Key findings

Auto searches saw an impressive bounce back throughout June to September 2020.

Generic queries saw recovery earlier with a +23% year over year (YoY) growth in June. Since July, “Makes” (Car Manufacturer related queries) show the biggest YoY evolutions compared to reseller and generic queries.

In Europe, we saw a high volatility in March, April and May in the ranking of the 10 most searched Makes (brands). “Premium” brands showed resilience at crisis peak since May.

Alternative Fuel Vehicle (AFV) has a stronger recovery (YoY growth) than “Fossil” fuel vehicles since June 2020.

Actions

The COVID-19 crisis brought quick search changes and volatility. Using automated solutions like Dynamic Search Ad (DSA) and Responsive Search Ads (RSA) combined with Microsoft Advertising Automated Bidding Strategies on top of your bidding tool enables you to adapt with agility.

The quick changes in top searched brands show that people change their minds and consider various brands. So increasing the awareness of your brands and models using generic keywords is a good strategy.

Alternative Fuel Vehicle (AFV) searches grew fast in June and is supported by some government incentives, take advantage of this by adapting your campaigns settings.
Automotive is driving growth again
EMEA auto searches grew + 5% year over year (YoY) in September

Source: Microsoft Internal Data, July 2018 - Sep 2020, Market(s) : DE, FR, ES, IT, NL and UK
25% here is YoY. On the other hand 22 in previous slide is index to Jan-June 2020 average.
Positive momentum is seen in EMEA auto searches since June 2020

Monthly searches indexed to Jan - Sep average

Source: Microsoft Internal Data, July 2018- Sep 2020, Market(s) : DE, FR, ES, IT, NL, UK
Make / Generic / Reseller

- Make: queries containing “make” or “make+model”, with or without generic terms
- Generic: queries not containing “make” or “make+model”
Generic queries saw growth earlier

Queries with reseller terms show better resilience during crisis peak in April

Source: Microsoft Internal Data, July 2018–Sep 2020, Market(s): DE, FR, ES, IT, NL, UK
Generic queries with the highest volume evolution (September YoY)

Ranked by September volume YoY

<table>
<thead>
<tr>
<th>DE Queries</th>
<th>Sep YoY evol</th>
</tr>
</thead>
<tbody>
<tr>
<td>e auto kaufen</td>
<td>135%</td>
</tr>
<tr>
<td>gebrauchtes auto kaufen</td>
<td>135%</td>
</tr>
<tr>
<td>pkw kaufen</td>
<td>108%</td>
</tr>
<tr>
<td>kleinwagen kaufen</td>
<td>72%</td>
</tr>
<tr>
<td>auto gebraucht kaufen</td>
<td>43%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ES Queries</th>
<th>Sep YoY evol</th>
</tr>
</thead>
<tbody>
<tr>
<td>coches ocasión</td>
<td>284%</td>
</tr>
<tr>
<td>venta de coches de segunda mano</td>
<td>100%</td>
</tr>
<tr>
<td>coches ocasión</td>
<td>85%</td>
</tr>
<tr>
<td>coches de ocasión</td>
<td>57%</td>
</tr>
<tr>
<td>coches clasicos</td>
<td>57%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FR Queries</th>
<th>Sep YoY evol</th>
</tr>
</thead>
<tbody>
<tr>
<td>automobile fr</td>
<td>542%</td>
</tr>
<tr>
<td>voiture suv</td>
<td>149%</td>
</tr>
<tr>
<td>suv hybride</td>
<td>123%</td>
</tr>
<tr>
<td>mandataires auto</td>
<td>81%</td>
</tr>
<tr>
<td>automobile</td>
<td>77%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UK Queries</th>
<th>Sep YoY evol</th>
</tr>
</thead>
<tbody>
<tr>
<td>car sales uk</td>
<td>450%</td>
</tr>
<tr>
<td>vans for sale uk</td>
<td>364%</td>
</tr>
<tr>
<td>all electric cars</td>
<td>288%</td>
</tr>
<tr>
<td>electric cars 2020</td>
<td>274%</td>
</tr>
<tr>
<td>car for sale uk</td>
<td>211%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IT Queries</th>
<th>Sep YoY evol</th>
</tr>
</thead>
<tbody>
<tr>
<td>automobile</td>
<td>2361%</td>
</tr>
<tr>
<td>auto ibride 2020</td>
<td>182%</td>
</tr>
<tr>
<td>revisione auto</td>
<td>124%</td>
</tr>
<tr>
<td>listino auto nuove</td>
<td>120%</td>
</tr>
<tr>
<td>noleggio auto palermo</td>
<td>88%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NL Queries</th>
<th>Sep YoY evol</th>
</tr>
</thead>
<tbody>
<tr>
<td>hybride auto's</td>
<td>164%</td>
</tr>
<tr>
<td>auto importeren uit duitsland</td>
<td>46%</td>
</tr>
<tr>
<td>tweedehands auto</td>
<td>31%</td>
</tr>
<tr>
<td>auto occasions</td>
<td>23%</td>
</tr>
<tr>
<td>electrische auto's 2020</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: Microsoft Internal Data, July 2018- Sep 2020, Market(s) : DE, FR, ES, IT, NL, UK
Makes: Volatility and Resilience

Which are the most searched brands?
This section show the top 10 ranking per country
Colors are tied to a rank not to a Make over the slides

⚠️ Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification
EMEA: A high volatility in brand popularity during lockdown

Source: Microsoft Internal Data, July 2018 - Sep 2020 - Market(s): DE, FR, ES, IT, NL and UK

For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make + Model / Make + Generic / Make + Model + Generic.

Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
EMEA saw a resilience of premium brands in April, and bigger index for other brands in June

Volatility of searches against January-September period seems to be a linked with the car manufacturer category

![Monthly searches index over Jan-Sep average](chart)

Source: Microsoft Internal Data, July 2018 - Sep 2020 - Market(s) : DE, FR, ES, IT, NL and UK.

For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make+Model / Make + Generic / Make + Model + Generic.

Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
DE: The Make ranks remains very stable over time compared to other markets

Source: Microsoft Internal Data, July 2018 - Sep 2020

For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make+Model / Make + Generic / Make + Model + Generic. Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
ES: A bigger volatility compared to other markets

For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make+Model / Make + Generic / Make + Model + Generic. Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.

Source: Microsoft Internal Data, July 2018- Sep 2020
FR: A high volatility in rank in March, April and May

“Premium” brands grew in March and April, showing higher resilience during crisis

Source: Microsoft Internal Data, July 2018 - Sep 2020

For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make+Model / Make + Generic / Make + Model + Generic.

Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
UK: Search ranks show more stability over time than other markets

Source: Microsoft Internal Data, July 2018 - Sep 2020
For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make+Model / Make + Generic / Make + Model + Generic. Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
IT: A higher volatility compared to other markets

Source: Microsoft Internal Data, July 2018 - Sep 2020

Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
NL: A high volatility compared to other markets

For each Make, the top 5 queries were selected to assess volume and measure rank. Queries in the scope are: Make / Make+Model / Make + Generic / Make + Model + Generic.

Source: Microsoft Internal Data, July 2018 - Sep 2020

Ranks may slightly change compared to the analysis released in July, this is due to continual enhancement of queries classification.
Alternative fuel vehicle (AFV) vs. “Fossil” fuel vehicles

A.F.V = Alternative fuel vehicle (Electric, Hybrid, GPL)
“Fossil” = not AFV by design, does not have electric/hybrid ability, then considered a “fossil” fuel vehicle
At the EMEA level, AFV has seen a stronger recovery (YoY growth) than fossil fuel searches since June.
**AFV: Queries with highest September YoY volume evolution**

### DE Queries
- fiat panda hybrid
- skoda elektroauto 2020
- fiat 500 hybrid
- toyota yaris hybrid 2020
- ford puma hybrid

### ES Queries
- renault zoe 2020
- bmw i8
- toyota rav4 hybrid
- kia niro
- tesla model s

### FR Queries
- toyota corolla hybride 2020
- peugeot 3008 hybride 2020
- toyota yaris hybride 2020
- peugeot hybride 2020
- toyota hybride 2020

### UK Queries
- peugeot 2008 electric
- ford puma hybrid
- new toyota yaris hybrid
- audi electric cars 2020
- electric car prices

### IT Queries
- fiat panda ibrida prezzo
- fiat 500 ibrida
- fiat panda ibrida
- honda jazz ibrida
- fiat 500 elettrica prezzo

### NL Queries
- polestar 2
- toyota yaris hybride
- volkswagen id3
- mg zs ev
- hybride auto's

Source: Microsoft Internal Data, July 2018 - Sep 2020 - Market(s): DE, FR, IT, NL and UK
To get actionable data, insights and best practices to help make decisions and grow your business, visit aka.ms/MicrosoftAdvertisingInsights
Methodology

Period: July 2018 to September 2020

Markets: queries in Germany (DE), France (FR), Spain (ES), Italy (IT), Netherlands (NL) or United Kingdom (UK)

Device: PC, Mobile, Tablet

Network: Microsoft Advertising Owned & Operated (O&O)

Queries: raw data is made of query key performance indicators (KPIs). The queries list used is made of queries containing at least one of these terms:

- Car Manufacturer Brands (Make) alone, or in combination with Model names
- Car Generic terms
- Reseller Brands

We applied a threshold to keep only queries which had a minimum of 200 clicks during the whole period (total of clicks over July 2018 to Sept 2020)

Brands of Car Manufacturers are called “Make”. Queries containing pure Make / Make+Model / Make+Generic / Make+Model + Generic are flagged as Make.