



Microsoft Advertising Insights
**Search insights in
the Mental
Health category**

Microsoft Advertising. Intelligent connections.



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1 Seasonal patterns



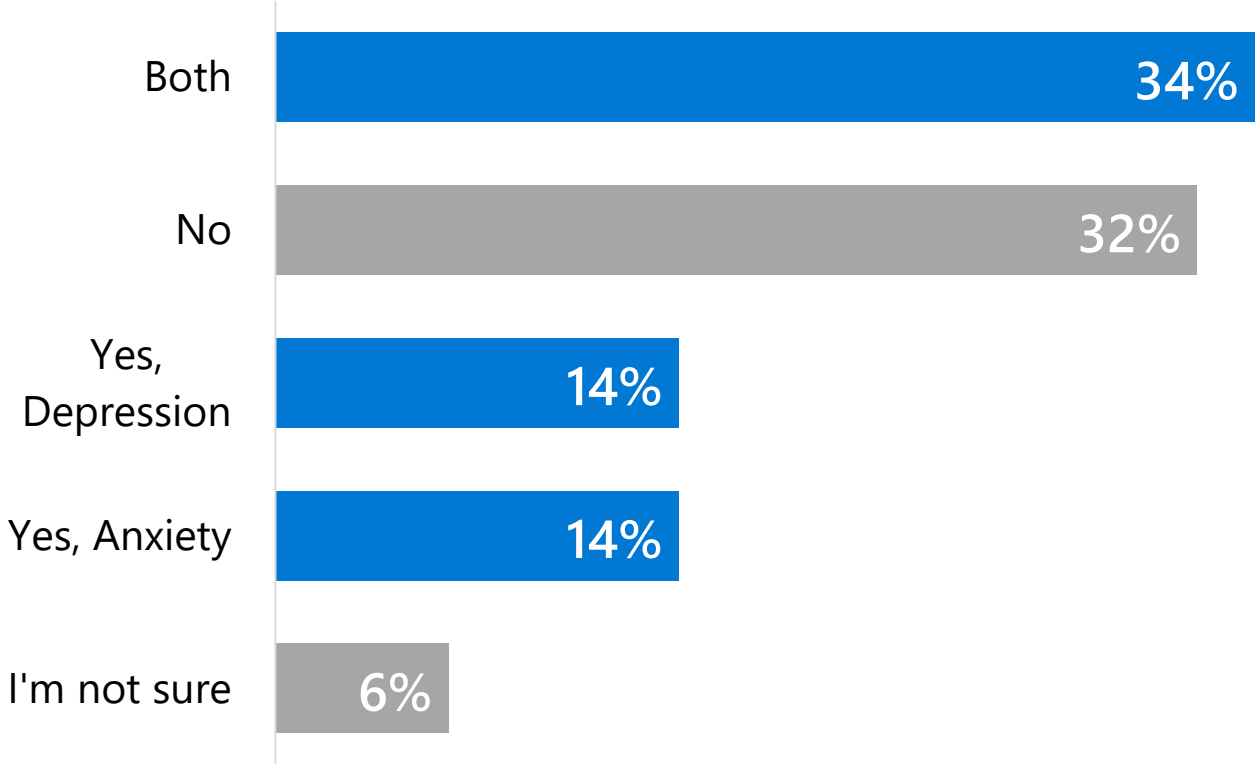
2 Impact of COVID-19 on mental health



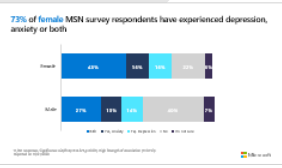
3 Online behavior – depression vs. mental wellness searchers

Seasonal patterns for Mental Health

62% of MSN survey respondents have experienced depression, anxiety or both



There is a strong correlation with gender, with more women having experienced either or both conditions



All respondents in network CividScience in my account
11,968 responses from 12/23/2019 to 08/12/2020 (Margin +/- 1%)
Exported on 10/21/2020



Mental Health covers several conditions, and we see increasing search for all conditions

Depression

-6%

Anxiety

-5%

ADHD

+5%

Schizophrenia

+14%

Year over year (YoY) search results page view (SRPV) growth – 2018 to 2019

Depression

+11%

Anxiety

+14%

ADHD

+12%

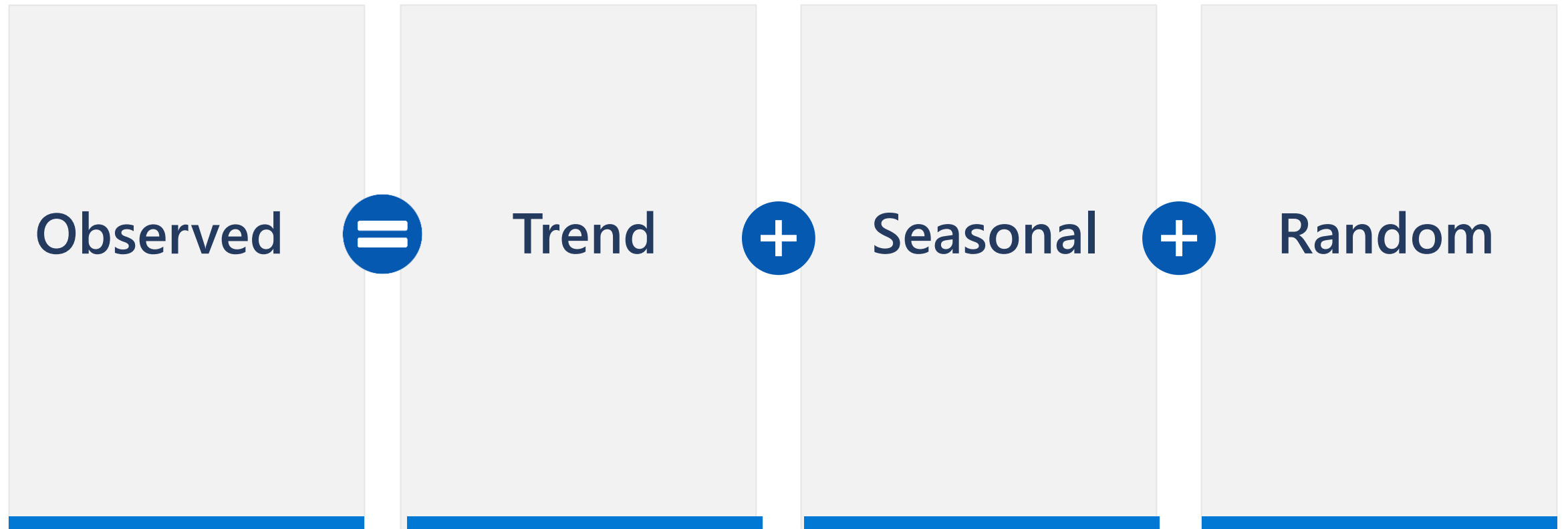
Schizophrenia

+53%

YoY SRPV growth – 2019 to 2020 (Jan-Oct)

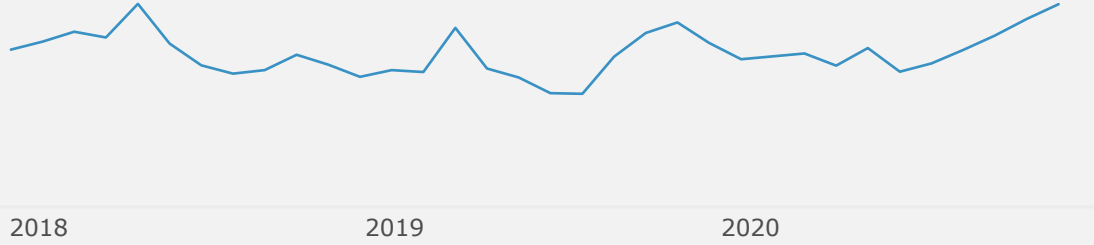
*ADHD = attention deficit hyperactive disorder

However, growth is more than just a single number



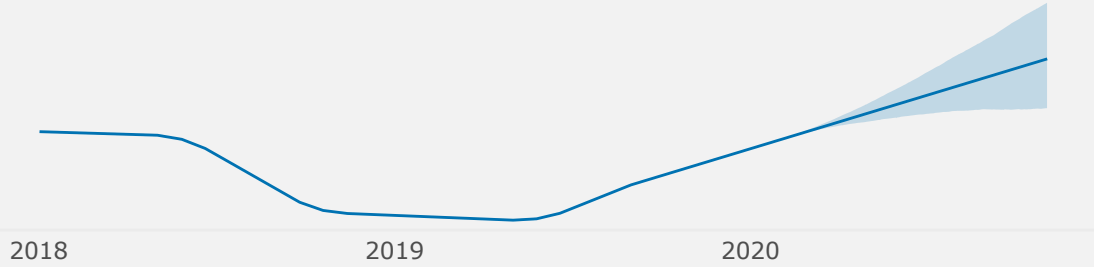
Depression interest has been growing since mid 2019 with clear seasonal trends

Observed

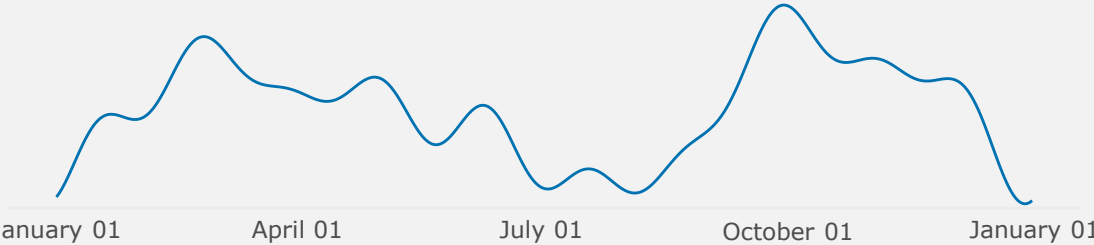


YoY 2020 growth
11%

Trend

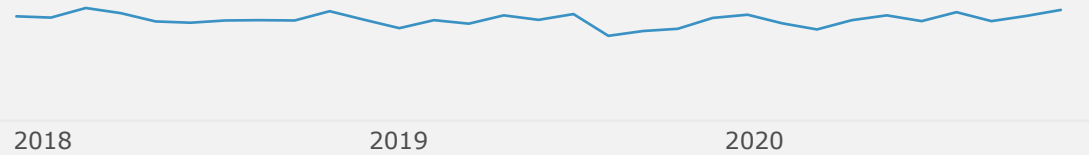


Seasonal



Anxiety searches have increased since mid 2019 and is higher in spring and fall

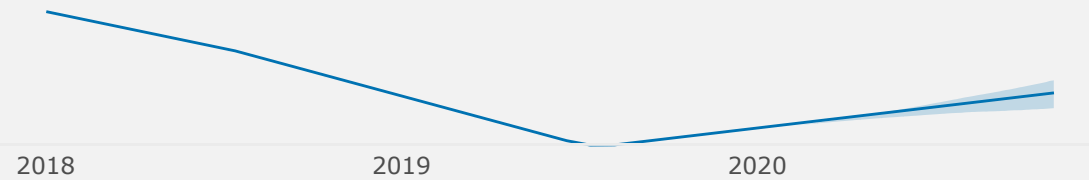
Observed



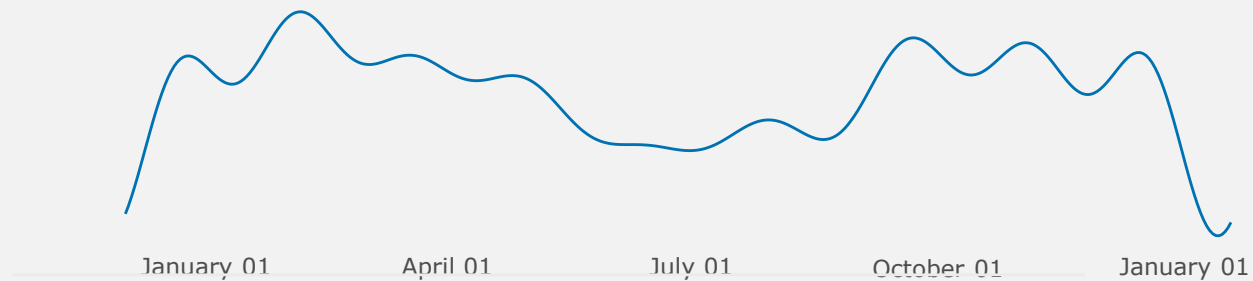
YoY 2020 growth

14%

Trend

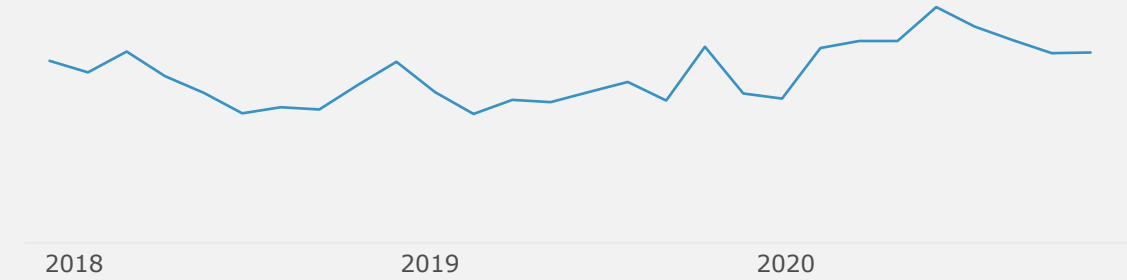


Seasonal



ADHD interest has increased since start of 2019

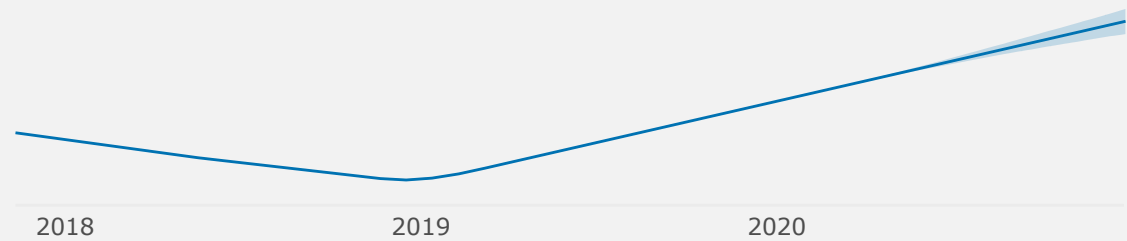
Observed



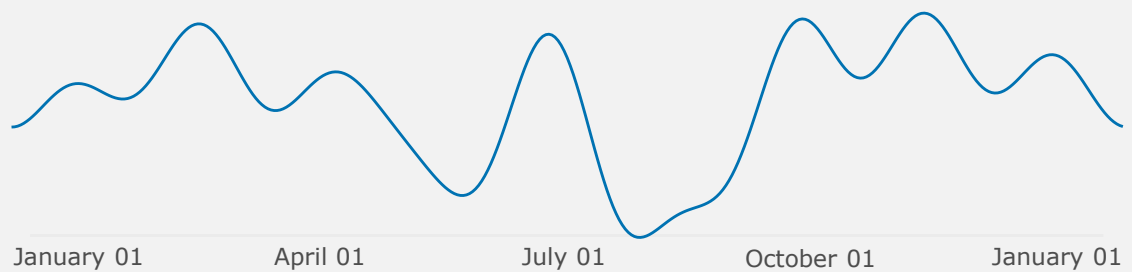
YoY 2020 growth

12%

Trend

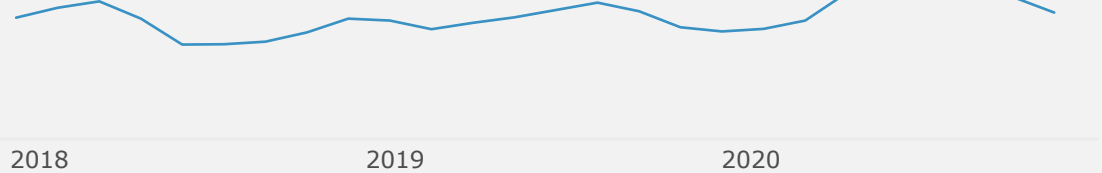


Seasonal



Schizophrenia searches has increased since start of 2019

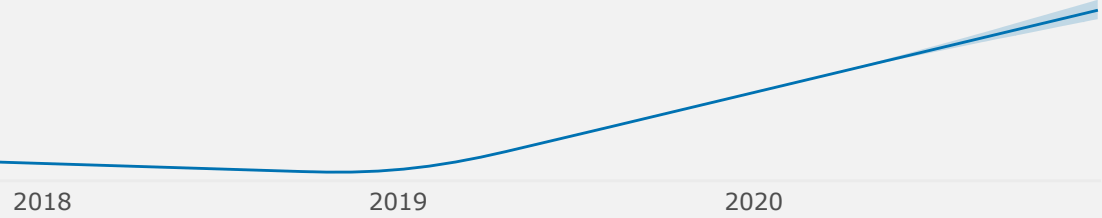
Observed



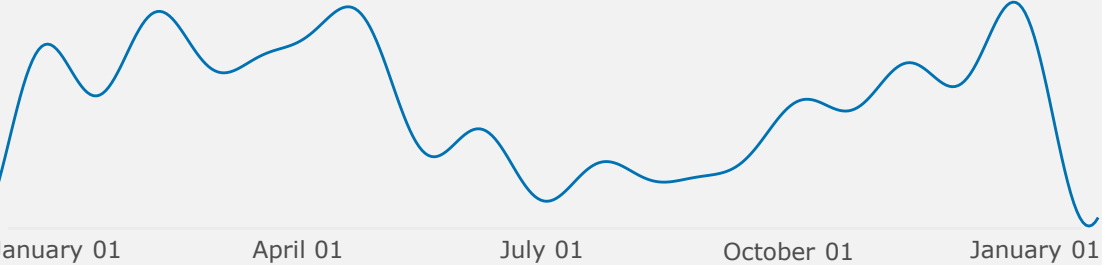
YoY 2020 growth

53%

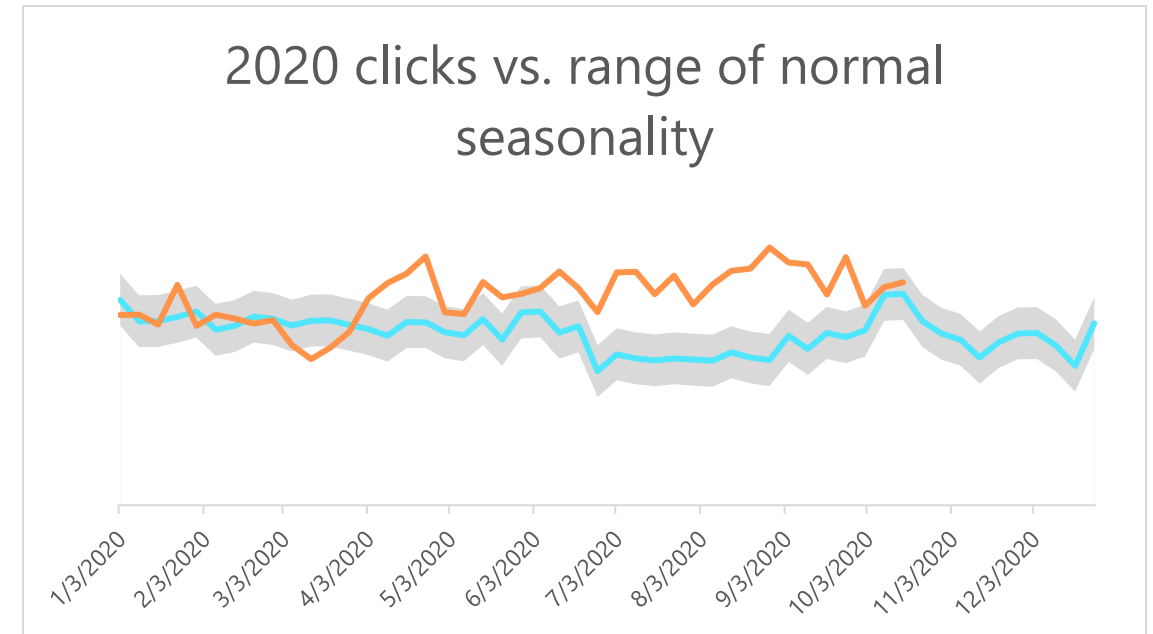
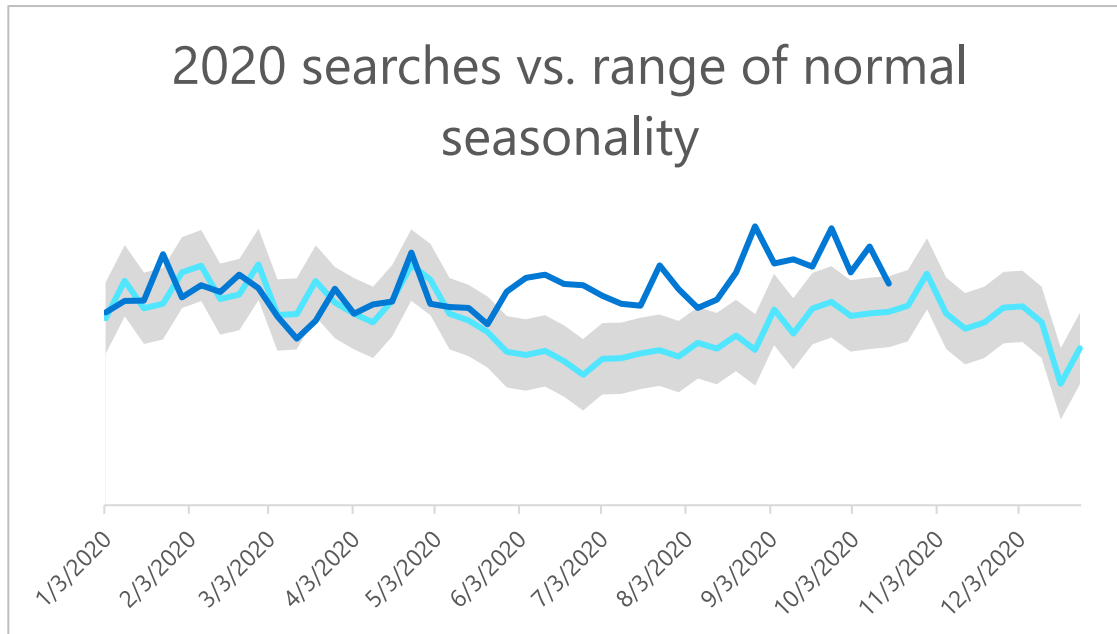
Trend



Seasonal



Mental Health Services are also seeing interest above normal

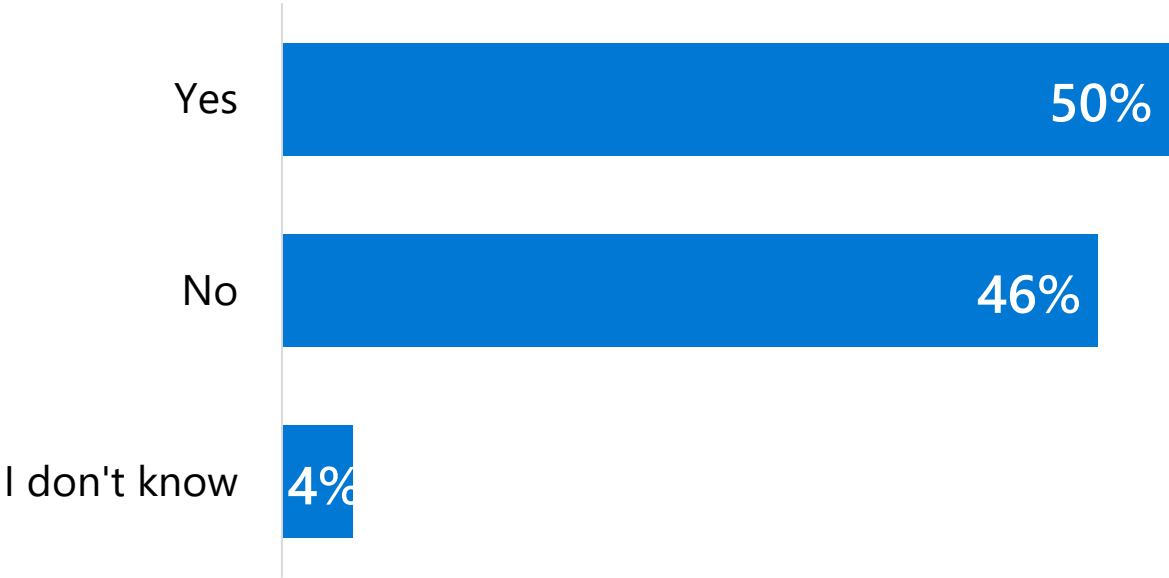


Searches have averaged **20%** above normality

Clicks have averaged **24%** above normality

Over half of MSN survey respondents have or has family that have received mental health treatment

Have you or anyone in your immediate family received mental health treatment?



15,224 responses from 01/24/2019 to 04/10/2020 (Margin +/- 1%)
Exported on 10/21/2020

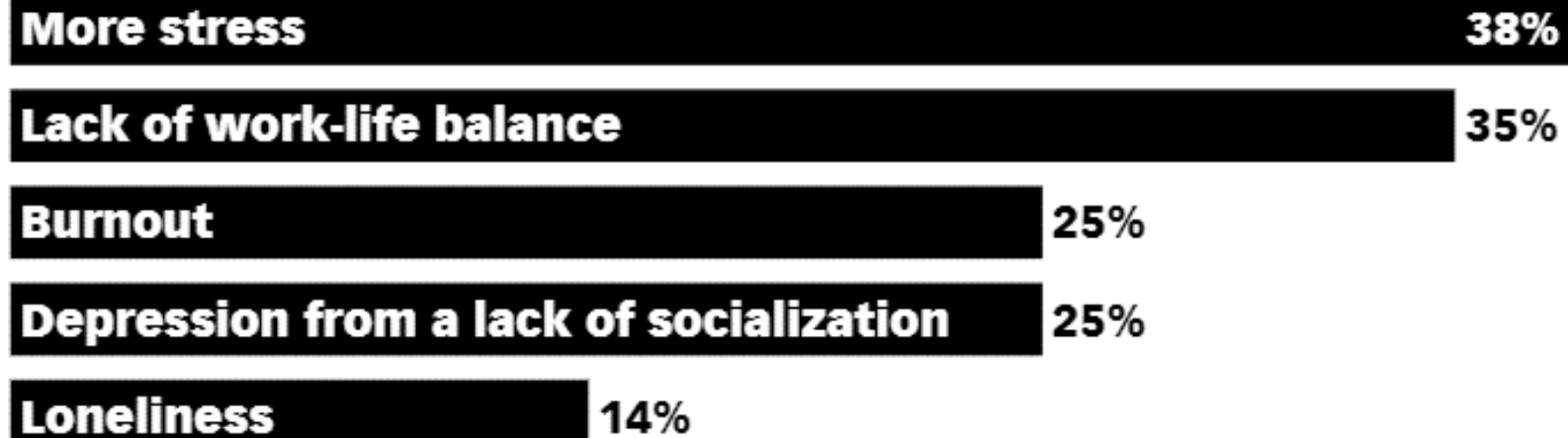


Impact of COVID-19 on Mental Health

“ Before the pandemic, 8.5% of U.S. adults reported being depressed. That number has risen to 27.8% as the country struggles with COVID-19. ”

How the Coronavirus Pandemic Has Negatively Affected the Mental Health of Adults Worldwide, Aug 2020

% of respondents



Source: Oracle and Workplace Intelligence, "AI@Work Study 2020" conducted by Savanta, Oct 7, 2020

258732

www.eMarketer.com

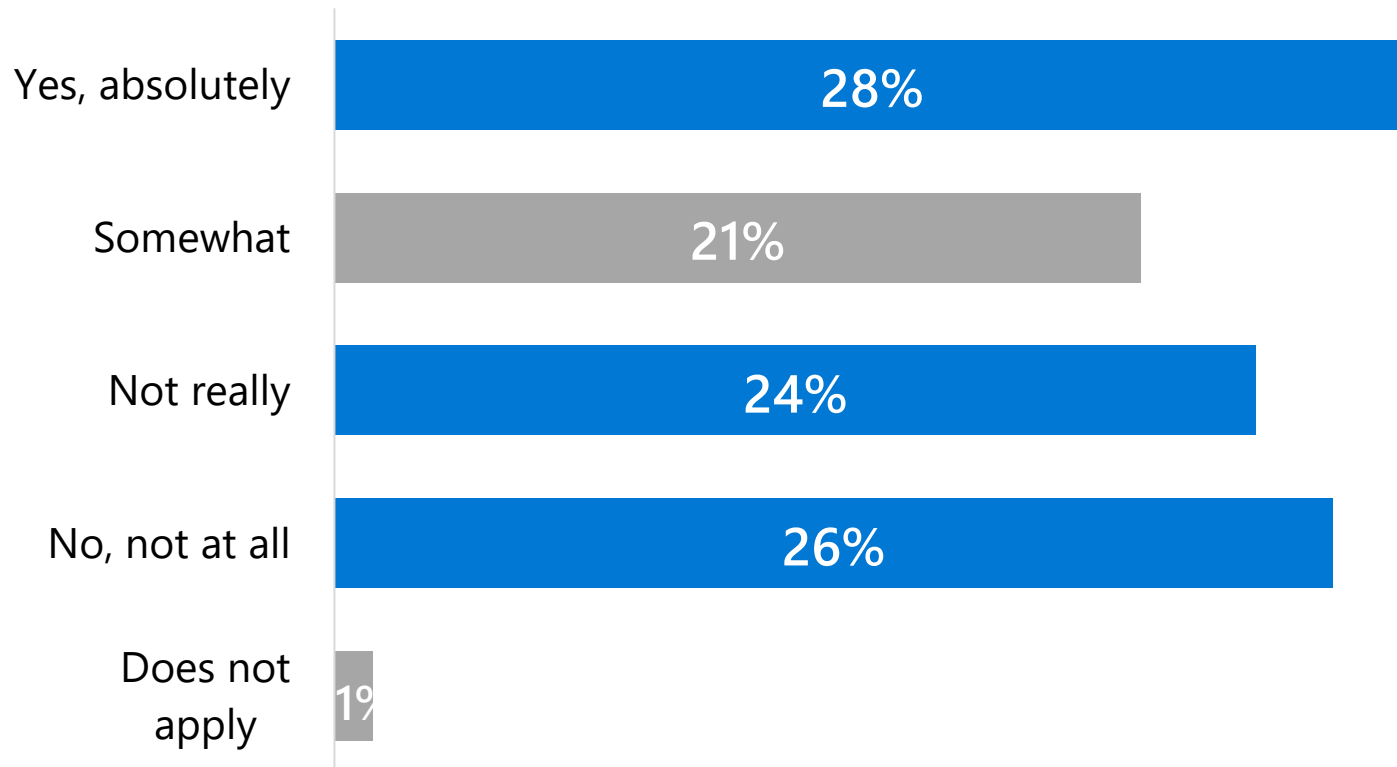
20% of COVID-19 patients
later develop mental illnesses

The most common disorders
experienced by COVID-19
survivors within 90 days of their
diagnoses are anxiety, depression
and insomnia



49% of MSN survey respondents report lost sleep due to the pandemic

Have you personally lost sleep due to worry / anxiety about the COVID-19 epidemic?



Studying online behavior

How can you differentiate between qualified depression seekers vs. general health/mental wellness interested?

Audiences are similar across the two groups

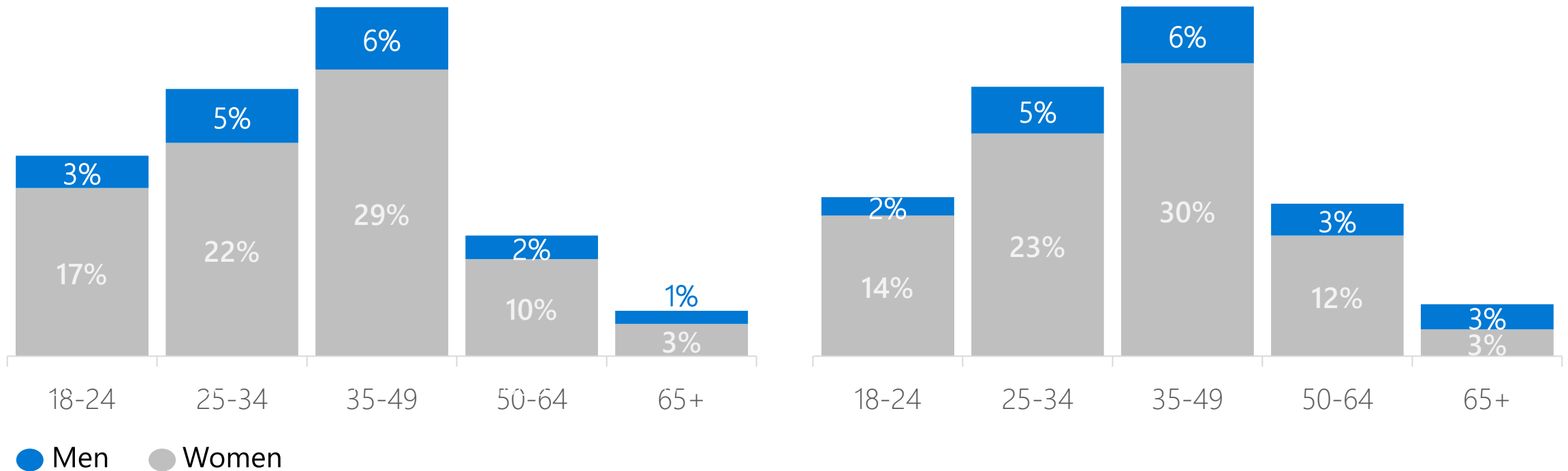
Distribution of searchers by age and gender



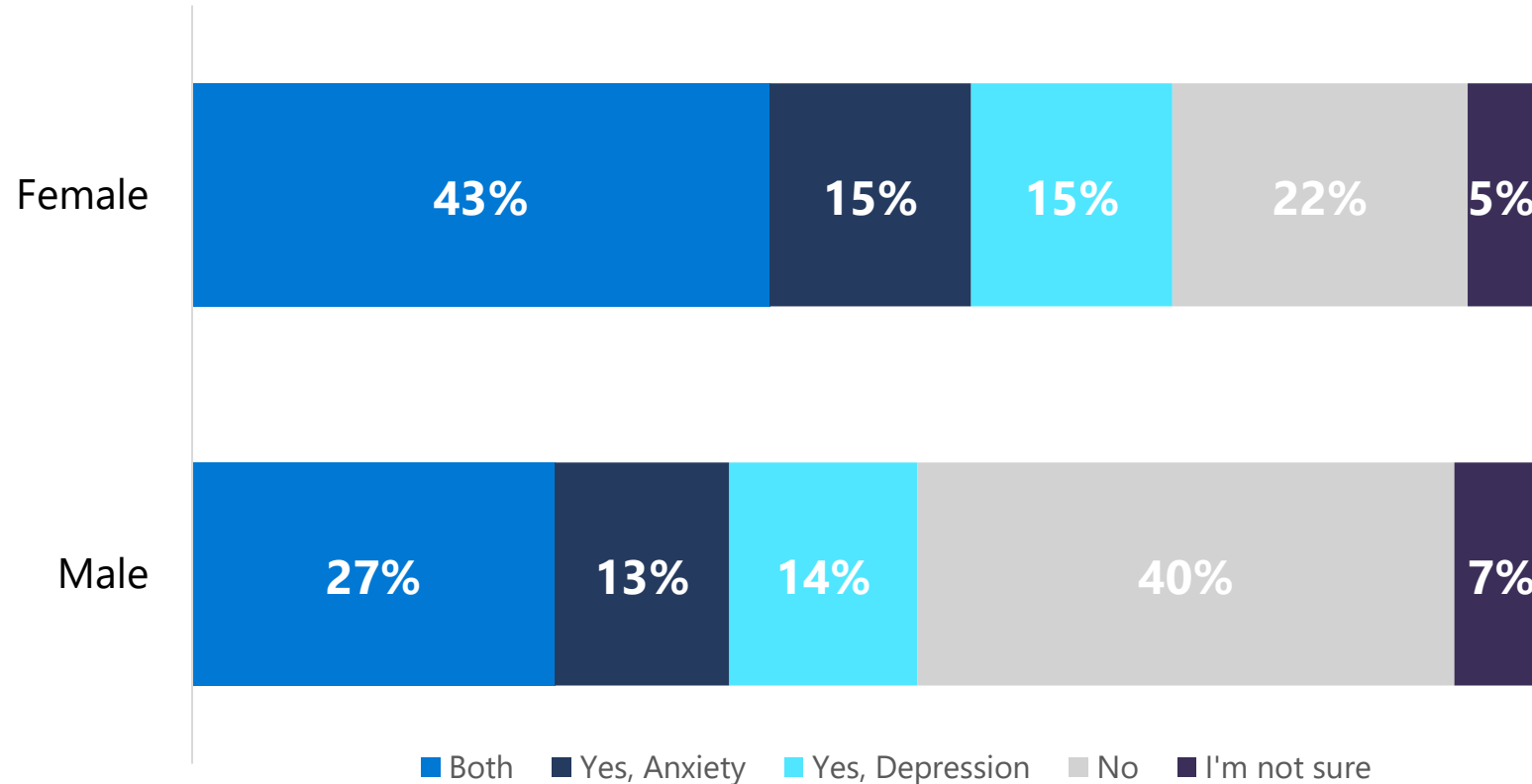
Depression



Mental Wellness



73% of female MSN survey respondents have experienced depression, anxiety or both



11,051 responses. Significance: $X^2(df=4)=514.675, p<0.001$, High Strength of Association ($T=0.153$)
Exported on 10/21/2020

Journeys are generally longer for wellness searchers than depression seekers

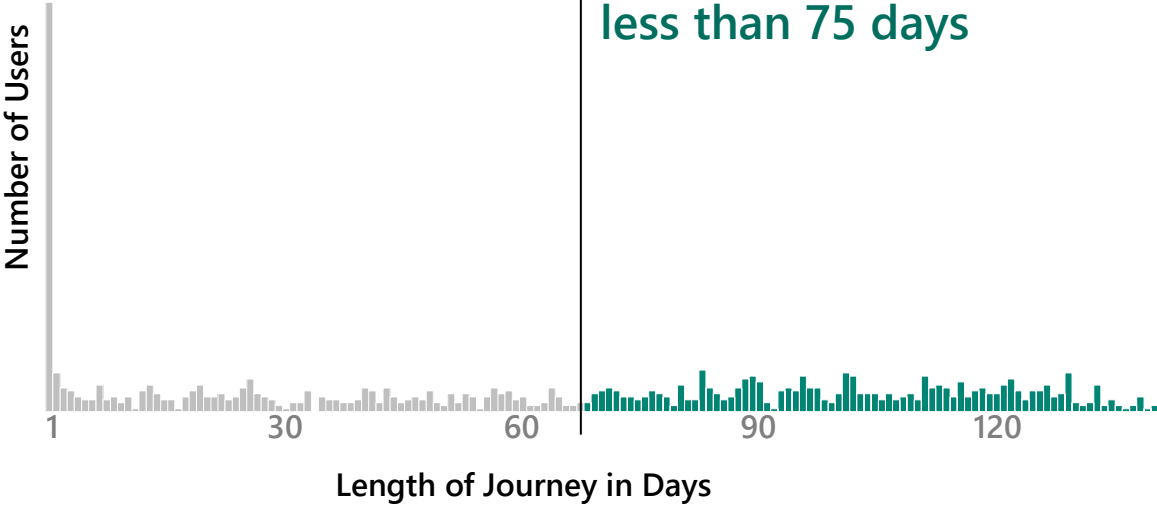
Length of journeys by interest



Average 11 days



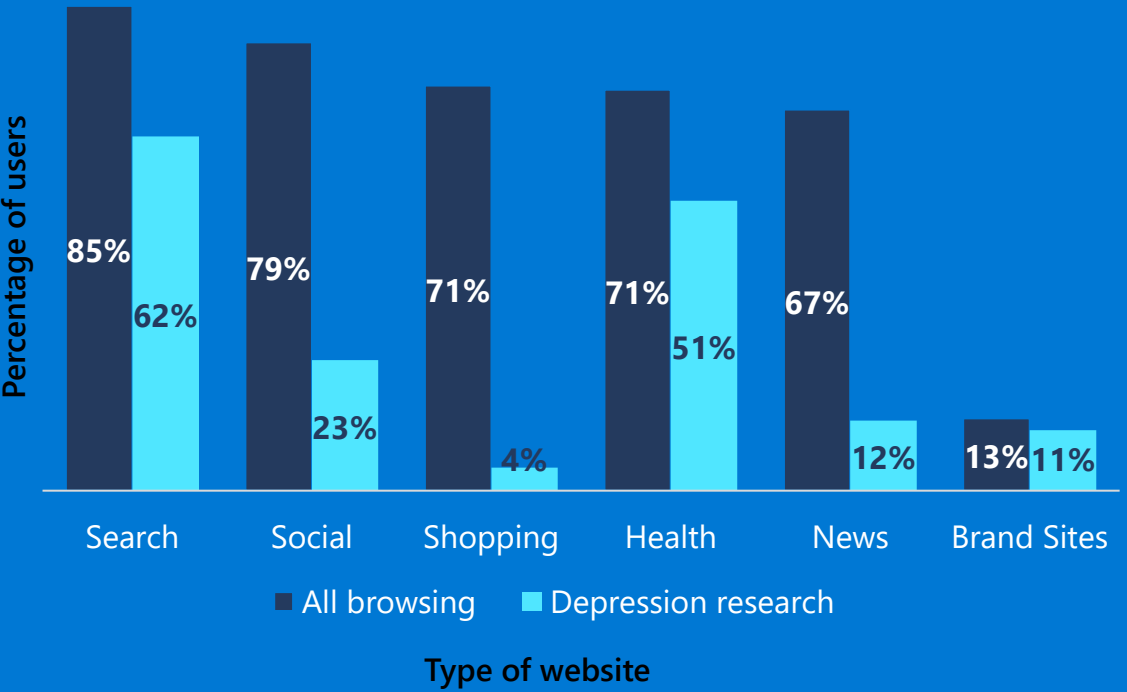
Average 13 days



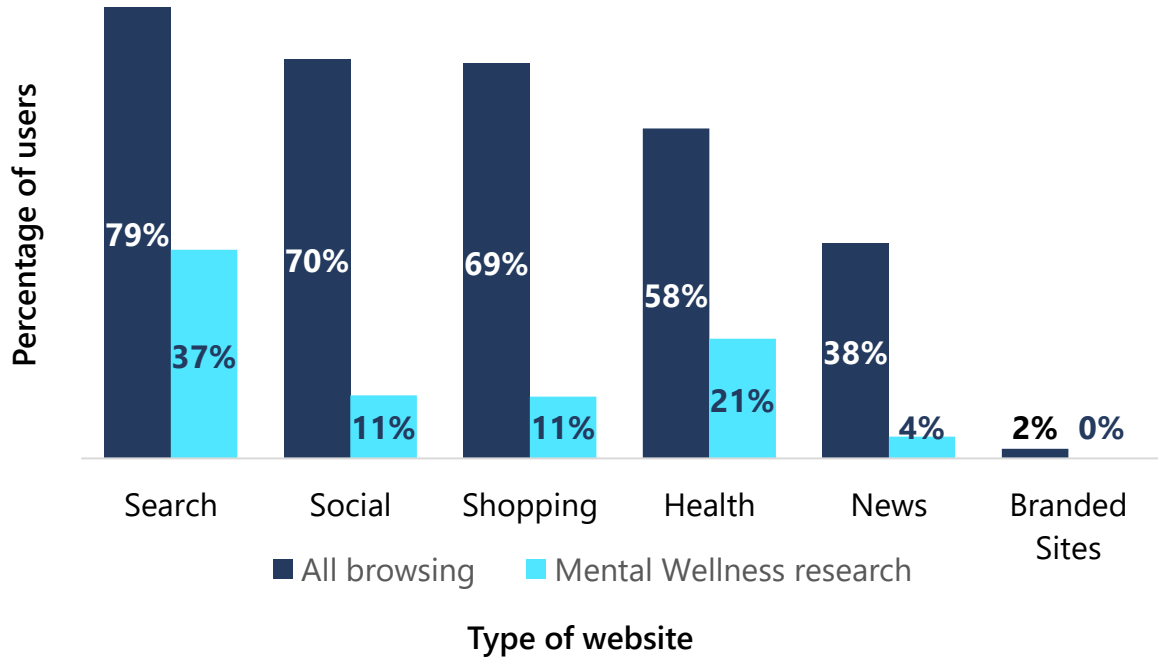
Depression seekers use search more than other websites compared to mental wellness seekers



2.4 unique websites visited
6.2 unique searches per user



2.9 unique websites visited
3.9 unique searches per user





8 in 10

Depression searchers have interacted
with COVID-19 info

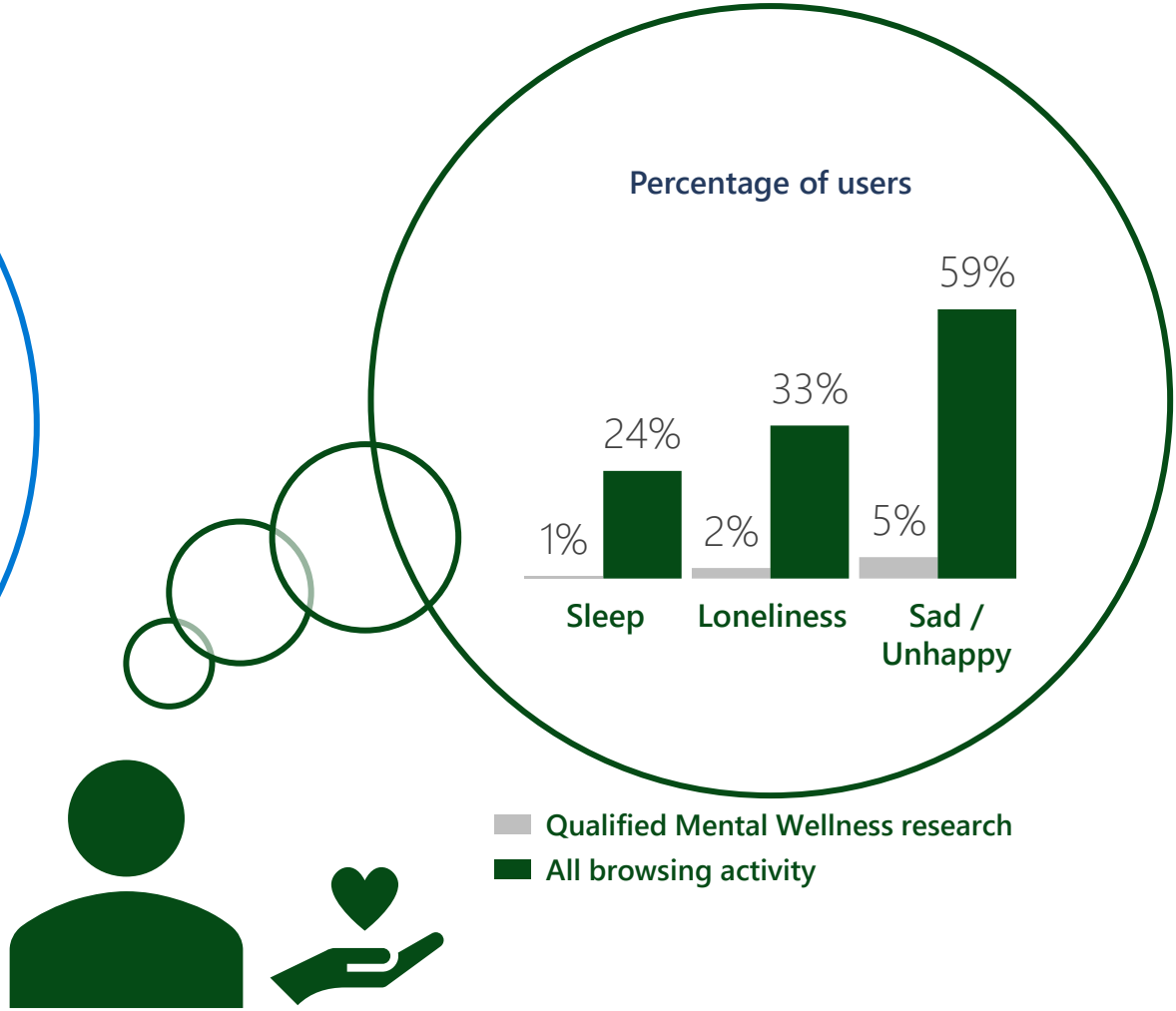
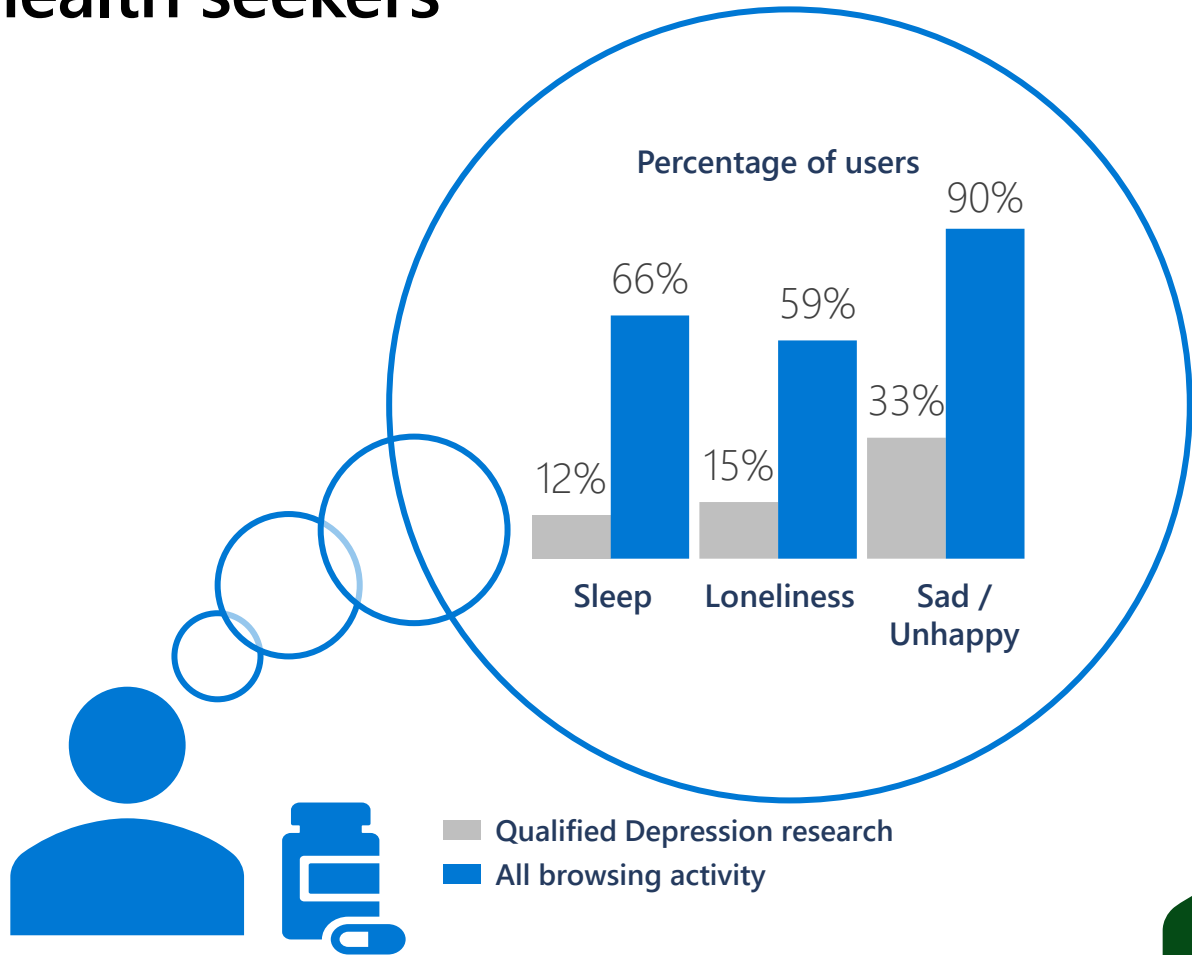
Compared to



7 in 10

Mental Wellness searchers

Depression seekers research symptoms more than general mental health seekers



Key findings

Increased search interest

All 4 conditions, Depression, Anxiety, ADHD and Schizophrenia, have seen increased search volume in 2020

However, there are different pattern among conditions

Seasonal search patterns

We do see seasonal patterns for each of the conditions. There are variations for each, however, the overall trend is valleys in the summer and around new year, and peaks in spring and summer.

Impact of COVID-19

Surveys confirm the increased strain on mental health during COVID-19.

Additionally, a recent study identified an increased risk of mental health issues for COVID-19 patients. 20% later develop mental health issues.

Audience skews female

There are more female (74%) than male (54%) that self-identify they have experienced depression or anxiety. We also see search audiences skews highly female.

Depression seekers prefer search

Depression seekers use search more than other websites compared to mental wellness seekers, with 6.2 searches compared to 3.9 searches per user.

However, they have shorter journeys on average with 11 days compared to 13 for mental wellness interested.

Depression focuses more on symptoms

A way to differentiate qualified depression searchers vs. general mental wellness is through symptom searches. Both in browsing behavior as well as their qualified condition research, depression seekers focus on symptoms more than general mental wellness searchers.

Summary

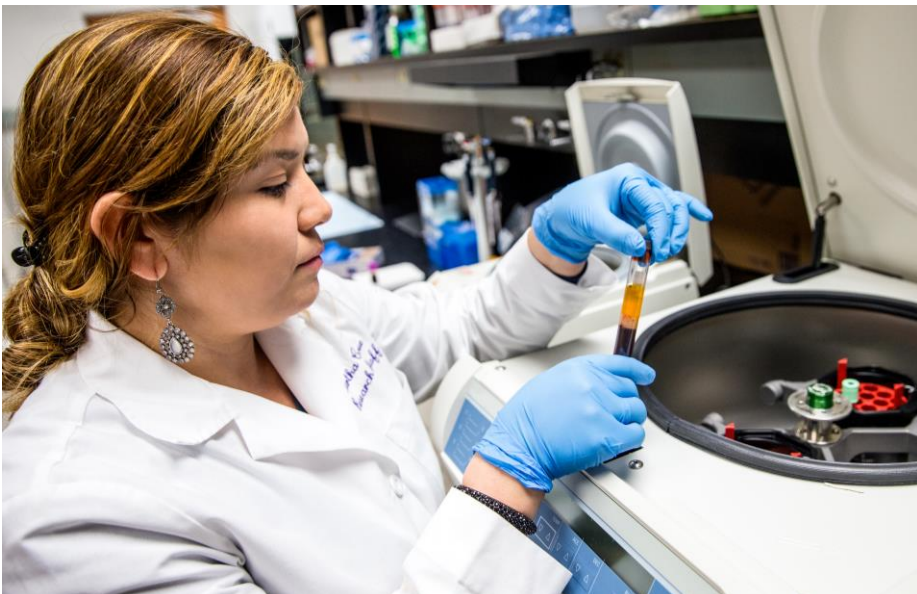
Search interest is increasing

- Are you investing in search and ensuring awareness for your brand?
- Are you adjusting to the seasonal trends?

How do you qualify the patient vs. the general wellness interested searcher?

- Focus on symptoms and opt in-to the partner network for the available related websites
- Search is a key channel for depression researchers, and they do use branded websites for their condition research
- Audience profile is similar across the two groups, however, is primarily female and between 25 and 49





"Search makes up 90% of lead forms and 95% of last touchpoint. It is the most crucial of our digital channels."

-- Tim Peyton, Senior Media Director at Lever Interactive

LEVER
i n t e r a c t i v e



VIEW THE CUSTOMER STORY

The Health Insurance Provider achieved well over **1 million impressions**, with a Click Through Rate (CTR) of **4.2%**

Unprecedented need for health coverage

When faced with an unprecedented global pandemic, one of the nation's leading Health Insurance providers shifted their strategy to address the consumer needs of Americans who lost their health insurance coverage. When the first wave of the COVID-19 pandemic forced millions of Americans into unemployment in March through May of 2020, an estimated 5.4 million people lost their employer-sponsored health insurance. In the absence of a comprehensive federal bill to address the high rates of uninsured, 12 states took unprecedented steps to offer coverage by opening a Marketplace Special Enrollment Period (SEP).

Search is most crucial digital marketing channel

With a need to quickly turn on lead generation and customer acquisition campaigns, this provider turned to search advertising as the most efficient approach to returning to the market. Their agency partner, [Lever Interactive](#), implemented a data driven approach to shift investments from more traditional marketing to better performing digital platforms and strategies.

Search delivered healthy results for health insurance provider

With a keen awareness of the time frame, the Microsoft Advertising team was dedicated to implementing strategies during SEP and were described as an "invaluable" partner in the process. Although Covid-19 and SEP presented new challenges for advertisers, Microsoft Advertising, Lever Interactive and the provider were able to adapt and drive success through collaboration. By reactivating campaigns, this client was able to achieve well over 1 million impressions with an impressive 4.2% CTR.

To get actionable data, insights and best practices to help make decisions and grow your business, visit aka.ms/MicrosoftAdvertisingInsights



Appendix

Methodology – Depression searchers

How we select users and what we analyze



Criteria

Users were qualified as having browsed or searched for **Depression related terms** 10 or more times



User base

689 Depression were identified as highly interested



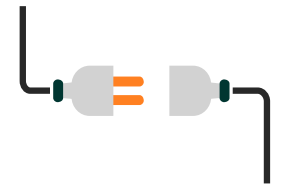
Location

All users analyzed were in the US on a PC device



Timeline

Digital research behavior was collected for April – September 2020



Conversion

Users were assumed to have ended their journey when they showed no Criteria behavior for 2 weeks after Timeline

Methodology – Mental Wellness searchers

How we select users and what we analyze



Criteria

Users were qualified as having browsed or searched for **self-care or mental wellness related terms** 10 or more times



User base

1000 searchers were identified as highly interested



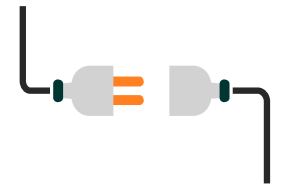
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