Health & Fitness
Germany, France, Spain and Italy

As of March 28, 2020
HYPOTHESIS

Since consumers are currently spending a lot more time at home, they might look to invest in more **Health & Fitness** products/equipment which will best suit their needs when they are training/working out outside of the gym.
‘Health & Fitness’ growing since lockdown begun in Germany with 196% YoY for searches and 277% YoY for Clicks

Indexed Searches
Overall 11% YoY

Indexed Clicks
Overall 14% YoY

Source: Microsoft Internal Data, All Devices
Strong ‘Weight Training’ query growth
Growth seen in other sub-verticals too

Indexed Searches for Health & Fitness sub-verticals

Query samples

**Cycling Equipment**: “fahrrad”, “e bike.”
**Exercise Machines**: “fitness”, “trampoline.”
**Fitness Technology**: “fitbit”, “smart watches.”
**Running shoes**: “nike zoom”, “laufschuhe.”
**Sports & Gymwear**: “skijacken”, “fussballschuhe.”
**Sports Equipment**: “step aerobic”, “tischtennisplatte.”
**Sports Nutrition**: “aminosäuren”, “proteine.”
**Weight Training**: “gewichte”, “kurzhanteln.”
‘Weight Training’ and ‘Exercise Machines’ searches have grown the most YoY

YoY Search Growth for Health & Fitness sub-verticals

- Exercise Machines: +112%
- Fitness Technology: -14%
- Running Shoes: 45%
- Sports Equipment: 73%
- Sports & Gymwear: -5%
- Sports Nutrition: 4%
- Weight Training: +899%

Source: Microsoft Internal Data, All Devices
Categories maintain share of volume searches even after seasonality

2020 - Share of Volume Searches

Source: Microsoft Internal Data, All Devices
‘Weight Training’ driven by generic weight training equipment

Indexed Searches for Top 10 ‘Weight Training’ queries

Top Growing Queries YoY
- Kurzhantel
- Multipresse
- Power rack

Source: Microsoft Internal Data, All Devices
*Searches indexed to 2nd calendar week in January **YoY Query Calculation based Year to Date 28th March with minimum of 500 Searches
**DE: Top 5 Volume Searches by Category**

<table>
<thead>
<tr>
<th>Cycling Equipment</th>
<th>Exercise Machines</th>
<th>Fitness Tech</th>
<th>Sports &amp; Gymwear</th>
<th>Running shoes</th>
<th>Sports Equipment</th>
<th>Sports Nutrition</th>
<th>Weight Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>fahrrad xxl</td>
<td>trampolin</td>
<td>fitbit</td>
<td>skijacken</td>
<td>laufschuhe</td>
<td>calisthenics</td>
<td>aminosäuren</td>
<td>gewicht</td>
</tr>
<tr>
<td>fahrrad</td>
<td>hoverboard</td>
<td>fitness tracker</td>
<td>sneaker damen</td>
<td>turnschuhe</td>
<td>blackroll</td>
<td>amino</td>
<td>kurzhandeln</td>
</tr>
<tr>
<td>e bike / ebike</td>
<td>crosstrainer</td>
<td>smart watch</td>
<td>Fussballschuhe</td>
<td>laufschuhe herren</td>
<td>tischtennisplatte</td>
<td>proteine</td>
<td>gewichte</td>
</tr>
<tr>
<td>cube bikes</td>
<td>Laufband</td>
<td>garmin vivoactive 3</td>
<td>winterjacken damen</td>
<td>laufschuhe damen</td>
<td>gymnastikball</td>
<td>arginin</td>
<td>hanteln kaufen</td>
</tr>
<tr>
<td>ktm e bike</td>
<td>ergometer</td>
<td>fitbit versa</td>
<td>skijacken damen</td>
<td>nike zoom</td>
<td>balance board</td>
<td>protein</td>
<td>power rack</td>
</tr>
</tbody>
</table>

**DE: Top 5 Volume Searches YoY by Category**

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<tr>
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<th>Weight Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>specialized e bike</td>
<td>trampolin kinder</td>
<td>fitbit versa lite</td>
<td>laufjacke herren</td>
<td>damen laufschuhe</td>
<td>boxtraining</td>
<td>hochkalorische nahrung</td>
<td>kurzhandel</td>
</tr>
<tr>
<td>mountainbike fully</td>
<td>speedbike</td>
<td>samsung galaxy fit</td>
<td>merino shirt</td>
<td>joggingschuhe</td>
<td>kettlebell kaufen</td>
<td>hochkalorische trinknahrung</td>
<td>multipresse</td>
</tr>
<tr>
<td>specialized levo</td>
<td>ergometer kaufen</td>
<td>fitbit inspire hr</td>
<td>polo sport</td>
<td>turnschuhe kinder</td>
<td>wahoo fitness</td>
<td>citrullin</td>
<td>power rack</td>
</tr>
<tr>
<td>damenrad</td>
<td>punching ball</td>
<td>pulsuhr mit brustgurt</td>
<td>skijacken</td>
<td>laufschuhe herren</td>
<td>sportsachen damen</td>
<td>komplexe kohlenhydrate</td>
<td>gewichtsweste</td>
</tr>
<tr>
<td>e bike fully</td>
<td>sportgerät</td>
<td>galaxy fit</td>
<td>trainingshose herren</td>
<td>laufschuhe kinder</td>
<td>boxsack kinder</td>
<td>proteinogene aminosäuren</td>
<td>kurzhandeln</td>
</tr>
</tbody>
</table>

Source: Internal Data, All Devices, March 2019 vs March 2020, Until 28st March
Key Takeaways

With fitness studios being closed due to COVID-19 restrictions, searches for exercise equipment to be used at home are growing.

Individual outdoor exercise is still possible, leading to an increase in searches for running shoes, bicycle equipment and sports wear.

Equipment related to weight exercise seems to be especially popular.

Recommendation:
Check and expand your keyword portfolio for growing categories

Recommendation:
Ensure your bids are competitive enough to generate clicks

Recommendation:
Try new ad copy speaking directly to the current situation.
Hypothesis

Since consumers are currently spending a lot more time at home, they might look to invest more in Health & Fitness products and equipment which will best suit their needs when they are training/working-out outside of the gym.
Health & Fitness category growing since lockdown started in France with 74% YoY for searches and 142% YoY for Clicks

Indexed searches
Overall 21% year over year (YoY)

Indexed clicks
Overall 13% YoY

Source: Microsoft internal data
Strong ‘Weight Training’ & ‘Yoga & Pilates’ query growth
Other sub-verticals also growing

Indexed Searches for Health & Fitness sub-verticals

Query samples

**Cycling equipment:** “velo”, “velo electrique.”

**Exercise machines:** “tapis course”, “rameur.”

**Fitness technology:** “montre”, “montre garmin.”

**Games sports:** “trampoline”, “arc.”

**Running shoes:** “chaussures running”, “chaussures sport”

**Team sports:** “ballon foot”, “but football.”

**Yoga pilates:** “tapis yoga”, “cousin yoga.”

**Weight training:** “banc musculation”, “halteres.”

Source: Microsoft internal data
YoY Search Growth for Health & Fitness sub-verticals

- Cycling equipment: 58%
- Exercise machines: +307%
- Yoga & pilates: 219%
- Running shoes: -34%
- Team sports: 131%
- Boxing: 107%
- Games sports: 85%
- Fitness technology: 15%

‘Weight training’ and ‘exercise machines’ searches have grown the most

Source: Microsoft internal data
‘Yoga & Pilates’ growth likely being driven by ‘Yoga mat’ related queries

Indexed Searches for Top 8 ‘Yoga & Pilates’ queries

Top growing queries YoY
- Tapis gym decathlon
- Tapis yoga ecologique
- Tapis gymnastique

Source: Microsoft internal data
*Searches indexed to 2nd calendar week in January **YoY query calculation based on year to date on 28th March
‘Weight Training’ growth likely being driven by generic weightlifting equipment that can be easily used at home

Indexed Searches for Top 8 ‘Weight Training’ queries

Top growing queries YoY
• Barre traction
• halteres
• Chaise romaine

Source: Microsoft internal data
*Searches indexed to 2nd calendar week in January **YoY query calculation based on year to date on 28th March
‘Exercise machines’ growth being driven by generic ‘treadmill’ (tapis de course) related queries

Indexed Searches for
Top 8 ‘Exercise Machines’ queries

Top Growing Queries YoY
- Tapis courses
- Mini stepper
- Tapis course professionnel

Source: Microsoft internal data
*Searches indexed to 2nd calendar week in January **YoY query calculation based on year to date on 28th March
## France: Top 5 volume searches by category

<table>
<thead>
<tr>
<th>Exercise machines</th>
<th>Yoga &amp; pilates</th>
<th>Weight training</th>
<th>Team sports</th>
<th>Boxing</th>
<th>Games sports</th>
<th>Cycling equipment</th>
<th>Fitness technology</th>
<th>Running shoes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tapis course</td>
<td>Tapis yoga</td>
<td>Banc musculation</td>
<td>Ballon foot</td>
<td>kimono</td>
<td>trampoline</td>
<td>velo</td>
<td>Montre connectee</td>
<td>Chaussure running</td>
</tr>
<tr>
<td>rameur</td>
<td>Tapis gym</td>
<td>Barre traction</td>
<td>Panier basket</td>
<td>Punching ball</td>
<td>arc</td>
<td>Velo electrique</td>
<td>montre</td>
<td>Chaussures running</td>
</tr>
<tr>
<td>stepper</td>
<td>Tapis gymnastique</td>
<td>halteres</td>
<td>But football</td>
<td>Sac frappe</td>
<td>ballon</td>
<td>vtt</td>
<td>Montre garmin</td>
<td>Chaussures sport</td>
</tr>
<tr>
<td>Tapis course electrique soldes</td>
<td>Coussin yoga</td>
<td>Chaise romaine</td>
<td>But foot</td>
<td>Gant boxe</td>
<td>Ballon basket</td>
<td>Velo electrique pas cher</td>
<td>Montre sport</td>
<td>Chaussure trail</td>
</tr>
<tr>
<td>Tapis course pas cher</td>
<td>Tapis yoga ecologique</td>
<td>Barre musculation</td>
<td>Ballon football</td>
<td>Kimono judo</td>
<td>Marche nordique</td>
<td>Vtt electrique</td>
<td>Montre cardio</td>
<td>Chaussures trail</td>
</tr>
</tbody>
</table>

## France: Top 5 volume searches YoY by category

<table>
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<th>Exercise machines</th>
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<tr>
<td>Tapis courses</td>
<td>Tapis yoga ecologique</td>
<td>Kit halteres</td>
<td>Mini panier basket</td>
<td>Sac boxe</td>
<td>Arc fleche</td>
<td>Velo appart</td>
<td>Montre connectee</td>
<td>Chaussure running femme</td>
</tr>
<tr>
<td>Mini stepper</td>
<td>Coussin yoga</td>
<td>Halteres reglables</td>
<td>Panier basket pied</td>
<td>Sac frappe pied</td>
<td>Table tennis table</td>
<td>Velo elliptique pliable</td>
<td>Montre polar</td>
<td>Basket running femme</td>
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<tr>
<td>Tapis course professionnel</td>
<td>Tapis gym</td>
<td>halteres</td>
<td>Panier basket</td>
<td>Kimono karate</td>
<td>Tire arc</td>
<td>Vtt xc</td>
<td>Montre garmin</td>
<td>Chaussure running homme</td>
</tr>
<tr>
<td>Tapis course pliable</td>
<td>Tapis yoga</td>
<td>Barre traction</td>
<td>Ballon football</td>
<td>Sac frappe</td>
<td>Ballon football americain</td>
<td>Velos elliptiques</td>
<td>montre</td>
<td>Basket running homme</td>
</tr>
<tr>
<td>Rameur musculation</td>
<td>Tapis gymnastique</td>
<td>Banc musculation</td>
<td>Cage foot</td>
<td>Gant boxe</td>
<td>flechettes</td>
<td>vtt</td>
<td>Montre cardio gps</td>
<td>Chaussures sport</td>
</tr>
</tbody>
</table>

Source: Microsoft Internal data.  
March 2019 vs March 2020 until 28th March
**Hypothesis** : Since consumers are currently spending a lot more time at home, they might look to invest more in Health & Fitness products and equipment which will best suit their needs when they are training/working-out outside of the gym.

**Conclusion** : The hypothesis is confirmed based on data

Some interesting highlights are:
- The YoY click index is way above YoY search index: 142% YoY for Clicks vs 74% YoY for searches, establishing a clear increased interest in these products.
- While media is zooming on brand new people now **running**, running shoes does not over-index.
- Yoga category is growing.
- Exercise machines and Weight training are growing, some of these product take space and are high cost, yet people are prioritizing sport and exercise and are ready to invest in equipment.
ES Health & Fitness

As of April 11, 2020
HYPOTHESIS

Since consumers are currently spending **a lot more time at home**, they might look to invest in more **Health & Fitness** products/equipment which will best suit their needs when they are training/working out outside of the gym.
Health & Fitness searches and clicks growth accelerating after lockdown

Growth searches and clicks accelerates during lockdown:

• Growth searches in last 4 weeks is **+262%** (vs. +22% this year before lockdown)
• Growth clicks in last 4 weeks is **+586%** vs. (vs. +145% before lockdown)

Last 4 weeks are week 12 – 15, covering the period 15 Mar - 11 Apr 2020
Source: Microsoft Internal, Spain, non-brand terms only
Exercise Machines are driving growth during lockdown period

'Cycling Equipment' searches

'Exercise Machines' searches

'Fitness Technology' searches

'Sports & Gymwear' searches

'Sports Equipment' searches

'Sports Nutrition' searches

Last 4 weeks are week 12 – 15, covering the period 15 Mar - 11 Apr 2020, previous 4 weeks covers 16 Feb - 14 Mar 2020

Source: Microsoft Internal, Spain, non-brand terms only
‘Exercise Machines’ driven by generic exercise machines

Indexed Searches for
Top 8 ‘Exercise Machines’ queries

Top Growing Queries YoY
• Bici estatica / Bicycle
• Cardio en casa / Cardio at home
• Cinta de correr / treadmill

Source: Microsoft Internal Data, All Devices
*Searches indexed to 2nd calendar week in January **YoY Query Calculation based Year to Date 28th March with minimum of 500 Searches
‘Exercise Machines’ grows significantly after lockdown restrictions

<table>
<thead>
<tr>
<th></th>
<th>05/Jan-11/Jan</th>
<th>12/Jan-18/Jan</th>
<th>19/Jan-25/Jan</th>
<th>26/Jan-01/Feb</th>
<th>02/Feb-08/Feb</th>
<th>09/Feb-15/Feb</th>
<th>16/Feb-22/Feb</th>
<th>23/Feb-29/Feb</th>
<th>01/Mar-07/Mar</th>
<th>08/Mar-14/Mar</th>
<th>15/Mar-21/Mar</th>
<th>22/Mar-28/Mar</th>
<th>29/Mar-04/Apr</th>
<th>05/Apr-11/Apr</th>
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<tbody>
<tr>
<td>Cycling Equipment</td>
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<td>14%</td>
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<td>16%</td>
<td>20%</td>
<td>19%</td>
<td>22%</td>
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<td>15%</td>
<td>56%</td>
<td>61%</td>
<td>61%</td>
<td>67%</td>
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<tr>
<td>Exercise Machines</td>
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<td>16%</td>
<td>12%</td>
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<tr>
<td>Fitness Technology</td>
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<td>14%</td>
<td>13%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Sports &amp; Gym Equipment</td>
<td>16%</td>
<td>20%</td>
<td>19%</td>
<td>22%</td>
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<tr>
<td>Sports &amp; Gymwear</td>
<td>20%</td>
<td>19%</td>
<td>15%</td>
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<tr>
<td>Sports Nutrition</td>
<td>14%</td>
<td>15%</td>
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<td>80%</td>
<td>90%</td>
<td>100%</td>
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</tr>
</tbody>
</table>

Source: Microsoft Internal Data, All Devices
### ES: Top 5 Volume Searches by Category

<table>
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<tr>
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<th>Sports Nutrition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ciclismo</td>
<td>gimnasio</td>
<td>fitbit</td>
<td>Ropa deportiva</td>
<td>baloncesto</td>
<td>aminos</td>
</tr>
<tr>
<td>bicicleta</td>
<td>Bicicletas estaticas</td>
<td>Relojes inteligentes</td>
<td>Medias largas</td>
<td>boxeo</td>
<td>proteinas</td>
</tr>
<tr>
<td>bicicletas</td>
<td>Bicicletas estatica</td>
<td>Reloj inteligente</td>
<td>Tiendas de deporte</td>
<td>barra</td>
<td>Aminoacidos</td>
</tr>
<tr>
<td>Bicicleta electrica</td>
<td>Gimnasia en casa</td>
<td>Garmin vivoactive 3</td>
<td>Sujetardo deportivo</td>
<td>Pelota de futbol</td>
<td>Creatina</td>
</tr>
<tr>
<td>mtb</td>
<td>Cintas de correr</td>
<td>Fitbit inc</td>
<td>Tienda de deportes</td>
<td>pelotas</td>
<td>proteina</td>
</tr>
</tbody>
</table>

### ES: Top 5 Volume Searches YoY by Category

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<th>Sports Nutrition</th>
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<tbody>
<tr>
<td>Venta de bicicletas</td>
<td>Bicicleta estatica plegable</td>
<td>Reloj inteligente</td>
<td>Medias largas</td>
<td>Bandas elásticas</td>
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<tr>
<td>ciclismo</td>
<td>Bici estatica</td>
<td>Relojes inteligentes</td>
<td>Tienda de deportes</td>
<td>kettlebell</td>
<td>Aminoacidos esenciales</td>
</tr>
<tr>
<td>bicicleta</td>
<td>Cardio en casa</td>
<td>Fitbit</td>
<td>Futbol americano</td>
<td>netball</td>
<td>amino</td>
</tr>
<tr>
<td>bicicletas</td>
<td>cardio</td>
<td>Garmin vivoactive 3</td>
<td>Botas de montana</td>
<td>Pelota de futbol</td>
<td>proteinas</td>
</tr>
<tr>
<td>Bicicleta de montana</td>
<td>Cinta de correr</td>
<td>Fitbit inc</td>
<td>Tiendas de deporte</td>
<td>pelotas</td>
<td>aminoacidos</td>
</tr>
</tbody>
</table>
HYPOTHESIS TESTING & CONCLUSION

**HYPOTHESIS**: Since consumers are currently spending a lot more time at home, they might look to invest in more Health & Fitness products/equipment which will best suit their needs when they are training/working out outside of the gym.

**CONCLUSION**: The hypothesis is confirmed. Since lockdown restrictions have taken place, search volume and clicks have grown significantly.

- Between 15th March 2020 – 11th April 2020, there has been 262% search volume growth YoY and a 586% clicks growth YoY.
- Several categories feed into this growth but ‘Exercise Machines’ has been the driving force in this growth with 1800% YoY search growth between week 12 and week 15.
- Taking a deeper look into this category, we revealed that consumers are searching mainly for generic exercise machine equipment, specifically treadmills & exercise bikes.
HYPOTHESIS

Since consumers are currently spending **a lot more time at home**, they might look to invest in more **Health & Fitness** products/equipment which will best suit their needs when they are training/working out outside of the gym.
Health & Fitness searches and clicks growth accelerating after lockdown

Weekly searches ‘Health & Fitness’

Restrictions effective

Weekly clicks ‘Health & Fitness’

Restrictions effective

Growth searches and clicks accelerates during lockdown:

- Growth searches in last 4 weeks is +218% (vs. +34% this year before lockdown)
- Growth clicks in last 4 weeks is +270% vs. (vs. +78% before lockdown)

Last 4 weeks are week 12 – 15, covering the period 15 Mar - 11 Apr 2020
Source: Microsoft Internal, Italy, non-brand terms only
Exercise Machines are driving growth during lockdown period

'Cycling Equipment' searches
- 2019
- 2020

'+120% YoY'

'Exercise Machines' searches
- 2019
- 2020

'+900% YoY'

'Fitness Technology' searches
- 2019
- 2020

'+9% YoY'

'Sports & Gymwear' searches
- 2019
- 2020

' -14% YoY'

'Sports Equipment' searches
- 2019
- 2020

'+133% YoY'

'Sports Nutrition' searches
- 2019
- 2020

'+26% YoY'

Last 4 weeks are week 12 – 15, covering the period 15 Mar - 11 Apr 2020, previous 4 weeks covers 16 Feb - 14 Mar 2020
Source: Microsoft Internal, Italy, non-brand terms only
Indexed Searches for
Top 8 ‘Exercise Machines’ queries

Top Growing Queries YoY

• Stepper
• Vogatore/rowing machine
• Tapis roulant technogym/treadmill

Source: Microsoft Internal Data, All Devices

*Searches indexed to 2nd calendar week in January **YoY Query Calculation based Year to Date 28th March with minimum of 500 Searches
‘Exercise Machines’ more than doubles in search share over time

2020 - Share of Volume Searches

Source: Microsoft Internal Data, All Devices
### IT: Top 5 Volume Searches by Category

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<td>Tapis roulant</td>
<td>fitbit</td>
<td>Scarpe de calcio</td>
<td>pallavola</td>
<td>proteine</td>
</tr>
<tr>
<td>ciclismo</td>
<td>cyclette</td>
<td>Garmin vivoactive 3</td>
<td>Scarponi da sci</td>
<td>palestra</td>
<td>creatina</td>
</tr>
<tr>
<td>mtb</td>
<td>fitness</td>
<td>Fitbit versa</td>
<td>Abbigliamento sportivo</td>
<td>Ginnastica ritmica</td>
<td>arginina</td>
</tr>
<tr>
<td>Mountain bike</td>
<td>ellittica</td>
<td>Fitness tracker</td>
<td>Scarponi da montagna</td>
<td>donic</td>
<td>aminoacidi</td>
</tr>
<tr>
<td>Bici elettrica</td>
<td>hoverboard</td>
<td>Fitbit inc</td>
<td>Abbigliamento da sci</td>
<td>Porte a soffietto</td>
<td>integratori</td>
</tr>
</tbody>
</table>

### IT: Top 5 Volume Searches YoY by Category

<table>
<thead>
<tr>
<th>Cycling Equipment</th>
<th>Exercise Machines</th>
<th>Fitness Tech</th>
<th>Sports &amp; Gymwear</th>
<th>Sports Equipment</th>
<th>Sports Nutrition</th>
</tr>
</thead>
<tbody>
<tr>
<td>bicicletta</td>
<td>Tapis roulant technogym</td>
<td>Garmin forerunner</td>
<td>Crop top</td>
<td>elastici</td>
<td>proteina</td>
</tr>
<tr>
<td>Bici da corsa</td>
<td>Cyclette pieghevole</td>
<td>Fitness tracker</td>
<td>Borse sportive</td>
<td>tubi</td>
<td>amino</td>
</tr>
<tr>
<td>ebike</td>
<td>stepper</td>
<td>Fitbit</td>
<td>Scarponi da montagna</td>
<td>bilanciere</td>
<td>Integratori alimentari</td>
</tr>
<tr>
<td>ciclismo</td>
<td>Pull up</td>
<td>Fitbit versa</td>
<td>Abbigliamento sportivo</td>
<td>Tavolo da ping pong</td>
<td>caseina</td>
</tr>
<tr>
<td>Mountain bike</td>
<td>Tapis roulant elettrico</td>
<td>Garmin vivoactive 3</td>
<td>Scarpe da donna</td>
<td>Palla da basket</td>
<td>proteine</td>
</tr>
</tbody>
</table>
HYPOTHESIS TESTING & CONCLUSION

HYPOTHESIS: Since consumers are currently spending a lot more time at home, they might look to invest in more Health & Fitness products/equipment which will best suit their needs when they are training/working out outside of the gym.

CONCLUSION: The hypothesis is confirmed. Since lockdown restrictions have taken place, search volume and clicks have grown significantly.

- Between 15th March 2020 – 11th April 2020, there has been 218% search volume growth YoY and a 270% clicks growth YoY.
- Several categories feed into this growth but ‘Exercise Machines’ has been the driving force in this growth with 900% YoY search growth between week 12 and week 15.
- Taking a deeper look into this category, we revealed that consumers are searching mainly for generic exercise machine equipment.
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