



EMEA Apparel Trends

As of May 16, 2020



Key Findings and Actions



Initial Hypothesis

Since lockdown restrictions have taken place across Europe, users are forced to stay indoor.

As a result, users cannot purchase fashion items directly in stores and therefore rely on online shopping as valuable alternative.

- **How do consumers behave when it comes to apparel searches?**
- **Is the large availability of items and online shops influencing their purchasing decision process?**



Key Findings

The initial hypothesis is **confirmed** by the growth seen in search volume and clicks across the markets, especially during the most recent weeks. Furthermore, some peculiar market trends can be spotted.

- The **UK** saw an uptick for clicks mainly. With searches rising the most for tracksuit bottoms. Women categories witnessed a huge uplift (+20% week-on-week), especially **footwear** and **sportswear** categories.
- **Spain** witnessed similar uplift in searches among most of the categories. While in **Italy** we have detected huge increment for few specific branded products.
- The growth slowed down in **France** recently. However, generic terms are still on the rise.



Recommended Actions

Persistent advertiser opportunity across all markets with not only search volume growth but clicks as well, which indicates a strong user's commercial intent.

We strongly advice our partners to:

- **Drive conversions** by reaching the Mainline and expanding your keyword set to drive relevant traffic to your stores
- Make sure your **brand traffic** is fully covered to defend your position
- Leverage **generic search traffic** to push your offers and services.
- Keep an eye on **pricing**. Some high growth search queries have seen a decreasing average CPC easily leading to high ROI

United Kingdom

UK: Searches **declined** after lockdown but are experiencing **slow growth since**

Clicks on the other hand have experienced consistent weekly and year on year growth

Indexed Search Volume

PM announced lockdown

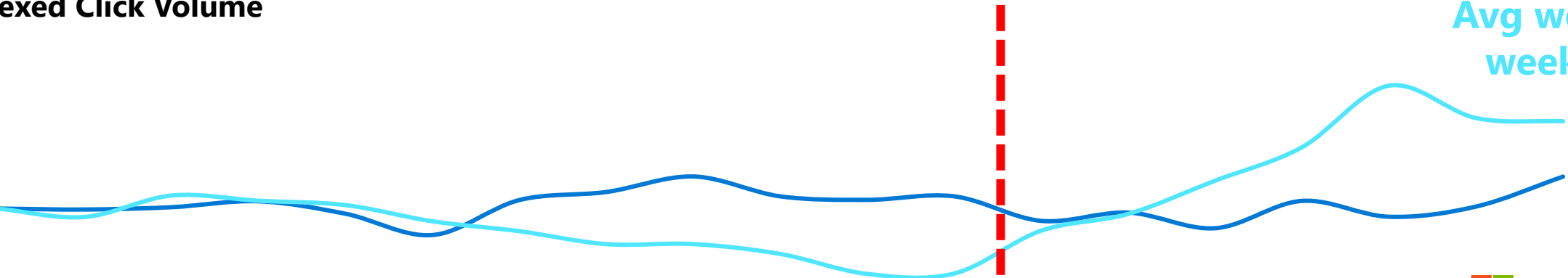
Avg week-on-week +3%

05-Jan	12-Jan	19-Jan	26-Jan	02-Feb	09-Feb	16-Feb	23-Feb	01-Mar	08-Mar	15-Mar	22-Mar	29-Mar	05-Apr	12-Apr	19-Apr	26-Apr	03-May	10-May
2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20

— 2019
— 2020

Indexed Click Volume

Avg week-on-week +2%

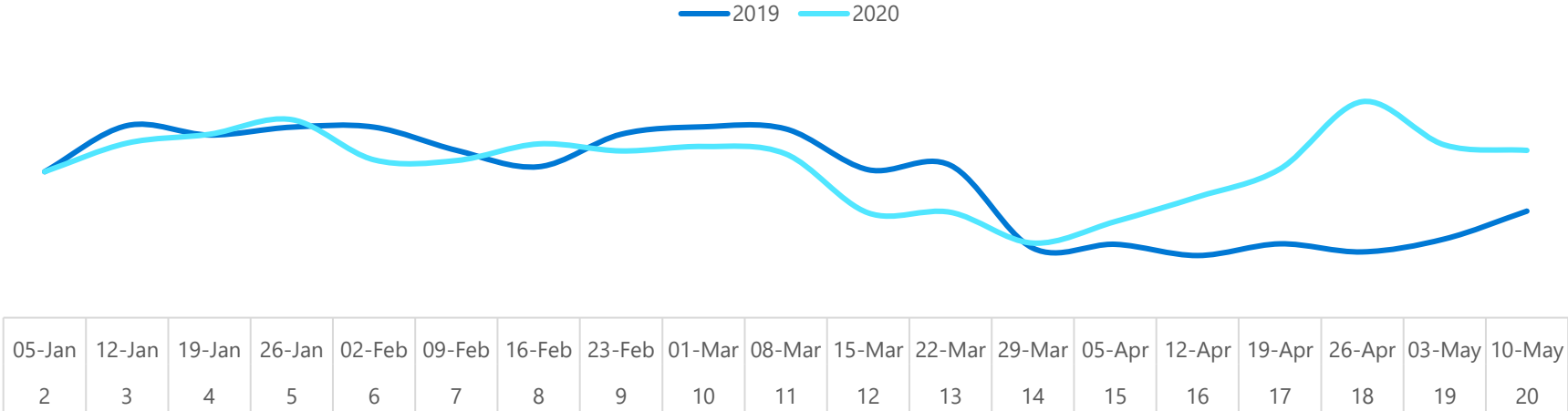


Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

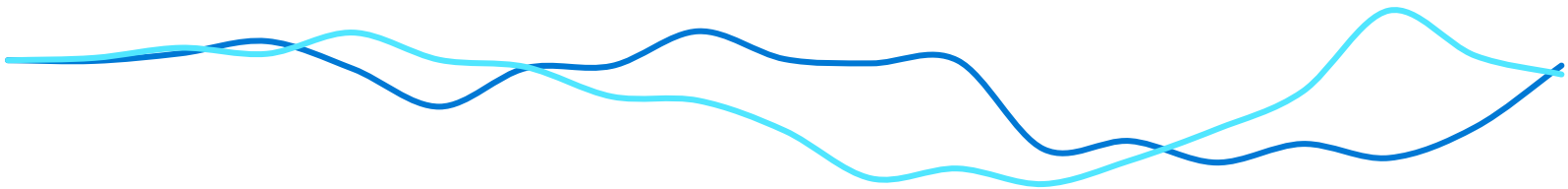


Clicks on audience specific searches have been growing since lockdown

Indexed Search Volume



Indexed Click Volume



All queries contained at least 1 category and 1 audience query

- Accessories
- Footwear
- Generic Clothes
- Jumpers
- Loungewear
- Outwear
- Sportswear
- Tops
- Trouser
- T-Shirt
- Underwear+Lingerie

+

- For Him
- For Her
- For Kids

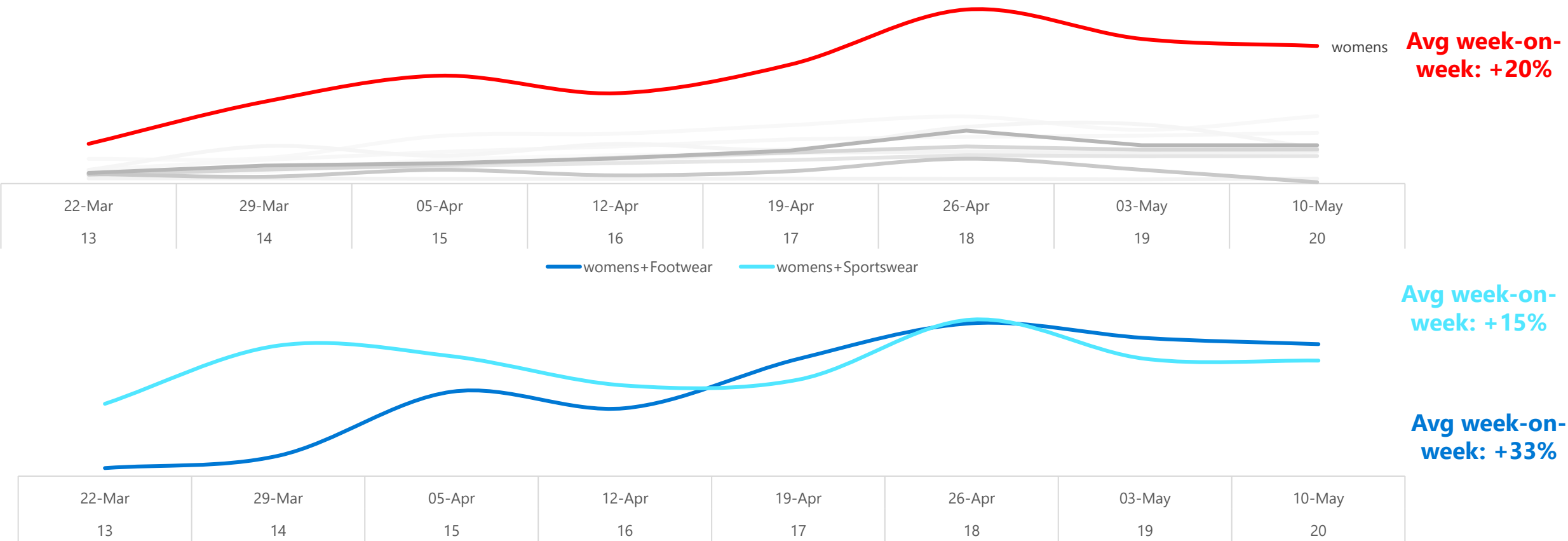
Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices



Searches for “**womens**” grew more than other audience specific searches

In particular, female footwear and sportswear saw significant growth

Indexed Search Volume

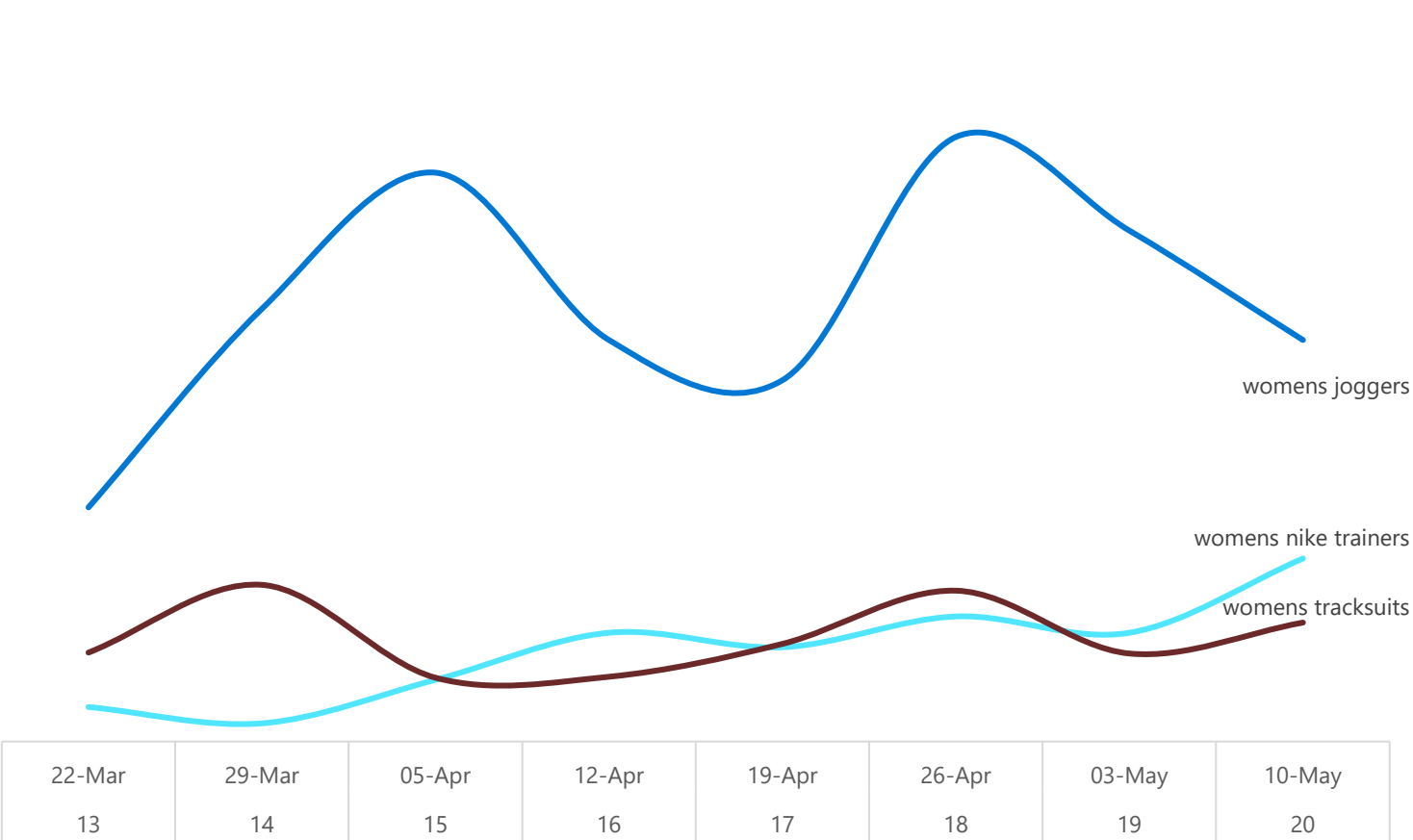


Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices



Category **growth** in most cases is being driven by very **specific products**

Indexed Search Volume

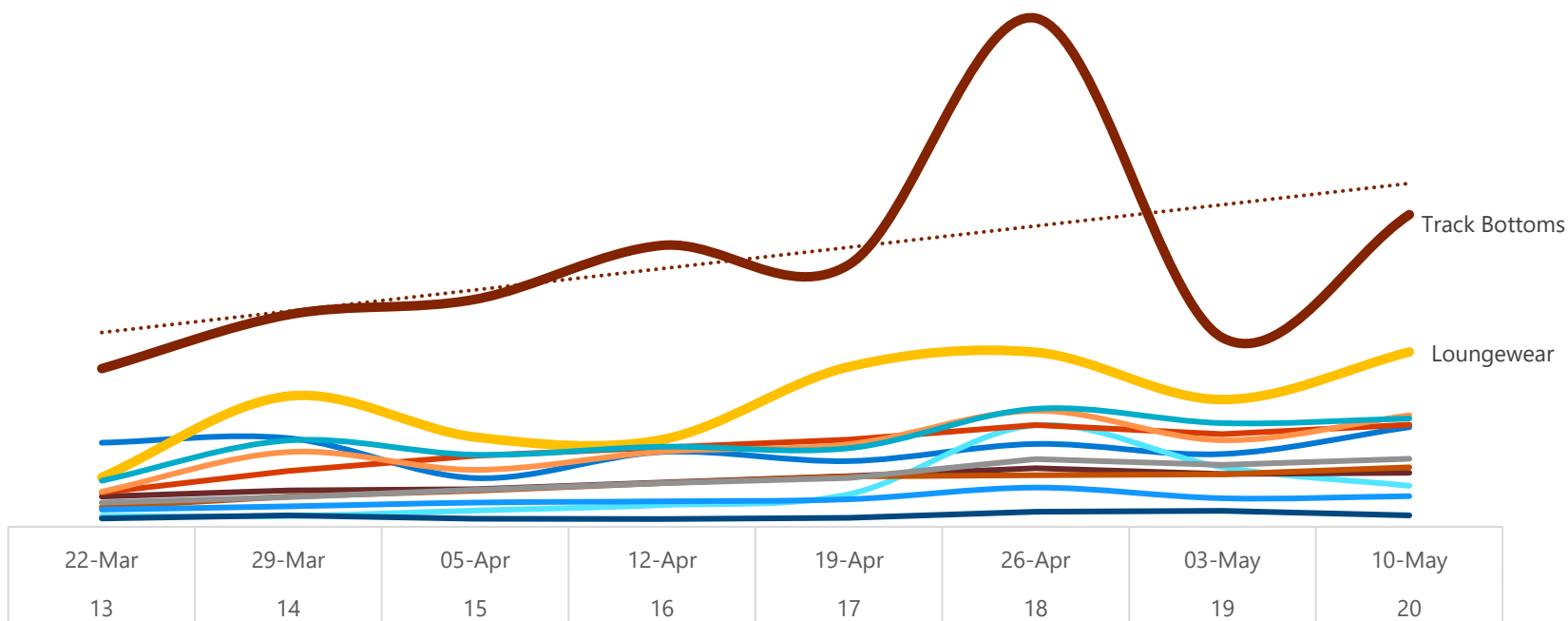


Category	Driver	Avg WoW*
Sportswear	womens joggers	+32%
Footwear	womens nike trainers	+42%
Sportswear	womens tracksuits	+27%

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices
 *Considering from week 13 until week 20

Track bottoms & Loungewear related searches have grown the most

Indexed Search Volume



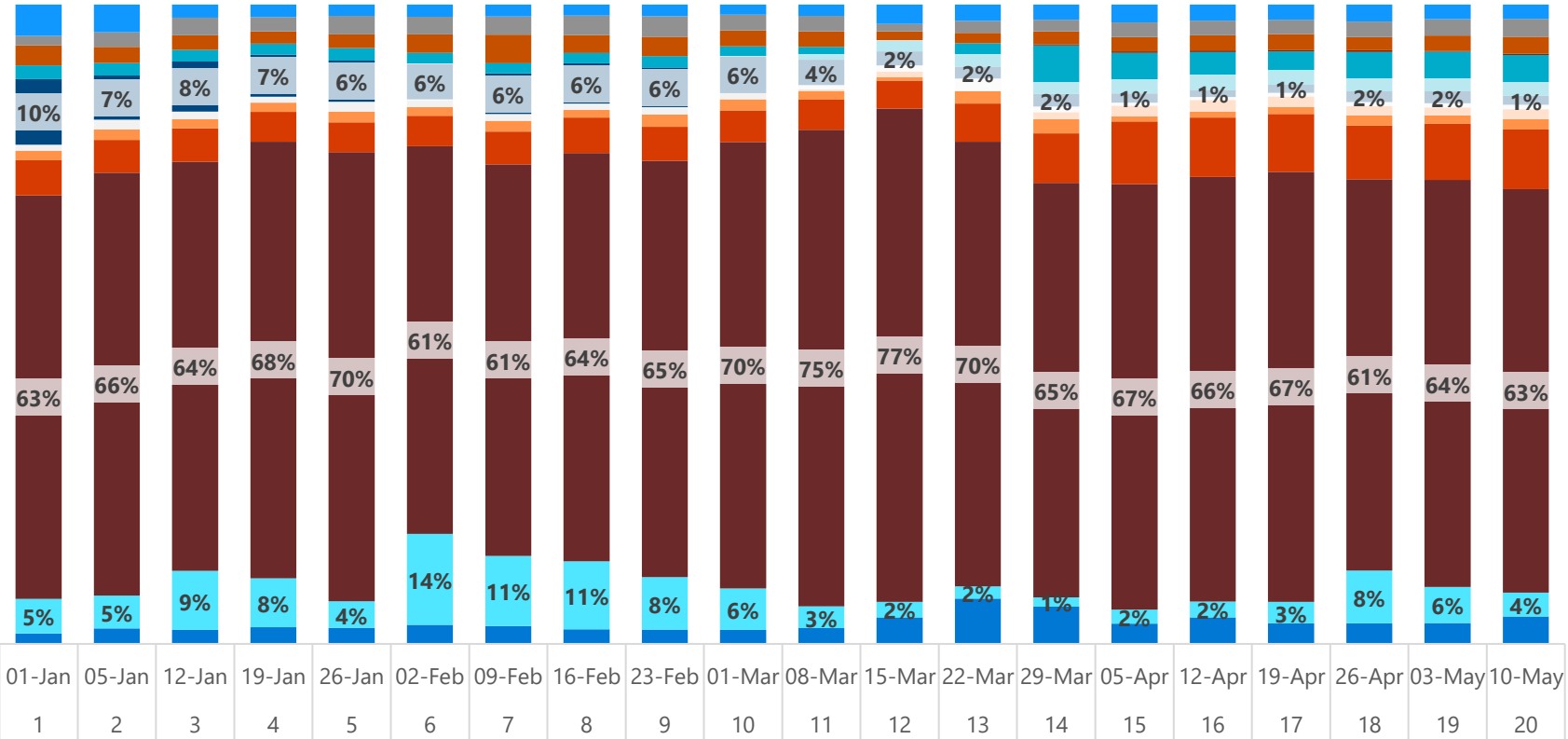
Category	Query sample
Accessories	man bag
Footwear	nike air max
Generic Clothes	girl clothing
Jumpers	nike hoodies
Loungewear	tracksuit bottoms
Outwear	mean coats
Sportswear	jogger women
Dresses	dresses girls
T-Shirt	polo shirt
Underwear + Lingerie	ladies underwear
Trouser	best jeans men

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

Consumer interest patterns have shifted since lockdown

Total searches split by the different categories

- Accessories
- Dresses
- Footwear
- Generic Clothes
- Jumpers
- Loungewear
- Outwear
- Sportswear
- Tops
- Track Bottoms
- Trouser
- T-Shirts
- Underwear + Lingerie



Search Volume distribution has fluctuated since lockdown

with searches for **'dresses'**, **'generic clothes'** terms and **'sportswear'** gaining share in the weeks since lockdown was introduced

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

UK: top 5 year-on-year volume searches by category

Accessories	Footwear	Generic Clothes	Jumpers	Loungewear	Outwear	Sportwear	Trousers	T-Shirt	Underwear + Lingerie	Dresses
mens sun hats	converse high tops	boys clothing	hoodies women	adidas tracksuit bottoms women	men gilet	joggers men	mens cargo trousers	ladies polo shirts	woman underwear	dresses women over 60
laptop bags women	air jordan 1	girls clothing	girls hoodies	girls pajamas	mens gilets	nike tracksuit bottoms	ladies jeans	t-shirts men	lingerie underwear	dresses women over 50
sunglasses men	nike trainers men	clothing sale	hoodies men	jogging bottoms women	coat stands	boys tracksuits	black jeans men	men t shirt	ladies lingerie	dresses girls
women backpack	nike air Jordan	kids clothes sale	men hoodies	tracksuit bottoms men	girls coats	girls tracksuit	jeans men	sweatshirts women	ladies knickers	dresses older women
clothing accessories	womens nike trainers	boys clothes	ladies fleece	tracksuit bottoms women	men jackets	men joggers	jeans pants	sweatshirts men	lingerie sale	dresses sale

UK: top 5 % volume searches by category

Accessories	Footwear	Generic Clothes	Jumpers	Loungewear	Outwear	Sportwear	Trousers	T-Shirt	Underwear + Lingerie	Dresses
man bag	nike air force 1	men clothing	hoodies women	jogging bottoms women	men jackets	mens tracksuit	men jeans	t shirts men	ladies underwear	dresses women over 50
man bags	nike air max	girls clothes	men hoodies	jogging bottoms men	men gilet	men joggers	jeans men	mens polo shirts	ladies lingerie	dresses older women
laptop bags women	men trainers	men clothes	women hoodies	tracksuit bottoms women	men coats	tracksuit bottoms	wrangler jeans men	sweatshirt women	ladies knickers	dresses women over 65
sunglasses men	Nike air max 270	boy clothes	hoodies men	adidas tracksuit bottom women	mens gilets	womens joggers	levi jeans men	sweatshirts men	Lingerie set	t shirt dress
women backpack	women trainers	girls clothing	nike tech fleece tracksuit	girls pajamas	mens barbour jacket	joggers women	cargo trousers women	boys t shirt	mens boxers	dresses girls

UNITED KINGDOM

Main Takeaways



KEY FINDINGS

The initial hypothesis is partially confirmed by the high growth seen in clicks. Nevertheless, searches did not rise that much, remaining around last year levels.

- **Track bottoms** and **Loungewear** product categories have been the unique driving force in searches increment, soaring at faster rate than the other categories.
- **Women categories** witnessed a huge uplift in searches (+20% Avg WoW), mainly led by **footwear** (+33% Avg WoW) and **sportswear** (+15% Avg WoW).

RECOMMENDED ACTIONS

Persistent advertiser opportunity across markets with not only search volume growth but clicks as well, which indicates a strong user's commercial intent.

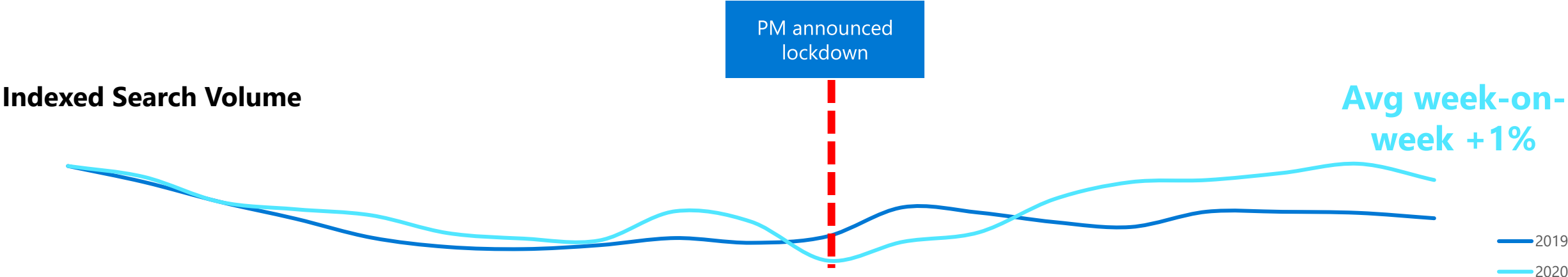
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- Keep an eye on **pricing**. Some high growth search queries have seen a decreasing average CPC which would easily lead to your expected ROI

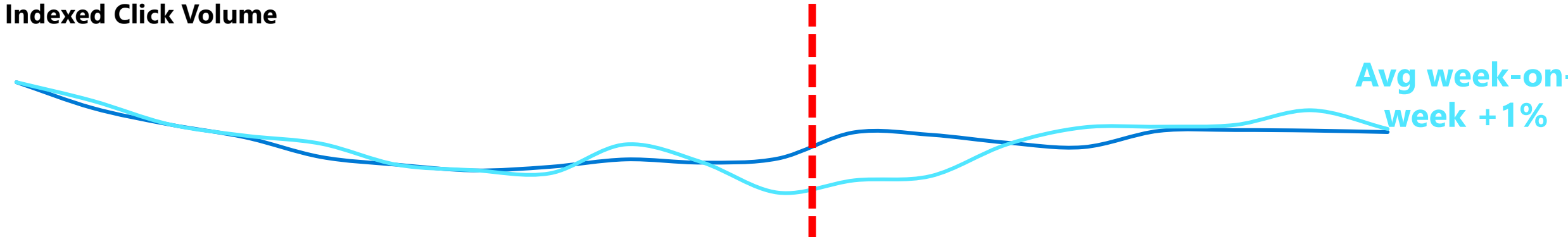
France

FR: Searches remained **constant over the period with a recent slow down**

Clicks fluctuated over time moving close to last year values



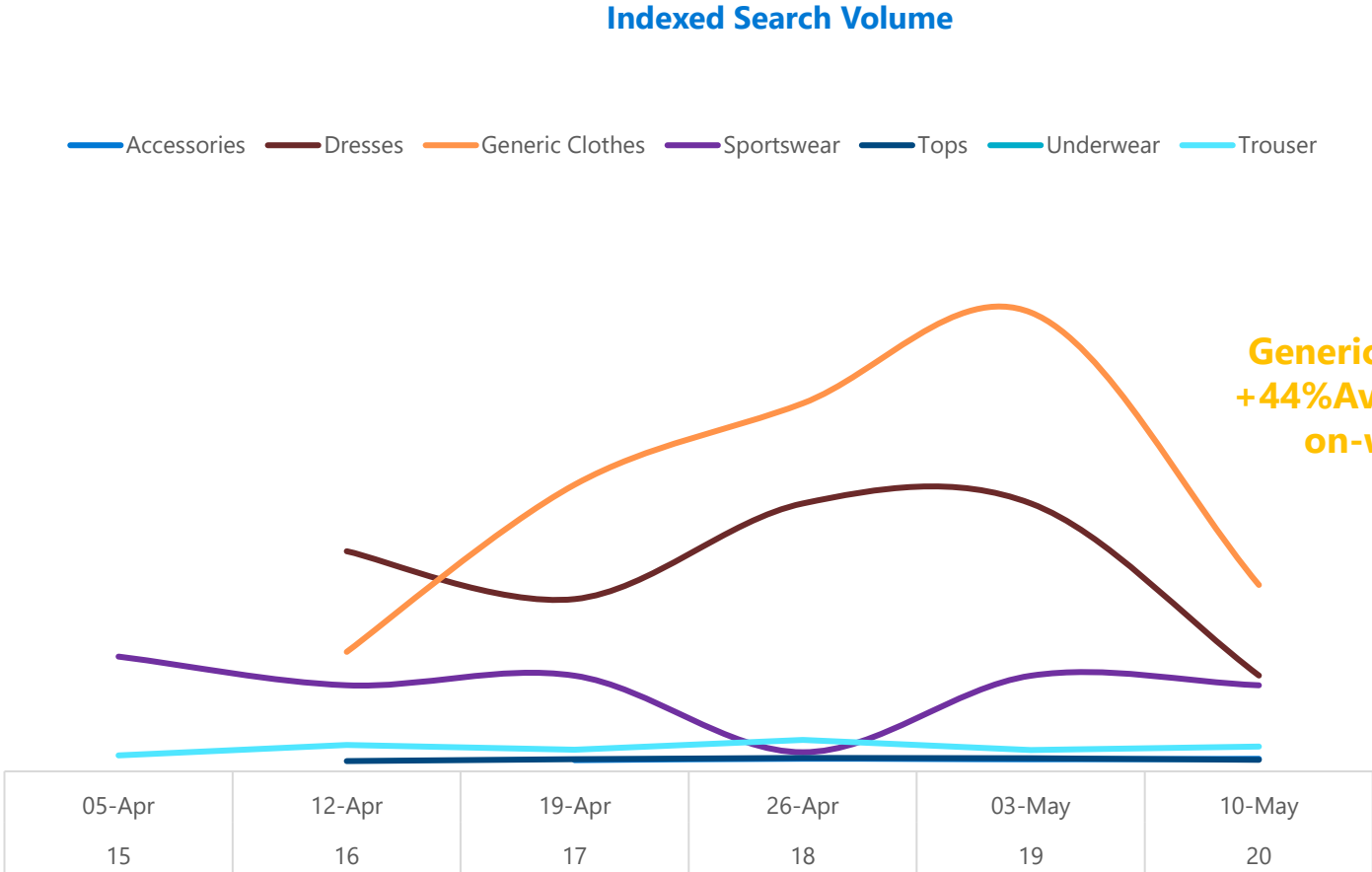
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Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

Generic clothes, dresses and sportswear searches intensified recently

However, upward trend slowed down during the most recent weeks



Query samples

- Accessories:** "man bag", "sunglasses"
- Footwear:** "nike air max"
- Generic Clothers:** "girl clothing"
- Jumpers:** "nike hoodies"
- Loungewear:** "tracksuit bottoms"
- Outwear:** "mean coats"
- Sportswear:** "jogger women"
- Tops:** "mens top"
- Trouser:** "men jeans"
- T-Shirt:** "polo shirt"
- Underwear+Lingerie:** "ladies underwear"

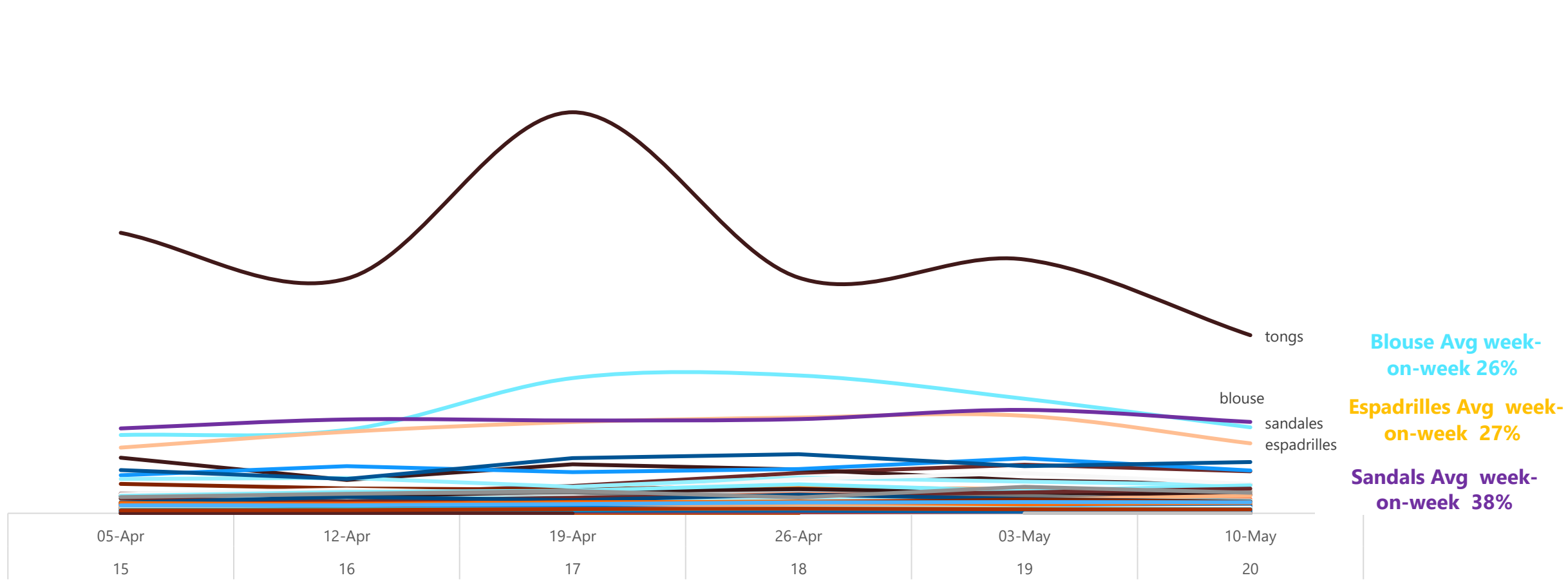
Query Samples given in English, but only French terms/Queries were used on the back end

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices



Tongs/Flip flops, blouse, espadrilles and sandals are **growing in searches at a rapid pace.**

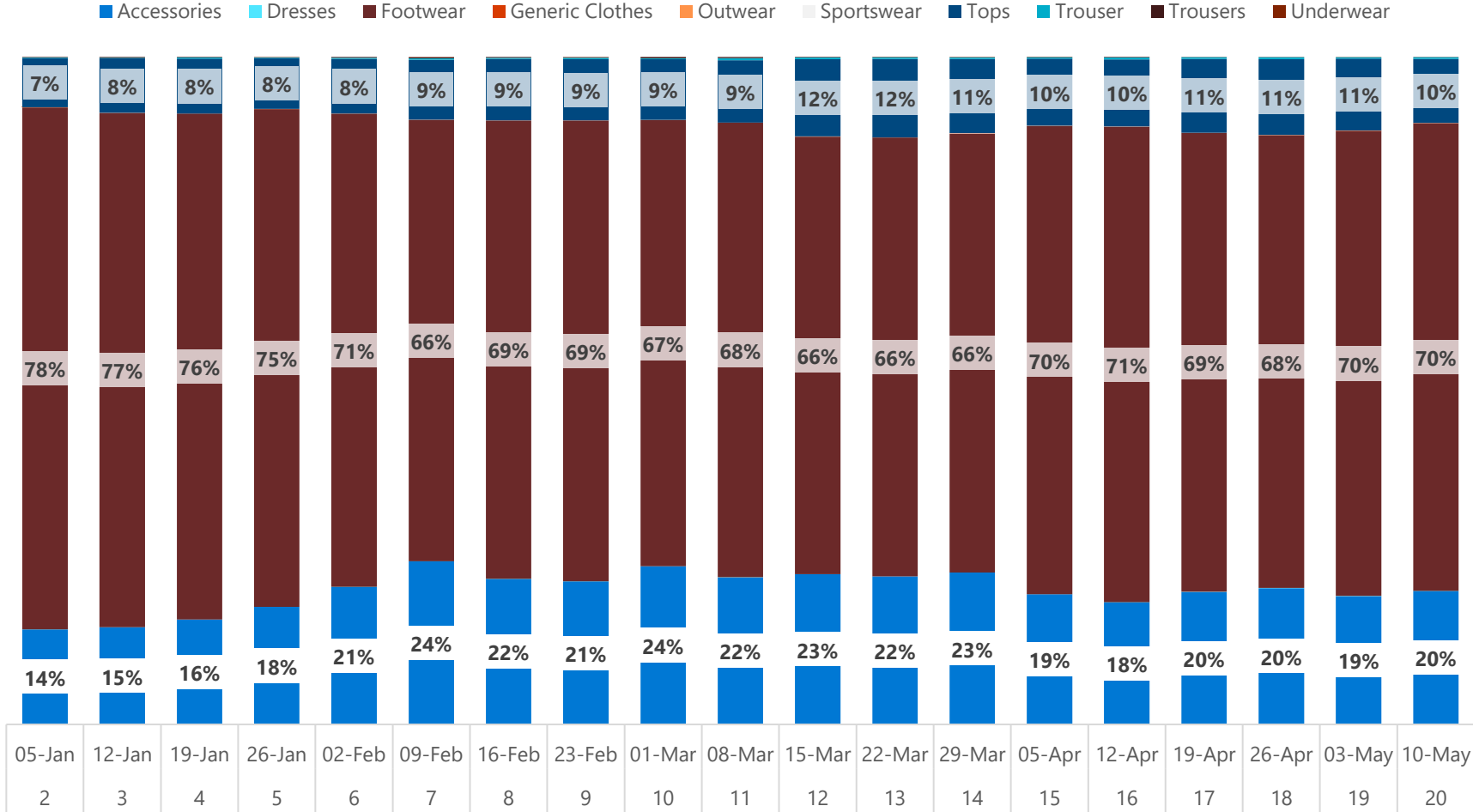
Indexed Search Volume



Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

Changing preferences and search patterns

Total searches split by the different categories



Dress related terms have increased its share of volume during the recent weeks. On the other hand, footwear experienced fluctuations over its percentage, with decline over the last 3 weeks.

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

FR: top 5 year-on-year volume searches by category

Accessories	Footwear	Generic Clothes	Trousers	Dresses
lunettes vue femme	air jordan femme	tunique grande taille moderne	chemise jean femme	robe chemise
bandana homme	nike air jordan 1	blouse femme mode	chemise jean	robe polo
gants	top chaussures running	achat vetement	veste jean homme	robe chemisier
accessoire cheveux	converse dior		veste jean femme	roba chemise
gemme bijoux	nike air force 1 femme		chemise jean homme	robe chemise longue

FR: top 5 % volume searches by category

Accessories	Footwear	Generic Clothes	Trousers	Dresses
bijoux	halle chaussures	blouses femme mode	veste jean femme	Robe chemise
ray ban	converse	tunique grande taille moderne	veste jean homme	robe polo
acheter lunettes ligne	besson chaussures	achat vetement	veste jeans femme	robe chemisier
accessoires	chaussures femme		chemise jean femme	robe chemise mi longue
lunettes	birkenstock		chemise jean	robe chemisier fluide

FRANCE

Main Takeaways



KEY FINDINGS

The initial hypothesis is confirmed by the high growth seen in searches and clicks. However, the trend seemed to slightly drop in the recent weeks.

- Despite recent slow down, **Generic clothes** queries has been the driving force in searches increment, soaring at faster rate than the other categories. **Dresses** and **sportwear** contributed to the all-up uplift but witnessed a sharp decline recently.
- **Specific generic products** witnessed an uplift more than other items. **Espadrilles** (+27 Avg WoW), **sandals** (+38% Avg WoW) and **blouse** (+26% Avg WoW) were among the top-driving products.

RECOMMENDED ACTIONS

Persistent advertiser opportunity across markets with not only search volume growth but clicks as well, which indicates a strong user's commercial intent.

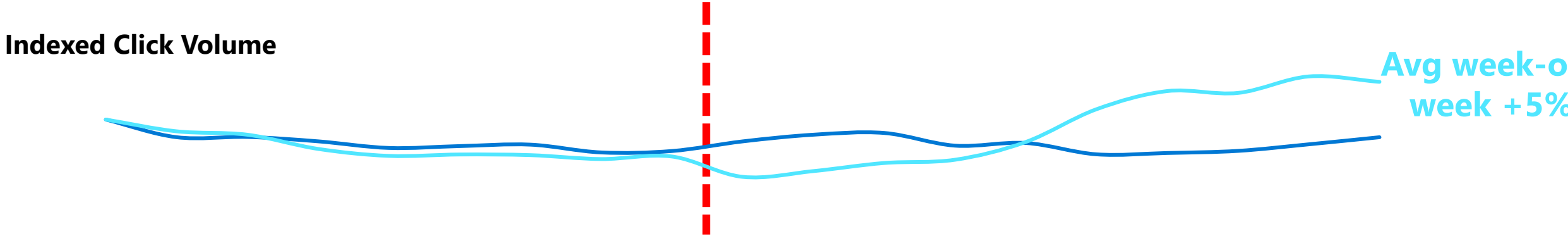
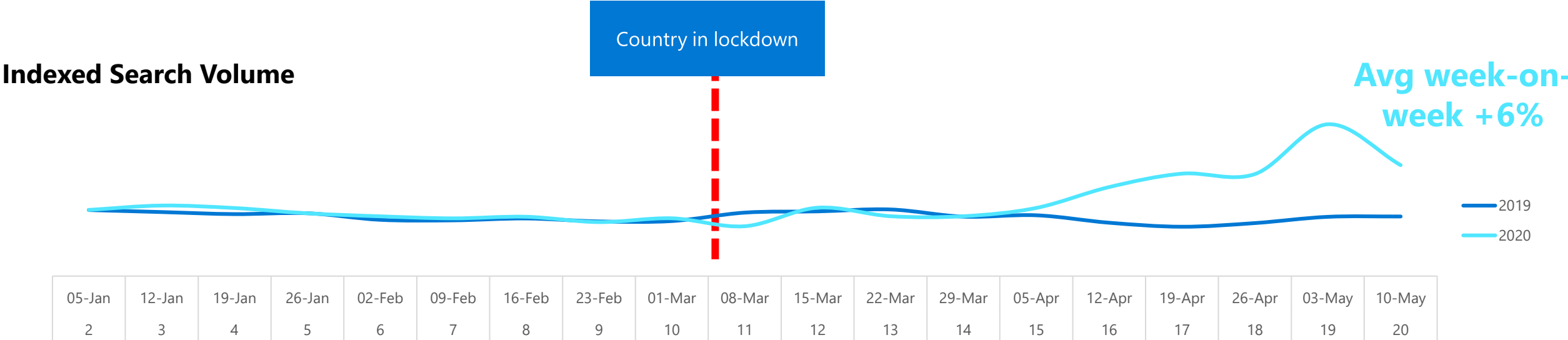
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Italy

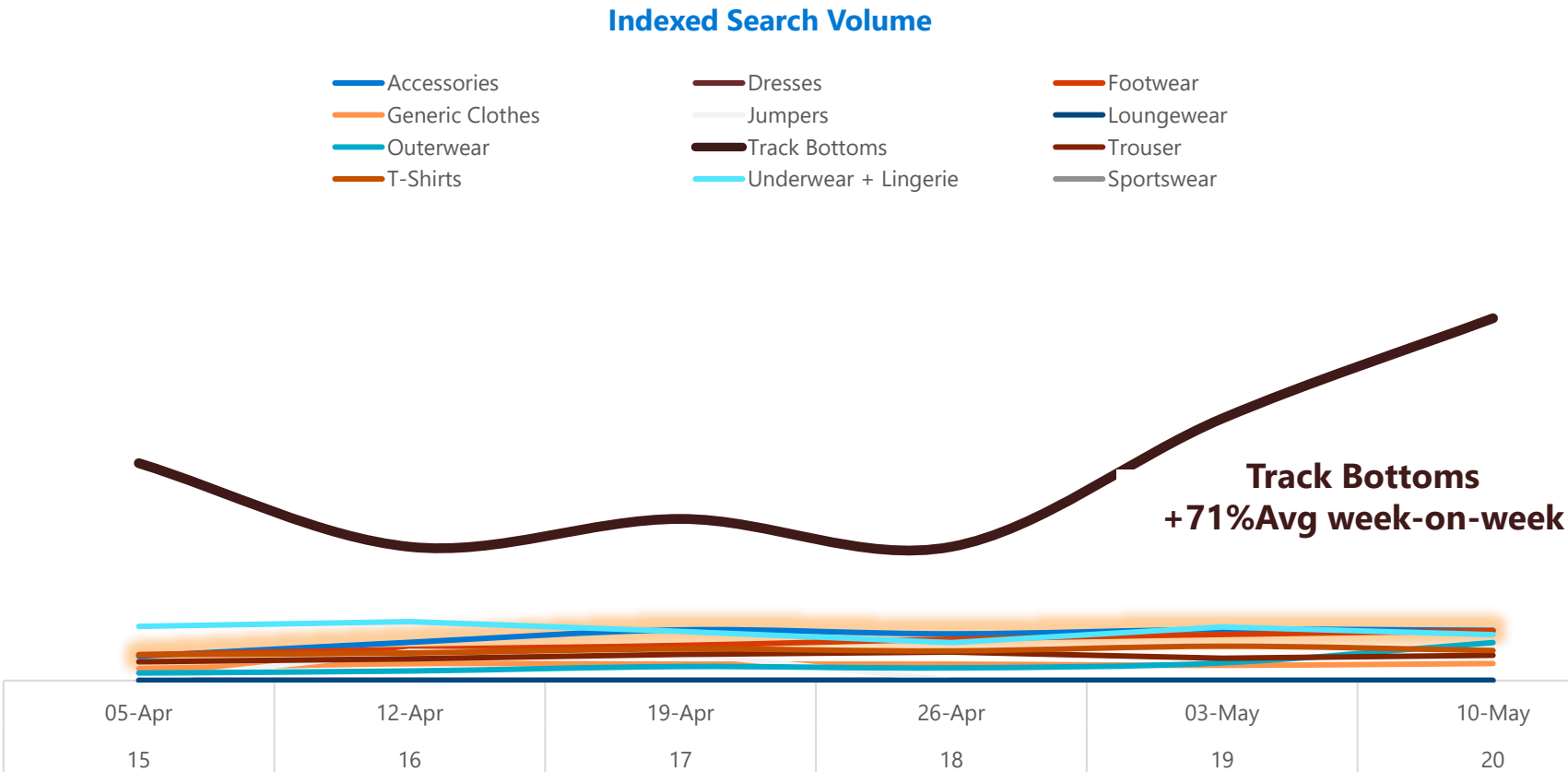
IT: Searches have been rising since mid-Apr

Clicks have been enjoying a gradual and strong upward trend as well



Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

Track bottoms related searches skyrocketed during the recent weeks.



Query samples

Accessories: "man bag", "sunglasses"

Footwear: "nike air max"

Generic Clothes: "girl clothing"

Jumpers: "nike hoodies"

Loungewear: "tracksuit bottoms"

Outerwear: "mean coats"

Sportswear: "jogger women"

Tops: "mens top"

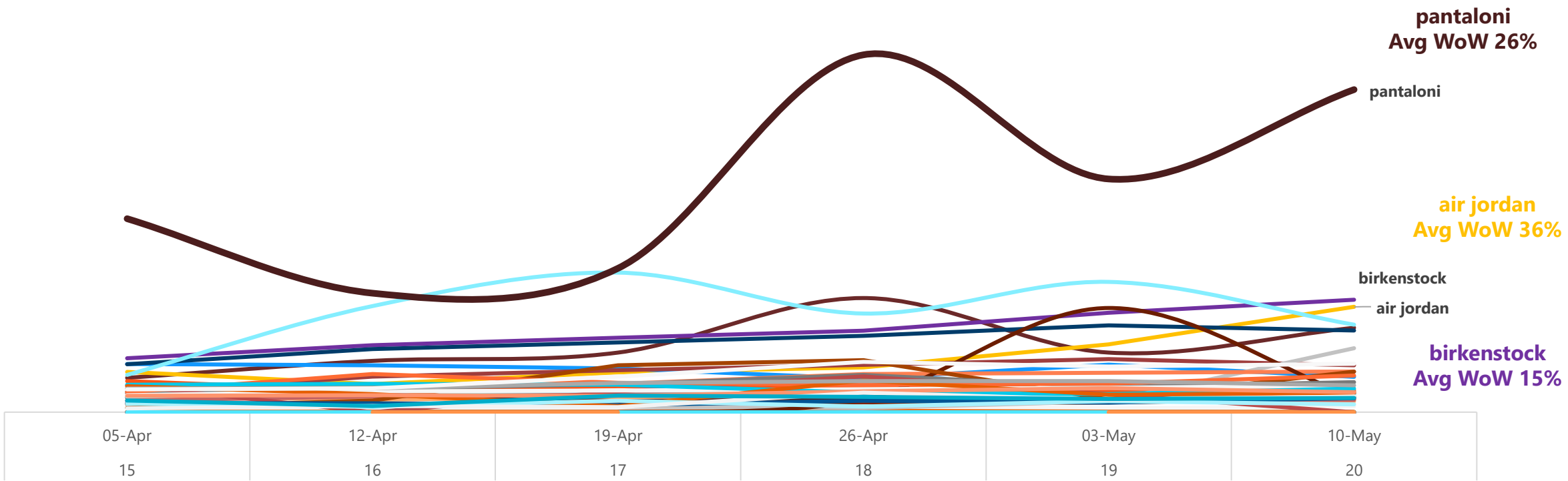
Trouser: "men jeans"

T-Shirt: "polo shirt"

Underwear+Lingerie: "ladies underwear"

Increment mainly driven by generic and branded products

Indexed Search Volume

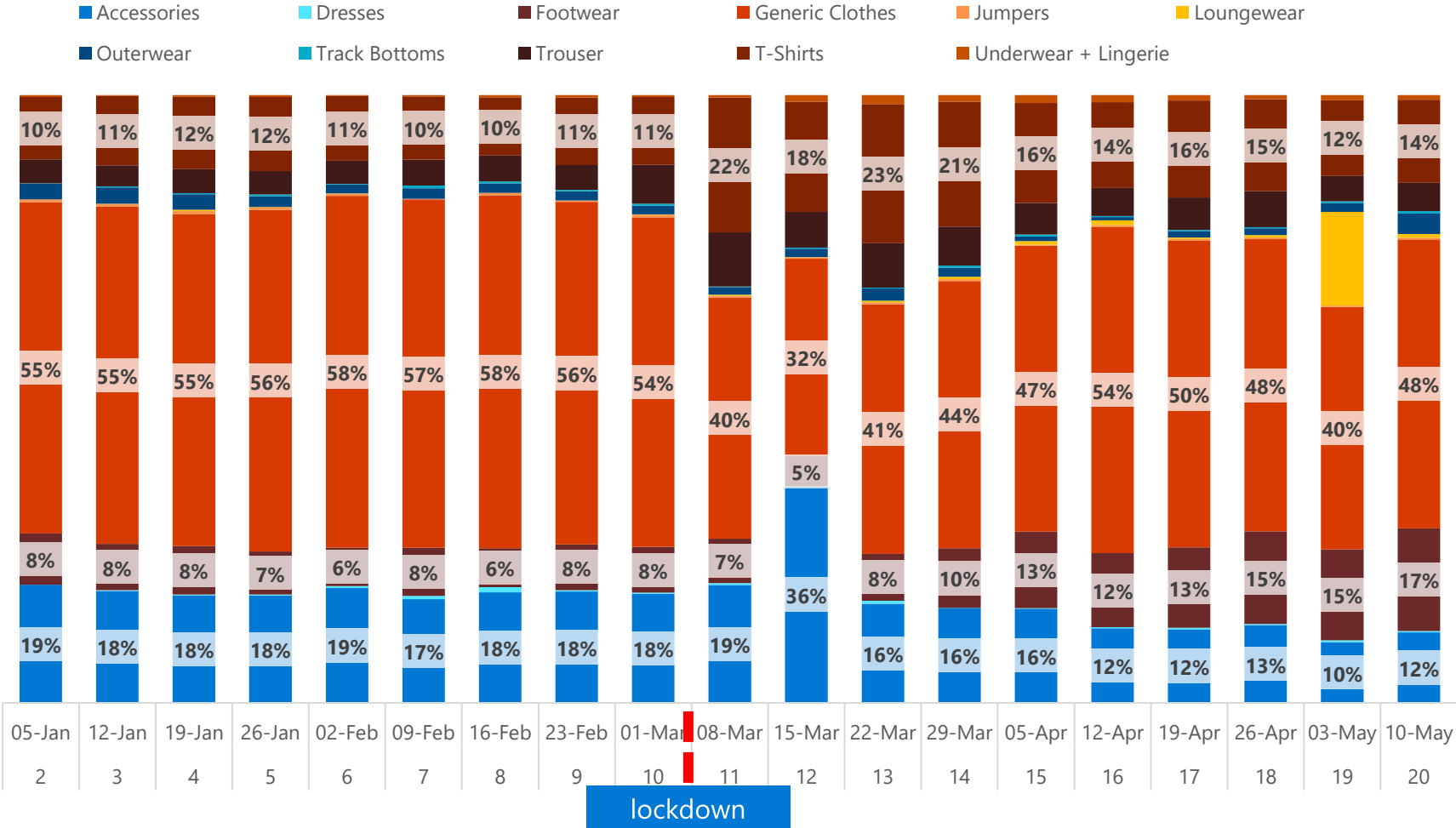


Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices



Changing preferences and search patterns

Total searches split by the different categories



Volume distribution fluctuated over time.

T-shirt related searches lost share of volume. On the other hand, Footwear gained dominance in the most recent weeks.

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

IT: top 5 year-on-year volume searches by category

Accessories	Footwear	Generic Clothes	Jumpers	Loungewear	Outwear	T-Shirt	Underwear + Lingerie	Dresses
portafoglio	superga scapre	abbigliamento bambini	cardigan	pigiama	cappotto	polo lacoste	tankini	abito da sposa
cappelli	air jordan	abbigliamento bambini	pullover	accappatoio microfibra	giacca	maglietta	bikini lovers	abito da sera
occhiali	crocs	abbigliamento sportivo		accappatoio	blazer	polo		vestito
zaino	all star converseve	kiabi abbigliamento		pigiama donna	gilet	polo ralph lauren		
borse micheal kors	birkenstock	abbigliamento bambina			blazer donna	maglie		

IT: top 5 % volume searches by category

Accessories	Footwear	Generic Clothes	Jumpers	Loungewear	Outwear	T-Shirt	Underwear + Lingerie	Dresses
ray ban	birkenstock	zara abbigliamento	cardigan	pigiama	cappotto termico esterno	polo	bikini lovers	abito da sposa
occhiali da vista	converse	zalando abbigliamento donna	pullover	accappatoio	cappotto termico	polo ralph lauren	tankini	vestito
occhiali	crocs	asos abbigliamento		pigiama donna	blazer	maglie		abiti da sera
cappelli	birkenstock outlet online	moda		accappatoio microfibra	captain blazer	Maglietta		
cintura gucci	air jordan	mango abbigliamento			gilet	polo lacoste		

ITALY

Main Takeaways



KEY FINDINGS

The initial hypothesis is confirmed by the high growth seen in searches and clicks. The upward trend remained stable both in clicks and searches, also during the most recent weeks.

- **Track Bottom** queries has been the horsepower of the uplift in searches, soaring at a faster rate than any other categories. (+71% Avg week-on-week)
- **Both generic and branded searches activity intensified** more around some specific items. **Pantaloni** (+26 Avg week-on-week), **air jordan** (+36 % Avg week-on-week) and **birkenstock** (+15% Avg week-on-week) were among the top-driving products.

RECOMMENDED ACTIONS

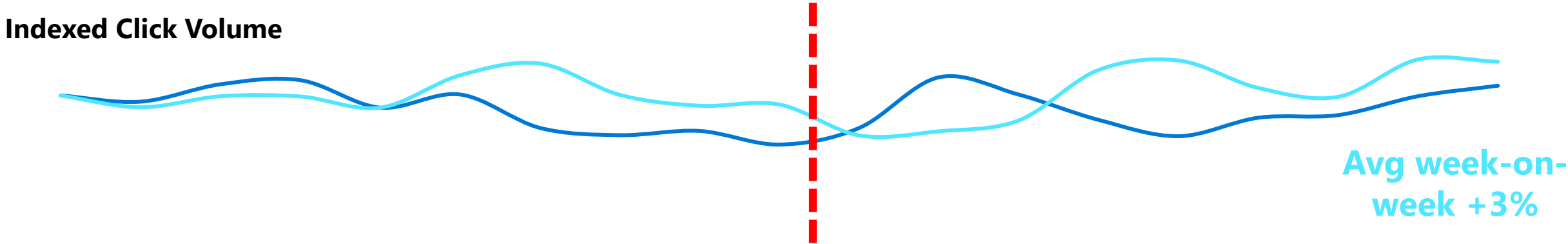
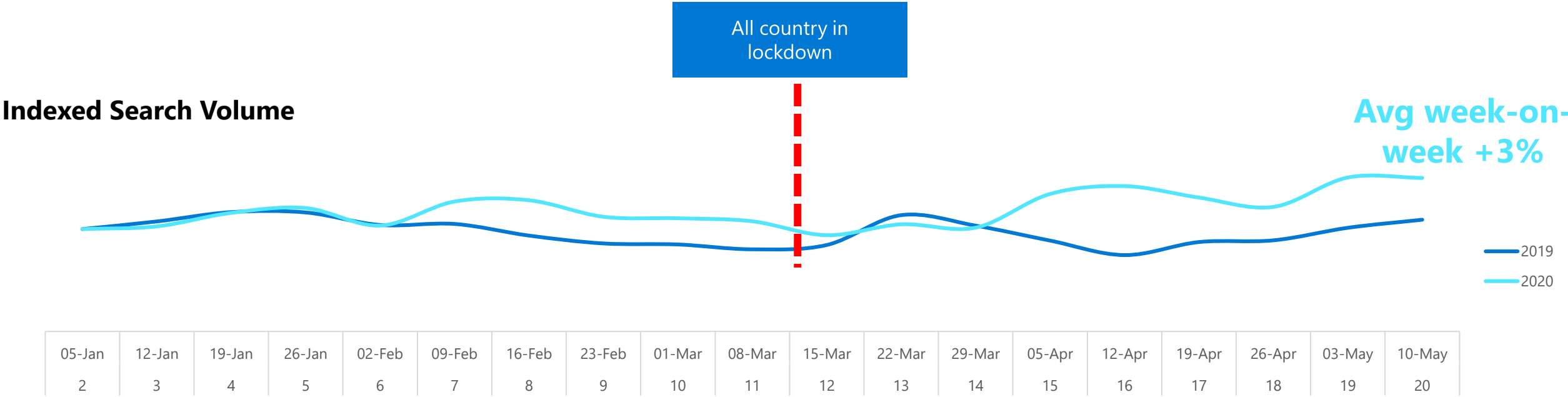
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Spain

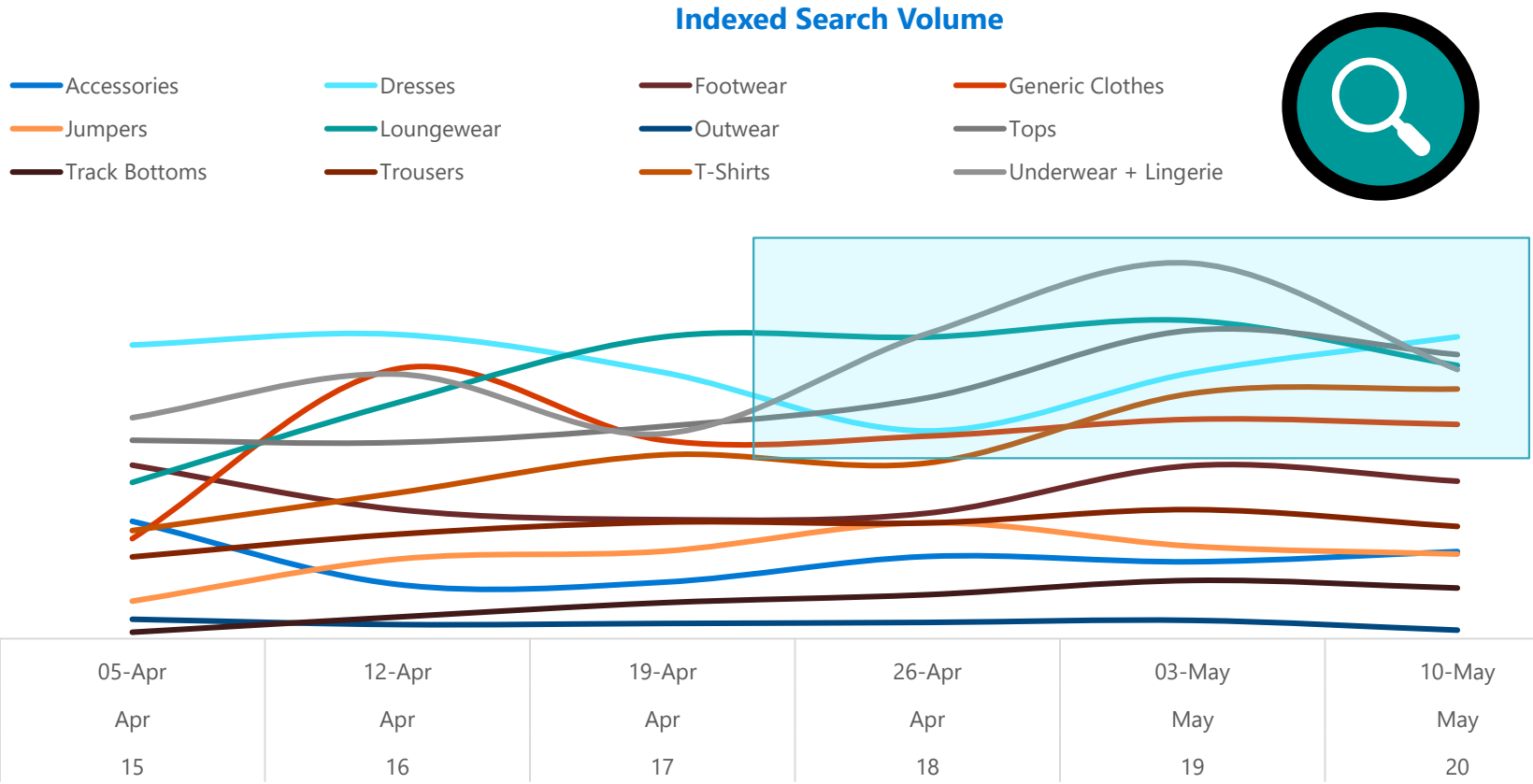
ES: Similar uphill rise for clicks and searches since lockdown



Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

Similar trends across most of the categories

However, few products enjoyed a more noticeable upward trend recently.



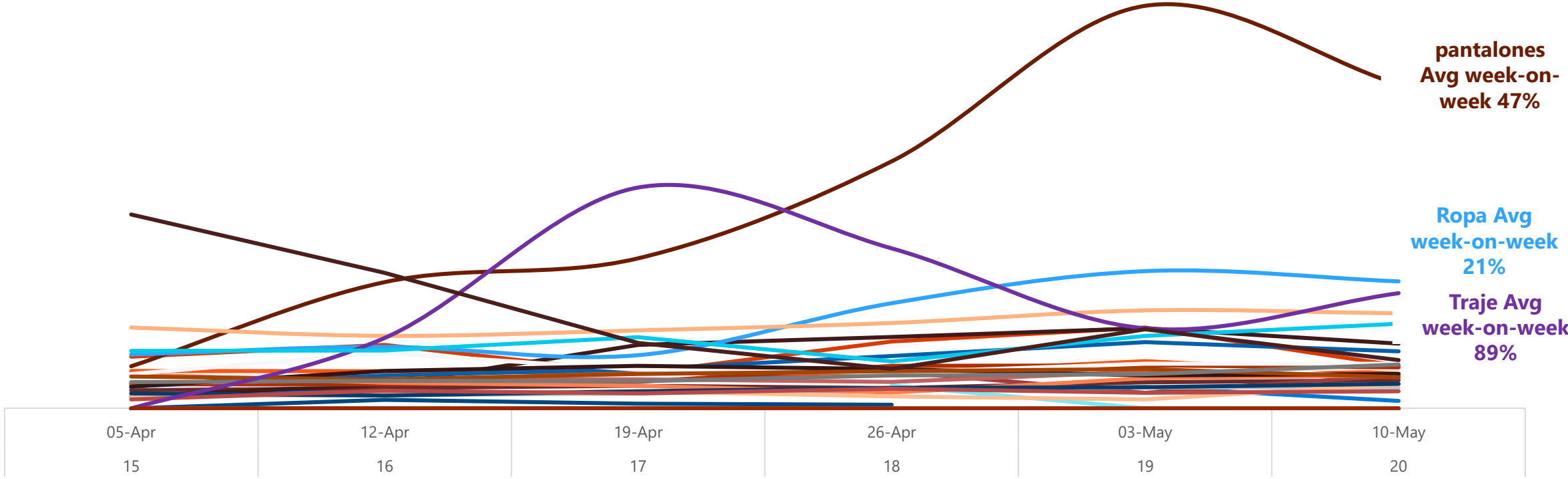
Query samples

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- Tops:** "mens top"
- Trouser:** "men jeans"
- T-Shirt:** "polo shirt"
- Underwear + Lingerie:** "ladies underwear"

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

Specific products **search activity intensified the most during recent weeks.**

Indexed Search Volume

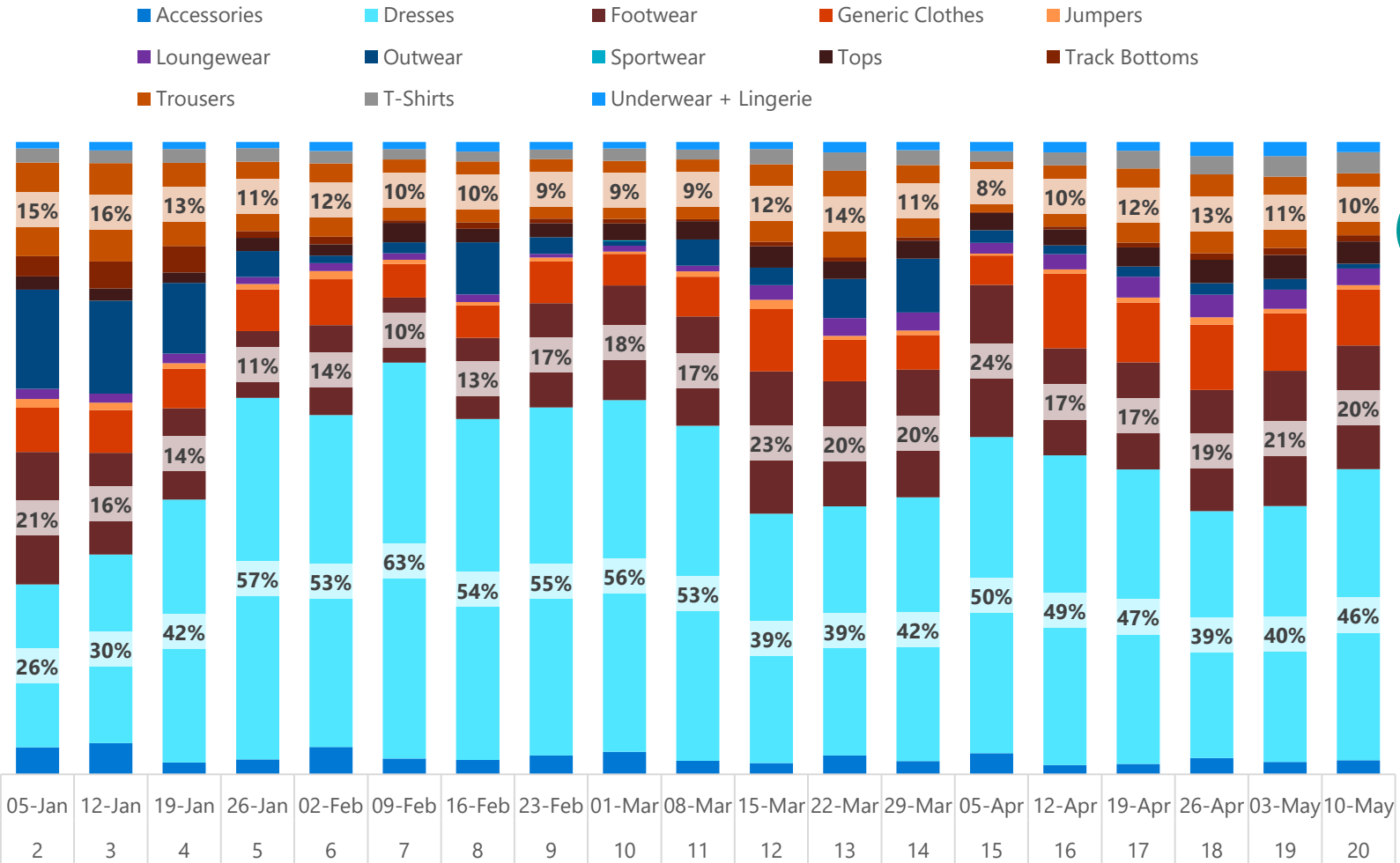


Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices



Changing preferences and search patterns

Total searches split by the different categories



Dress terms have lost a huge portion of its share of volume. However, jumpers seemed to gain popularity and increased its volume % during the last 4 weeks.

Source: Microsoft Internal Data, Jan-Feb-Mar-Apr-May 2019 & 2020, All Devices

ES: Top 5 year on year volume searches by category

Accessories	Footwear	Jumpers	Loungewear	Outwear	T-Shirt	Underwear + Lingerie	Dresses
chalecos	zapato de vestir comodos	sudaderas hombre	pijama	abrigos mujer	polo ralph lauren	calcetines	los vestidos mas bonitos en mango
mochilas vans	zapato de baile	sudadera mujer	pijamas	chaqueta	camiseta personalizado	bikini	vestidos en tallas grandes
bolsos de fiesta	zapato el corte ingles de mujer	sudadera	pijama hombre	chaquetas	polos		shein vestidos
gafas de sol	flip flop	sudaderas	pijama hombre h m	sbrigos el corte ingles	comprar camiseta		vestidos de moda en tallas grandes
mochilas	zapato fluchos	sudaderas personalizadas		chaqueta alcohada mujer	camiseta nba		Vestidos de fiesta tallas grandes

ES: Top 5 % volume searches by category

Accessories	Footwear	Jumpers	Loungewear	Outwear	T-Shirt	Underwear + Lingerie	Dresses
gafas de sol	converse	sudaderas	pijama	chaqueta	polo ralph lauren	bikini	ofertas en vestidos de mango
mochilas	zapatos de tacon comodos	sudadera	pijamas	descuento en abrigos para mujer	camiseta de futbol	calcetines	vestidos de moda en tallas grande
gafas ray ban	zapatos mujer	jersey hombre	pijama hombre	chaqueta mujer	camiseta baratas		vestidos de moda para mujeres mayores
bolso tours	los mejores zapatos para el verano	jerseys hombre	pijama hombre h m	chaquetta teba caballero	camiseta nba		vestidos de fiesta
bolso mujer	crocs	jersey de agujas para nino		chaquetas	Camiseta futbol baratas		Los vestidos mas bonitos en mango

SPAIN

Main Takeaways



KEY FINDINGS

The initial hypothesis is confirmed by the high growth seen in searches and clicks. The upward trend remained stable both in clicks and searches, also during the most recent weeks.

- **All categories contributed to the rise in searches**, growing more or less at the same pace.
- Despite the growth being equally distributed across the categories, **specific generic products enjoyed higher growth rate. Pantalones** (+47% Avg week-on-week), **ropa** (+ 21% Avg week-on-week) and **traje** (+89% week-on-week) were among the top-driving products.

RECOMMENDED ACTIONS

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Microsoft Advertising's EMEA AAIG Contacts



THOM ARKESTAAL
Head of Advertiser Analytics



AKHILA SHESHADRI
Analytical Lead
Tech & Telco /Auto



PHIL JONES
Analytical Lead
Finance/Insurance



SARAH ESSA
Analytical Lead
Travel



BARRY MURRAY
Analytical Lead
Retail



DOUWE VAN DER MEER
Analytical Lead
Western Europe



LUCA IMMOVILLI
Analytical Lead
Southern Europe



PETER HAUBOLD
Analytical Lead
Germany



THOMAS HERRY
Analytical Lead
France



ZUBAIR PATEL
Data Specialist



DARIO CUGNO
Data Specialist