



Microsoft Advertising Insights

Moving season preparation for Cable and Internet Service Providers

Microsoft Advertising. Intelligent Connections.



Purpose

We are striving to provide industry insights to advertisers ahead of moving season for effective planning and budgeting preparation.

This analysis is primarily geared towards Cable and Internet Service Providers (ISPs).

Our Definition of Moving Season:

In our analysis, we define moving season as June and July, but most charts can be viewed across several months.

Contents

- Cable/ISP forecasts and query trends
- Comparison: Cable & ISP vs. moving trends
- Cable & ISP geographic trends
- Amplifying search with native

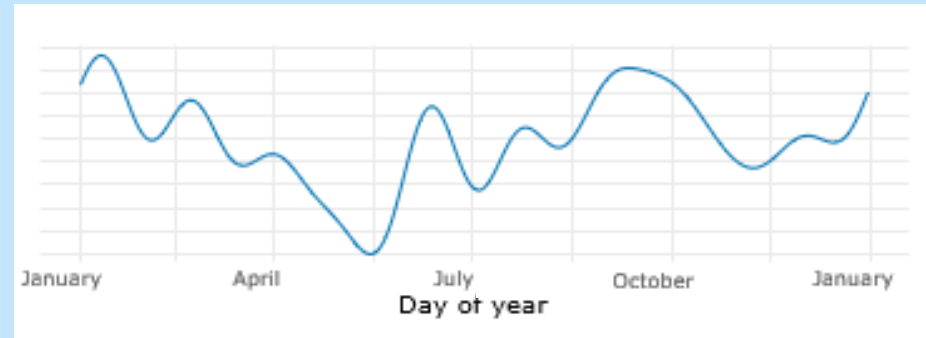
Cable and ISP forecasts and query trends



Non-brand searches typically see more volume during moving season

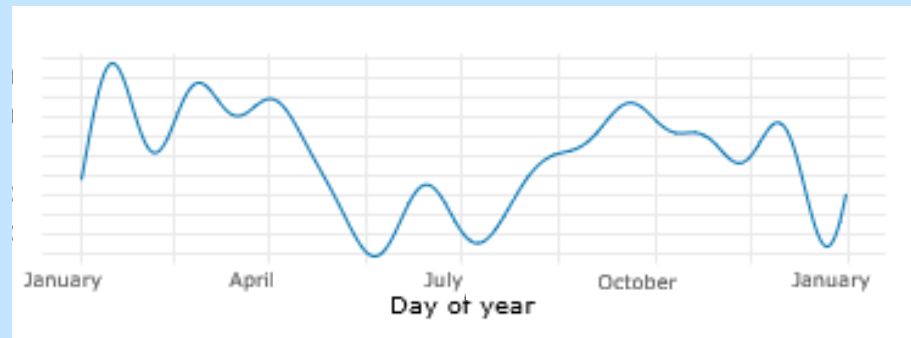
Pre-COVID monthly search volume trends: Cable & ISP queries

Non-brand:



Non-brand queries see a bigger lift during moving season periods (particularly summer), indicating a need to **invest in non-brand to ensure full coverage for moving season.**

Brand:

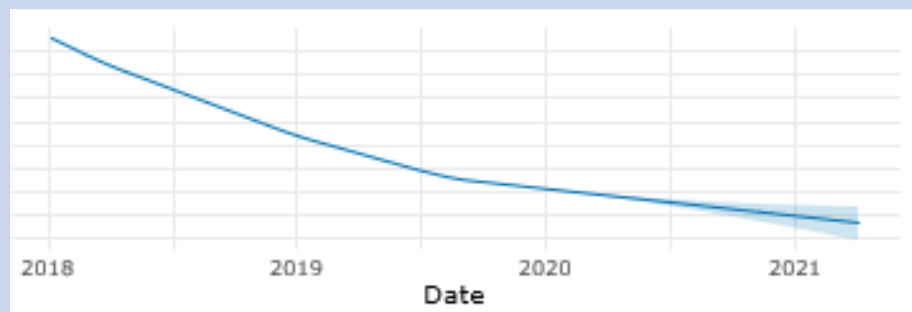


Brand queries tend to be higher than non-brand during non-moving season months, highlighting the **importance of brand term investment year-round.**

Non-brand search volume was decreasing year over year (YoY) pre-COVID

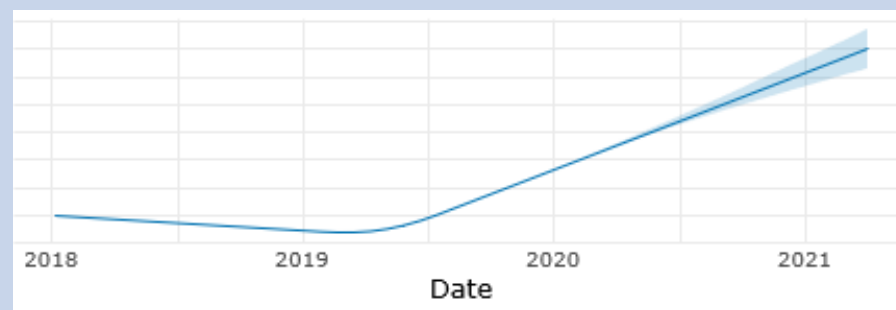
Pre-COVID yearly search volume trends: Cable & ISP queries

Non-brand:



Before COVID, non-brand searches for cable and internet service providers were decreasing YoY.

Brand:

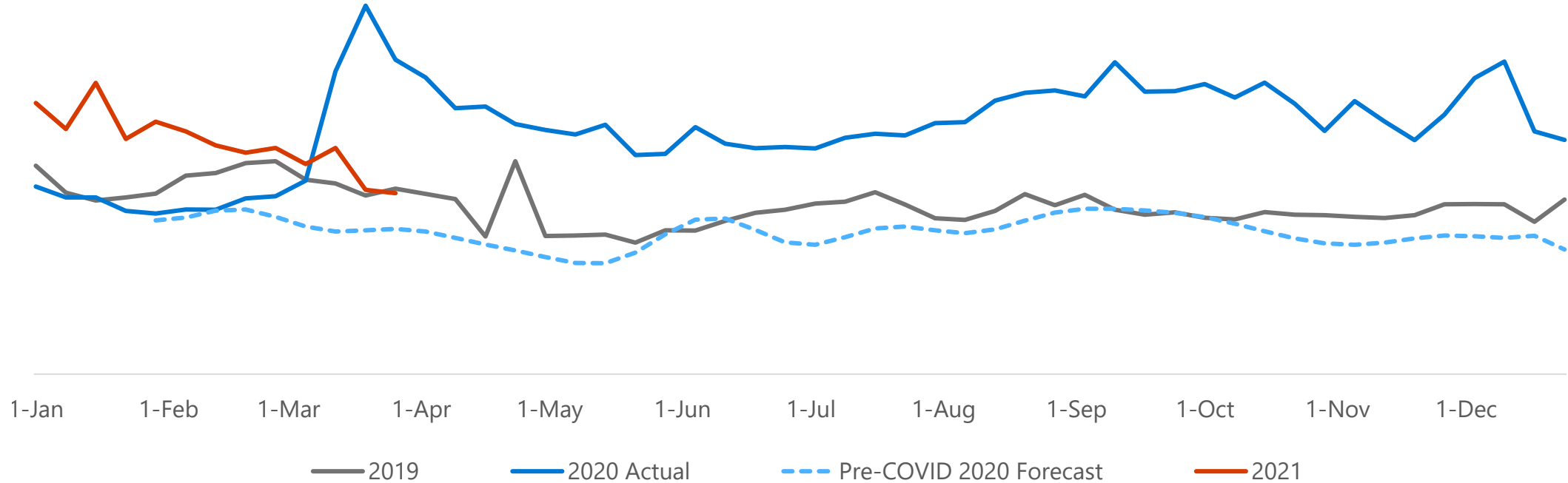


Brand searches were projected to grow steadily YoY before COVID.

Non-brand Cable and Internet searches beat the original 2020 forecast by 43%

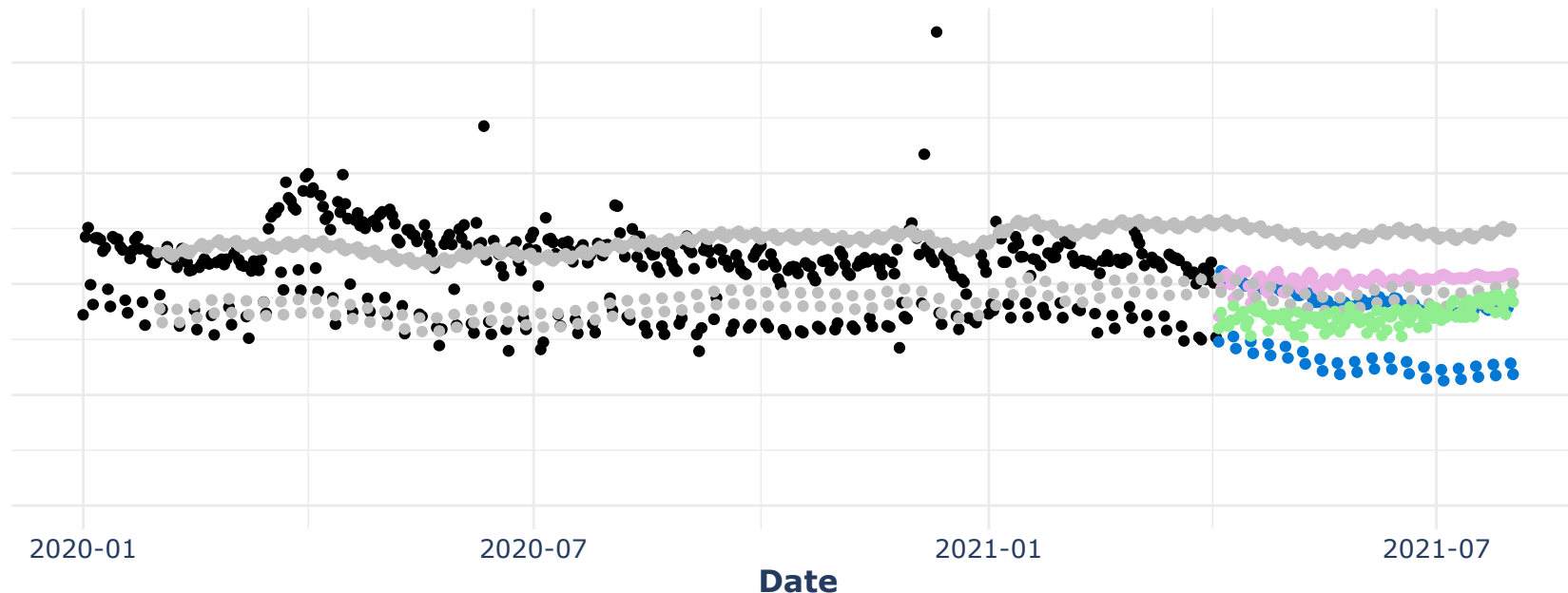
Cable & ISP search volume vs. pre-COVID forecast

Non-brand



Brand searches are projected to stay flat for the next 100 days, but will most likely trend upward in July for moving season

Forecasted search volume over time: Cable & ISP brand queries



*** Two black/gray/blue lines are present due to fluctuations in weekday vs. weekend volume (lower set of lines is weekend)*

Black shows actual searches, **grey** is the expected searches without the effect of COVID, **pink**, **blue** and **green** are three unique methods of forecasting searches based on the effect of COVID

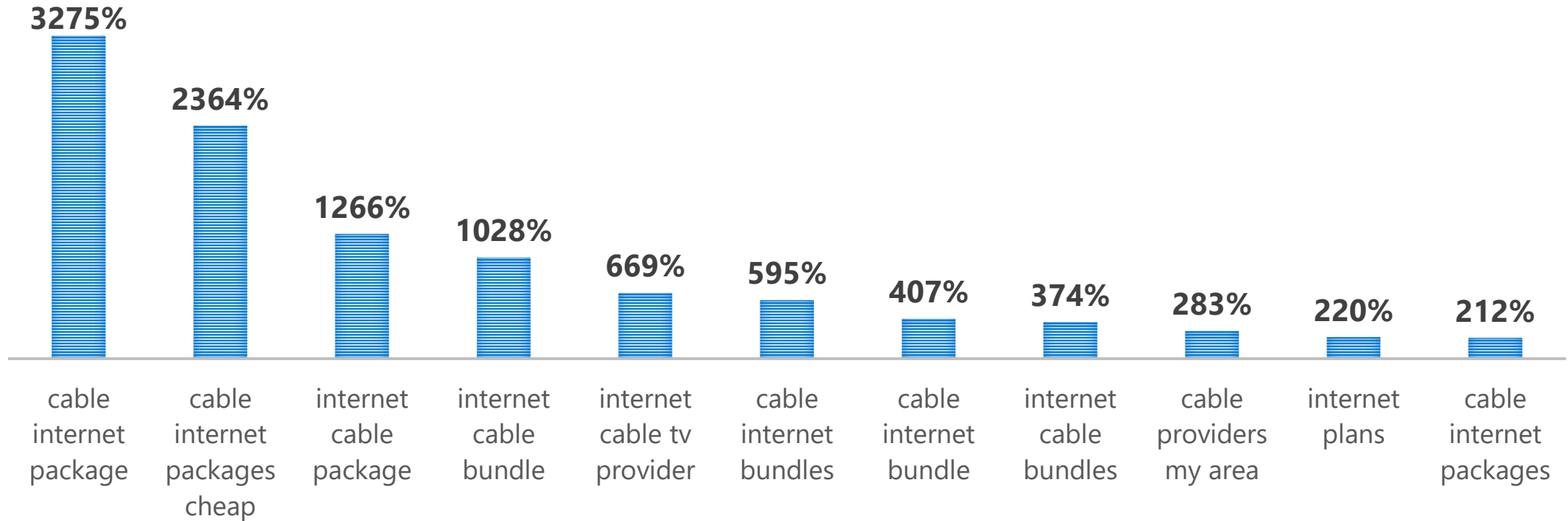
Green – COVID heavy-weighted forecast

Pink – Uses COVID data but puts less weight on it compared to the green model

Blue – COVID aware but puts less weight compared to the green model and will have more sensitivity to variance on shorter time frames than the pink model

Searches grew YoY during moving season, especially with bundle packages

Top queries by post-COVID % growth



Pro tip: Ensure coverage of newly popularized keywords to maximize ad visibility.

Users first began increasing searches for bundles and deals in 2019's moving season

Top 25 nonbrand Cable & ISP queries during moving season

2018

internet
internets
cable business
cable tv
cable tv internet provider
internet providers
cable tv online
cable tv channels numbers
cable
internet games online
cable tv listing
cable tv internet
internet service providers

cable internet packages
internet marketing
internet lead management
software
internet speed
internet movie database
internet download manager
cable providers my area
internet satellite tv
internet service
internet archive
internet options
internet banking
cable tv channel listings

2019

internet
cable internet
internet business phones
cable tv
internet providers
cable one
internet service providers
internet download manager
cable
internet archive
internet speed
internet cable bundles
internet movie database

internet cable
internet business providers
internet options
cable internet providers near me
cable internet bundle
internet plans
internet deals
cable deals
cable internet bundles
internet service
internet cable tv
cable tv internet providers

2020

internet
cable internet bundles
internet cable bundles
internet cable bundle
cable internet bundle
internet cable tv provider
internet speed
internet plans
cable internet
internet cable packages cheap
cable internet packages cheap
internet service plans
cable tv
cable internet packages

internet providers
cable internet package
cable
internet business
providers
internet security
internet cable package
internet download
manager
cable providers my area
internet cable
cable deals
cable internet providers
near me
internet deals
internet service providers

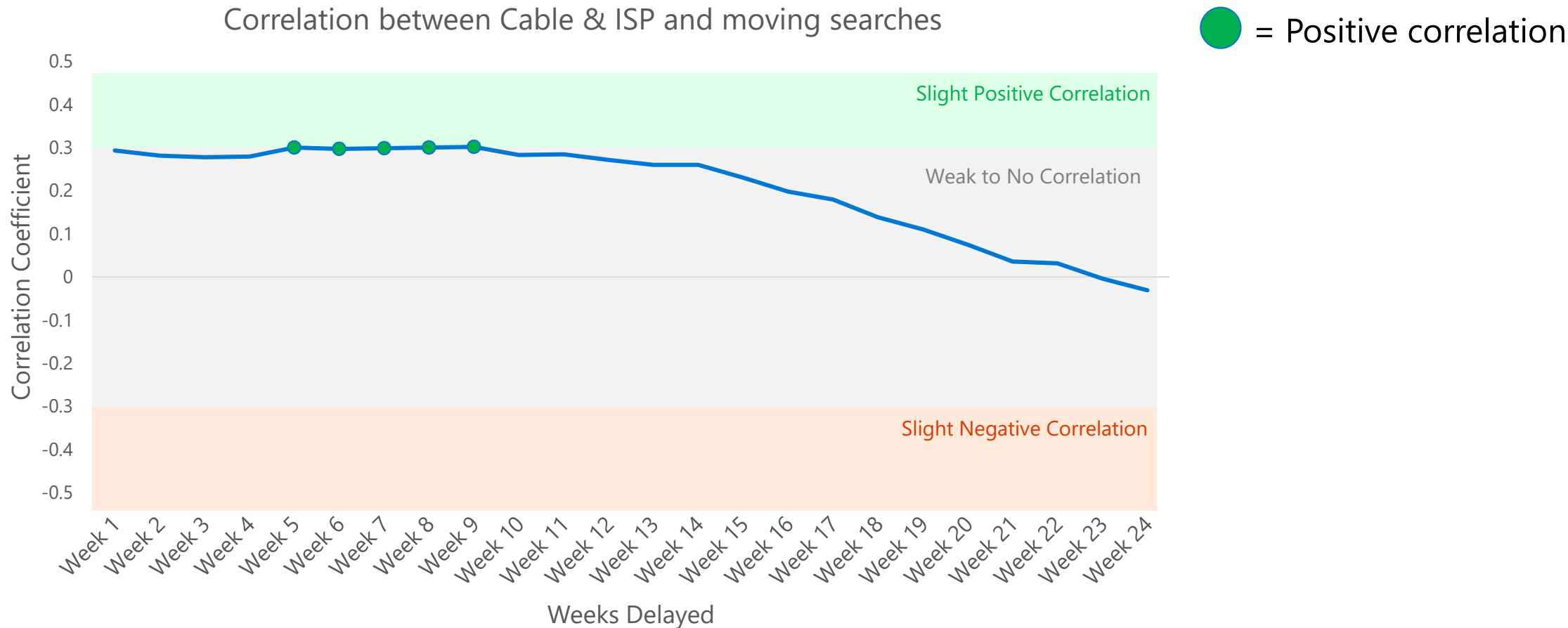


Pro tip: Bid on package, bundle, and deal related terms to capture the growing interest in this area.

Comparing moving searches to Cable and Internet seasonal trends



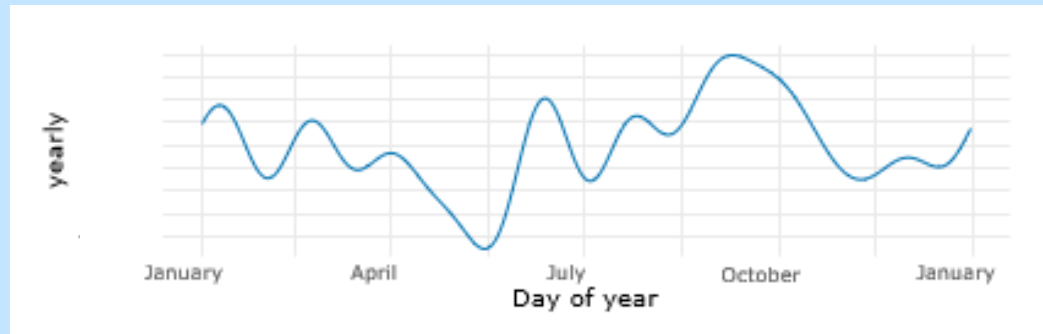
Cable & ISP searches often align with moving searches after 5-9 weeks



Cable & ISP searches peak alongside moving searches in the summer

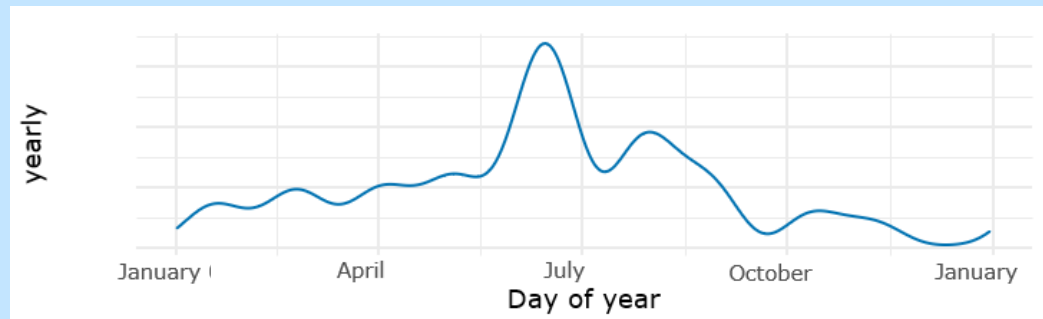
Pre-COVID search volume trends (monthly)

Cable & ISP:



Cable and ISP queries are heightened from early summer to fall, aligning with moving search peaks.

Moving:



Pro tip: Target moving audiences for a mid to lower funnel capture.

Moving searches in 2020 were 19% higher than originally forecasted

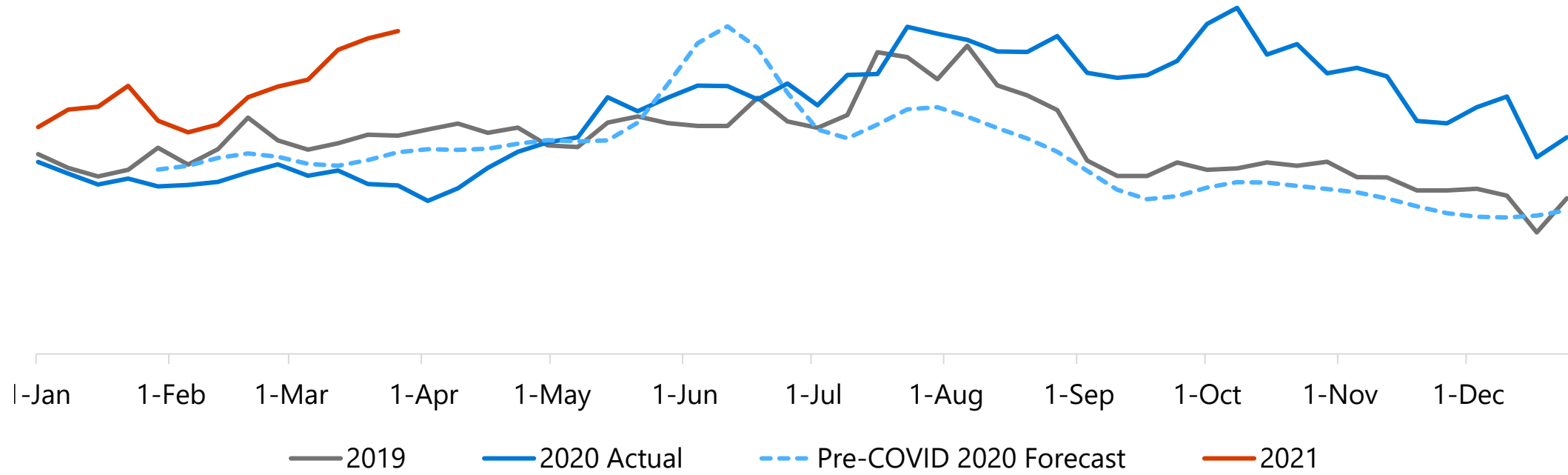


The increase in moving searches so far in 2021 is likely due to a **lengthening of typical moving season timing as a result of COVID.**



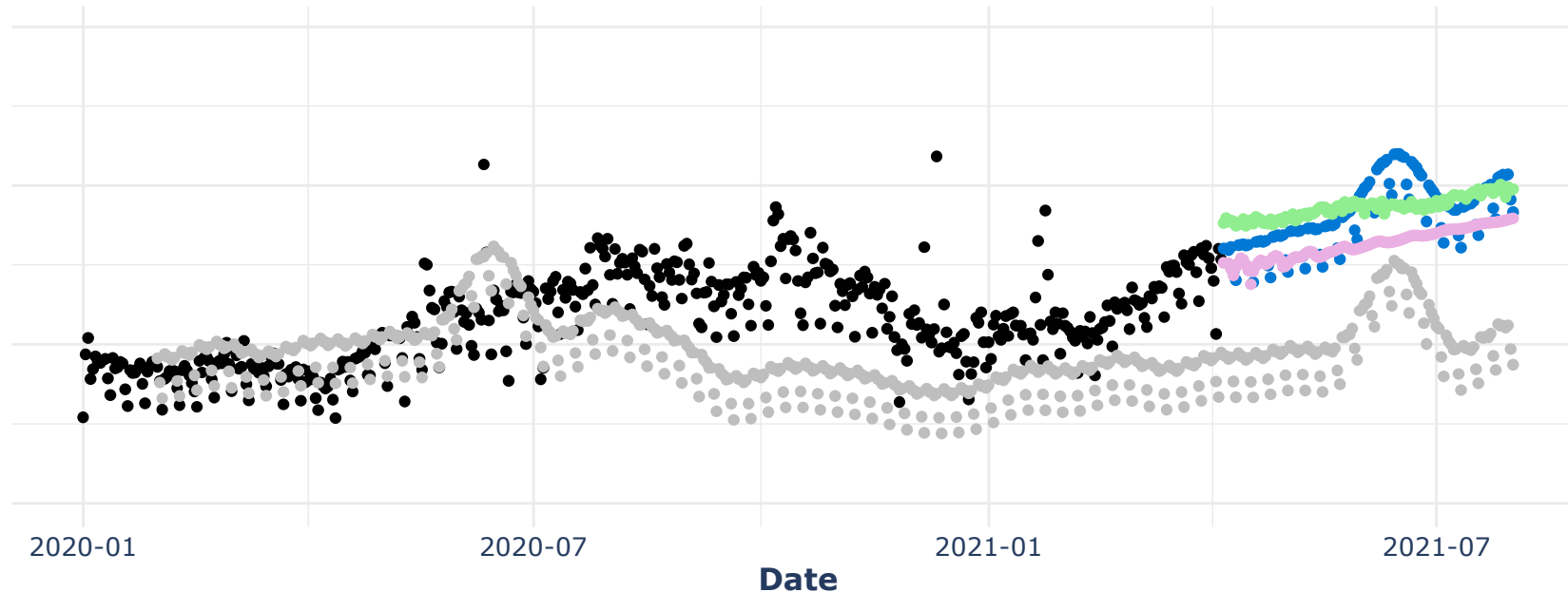
The 19% uptick in searches for 2020 was possibly due to **evolving housing needs of remote work**

Moving search volume



Moving searches are projected to remain elevated in the next 100 days

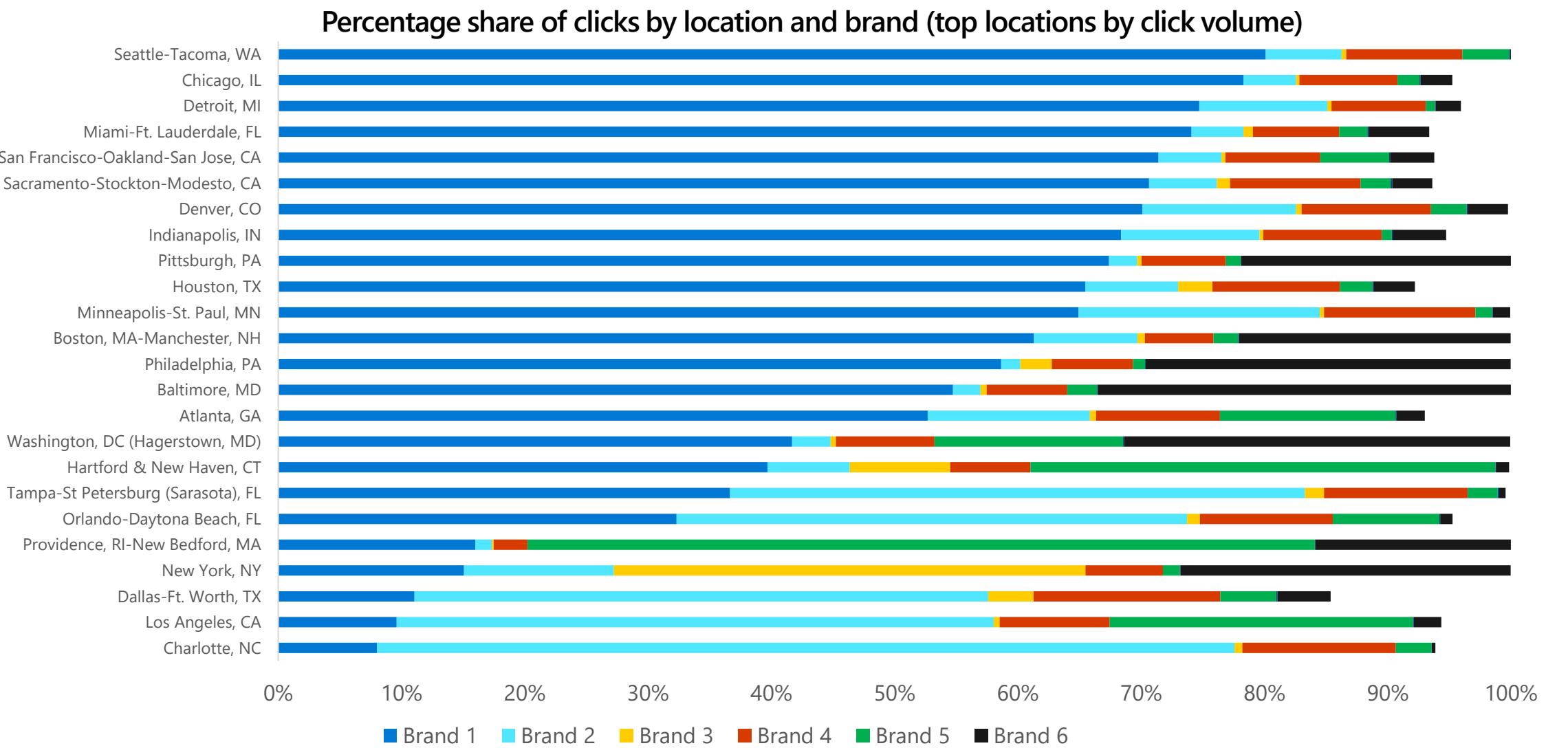
Forecasted search volume over time : moving queries



Black shows actual searches, **grey** is the expected searches without the effect of COVID, **pink**, **blue** and **green** are three unique methods of forecasting searches based on the effect of COVID

Green – COVID heavy-weighted forecast
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One brand has the highest click share in most cities; NYC is most diverse



Search and native combined opportunities



Activate moving season insights on the Microsoft Audience Network



Premium native placements
Strict publisher standards and AI-powered curation



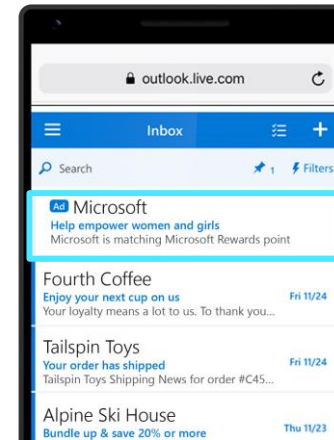
Brand-safe experiences
Transparency and controls for advertisers



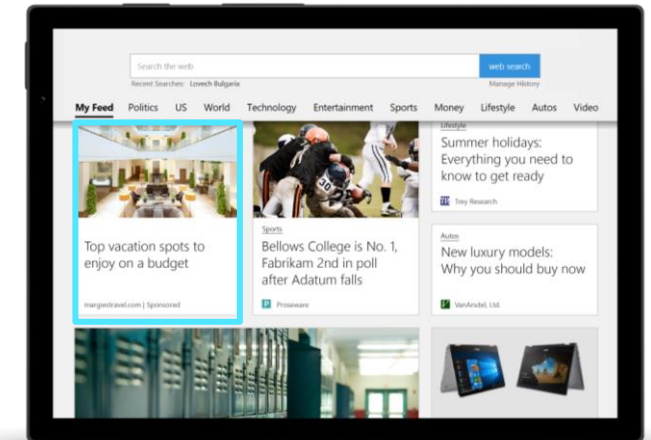
Highly contextual ad placements
Based on Microsoft first-party data



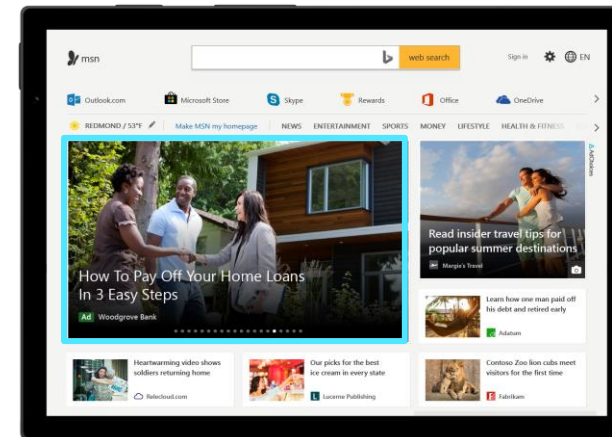
Strong industry ad performance
Driven by leading-edge AI technology



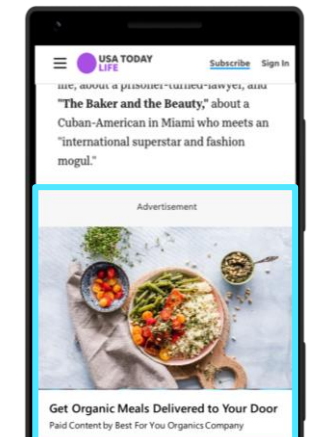
Outlook.com



Microsoft Edge



MSN



Select publisher partners

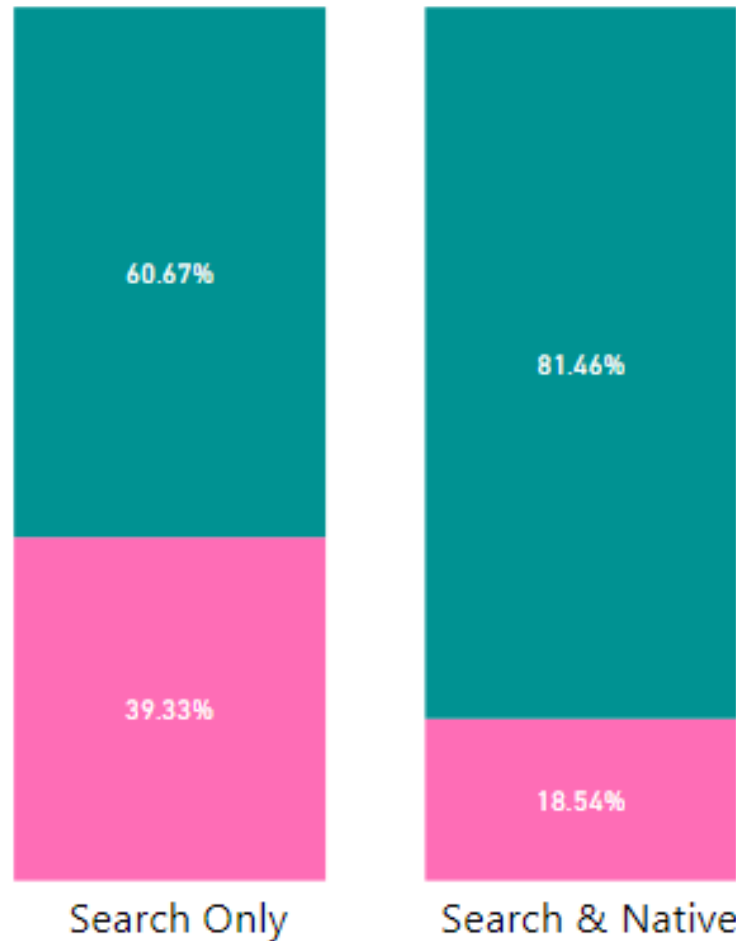
Users exposed to both search and native ads searched more non-brand queries

Impressions by query category

● Brand ● Non-Brand



Pro tip: Target In-Market Audiences on the Microsoft Audience Network to drive brand awareness & convert users from a non-brand search to a branded search.

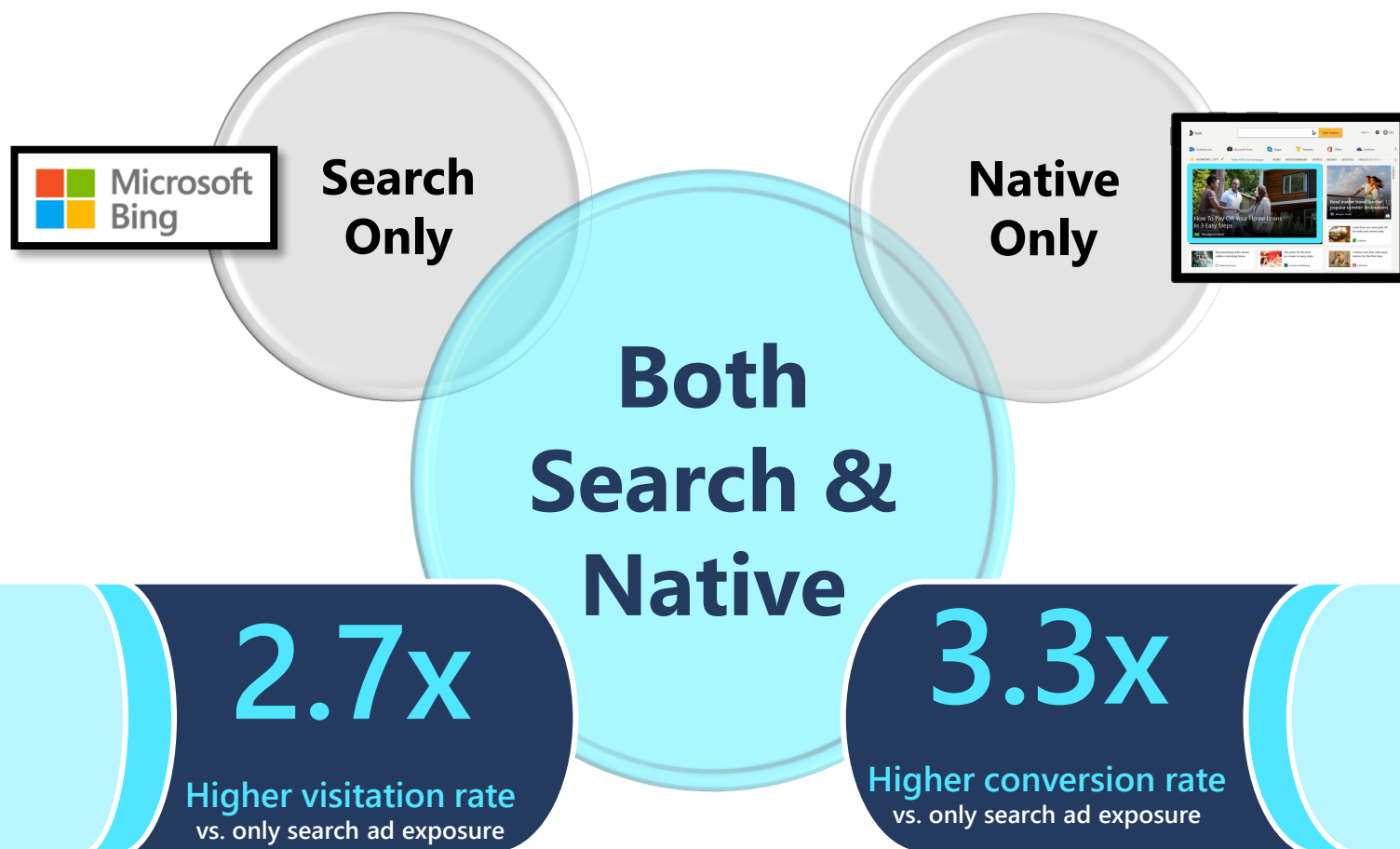


Users whose Cable & ISP research journeys contained both search and native ads had a higher ratio of searching for non-brand queries, indicating these consumers are doing extensive Cable & ISP research.

Path channel mix

Maximize performance by combining strategies

Technology & Telecommunications Ad Effectiveness Study



Users exposed to both Microsoft Search ads & Microsoft Audience ads are **more likely to visit and convert on a Technology & Telecommunications advertiser's website** compared to those who are exposed to only one type of ad.

Notes: Results may vary for each advertiser based on campaign settings, targeted audiences, and other factors. Lift metrics represent an average of all advertisers with completed lift studies to date (Feb. 2021).

These advertisers may be a non-representative sample of all advertisers on the marketplace. Lift measured between exposed users and a control group of eligible unexposed users, with lift represented on a per-user basis. Average user count per advertiser study = 844K

Users exposed to Microsoft Audience ads engage with your brands at a higher rate

Technology & Telecommunications Ad Effectiveness Study



AWARENESS

2.3x

*Lift in brand awareness
per user, measured by
post-exposure brand
search rate*



CONSIDERATION

5.0x

*Lift in brand consideration per
user, measured by post-
exposure domain visit rate*



CONVERSION

4.3x

*Lift in brand purchase per
user, measured by post-
exposure conversion page
visit rate*

Notes: Results may vary for each advertiser based on campaign settings, targeted audiences, and other factors. Lift metrics represent an average of all advertisers with completed lift studies to date (Feb. 2021). These advertisers may be a non-representative sample of all advertisers on the marketplace. Lift measured between exposed users and a control group of eligible unexposed users, with lift represented on a per-user basis. Average user count per advertiser study = 844K



Key takeaways and recommendations

- ❑ Trends point to a lengthened moving season, with potentially heightened interest from March through fall. Advertisers should **start preparing for moving season sooner** and **expect to meet increasing search demand** for moving with a possible lift for Cable & ISP as a result.
- ❑ Consumers are likely to search for Cable & ISPs 5-9 weeks after they search for moving terms; bid on **moving-specific keywords to capture users** who might need Cable or Internet services soon.
- ❑ Non-brand Cable & ISP searches tend to get more traction than brand during moving season, but brand is more stable throughout the year. **Prioritize coverage of non-brand** during moving season.
- ❑ Ensure coverage of emerging keywords to maximize ad visibility, such as those around **packages, bundles, and deals**.
- ❑ Use the **Microsoft Audience Network** to reach more users and augment search ad performance.

To get actionable data, insights and best practices to help make decisions and grow your business, visit MicrosoftAdvertising.com/Insights

