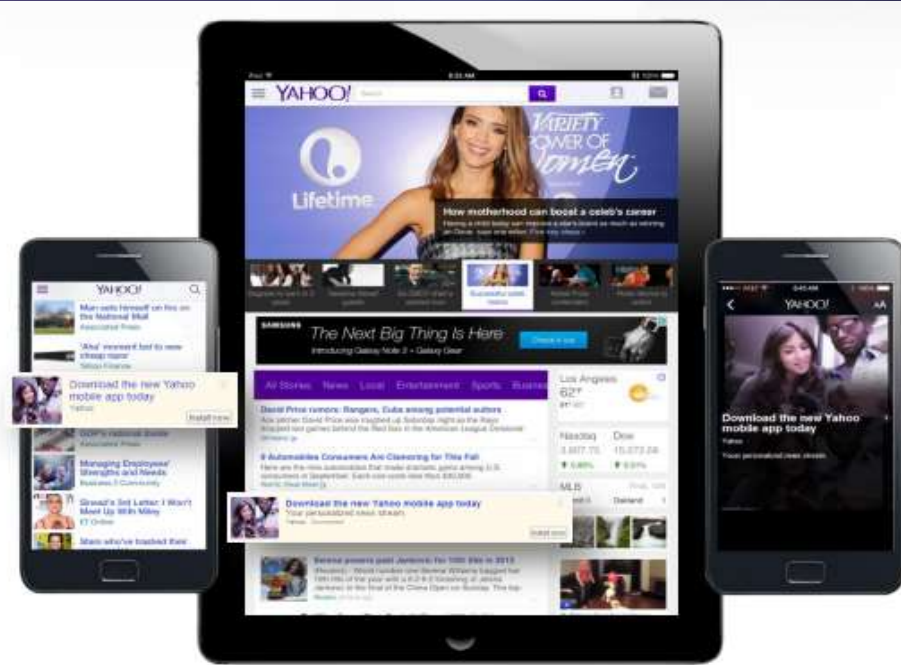
- Promote your mobile apps to millions
- Encourage instant app installation
- Naturally blend within mobile experiences

Easy Setup

- Manage campaigns with our self-serve tool
- Use our interactive reporting tools
- Track your app installs

Priced for Performance

- Set a budget
- Receive impressions for free
- Pay only for clicks or for app installs



Yahoo Weather

Yahoo Weather App:
winner of the 2013 Apple
Design award, and more
recently a 2014 Lovie
award in the Mobile &
Applications category



Yahoo Travel - Inspiration & Discovery

ASPIRATIONAL, ACCESSIBLE, & INSPIRATIONAL - FOR TRAVEL LOVERS EVERYWHERE



FOR CONCEPT ONLY.
SUBJECT TO CHANGE PER
YAHOO SPECIFICATIONS.

Original Content

From pedigreed travel editors

Best-in-Class Partners

including Travel+Leisure, Fodors, & more

Elegant Design Interface

with visually immersive content across screens

Native Advertising

integrates seamlessly with original content

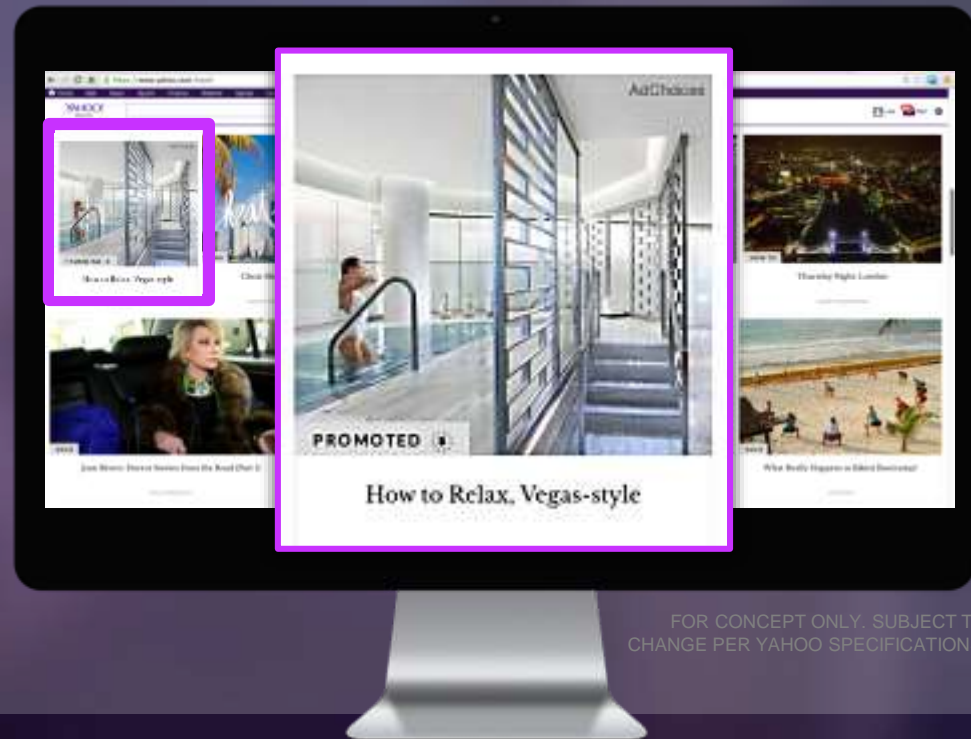
Innovative Advertising Canvas

Content Marketing Module – an organic, shareable experience

CONTENT MARKETING IS DISPLAYED NATIVE TO OTHER CONTENT AROUND IT

Content marketing pieces will offer a wide variety of engagement levers

Playable Native
Ad Content in-line



FOR CONCEPT ONLY. SUBJECT TO CHANGE PER YAHOO! SPECIFICATIONS.

Key Takeaways

1

- Focus on blockers to conversions on Mobile

2

- Use marketing tactics that compliment Search

3

- Engage users with inspiring content and rich visuals

4

- Push app downloads where possible