MICROSOFT ADVERTISING

AU software & teleconferencing trends

Apr 9th
Summary of findings

On Mar 11th WHO declared Covid19 pandemic. As a result the tech industry in Australia is experiencing rapid growth as more companies allow employees to work from home.

- Software related searches increased +79% in the last week of March compared to same time last year.
- The double-digit growth is happening globally with productivity software, teleconference and specific applications taking the lead.
- Working from home means more creativity and curiosity, and brings more attention to internet security and software for contractors.
Searches surged in the software category after pandemic declared

Weekly search trends and volume change

Source: Microsoft Advertising Internal Data, all devices, Jan – Mar, 2019 v. 2020,
Strong need for remote collaboration tools

Category increase driven predominantly by:

- **Productivity** +194% (e.g. office 365, google docs)
- **Teleconferencing** +910%
- **Specific applications** +55% (e.g. accounting, design/website, internet security, HR)

Weekly volume trend for subcategories:

- **Productivity**
- **Teleconference**
- **Specific application**

Source: Microsoft Advertising Internal Data, all devices, Jan – Mar 2020, top searches last two weeks of March vs average weekly searches of January, sample size: 40000
Not just in Australia, software is trending high globally

Top areas sorted by volume and calendar week

Consider expanding the geo-targeting to other countries if your products could be scaled out globally.

Source: Microsoft Advertising Internal Data, Feb – Mar 2020
## Top 20 searches by volume in productivity and teleconferencing in AU

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<tr>
<th>Productivity</th>
<th>Teleconference</th>
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Microsoft internal data, March 2020. All devices. List of most frequently occurring tokens.
Growth varies significantly between brand and generic terms which suggests different consumer awareness.

Volume increase by subcategories and query type:

- **Accounting**
  - Non-Brand: +29% (8%)
  - Brand: +21% (21%)

- **Website/design**
  - Non-Brand: +76% (40%)
  - Brand: +77% (36%)

- **Internet security**
  - Non-Brand: +77% (21%)
  - Brand: +56% (56%)

- **HR**
  - Non-Brand: +16% (11%)
  - Brand: +5% (5%)

Source: Weekly volume of March compared to January, Microsoft Advertising Internal Data, all devices, Jan – Mar 2020, top searches, sample size: 40000
Xero is top of mind for searchers. Growing demand for software specifically for contractors

Share of brand searches in March 2020

- Xero: 50%
- Quickbooks: 33%
- MYOB: 16%
- Sage: 1%

For contractors: +137% wow
Volume increase in March

Source: Microsoft Advertising Internal Data, all devices, Jan – Mar 2020
Staying home means more creativity and curiosity.

We're predicting this trend will keep an upward trajectory if the lock-down is extended.

Weekly volume trends on "how to" and "make/build" terms

Source: Microsoft Advertising Internal Data, all devices, Jan – Mar 2020, top searches, sample size: 40000

How to
+95%

Make/build/create/design
+136%
In the internet security category, simple terms lead generic growth.

Apart from brand terms, a lot of searchers use generics such as "best antivirus". This trend combined with increasing demand for VPN (+106% search compared to Jan) signals a lot of people may be using personal laptops for work and are looking to quickly gain security.

**Antivirus & security**

- +98%

**Best & free**

- +95%

*Week over week volume change from last 2 weeks of March compare to January weekly average*

Source: Microsoft Advertising Internal Data, sample top all devices, Jan – Mar 2020, top searches, sample size : 40000
Key Takeaways

1. Demand of software and remote communication spikes, business have a huge opportunity to connect their customers with the right product and provide a great customer experience.

2. Global presence now is the ladder for future growth. Leverage it if your products could be scaled out globally.

3. Understand the factors that drive the growth and adjust your campaign strategy.