



MICROSOFT ADVERTISING

COVID-19 Software & Teleconferencing trends (U.S.)

Microsoft Advertising. Intelligent connections.

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

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

*





Software searches are up 27% and Teleconferencing 615% vs. the normal seasonality forecast

Take advantage of queries and products centered around productivity at home

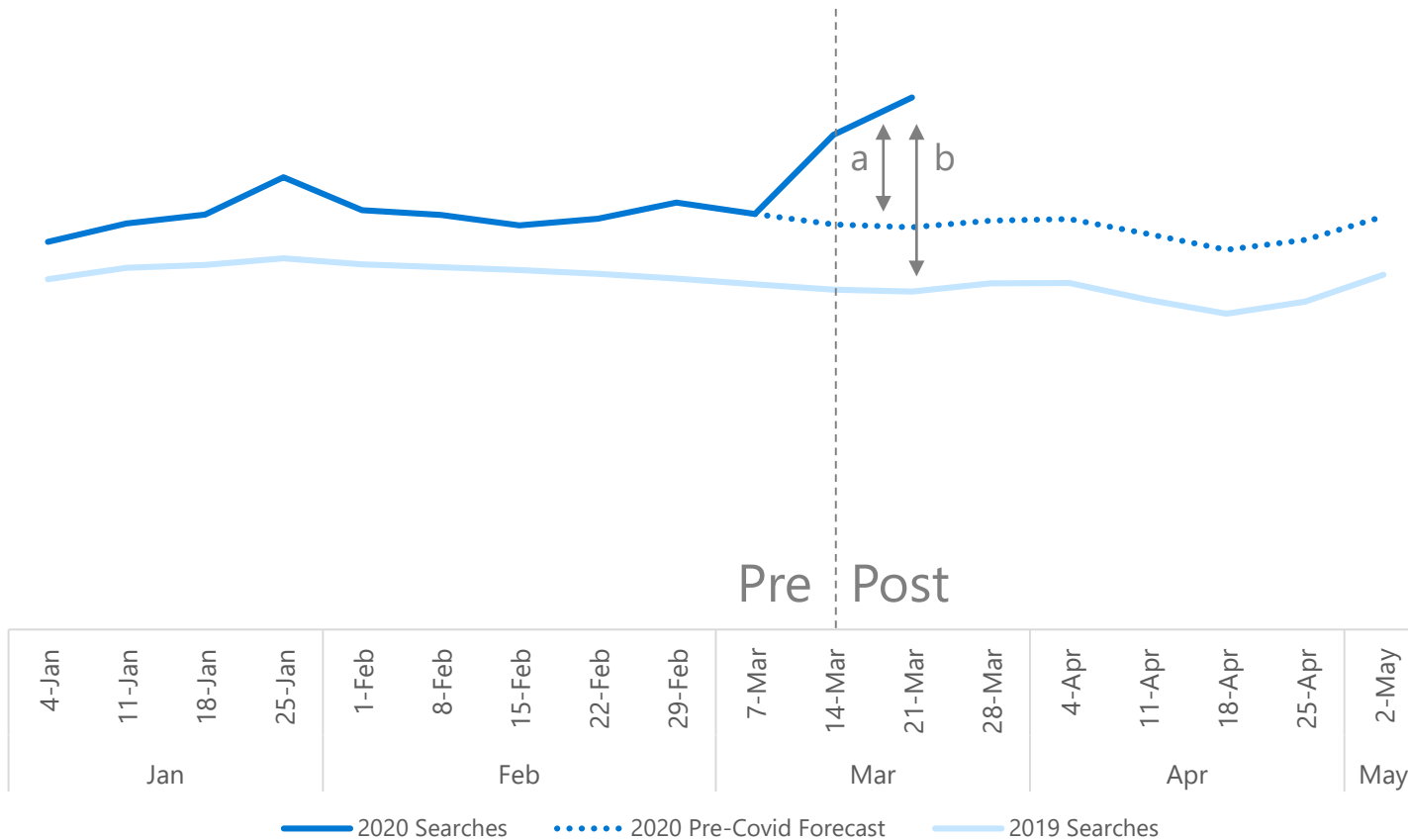


Software and Teleconferencing are both seeing upticks in desktop PC searches and Microsoft Audience Ads

Focus your efforts on these devices and ad types

Software searches are trending up

Year-over-year (YoY) search trends with pre-coronavirus forecast



Software searches

a **+27%**

to forecast, post timeframe

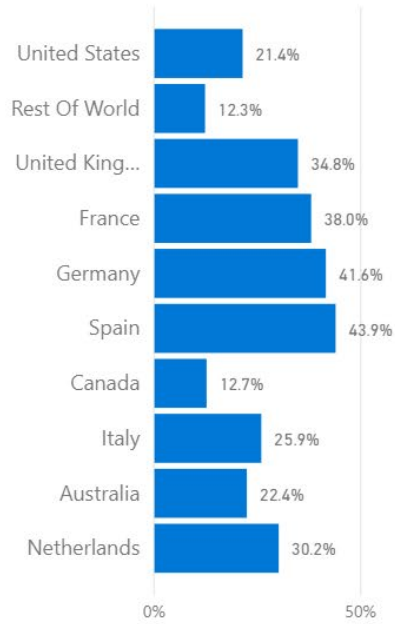
b **+51%**

YoY, post timeframe

This trend is happening globally

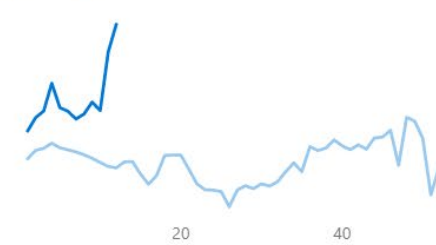
Top global geos, sorted by volume and calendar week

Searches YOY % Change



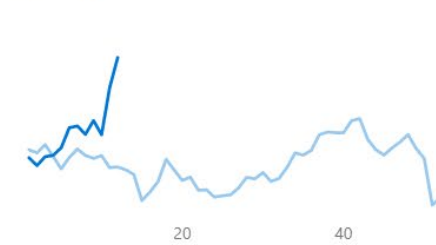
US

● 2019 ● 2020

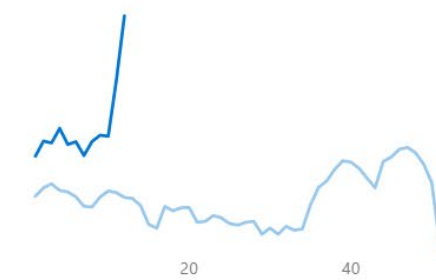


ROW

● 2019 ● 2020

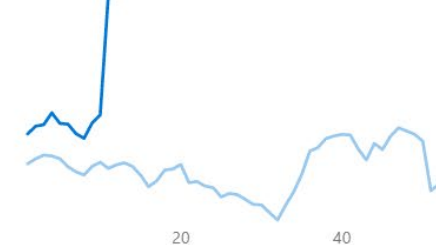


UK



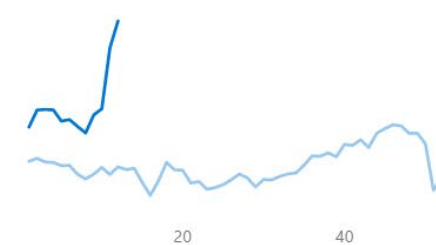
France

● 2019 ● 2020

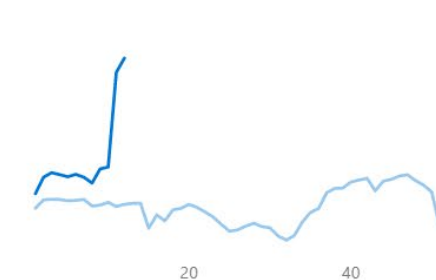


Germany

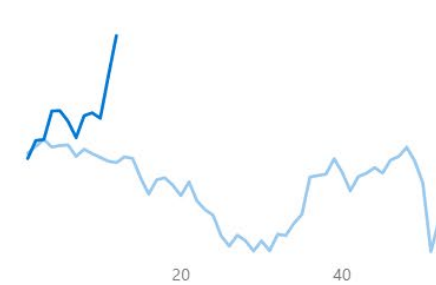
● 2019 ● 2020



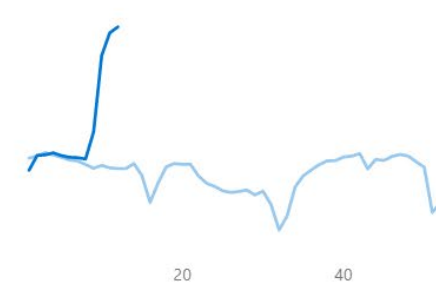
Spain



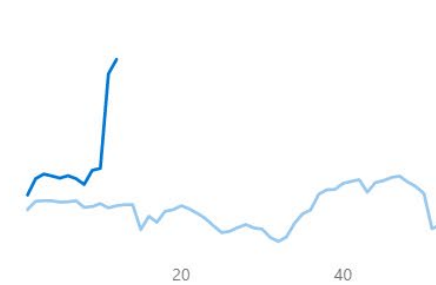
Canada



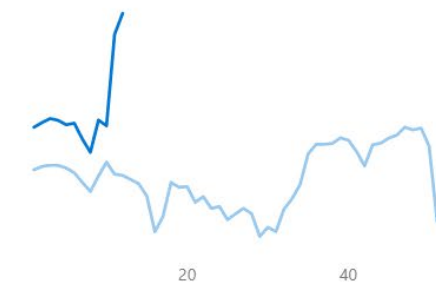
Italy



Australia



Netherlands

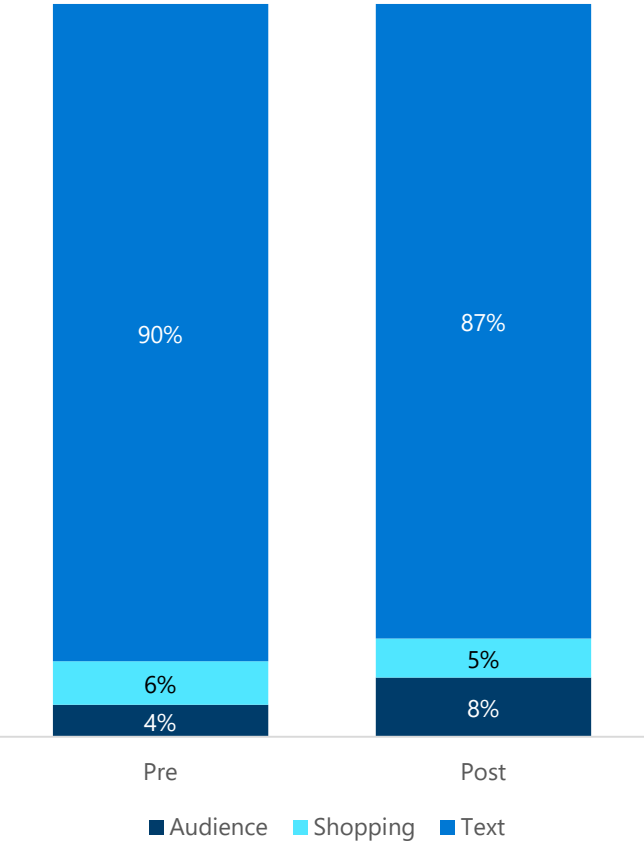


Italy is showing signs of a plateau in Software searches; this may be a leading indicator for the U.S.

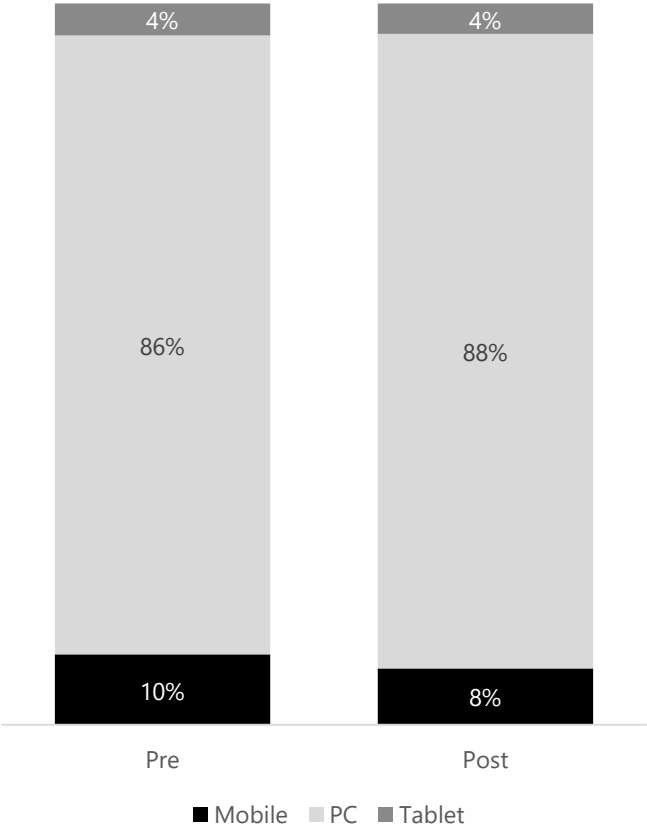
Software clicks have shifted toward Microsoft Audience ads and desktop PCs

Share of clicks, pre vs. post timeframe

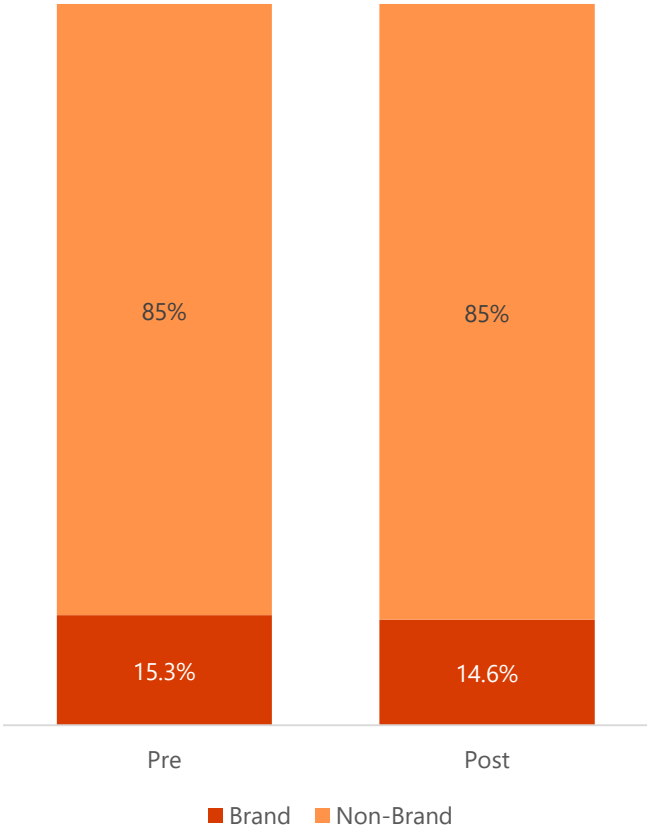
Clicks by ad type



Clicks by device type



Clicks by brand vs. non-brand

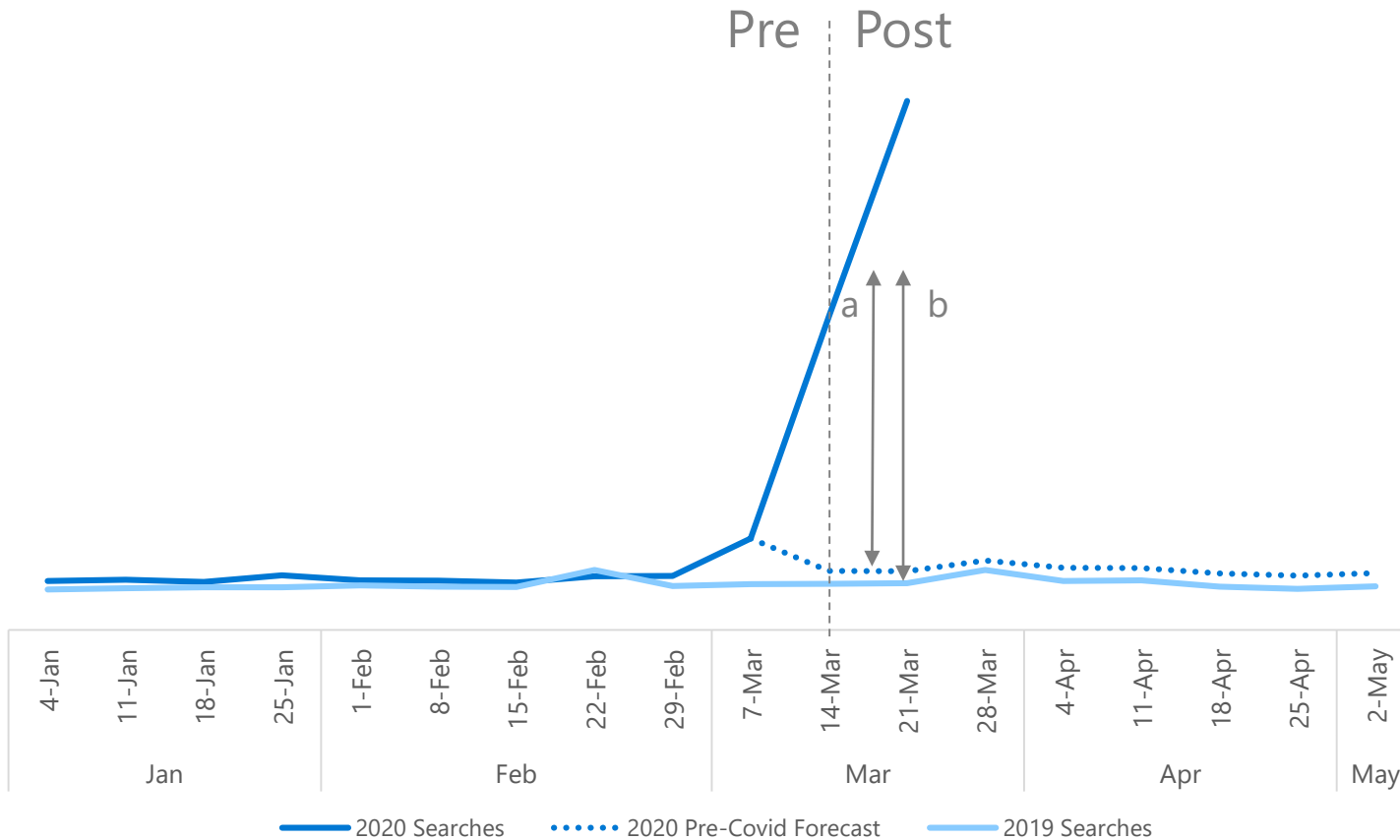


Source: Microsoft Advertising Internal Data, Jan – Mar 2020



Teleconferencing searches are trending up

YoY search trends with pre-coronavirus forecast



Teleconferencing searches

a **+615%**

to forecast, post timeframe

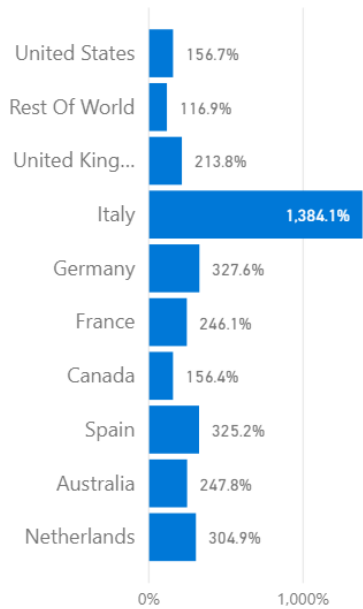
b **+805%**

YoY, post timeframe

Trend is happening globally for Teleconferencing

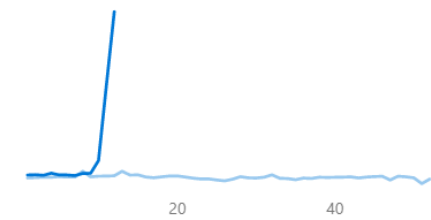
Top global geos sorted by volume and calendar week

Searches YOY % Change



US

● 2019 ● 2020

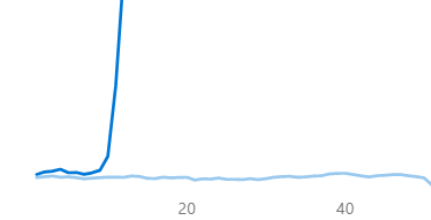


ROW

● 2019 ● 2020

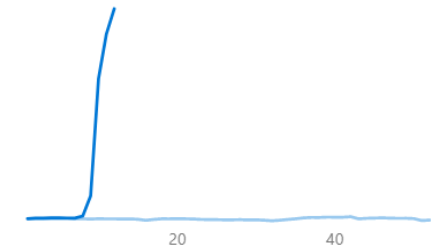


UK



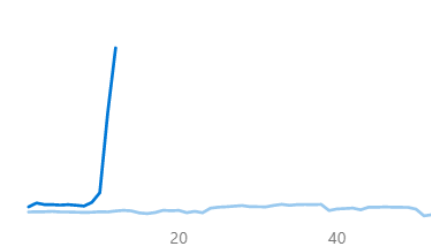
Italy

● 2019 ● 2020

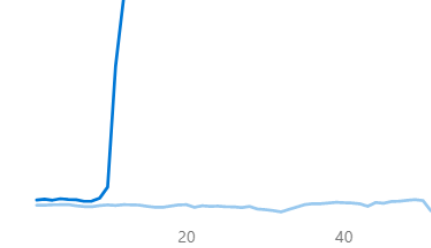


Germany

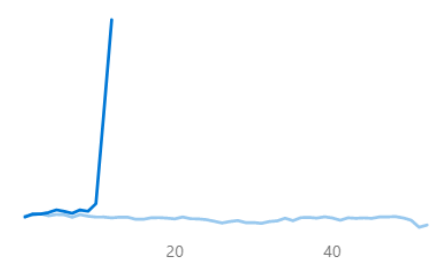
● 2019 ● 2020



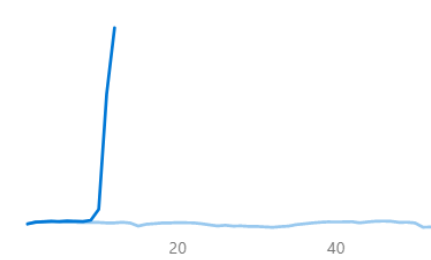
France



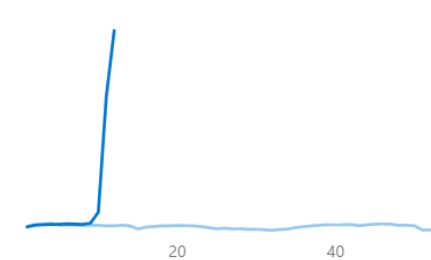
Canada



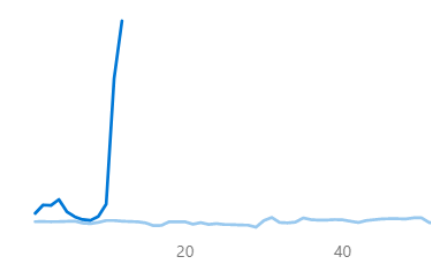
Spain



Australia



Netherlands

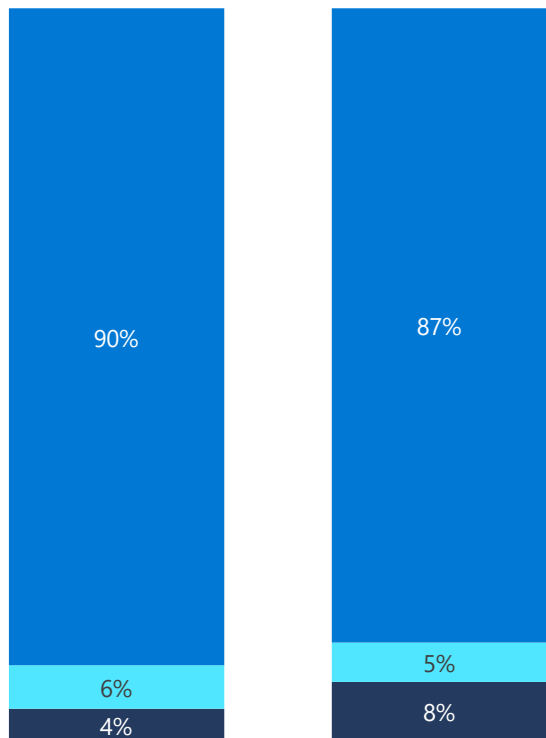


Italy is showing continued growth in searches and this may be a leading indicator for US

Teleconferencing clicks have shifted toward Microsoft Audience ads and desktop PCs

Share of clicks, pre vs. post timeframe

Clicks by ad type



Pre Post

■ Audience ■ Shopping ■ Text

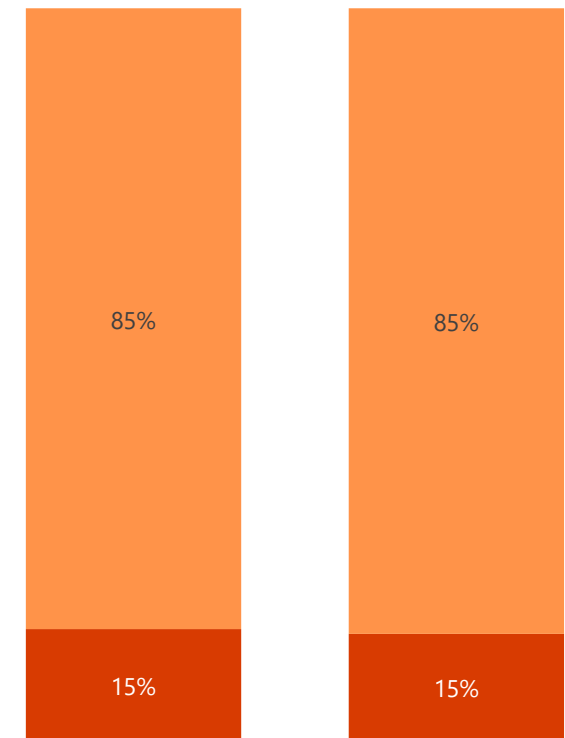
Clicks by device type



Pre Post

■ Mobile ■ PC ■ Tablet

Clicks by brand vs. non-brand



Pre Post

■ Brand ■ Non-Brand



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