



Hobby trends – US, EMEA & APAC

Data through April 3, 2020

This analysis compares “pre” vs. “post” timeframes*

(determined by the COVID-19 national emergency declaration date)

*

“Pre” timeframe = January 1 – March 13, 2020

“Post” timeframe =
March 14 onward

4-Jan

11-Jan

18-Jan

25-Jan

1-Feb

8-Feb

15-Feb

22-Feb

29-Feb

7-Mar

14-Mar

21-Mar

January

February

March



US Hobby trends

Data through April 3, 2020



Previously down year over year (YoY), North American (NA) hobby searches are now above forecast and growing

Hobby searches grew 17% week over week (WoW) since COVID-related orders



There has been unmet consumer interest as search growth outpaces click growth across hobbies

Clicks are up for grabs in the hobby marketplace

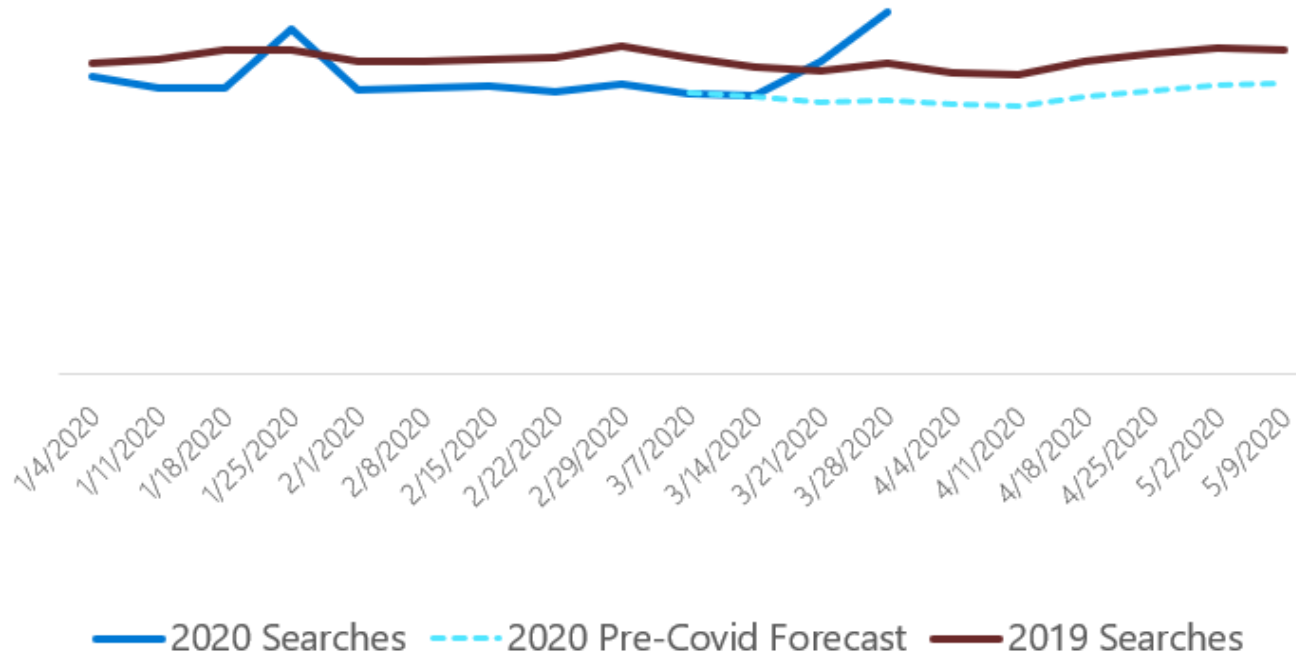


Shopping, mobile and brand click shares are growing

Review keywords and products to ensure complete coverage, and pair with sufficient budgets

Previously down, hobbies are on the rise

YoY search trends with pre-COVID forecast



Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, North America
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only

Searches

+16%

to forecast Post

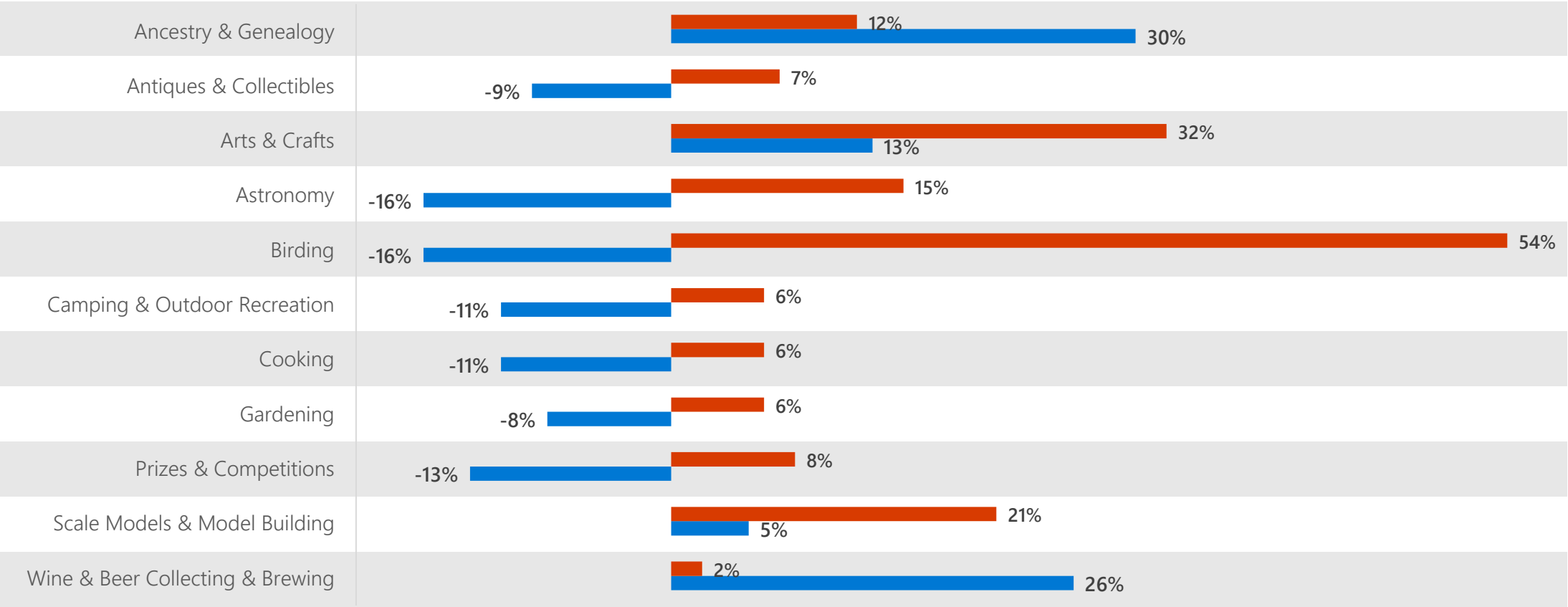
+4% YoY

during 2019 Post

(-8% YoY during Pre)

NA searches are growing across hobbies with many clicks available

Pre-to-Post changes in YoY searches and clicks

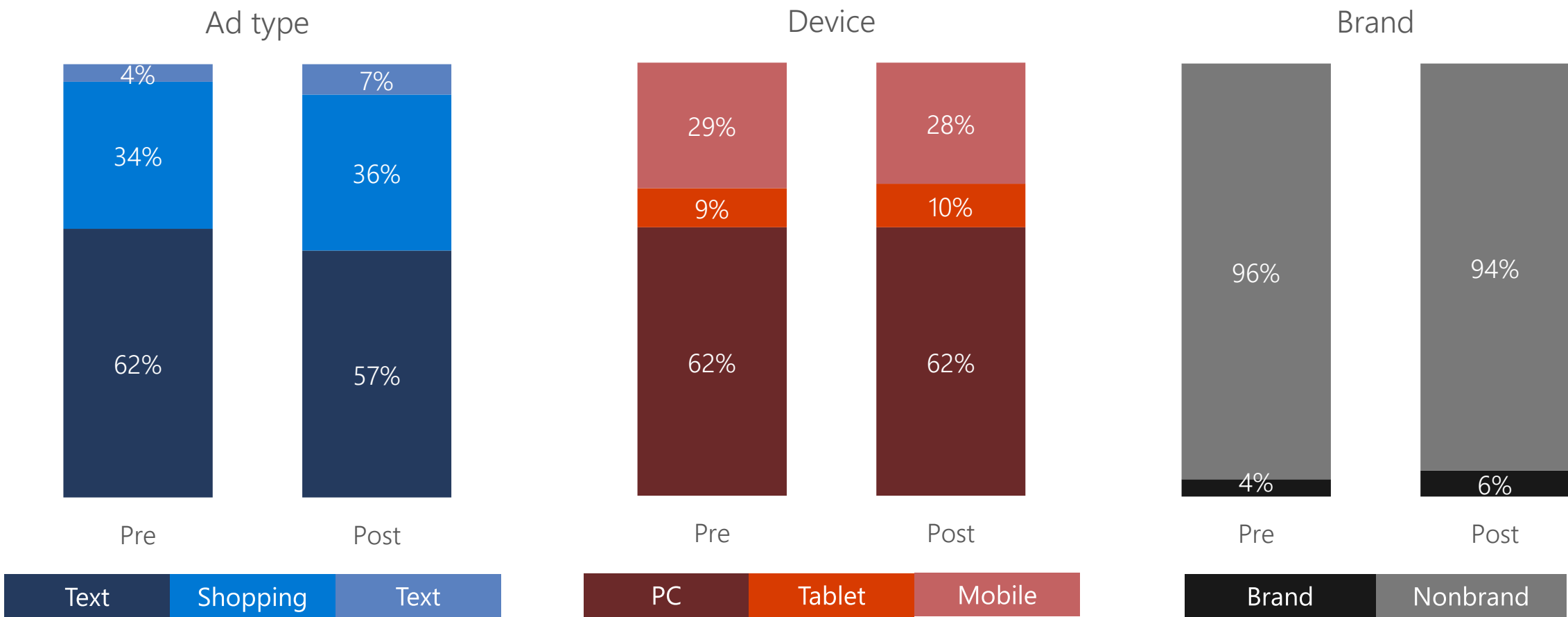


Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, North America
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only



Shopping, audience and brand traffic click shares are growing

Share of clicks, Pre vs. Post



Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, North America
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only



EMEA Hobby trends

Data through April 3, 2020



Previously flat YoY, EMEA hobby searches are now growing and outpacing forecast

Searches have grown 18% WoW since COVID-related orders



Post searches and clicks are growing across multiple hobbies in EMEA

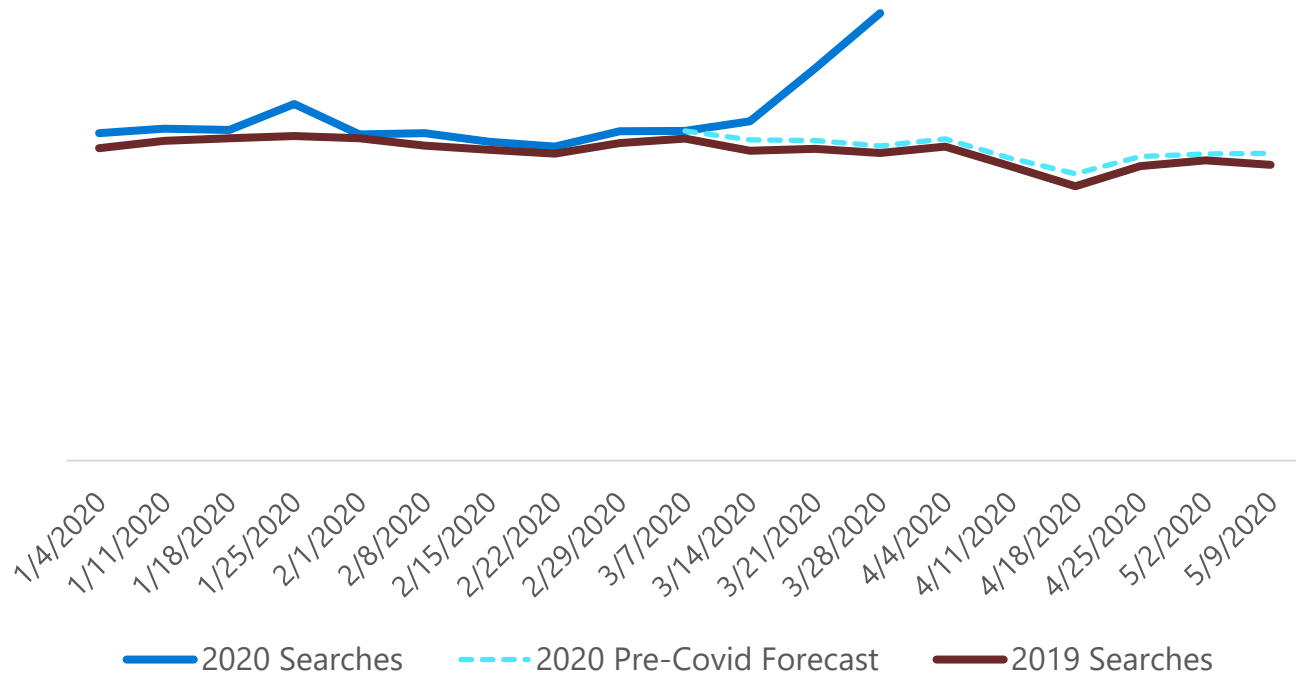


Audience Ads' click share is growing within hobbies

Ensure there are sufficient Audience Ads budgets to capture larger portions of traffic

Previously flat, EMEA hobby traffic is growing

YoY search trends with pre-COVID forecast



Searches

+23%

to forecast Post

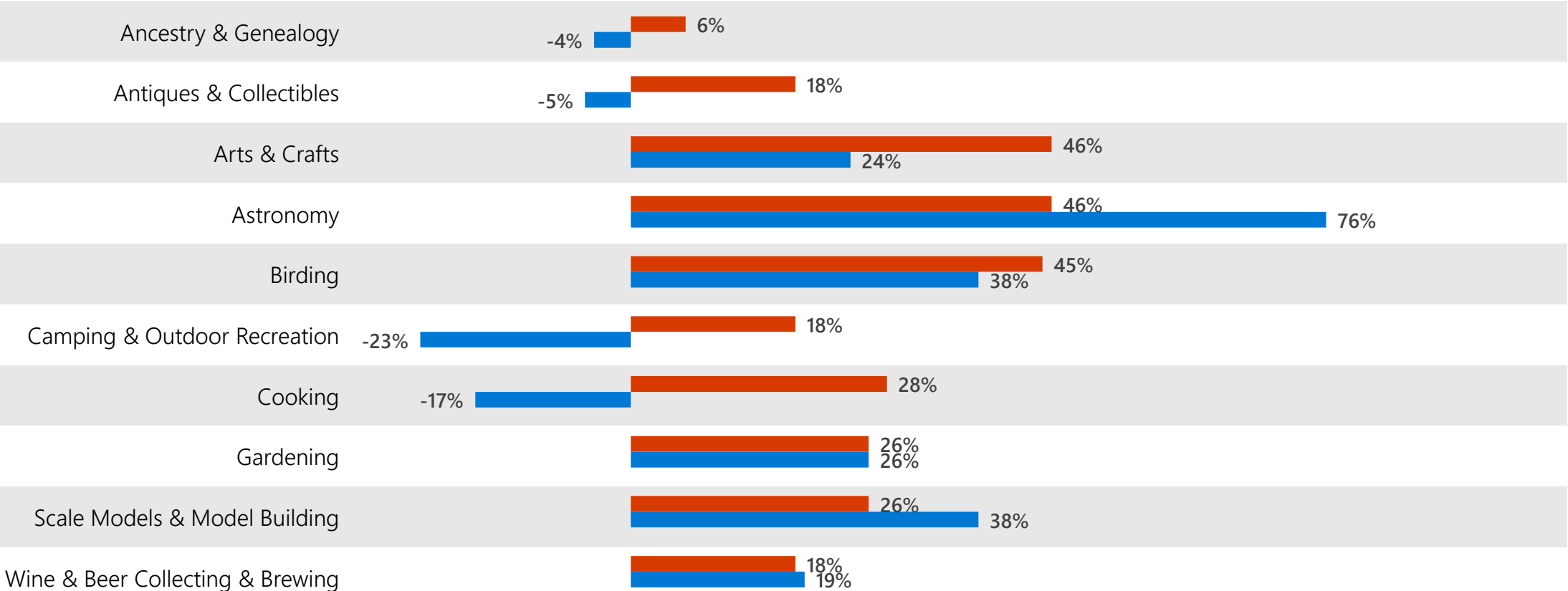
+27% YoY

during 2019 Post

(+4% YoY during Pre)

Searches and clicks are growing across multiple hobbies in EMEA

Pre-to-Post changes in YoY searches and clicks

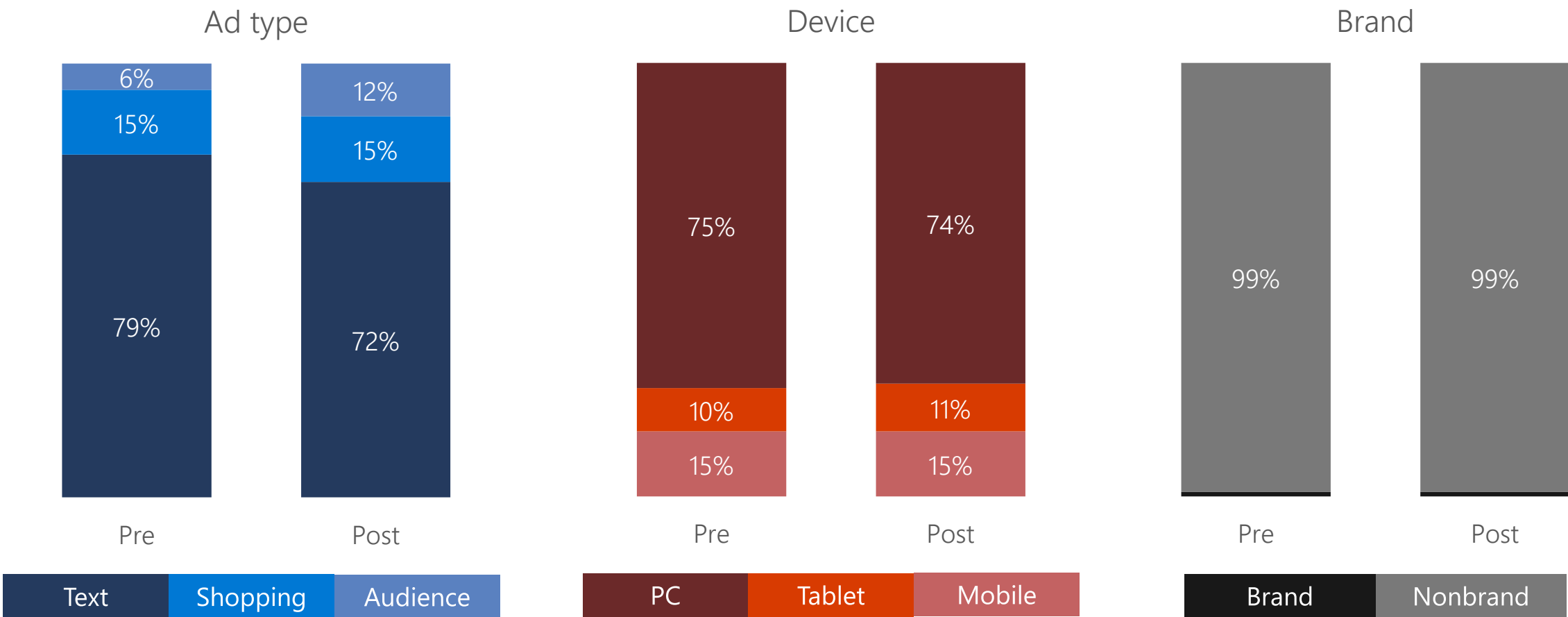


Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, EMEA
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only



Hobby clicks are shifting to Audience Ads in EMEA

Share of clicks, Pre vs. Post



Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, EMEA
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only



APAC Hobby trends

Data through April 3, 2020



Already having increased YoY, APAC hobby searches are growing quickly during the Post period

Searches have grown 19% WoW since COVID-related orders



There has been unmet consumer interest as search growth outpaces click growth across hobbies

Clicks are up for grabs in the hobby marketplace

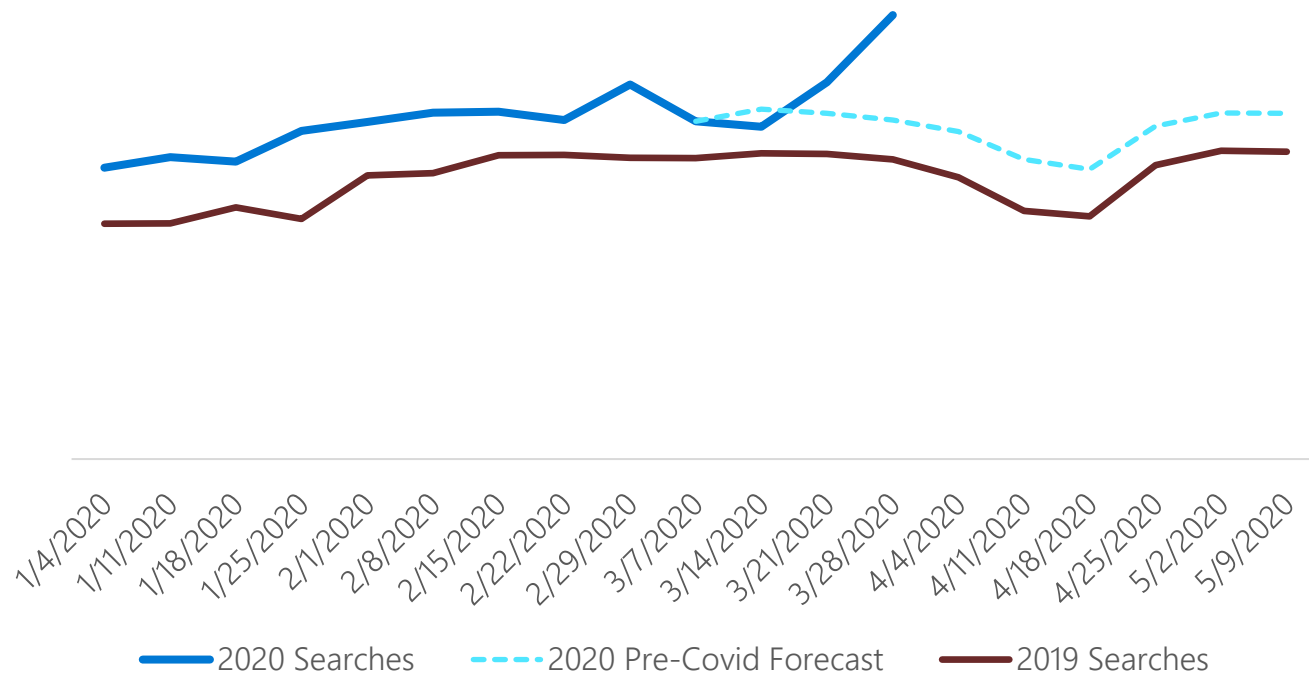


There has been larger Audience Ads click share during Post compared to Pre

Ensure there are sufficient Audience Ads budgets to capture larger portions of traffic

Already growing, hobbies searches are spiking up in APAC

YoY search trends with pre-COVID forecast



Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, APAC
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only

Searches

+16%

to forecast Post

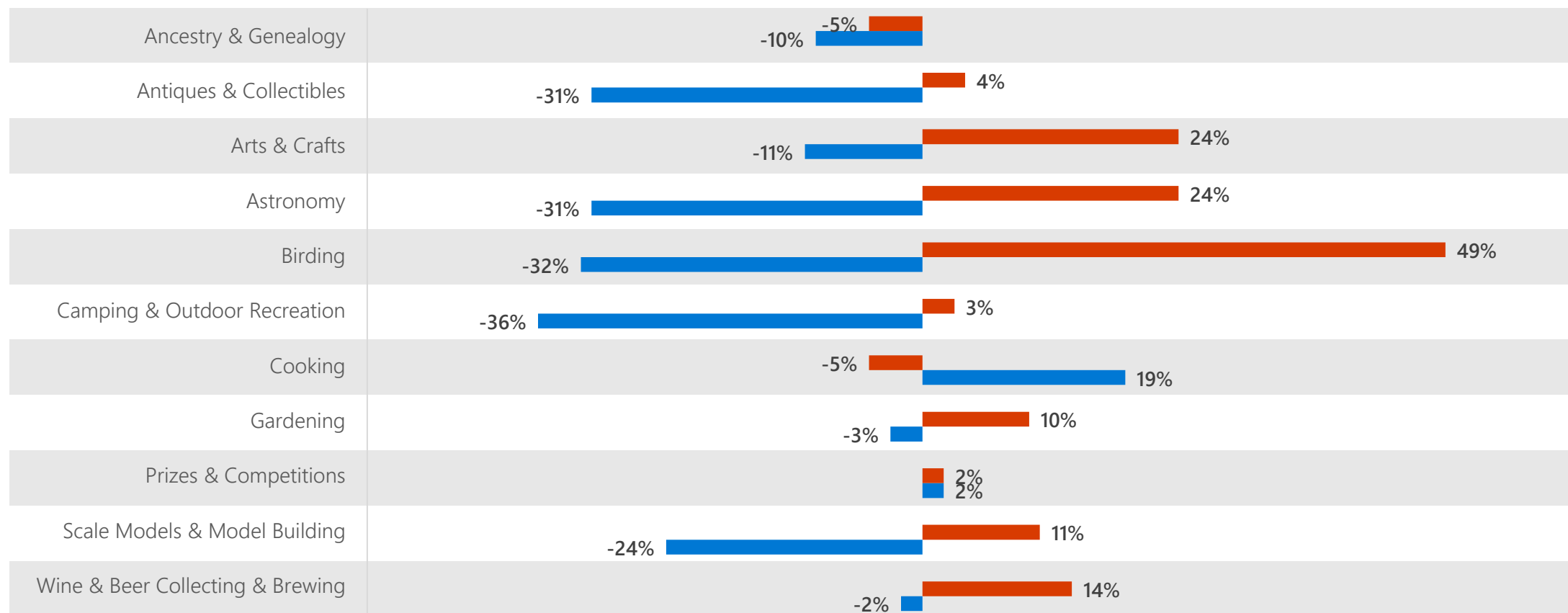
+27% YoY

during 2019 Post

(+20% YoY during Pre)

APAC searches are growing across hobbies with many clicks available

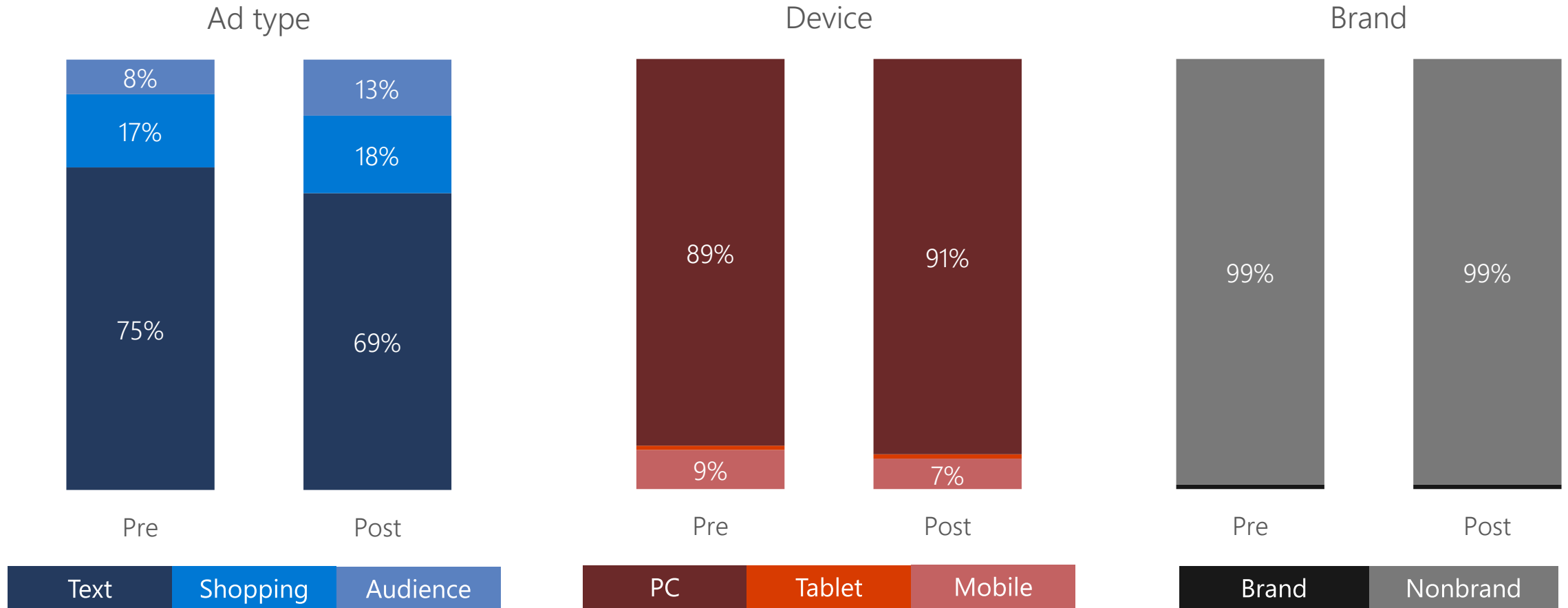
Pre-to-Post changes in YoY searches and clicks



Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, APAC
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only

Audience Ads and Shopping Campaigns are growing in APAC

Share of clicks, Pre vs. Post



Source: Microsoft Advertising Internal Data, Jan – April, 2019 v. 2020, APAC
Pre = 1/1/20 to 3/13/20, Post = 3/14/20 to 4/3/20
Hobbies category searches only

Checklist

Immediate actions

Ads	<input type="checkbox"/> Check the extensions you're using. Use "delivery, curbside pickup, other services" that are unique and applicable to your business.
	<input type="checkbox"/> Shopping: Adjust product group bidding strategy to align with your inventory dynamics.
	<input type="checkbox"/> Shopping: Keep your product feed files up to date as product inventory and prices may change rapidly.
	<input type="checkbox"/> Automatically test different messaging by adding Responsive Search Ads (RSA) to your ad groups. Add assets with "delivery options."
	<input type="checkbox"/> Check your editorial rejections as COVID-19-related terms are disallowed.
	<input type="checkbox"/> Check your text ads. Replace any standard text ads with Expanded Text Ads and RSA (standard text ad volume will begin to decline April 1).
Keywords	<input type="checkbox"/> Search partners: Review publisher reports to optimize performance on the search partner network.
	<input type="checkbox"/> Use "Broadience" (broad match + audience targeting) to help you efficiently expand reach and identify new opportunities.
	<input type="checkbox"/> Add keywords with terms around delivery, curbside pickup, fees waived, etc. as fit for your business (note "COVID-19" terms are restricted).
	<input type="checkbox"/> Review your search term reports for emerging queries to add as keywords or add negatives to avoid poor performance.
	<input type="checkbox"/> To capture emerging queries, create or reactivate Dynamic Search Ads (DSA) as a "catchall" with a lower bid and use discoverability tools like Microsoft Advertising Intelligence and Keyword Planner .
Audience	<input type="checkbox"/> Revamp your branded strategy and consider broad match on your core brand terms to cover highly relevant emerging queries.
	<input type="checkbox"/> Create Remarketing lists with more recent frequencies (ex: 1, 3, 7, 14, 30 days) to target customers still looking to purchase.
	<input type="checkbox"/> Use In-market Audiences to target customers who are in-market for your product (especially for areas of opportunity for you).
	<input type="checkbox"/> If you're using Shopping Campaigns, make sure you have Product Audiences (dynamic remarketing) set up to help increase performance.
	<input type="checkbox"/> Optimize your Audience Ads campaign and reach people where they are today while navigating the web and news sites at home.
	<input type="checkbox"/> Add images to your search campaign, so your ads can serve on the Microsoft Audience Network and get in front of more potential customers.
Bidding	<input type="checkbox"/> Refine targeting settings to reflect consumer trends for your business around geographies, time of day, etc. Use the Bing COVID-19 Tracker to help.
	<input type="checkbox"/> Balance between using automation and manual reviews. Monitor auto-bidding , but keep a close eye to adapt to a fluctuating marketplace.
	<input type="checkbox"/> Monitor SOV/click share and adjust bids, especially where you see opportunities with less competition in the marketplace during this time.
Budget	<input type="checkbox"/> Review your smart targets, adjusting as needed if your targets shift (ex: target conversion rates). Layer Enhanced CPC on top of manual bids.
	<input type="checkbox"/> Check budgets in the Microsoft Advertising Interface daily. Watch for budget pause notifications, which may not show up in bid management tools.
	<input type="checkbox"/> Reallocate budget to your best-performing campaigns and products as performance fluctuates with emerging trends.
	<input type="checkbox"/> Keep campaigns running at a lower CPCs and lower budget to capitalize on decreased marketplace competition, instead of pausing campaigns.

Checklist

Restoration strategies

Ads	<input type="checkbox"/> Ad rotation should be set to optimize .
	<input type="checkbox"/> Check your editorial rejections as COVID-19-related terms are disallowed.
	<input type="checkbox"/> Begin the (required) move to Expanded Text Ads and add Responsive Search Ads (RSA) to your ad groups as an efficient way to swiftly change your text ad messaging.
	<input type="checkbox"/> Use ad customizers and IF functions where applicable. Use audiences to land effective messaging.
	<input type="checkbox"/> Shopping: Use Local Inventory Ads to indicate availability of items and adjust product group bids based on inventory changes.
Keywords	<input type="checkbox"/> Shopping: As your inventory levels grow, re-evaluate your product group strategy and product prioritization to meet your campaign goals.
	<input type="checkbox"/> Check the extensions you're using. Use "delivery, curbside pickup, other services" that are unique and applicable to your business.
	<input type="checkbox"/> Monitor keyword recommendations specific to your account surfaced in Microsoft Advertising user interface.
	<input type="checkbox"/> Continue to use "Broadience" (broad match + audience targeting) to help you expand reach and identify new opportunities after the initial period of greater volatility has passed.
	<input type="checkbox"/> Reevaluate strategy on keywords around delivery, curbside pickup, fees waived (COVID-19-terms are restricted).
Audience	<input type="checkbox"/> To capture newly emerged queries, create or reactivate Dynamic Search Ads (DSA) as a "catchall" with a lower bid and use tools like Microsoft Advertising Intelligence and Keyword Planner .
	<input type="checkbox"/> Reevaluate Remarketing list frequencies (ex: 1, 3, 7, 14, 30 days) to target customers still looking to purchase.
	<input type="checkbox"/> Use In-market Audiences to target customers who are in-market for your product (especially for areas of opportunity for you).
	<input type="checkbox"/> Use Product Audiences (dynamic remarketing) to maximize the performance of your shopping ads.
	<input type="checkbox"/> Create a separate Audience Ads campaign to reconnect with your ideal audience in high-quality and brand-safe native placements.
Bidding	<input type="checkbox"/> Add images to your search campaigns to expand your audience reach and drive increased performance.
	<input type="checkbox"/> Refine targeting settings to reflect consumer trends for your business around geographies, time of day, etc. Use the Bing COVID-19 Tracker to help.
	<input type="checkbox"/> Once the market has "leveled" out and fluctuations have lessened, begin moving back to automated bidding with adjusted targets.
Budget	<input type="checkbox"/> When using manual bids, monitor SOV to adjust bids and leverage ECPC.
	<input type="checkbox"/> Ensure you are setup for real-time success if you are re-entering the auction by leveraging first page bid recommendations in the UI.
	<input type="checkbox"/> Begin planning for increases (or decreases) in campaign budgets as the markets shifts from greater volatility to a new normal.
	<input type="checkbox"/> Monitor SOV to adjust budgets based on new trends, inventory, etc.

Feeds	<ul style="list-style-type: none"> <input type="checkbox"/> Send a complete feed with all product offers and include recommended fields – GTIN, MPN, Brand, Color, Size, Shipping Cost, Multiple Images, and more <input type="checkbox"/> Optimize product titles and descriptions for improved product matching and relevance. Use the Search Term Report at the offer level for relevant terms to include and test. <input type="checkbox"/> Leverage Custom labels in your feed to customize your product groups to meet your business goals. <input type="checkbox"/> Import your Google product offerings to Microsoft Merchant Center to mirror your campaigns from Google. <input type="checkbox"/> Schedule automatic downloads of product feeds to keep your prices and inventory fresh. <input type="checkbox"/> Once stores open again, use Local Inventory Ads to drive traffic to your physical stores. Also a great option for the Shop online, pick up in store trend.
Merchant Center	<ul style="list-style-type: none"> <input type="checkbox"/> Schedule your Merchant Promotions and include any relevant promotional codes. <input type="checkbox"/> Opt into Automatic item updates for price and/or availability to ensure your Product Ad details match the customer experience on your landing pages. <input type="checkbox"/> Use the new List view for ad groups to easily see your product group taxonomy and make bulk operations to your product groups like bid changes by percentage or filter products. <input type="checkbox"/> Campaign priority settings (low, medium, high) give you more control over which campaigns and products take precedent
Audience	<ul style="list-style-type: none"> <input type="checkbox"/> Product Audiences (dynamic remarketing) can help you take your shopping ads to the next level with increased performance. <input type="checkbox"/> Use Product Ads on the Microsoft Audience Network to expand your reach and get your products in front of customers where they are today.
Reporting	<ul style="list-style-type: none"> <input type="checkbox"/> Review share of voice metrics with Click share and Absolute top impression share reporting to see how traffic volume compares to your competitors. <input type="checkbox"/> Use the Product match count reporting to identify product serving issues within your feed and campaigns. <input type="checkbox"/> Easily add negative keywords from your search term reports to filter unqualified traffic to your Product Ads. <input type="checkbox"/> Regularly review your Product negative keyword conflicts report to ensure negative keywords are not limiting how your Product Ads are serving. <input type="checkbox"/> Check your feed error reports to trouble shoot rejections and resubmit corrections. <input type="checkbox"/> Review the Untargeted offers report to confirm all product offers are targeted by a campaign. An All Products as a catch-all bucket for new products or low-bid products is recommended. <input type="checkbox"/> Review your Product partition report to view product group performance and use the Product dimensions report to see product SKU level performance.
Bidding	<ul style="list-style-type: none"> <input type="checkbox"/> Balance between using automation and manual reviews. Monitor auto-bidding but keep a close eye to adapt to a fluctuating marketplace. <input type="checkbox"/> Adding Enhanced CPC will leverage auction-time signals and increase the likelihood of clicks driving conversions. <input type="checkbox"/> Test new auto bidding pilots for Shopping: Maximize Clicks and Target Return on Ad Spend (ROAS)
Budget	<ul style="list-style-type: none"> <input type="checkbox"/> Plan budgets to meet the increased traffic demands by monitoring SOV. <input type="checkbox"/> Allocate additional budget to your current best-performing and products. <input type="checkbox"/> Monitor your daily budgets and adjust as needed with the changing environment.

Checklist

New opportunities

Ads	<input type="checkbox"/> Ad rotation should be set to optimize .
	<input type="checkbox"/> Check your editorial rejections as COVID-19-related terms are disallowed.
	<input type="checkbox"/> Efficiently replicate your marketing messaging strategy changes in your text ads. Replace any standard text ads with Expanded Text Ads and RSA (standard text ad volume will begin to decline April 1).
	<input type="checkbox"/> Use ad customizers and IF functions where applicable. Use audiences to land effective messaging.
	<input type="checkbox"/> Search partners: Expand your reach to a wider audience across all devices on proven, reputable and tested sites.
Keywords	<input type="checkbox"/> Check the extensions you're using. Use "delivery, curbside pickup, other services" that are unique and applicable to your business.
	<input type="checkbox"/> Monitor keyword recommendations relevant to your business surfaced in the Microsoft Advertising user interface.
	<input type="checkbox"/> Use "Broadience" (broad match + audience targeting) to help you expand reach and identify new opportunities once the volatility has settled.
	<input type="checkbox"/> Monitor keywords and consider relevant terms around delivery, curbside pickup, fees waived (COVID-19-terms are restricted)
	<input type="checkbox"/> To capture emerging queries, use Dynamic Search Ads (DSA) as a "catchall" and use tools like Microsoft Advertising Intelligence and Keyword Planner .
Audience	<input type="checkbox"/> Use the Google Import tool to expand your reach by automatically mirroring your Google Ads campaigns and changes on Microsoft Advertising.
	<input type="checkbox"/> Create Remarketing lists with more recent frequencies (ex: 1, 3, 7, 14, 30 days) to target customers still looking to purchase.
	<input type="checkbox"/> Use In-market Audiences to target customers who are in-market for your product (especially for areas of opportunity for you).
	<input type="checkbox"/> Product Audiences (dynamic remarketing) can help you take your shopping ads to the next level with increased performance.
	<input type="checkbox"/> Use Product Ads on the Microsoft Audience Network to expand your reach and get your products in front of customers where they are today.
Bidding	<input type="checkbox"/> Add images to your search campaigns to expand your reach and connect with customers in new places on the Microsoft Audience Network.
	<input type="checkbox"/> Refine targeting settings to reflect consumer trends for your business around geographies, time of day, etc. Use the Bing COVID-19 Tracker to help.
	<input type="checkbox"/> Balance between using automation and manual reviews. Monitor auto-bidding , but keep a close eye to adapt to a fluctuating marketplace.
Budget	<input type="checkbox"/> Adding Enhanced CPC will leverage auction-time signals.
	<input type="checkbox"/> Review your smart targets, adjusting as needed if your targets shift, for example target cost per conversion.
	<input type="checkbox"/> Plan budgets to meet the increased traffic demands by monitoring SOV.
	<input type="checkbox"/> Allocate additional budget to your current best-performing ads and products.
	<input type="checkbox"/> Monitor your daily budgets and adjust as needed with the changing environment.



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