MICROSOFT ADVERTISING

COVID-19: Telco & Mobile Hardware OEMs

Tech & Telco
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Query networks: COVID-19 timeline
Evaluating relationships between queries before and after COVID-19
February-April 2020
The visuals of query networks to follow are based on how often queries were searched together within a path during the months of February-April when COVID-19 impacted our world community. Any query that shows in the community must have been linked to another query in someone's path at least 80 times. The queries are not manually linked or categorized. An algorithm has grouped them based on consumer search behavior as it relates to their query paths.
This community is hyper focused on iPhone 11 related queries as well as a mix of older iPhone models and non-brand queries. Little to no cross-shopping showing singular minded queries within the Apple iOS ecosystem.
Samsung has a strong bond in its phone brand

The Samsung phones community of queries shows a change in what we saw during the 2019 holidays. The Samsung phone community was much more dense with different variations of the queries for the new Galaxy S20 and previous years model. There was some cross shopping with Motorola and Pixel 4.
The T-Mobile query community was the most diverse in the months. A high occurrence of cross shopping with most smaller carriers including Boost, Cricket, MetroPCS, Mint, Spectrum, TracFone, OnePlus, Straight Talk, Virgin, Total Wireless, as well as the 3 larger carriers.
In the AT&T community of queries the core AT&T brand query is closely tied to Apple store, Apple tv, Apple.com, Apple watch, and Best Buy queries. (also saw some online banking queries like PNC and BofA.)
The query networks are helpful to see what consumers are searching for in their multiple query paths. Opportunities such as highly targeted conquesting, expanding keywords in a category, or keywords in other categories not previously thought of can be surfaced. Note that each query network can also link one or more other query networks.
Impact of COVID-19 through the lens of query paths
We’ve categorized queries as Carrier, Non-Brand, Apple Hardware, Samsung Hardware, Google Hardware, and Other OEM Hardware to help understand the relationship, trends, and scenarios of how query paths started and ended pre and post impact of COVID-19.
Queries for branded phones and telco services increased in March as COVID-19 related cases surged.

Non-Brand queries surpassed branded queries during March. 1 in 3 queries were Non-Brand in March.

Queries such as “cell phone deals”, “senior cell phone plans”, & “cell phones”
A surge in carrier related queries and services branded and non-branded occurred in March. Many related to deals and lower cost carriers.

Queries for branded phones and telco services increased in March as COVID-19 related cases surged.

Carrier queries made up nearly 37% of all queries when looking at all segments.

Queries surging for carriers included “t-mobile”, “att”, “metropcs”, “comsumer cellular”.

Source: Microsoft Advertising Internal Data, Feb-April 2020
The last click results change dramatically when we know how a path starts.

<table>
<thead>
<tr>
<th>When a path starts with a</th>
<th>87% of the paths ended on a Carrier click, 5% of last clicks were Non-Brand, 5% were Samsung, the remaining 3% were Apple and Other Hardware clicks</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Carrier&quot; related query</td>
<td></td>
</tr>
<tr>
<td>When a path starts with a</td>
<td>49% of the paths ended on a Carrier click 33% of last clicks were Apple Hardware, 10% were Samsung, 6% were Non-Brand, and 2% Other Hardware clicks</td>
</tr>
<tr>
<td>&quot;Apple Hardware&quot; related</td>
<td></td>
</tr>
<tr>
<td>query</td>
<td></td>
</tr>
<tr>
<td>When a path starts with a</td>
<td>60% of paths ended on a Samsung click, 27% of last clicks were Carrier, 8% were Non-Brand, 4% were Apple, and 1% were Other Hardware clicks</td>
</tr>
<tr>
<td>&quot;Samsung Hardware&quot; related query</td>
<td></td>
</tr>
<tr>
<td>When a path starts with a</td>
<td>53% of paths ended on a Carrier click 23% of last clicks were Non-Brand, 13% were Samsung, 8% were Apple, and 3% were Other Hardware clicks</td>
</tr>
<tr>
<td>&quot;Non-Brand&quot; related query</td>
<td></td>
</tr>
</tbody>
</table>

Source: Microsoft Advertising Internal Data, Feb-April 2020
Looking deeper within query paths, we find some interesting trends that differ from Gen-Z (25 and under) to the rest of the population.
Search trends pre- and post-COVID-19

Rest of the population (25 years and older)

Top Non-Brand query trends for consumers

25 years+

were more interested in plan deals and phone deals. Senior discount queries surged with consumers likely searching on behalf of their parents and grandparents.

25 years and younger (Gen Z)

searched for hardware like phones, free phones, and cheap phones in March

Source: Microsoft Advertising Internal Data, Feb-April 2020
Top Non-Brand superlative ("best") query trends for consumers

25 years+
were more interested in plan deals and phone deals. Senior discounts queries surged with consumers likely searching on behalf of their parents and grandparents.

25 years and younger (Gen Z)
searched for hardware, including best smartphones and phone deals, mainly in March.
Search trends pre- and post-COVID-19

Rest of the population (25 years and older)

Top Samsung query trends for consumers

25 years+

Trends did not change too much from Feb-April, other than a variant of “Samsung” being contained in the S20 queries increasing MoM

25 years and younger (Gen Z)

searched for “Samsung” in the query more often into March but the older S10 was searched more in April.

Source: Microsoft Advertising Internal Data, Feb-April 2020
Search trends pre- and post-COVID-19

Rest of the population (25 years and older)

Trends did not change too much from February-April for Apple, as both newer and older models were just as popular month-over-month (MoM)

25 years+

25 years and younger (Gen Z)

searched with similar trends as those older than 25 (aside from a small change where the iPhone X moved passed iPhone 7 in April)

Source: Microsoft Advertising Internal Data, Feb-April 2020
Search trends pre- and post-COVID-19

Rest of the population (25 years and older)

Top queries containing 5G trends for consumers

25 years+

Searched more for 5G phones and Samsung 5G models, with April trend showing a shift to those two queries

25 years and younger (Gen Z)

Samsung-specific 5G phones were searched for more often starting in March, but became less specific in April

Source: Microsoft Advertising Internal Data, Feb-April 2020
Search trends pre- and post-COVID-19

Rest of the population (25 years and older)

Top Non-Brand 5G queries Feb-April 2020

Query Phrase
- 5g
- 5g coverage map
- 5g phones
- 5g technology
- cheap phones 5g
- discounted 5g phone deal
- what is 5g

Trends did not change too much Feb-April other than “new 5g phone deals” popping in April

25 years +

Top Non-Brand 5G query trends for consumers

25 years and younger (Gen Z)

searched for “new 5g phone deals”, “best price 5G cell phones” & “5g tech” in March, but were not top queries in February or April

Source: Microsoft Advertising Internal Data, Feb-April 2020
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*