Streaming and B2B Microsoft Audience Network activation of COVID-19 trends
Tech & Telco
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Search trends and Microsoft Audience Network activation: B2B Technology
General ‘remote work’ and ‘work from home’ (‘wfh’) searches have increased dramatically

Search volume over time
Teleconferencing is trending up
Search trends YoY with pre-COVID-19 forecast

‘teleconferencing’ searches

- **a** +615% vs. forecast post-COVID-19
- **b** +805% vs. last year post-COVID-19

Source: Microsoft Advertising Internal Data, Jan – Mar, 2019 v. 2020
Productivity tool related brand term search volume and clicks have increased

**Search volume – brand terms**
- Search volume has increased 68% in the past 3 weeks

**Click volume – brand terms**
- Click volume has increased 134% in the past 3 weeks

Top brand queries
Productivity tool related nonbrand search volume and clicks have increased

Search volume – nonbrand terms

Search volume has increased 138% in the past 3 weeks

Click volume – nonbrand terms

Click volume has increased 85% in the past 3 weeks

Top nonbrand queries
Increased search and click volume for digitization queries shows a heightened interest in establishing online presences post-COVID-19.

The increase in clicks indicates that business owners and employees are following through with their search intent.

Proprietary Bing Source Data
Microsoft Audience Network activation – B2B Technology
Tech & Telco advertisers represent a small but growing segment on the Microsoft Audience Network.

Tech & Telco still offers advertisers a relative first mover advantage in reaching users on the Microsoft Audience Network.
Microsoft Audience Network efficiency for Tech & Telco is improving

**Audience Network click-through rate (CTR) for Tech & Telco advertisers has increased since March**

**Audience Network cost-per click (CPC) for Tech & Telco advertisers has decreased since March**
Reach a business audience on Microsoft Audience Network using In-Market Segments

B2B Technology Audiences can help you reach millions on the Microsoft Audience Network

Using a variety of signals, Microsoft curates audience targeting segments for B2B technology advertisers across multiple products and categories.
Remember that B2B users are also B2C consumers

Consumers in market for your product...

2.54M

Users who are in market for CRM Solutions....

...Are also in market for others

55% are also in market for Travel

40% are also in market for Computer Accessories
Reach a Business Audience on Microsoft Audience Network using LinkedIn Profile Targeting

Industry, Company, and Job Function Targeting can help target niche segments

15% CTR*

Ads shown to LinkedIn Profile Targeting audiences saw up to a 15% greater click-through rate (CTR) than the same ads shown to non-audience targeted users

42% CVR*

Ads shown to LinkedIn Profile Targeting audiences saw up to a 42% greater conversion rate (CVR) than the same ads shown to non-audience targeted users

Reach a Business Audience on Microsoft Audience Network using LinkedIn Profile Targeting

Industry, Company, and Job Function Targeting can help target niche segments

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<tr>
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Respond to COVID-19 trends in Native
Amplify corporate messaging with targeted reach

Maximize reach of Corporate Social Responsibility campaigns by reaching targeted audiences in premium environments with the Microsoft Audience Network.
Activate across targeting features to maximize reach and click volume
Apply bid modifiers to individual segments to maintain efficiency

Product Audiences, Device Targeting, and Location Targeting offer the lowest CPC for B2B Technology advertisers

Remarketing, Custom, and Similar Audiences generate the highest CTR for B2B Technology advertisers

Microsoft Audience Network exposure drives lift on search

Lift in impressions post-exposure:
- Retail: +62% +80%
- Travel: +42% +69%
- Tech/Telco: +29% +55%
- Financial Services: +20% +25%
- Autos: +35% +19%

Lift in clicks post-exposure:
- Retail: +62% +80%
- Travel: +42% +69%
- Tech/Telco: +29% +55%
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1. Jan 2019 – Feb 2020. Exposed vs. Control lifts for both clicks and searches per user. Searches based on ad flag for selected advertiser and other advertisers in that vertical. On average, those clients saw the reported lift in Search Impressions per user and reported lift Search Clicks per user for exposed users compared to those who were not exposed to an ad on the Microsoft Audience Network.

- This is based on a sample of our pilot advertisers and is not a marketplace lift
- The experienced lift is on a per-user basis for the exposed users, not the advertisers’ full search program
Search trends and Microsoft Audience Network activation: B2C Technology
It’s not just seasonality
Starting mid-March, searches for streaming brands are above average compared to the 30-day average

Trended searches of streaming brands
(10-day average vs. 30-day average)

Proprietary Bing Source Data
Brand streaming terms included queries relating to the following brands: Amazon Prime Video, Apple TV, Disney Plus, HBO, Hulu, Netflix, SlingTV, YouTube
Trending search volume for March is up compared to the same period in previous years.

Searches for streaming brands: trendlines

Proprietary Bing Source Data
Brand streaming terms included queries relating to the following brands: Amazon Prime Video, Apple TV, Disney Plus, HBO, Hulu, Netflix, SlingTV, YouTube
Internet and ISP-related clicks have recently spiked, and now outnumber clicks to Cable TV-related terms.

Cable & Internet/ISP clicks in March 2020

February 28, 2020
First U.S. COVID-19 death (WA)

February 29, 2020
U.S. announces travel restrictions

March 11, 2020
COVID-19 declared a pandemic; U.S. bars travel from Europe

March 16, 2020
Shelter-in-place begins in many U.S. cities
5G searches continue to grow exponentially YoY

This has been largely driven by recent developments in 5G devices and infrastructure.
5G volume is currently experiencing an upswing

Despite the short down swing at the start of March, 5G momentum is back on the rise within the last few weeks and appears to be stronger than in 2019.
5G searches for plans and carriers are driving the late growth
Microsoft Audience Network activation – B2C Technology
Tech & Telco advertisers represent a small but growing segment on the Microsoft Audience Network.

Tech & Telco still offers advertisers a relative first mover advantage in reaching users on the Microsoft Audience Network.
Audience Network efficiency for Tech & Telco is improving

- Audience Network CPC for Tech & Telco advertisers has decreased since March
- Audience Network CTR for Tech & Telco advertisers has increased since March
Reach a technology audience on Microsoft Audience Network using In-Market Segments

Consumer Tech Audiences can help you reach millions on the Microsoft Audience Network

Using a variety of signals, Microsoft curates audience targeting segments for Consumer technology advertisers across multiple products and categories

Proprietary Bing Source Data
Technology users are also consumers for other products

Consumers in market for your product...

8.2M
Users who are in market for Mobile Phone Service....

...Are also in market for others

51% are also in market for Moving & Relocation
39% are also in market for Toys & Games
Reach a technology audience on Microsoft Audience Network using LinkedIn Targeting

Industry, Company, and Job Function targeting can help target niche segments

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Activate across targeting features to maximize reach and click volume

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Product Audiences, Location Targeting, and Device Targeting offer the lowest CPC for B2C Technology Advertisers

Remarketing, Custom, and Product Audiences generate the highest CTR for B2B Technology advertisers

Respond to COVID-19 trends in Native
Amplify Marketing for high demand product

- Great Value, Unlimited Superfast Fibre Broadband. Order From Vodafone Today.
  - Increasing demand for High Speed Internet

- Increasing demand for Home Fitness Technology
- Increasing demand for Home Office Technology

Respond to increased demand for Technology products by reaching targeted audiences in premium environments with the Microsoft Audience Network.
Microsoft Audience Network exposure drives lift on search

Lift in impressions post-exposure:
- Retail: +62%
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# Marketplace signals – U.S. short window

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<tr>
<td>Technology</td>
<td><img src="images/green.png" alt="Green" /></td>
<td>Marketplace index is showing positive momentum</td>
</tr>
<tr>
<td>Telecommunications</td>
<td><img src="images/green.png" alt="Green" /></td>
<td>Marketplace index is showing some stability</td>
</tr>
<tr>
<td>Web Services</td>
<td><img src="images/yellow.png" alt="Yellow" /></td>
<td>Marketplace index is showing negative momentum</td>
</tr>
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Data through: 4/19/2020
Marketplace Rebound Gauge, United States, Short Window

When short term averages crest long term averages, this is a strong signal the marketplace is reversing.

- Technology
- Telecommunications
- Web Services

Median of April ’19 and April ’18
3, 5, 8, 10, 12, 15-day moving averages
30, 35, 40, 45, 50, 55-day moving averages

Data: Microsoft Advertising Internal, January 2020 - Present
Median of April ’19 and April ’18
3, 5, 8, 10, 12, 15-day moving averages
30, 35, 40, 45, 50, 55-day moving averages

Marketplace Rebound Gauge, United States, Long Window
When short term averages crest long term averages, this is a strong signal the marketplace is reversing
Strategies and recommendations

Learn immediate and recovery-phase strategies, and how to approach new opportunities and optimize account health in the Digital Advertiser’s Guide to COVID-19