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)

* 

“Pre” timeframe

4-Jan 11-Jan 18-Jan 25-Jan 1-Feb 8-Feb 15-Feb 22-Feb 29-Feb 7-Mar 14-Mar 21-Mar 
January February March

“Post” timeframe
Software and Teleconferencing are both seeing upticks in desktop PC searches and Microsoft Audience Ads.

Software searches are up 27% and Teleconferencing 61.5% vs. the normal seasonality forecast.

Take advantage of queries and products centered around productivity at home.

Focus your efforts on these devices and ad types.
Software searches are trending up

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

Source: Microsoft Advertising Internal Data, Jan – Mar, 2019 v. 2020

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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

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**
- Pre: 90% Audience, 6% Shopping, 4% Text
- Post: 87% Audience, 5% Shopping, 8% Text

**Clicks by device type**
- Pre: 86% Mobile, 10% PC, 4% Tablet
- Post: 88% Mobile, 8% PC, 4% Tablet

**Clicks by brand vs. non-brand**
- Pre: 15.3% Brand, 85% Non-Brand
- Post: 14.6% Brand, 85% 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

Source: Microsoft Advertising Internal Data, Jan – Mar, 2019 v. 2020
Trend is happening globally for Teleconferencing

Top global geos sorted by volume and calendar week

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

Source: Microsoft Advertising Internal Data, Feb – Mar 2020
Teleconferencing clicks have shifted toward Microsoft Audience ads and desktop PCs

Share of clicks, pre vs. post timeframe

Clicks by ad type

- Pre: 90% Audience, 6% Shopping, 4% Text
- Post: 87% Audience, 5% Shopping, 8% Text

Clicks by device type

- Pre: 86% Mobile, 10% PC, 4% Tablet
- Post: 88% Mobile, 8% PC, 4% Tablet

Clicks by brand vs. non-brand

- Pre: 85% Brand, 15% Non-Brand
- Post: 85% Brand, 15% Non-Brand

Source: Microsoft Advertising Internal Data, Jan – Mar 2020