AU Apparel Trends

April 16th 2020
Summary of findings

Apparel related searches increased +17% post lock-down compared to same time last year.

Being comfortable at home is one of the biggest drivers to current search growth.

While brand searches dominate essential wear and activewear, non-brand searches with category focus are also popular in sleepwear, underwear and comfortable streetwear categories.
Searches regain momentum after soft stretch in the most recent reporting week

Apparel weekly searches

+17%

post lock-down compared to the same period in 2019

Weekly search trends and volume change

Source: Microsoft Advertising Internal Data, all devices, Jan 1– Apr 4, 2019 v. 2020,
Searches and clicks are trending upwards with declining cost per click

Weekly key metrics trends

Source: Microsoft Advertising Internal Data, all devices, Jan 1– Apr 4, 2019 v. 2020,

Strong opportunity to capture increasing consumer demand at a lower cost
Growth is driven by need of being comfortable while staying at home

Microsoft Advertising Internal Data, Mar 1– Apr 10, 2020
Searches peak on Thursday across key categories with +16% weekly average

Daily search trends

- Basics & Essentials
- Comfortable Streetwear
- Activewear
- Sleepwear
- Underwear

Microsoft Advertising Internal Data, Mar 1– Apr 10, 2020
Essentials and activewear category searches are dominated by brand terms

Share of essentials and activewear related searches from March 1st to April 10th, 2020

- Cotton On: 30%
- Best & Less: 19%
- Ezibuy: 6%
- Uniqlo: 5%
- Just Jeans: 3%

- Nike: 19%
- Adidas: 13%
- Lorna Jane: 6%
- Puma: 5%
- Gymshark: 1%

Source: Microsoft Advertising Internal Data, Mar 1– Apr 10, 2020
People mix brand and generic when looking for sleepwear, underwear and comfortable streetwear

<table>
<thead>
<tr>
<th>Sleepwear</th>
<th>Underwear</th>
<th>Comfortable streetwear</th>
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<tbody>
<tr>
<td><strong>Top brands</strong></td>
<td><strong>Trending categories</strong></td>
<td><strong>Top brands</strong></td>
</tr>
<tr>
<td>Peter Alexander</td>
<td>[gender] pyjamas</td>
<td>Iconic</td>
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<tr>
<td>Painelle</td>
<td>robe</td>
<td>[brand]/[style] hoodies</td>
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<tr>
<td>Best n Less</td>
<td>dressing gowns</td>
<td>Asos</td>
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<tr>
<td>loungewear</td>
<td>sleepwear</td>
<td>City Beach</td>
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<td>Gingerlilly</td>
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<td>Culture Kings</td>
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<td>Bonds</td>
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<td>Bras n Things</td>
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<td>Modibodi</td>
<td>[brand]/[functional] bras</td>
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<tr>
<td>Lounge underwear</td>
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<td>Victoria’s Secret</td>
<td>[categories] +Australia</td>
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Source: Microsoft Advertising Internal Data, Mar 1 – Apr 10, 2020
Key Takeaways

1. Demand of comfortable apparel spikes, businesses have a huge opportunity to connect their customers with the right product and provide a great customer experience.

2. Investing in Brand and conquering activities is crucial for essential wear and activewear.

3. Ensure your presence of trending products to keep your brand on top of consumers’ minds.