



# Auto industry impact overview (U.K.)

Through March 21, 2020



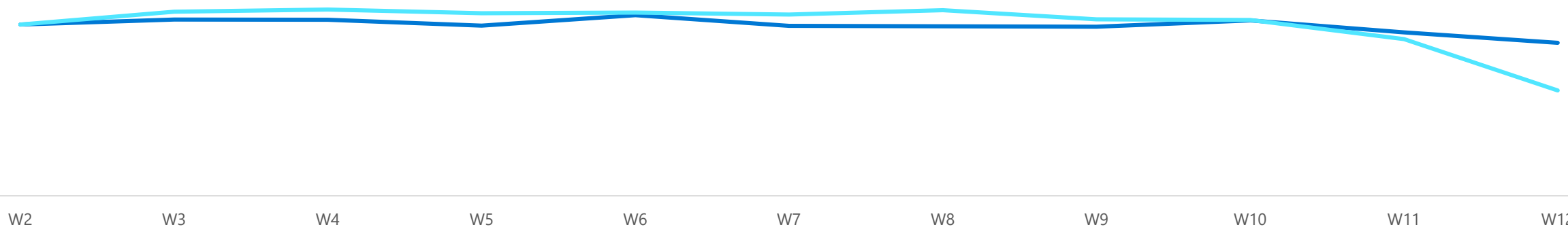
We expect the online engagement of auto consumers to drop drastically from the beginning of the lockdown. But...

1. How deep is the impact on Microsoft Advertising?
2. Are all brands seeing the same level of impact?

# Lockdown has significantly impacted car buying in the U.K.

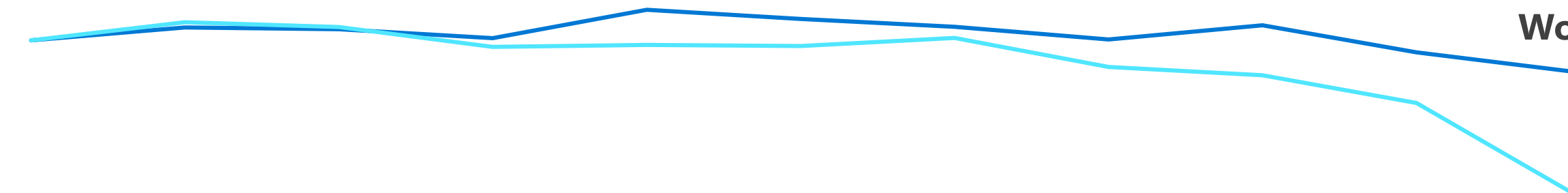
Search results page views (SRPVs)  
indexed to Jan. Week 2 (W2)

**-33% week over week  
(WoW)**



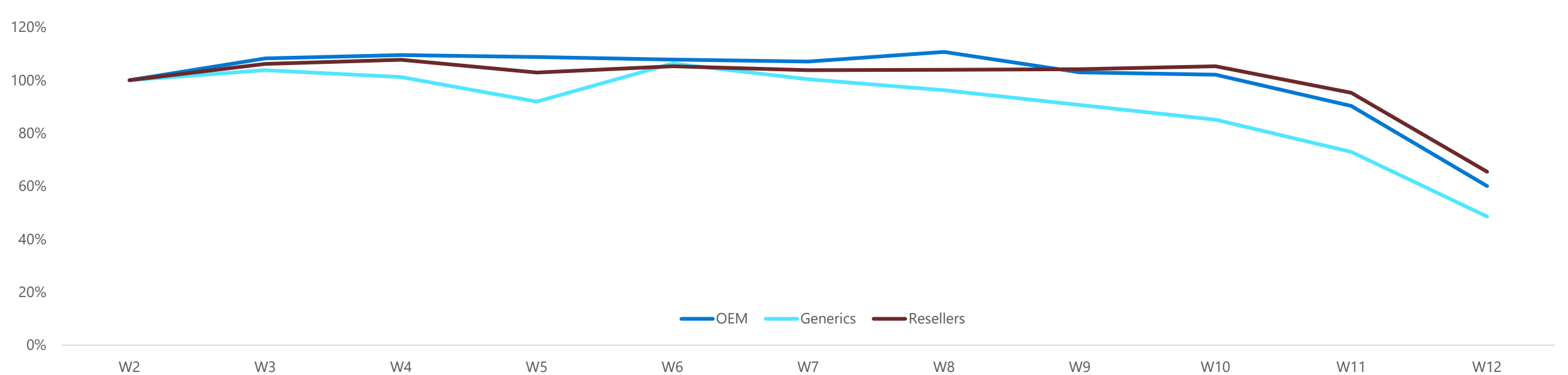
Clicks indexed to Jan. W2

**-38%  
WoW**



# Reseller brands have been impacted the least so far, but it's marginal

Search volume indexed to W2 (05/Jan – 11/Jan)



WoW  
(week ending  
21<sup>st</sup> Mar.)

Original Equipment Manufacturer (OEM) brands  
-34%

Generics  
-33%

Reseller brands  
-31%

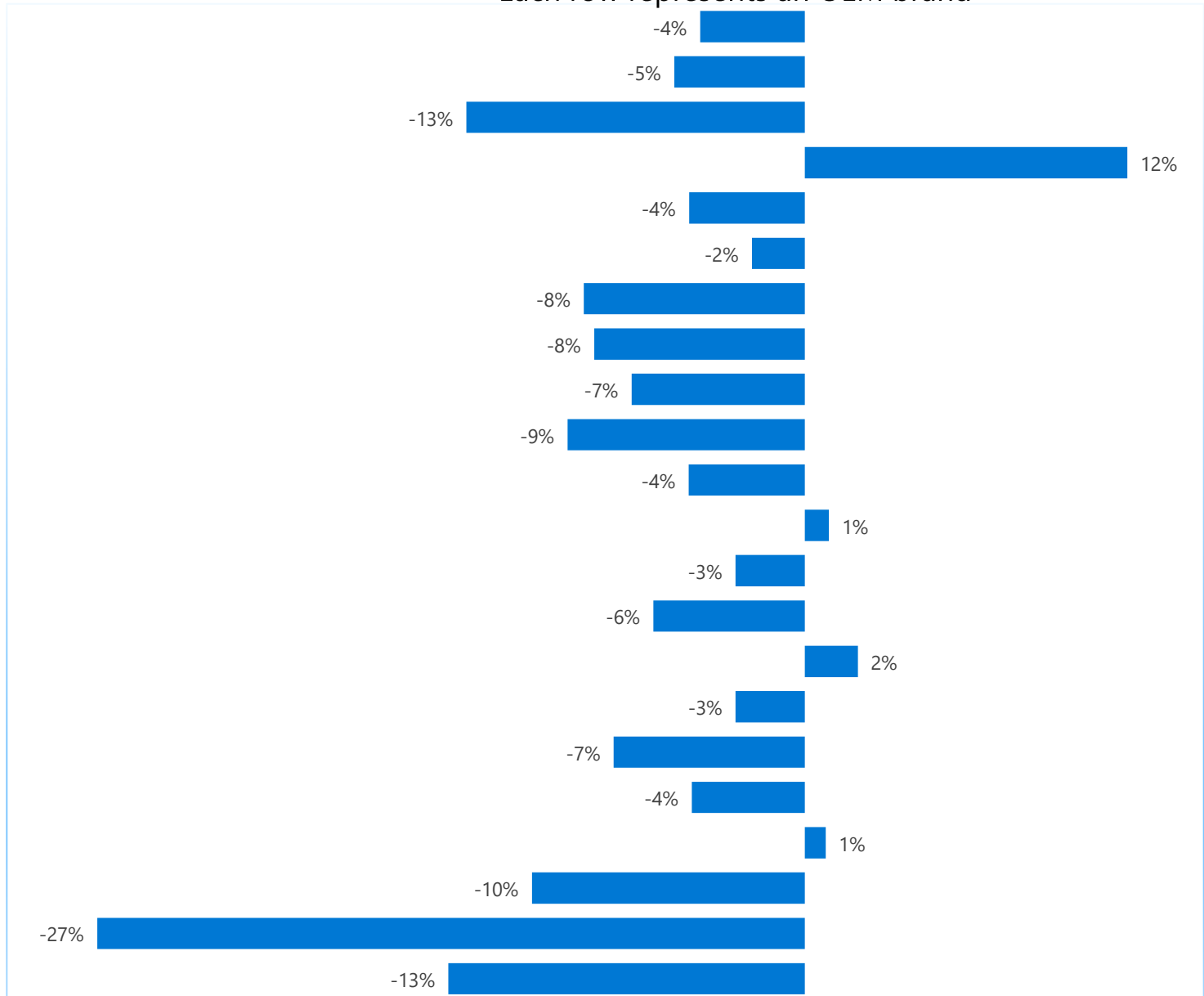


**Don't forget:** Recent launches & marketing strategies prior to the lockdown influence these WoW search volume trends to a great extent

OEM brands\* WoW search volume trend

15/Mar. – 21/Mar. over 08/Mar. – 14/Mar.

\* Each row represents an OEM brand



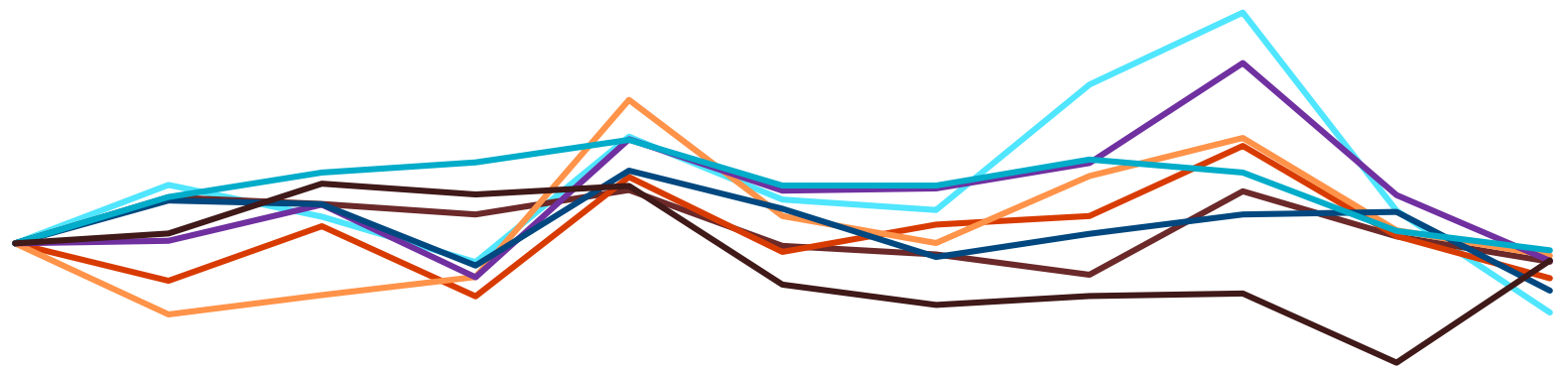
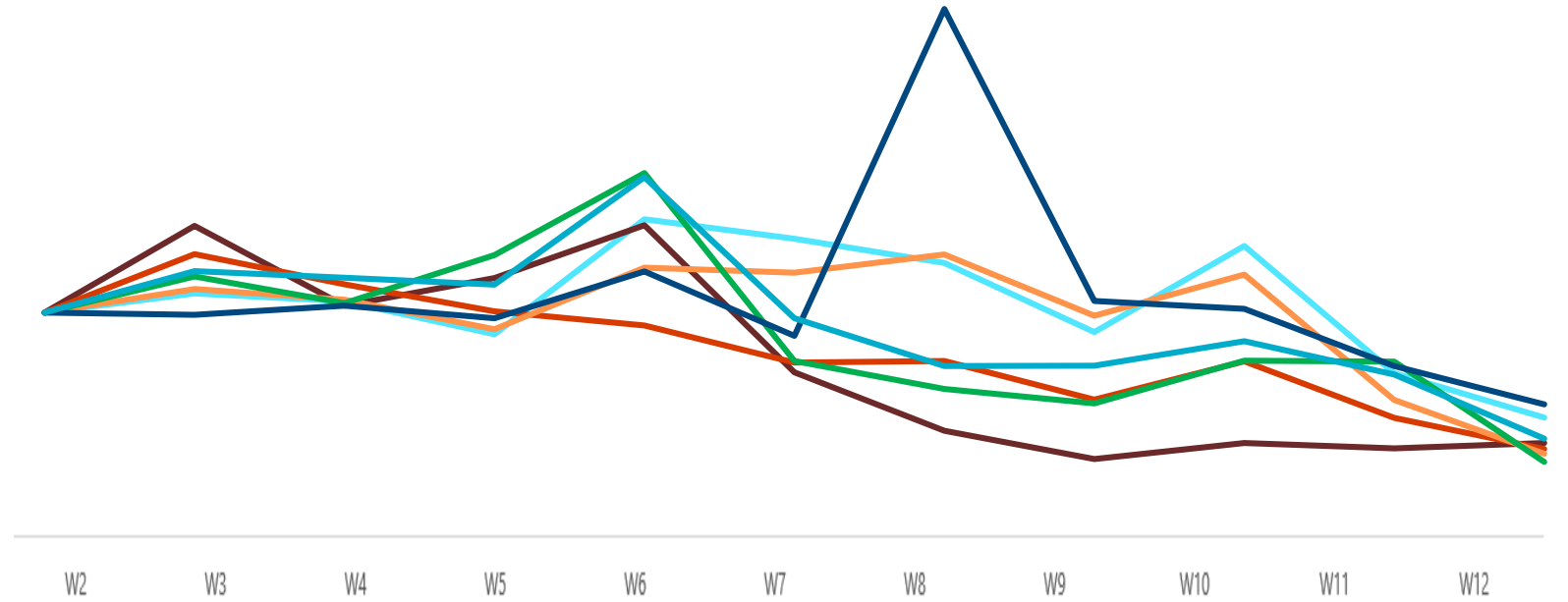
Source: Microsoft Internal Data, Bing O&O Traffic, All Devices

# Economy brands

Most economy brand searches have declined

Search volume\* indexed to Week 2 (05/Jan – 11/Jan)

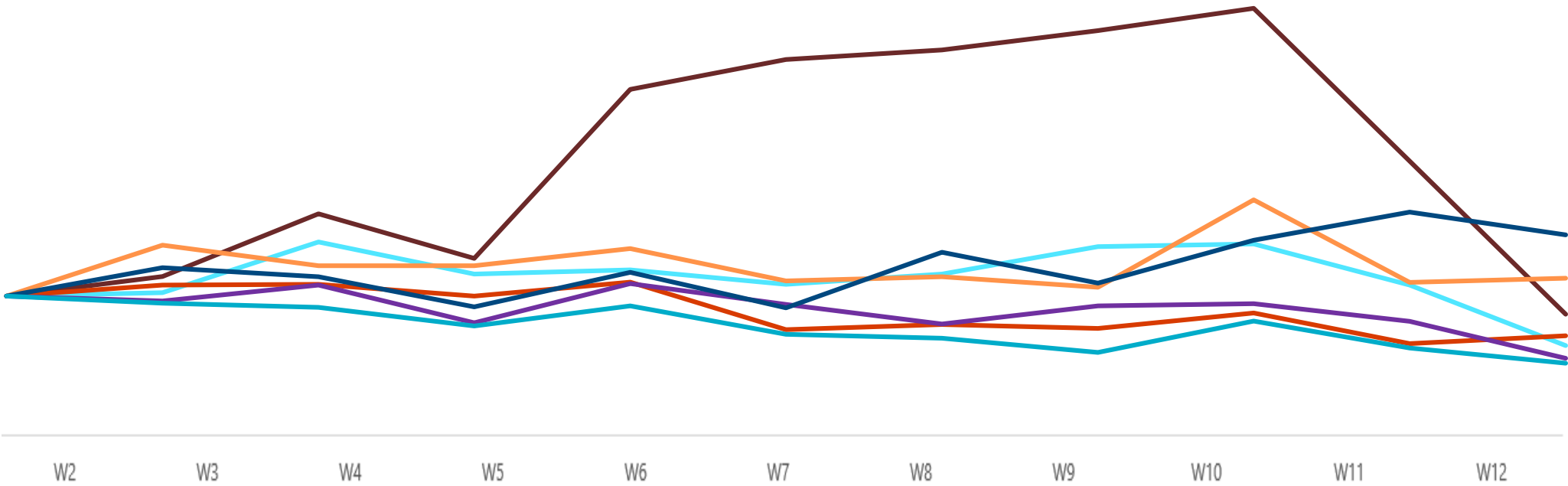
\* Each line represents an economy brand



# Most luxury brands had the same level of consumer engagement

**Search volume\* indexed to Week 2 (05/Jan – 11/Jan)**

\* Each line represents a luxury brand



Source: Microsoft Internal Data, Bing O&O Traffic, All Devices



Thank you