Consumer trends in at-home entertainment during COVID-19 (AU)

May 7th, 2020
On March 23rd Australia introduced strict lockdown laws. As consumers spend more time at home with family, their need to invest in at-home entertainment options has taken priority over other categories.

Weekly at-home entertainment searches and clicks have gained significant momentum when compared to start of this year.

Australians intend to invest more on content and devices to keep themselves entertained during lockdown.

With schools and day-cares shutting down, searches for children’s content has increased.
Market watch
Uncertain times have led to decreased spending intention across categories, except for groceries and at-home entertainment.

<table>
<thead>
<tr>
<th>Category</th>
<th>% of Respondents</th>
<th>Net Intent¹</th>
<th>Net Intent²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Groceries</td>
<td>28</td>
<td>+17</td>
<td></td>
</tr>
<tr>
<td>Snacks</td>
<td>20</td>
<td>-3</td>
<td></td>
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<tr>
<td>Tobacco products</td>
<td>14</td>
<td>-8</td>
<td></td>
</tr>
<tr>
<td>Food takeout &amp; delivery</td>
<td>20</td>
<td>-17</td>
<td></td>
</tr>
<tr>
<td>Alcohol</td>
<td>15</td>
<td>-9</td>
<td></td>
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<tr>
<td>Quick-service restaurant</td>
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<td>-45</td>
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<tr>
<td>Restaurant</td>
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<tr>
<td>Footwear</td>
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<td>-62</td>
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<tr>
<td>Apparel</td>
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<tr>
<td>Jewelry</td>
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<td>-73</td>
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</tr>
<tr>
<td>Accessories</td>
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<td>-75</td>
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<td>Non-food child products</td>
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<td>-17</td>
<td></td>
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<tr>
<td>Household supplies</td>
<td>16</td>
<td>+1</td>
<td></td>
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<tr>
<td>Personal-care products</td>
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<td>-8</td>
<td></td>
</tr>
<tr>
<td>Skin care &amp; makeup</td>
<td>3</td>
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<tr>
<td>Furnishings &amp; appliances</td>
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<tr>
<td>Entertainment at home</td>
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<tr>
<td>Books/magazines/newspapers</td>
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<td>-21</td>
<td></td>
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<tr>
<td>Consumer electronics</td>
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<tr>
<td>Out-of-home entertainment</td>
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<td>-77</td>
<td></td>
</tr>
<tr>
<td>Pet-care services</td>
<td>4</td>
<td>-39</td>
<td></td>
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<tr>
<td>Fitness &amp; wellness services</td>
<td>8</td>
<td>-65</td>
<td></td>
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<tr>
<td>Personal-care services</td>
<td>2</td>
<td>-62</td>
<td></td>
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<tr>
<td>Gasoline</td>
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<td></td>
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<tr>
<td>Vehicle purchases</td>
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<tr>
<td>Short-term home rentals</td>
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<tr>
<td>Travel by car</td>
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<tr>
<td>Cruises</td>
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<tr>
<td>Adventures &amp; tours</td>
<td>3</td>
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<td>International flights</td>
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<td>Hotel/resort stays</td>
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</tr>
<tr>
<td>Domestic flights</td>
<td>4</td>
<td>-81</td>
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</tr>
</tbody>
</table>

¹: Over the next two weeks, do you expect that you will spend more, about the same, or less money on these categories than usual? Figures may not sum to 100% because of rounding.

²: Net intent is calculated by subtracting the % of respondents stating they expect to decrease spending from the % of respondents stating they expect to increase spending.

Category deep dive

1. Devices
2. Books & Literature
3. Gaming & Media
Home schooling for kids coupled with their parents working-from-home has resulted in a significant increase in searches for various devices.
Searches & clicks for devices saw a sharp increase with the introduction of stricter precautionary measures.
**Laptop** searches saw a sharp uplift when companies introduced work-from-home guidelines.

**Queries with highest uplift** (compared to January)

- "iphone se" + >1000%
- "iphone 11 pro max" +978%
- "speakers" +392+
- "harvey norman computers" +242%
- "headphones" +183%
- "kindle/kindle Australia" +200%
- "gaming pc" +123%
- "ipad/ ipad pro" +122%
- "laptop/laptops" +100%
- "macbook" +80%
- "lenovo" +75%

Microsoft internal data | Devices | Jan vs Apr 2020 | search volume | Top 200 queries
Strong spike across **Devices** indicate people’s increased interest in various devices

<table>
<thead>
<tr>
<th>Sub-category</th>
<th>Growth compared to January</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio</td>
<td>125%</td>
</tr>
<tr>
<td>Kindle</td>
<td>120%</td>
</tr>
<tr>
<td>Laptops</td>
<td>96%</td>
</tr>
<tr>
<td>Bluray/mp3</td>
<td>64%</td>
</tr>
<tr>
<td>Home Theatre</td>
<td>63%</td>
</tr>
<tr>
<td>Tablet</td>
<td>61%</td>
</tr>
<tr>
<td>Smart Phones</td>
<td>38%</td>
</tr>
</tbody>
</table>

**Sub-category split (March-April search volume):**
- Smart Phones: 34%
- Laptops: 41%
- Audio: 12%
- Tablet: 8%
- Kindle: 3%
- Bluray/DVD players: 1%
- Home Theatre: 1%
A strong uplift in brand searches across categories indicate increase in demand for these products

<table>
<thead>
<tr>
<th>Laptops</th>
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<th>Smart Phones</th>
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<table>
<thead>
<tr>
<th>Tablet</th>
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</tr>
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<tbody>
<tr>
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<td></td>
<td></td>
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<td>+97%</td>
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<tr>
<td>samsung</td>
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<td></td>
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<td>+10%</td>
</tr>
</tbody>
</table>

Top Brands by search volume (March+April)

Uplift = January vs. April search volume uplift

Microsoft Internal Data | Home & Garden | Jan vs. Apr 2020 | search volume | See appendix for more info
Online marketplaces and department stores have witnessed substantial growth in consumer demand.

**Online marketplaces**
- ebay: +84%
- amazon: +129%
- kogan: +128%
- catch.com.au: +196%
- graysonline: +163%

**Department stores**
- kmart: +125%
- big w: +32%
- target: +138%
- Myer: +160%
- DJ: +138%
2. Books & Literature

We have seen in an increase in demand as individuals, couples and families increase interest in at-home leisure activities.

Includes Audio & eBooks
Introduction of stricter precautionary measures seems to have resulted in an increased interest in Books & Literature category.
With schools and daycares shutting down, children’s books & literature has witnessed the highest growth.

Queries with highest uplift (compared to January):

- “epic books” + >1000%
- “qb bookshop online” + 977%
- “very hungry caterpillar” + >800%
- “ebook/s” + 452%
- “scholastic” + 417%
- “pearson places” + 325%
- “kindle australia” + 197%
- “google books” + 151%
- “dymocks online” + 151%
- “booktopia australia” + 85%
- “audible” + 76%
Strong spike across **Books & Literature** categories indicate people’s need to consume this content has increased more than ever.

Sub-category search growth compared to January:
- **Children's Books & Literature***: 362%
- Textbooks: 180%
- ebooks: 127%
- Others**: 86%
- Traditional Book Stores: 86%
- Audio books: 85%
- Online Book Stores: 48%

Sub-category split (March-April search volume):
- Children's Books & Literature*: 28%
- Online Book Stores: 23%
- Traditional Book Stores: 13%
- Textbooks: 4%
- Audio books: 7%
- ebooks: 13%
- Others**: 11%

*Children’s Books & Literature includes searches for books, titles, authors & other learning resources
**Others = Titles, Authors, Topics and generics

Microsoft internal data | Books & Literature | Jan - Apr 2020 | search volume
A strong uplift in brand searches across categories indicate increase in demand for these products

**Children's Books & Literature**
- epic: + > 12k%
- scholastic: +600%
- raz-kids: +100%

**Traditional Book Stores**
- dymocks: +92%
- qbd: 107%
- koorong: +51%
- angus robertson: +59%
- barnes noble: +59%

**Online Book Stores**
- booktopia: +81%
- book depository: +21%
- fantastic fiction: -11%
- kobo: +113%
- amazon: +638%
- AbeBooks: +127%

**eBooks**
- kindle: +88%
- google books: +151%
- pottermore: +34%
- ibooks: +232%
- bookbub: -2%

Top Brands (by March-April search volume)
Uplift = January vs April search volume uplift

*Children's Books & Literature includes searches for books, titles, authors & other learning resources*
3. Gaming & Media

i. Streaming
ii. Console Gaming
iii. Puzzles, Lego and Board Games
i. Streaming

As the lockdown laws were introduced, our platform saw a large growth in search volume, with Amazon Prime Video, Disney Plus, and Netflix being the largest movers.
Isolation and the lock-down has led to increased intent to consume online digital media, especially movies and shows

<table>
<thead>
<tr>
<th>Activity</th>
<th>Decrease</th>
<th>Stay the same</th>
<th>Increase</th>
<th>Net Intent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movies or shows</td>
<td>4%</td>
<td>38%</td>
<td>58%</td>
<td>+54</td>
</tr>
<tr>
<td>Live news</td>
<td>6%</td>
<td>45%</td>
<td>49%</td>
<td>+43</td>
</tr>
<tr>
<td>Video content</td>
<td>4%</td>
<td>47%</td>
<td>49%</td>
<td>+45</td>
</tr>
<tr>
<td>Texting, chatting and messaging</td>
<td>4%</td>
<td>47%</td>
<td>49%</td>
<td>+45</td>
</tr>
<tr>
<td>Reading news online</td>
<td>5%</td>
<td>47%</td>
<td>48%</td>
<td>+43</td>
</tr>
<tr>
<td>Social media</td>
<td>6%</td>
<td>51%</td>
<td>43%</td>
<td>+37</td>
</tr>
<tr>
<td>TV</td>
<td>6%</td>
<td>53%</td>
<td>41%</td>
<td>+35</td>
</tr>
<tr>
<td>Reading for personal interest</td>
<td>9%</td>
<td>50%</td>
<td>41%</td>
<td>+32</td>
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<tr>
<td>Video games</td>
<td>11%</td>
<td>51%</td>
<td>38%</td>
<td>+27</td>
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<tr>
<td>Working</td>
<td>27%</td>
<td>51%</td>
<td>22%</td>
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<tr>
<td>Reading print news</td>
<td>29%</td>
<td>57%</td>
<td>14%</td>
<td>-15</td>
</tr>
</tbody>
</table>

1 Q: Over the next two weeks, how much time do you expect to spend on these activities compared to how much time you normally spend on them? Figures may not sum to 100% because of rounding.
2 Net intent is calculated by subtracting the % of respondents stating they expect to decrease time spent from the % of respondents stating they expect to increase time spent.

Online streaming is the biggest shift in increased user behaviour due to COVID-19.
This behaviour is highlighted by the growth in streaming related searches and clicks on our platform.
COVID-19 and lockdown laws have caused a large increase in online video streaming products & services.

Queries with highest uplift (compared to January):

- "amazon prime movies" +280%
- "amazon prime video" +150%
- "apple tv+" +1000%
- "apple tv plus" +96%
- "netflix party" +220%
- "netflix tv shows" +89%
- "netflix movies" +23%
- "disney+" +1000%
- "disney plus" +79%
- "stan.com.au" +165%
- "foxtel australia" +116%
Growth is seen across all streaming services, with the exception of sports service Kayo – driven due to sporting events on-hold.

Sub-category search growth compared to January:
- Amazon Prime Video: 168%
- Disney Plus: 142%
- Netflix: 70%
- Foxtel Now: 69%
- Stan: 68%
- Apple TV: 60%
- Kayo: -70%

Streaming services split by search volume:
- Netflix: 56%
- Stan: 15%
- Disney Plus: 14%
- Foxtel Now: 7%
- Apple TV: 1%
- Amazon Prime Video: 6%
- Kayo: 2%

Netflix dominates our platform, followed by Stan and Disney Plus.
ii. Console Gaming

Console gaming sales searches also grew significantly during lockdown, with game titles such as Animal Crossing generating the biggest shift and in turn creating great interest in the gaming consoles.
Video game sales are spiking in many markets due to COVID-19

1. Global Web Index (GWI) in December 2019 showed that console gaming has remained a steady platform within the industry with 1 in 4 internet users, and 2 in 5 gamers, still using games consoles to play games.

2. From COVID-19, console gaming has seen a large increase in sales across majority of markets, seen by a peak of 111% spend YoY within week ending 19th of April in the U.S.

Source:
1. Global Web Index report 2019
2. FIRST report from Facteus, April 29, 2020 [https://first.facteus.com/](https://first.facteus.com/)
The same trend is found locally in Australia, as sales rise mid-March

+286%

week-over-week (WoW) uplift in physical console sales
(within the same week of social distancing measures first being announced in Australia (March 16 – 22))*

+279%

week-over-week uplift in physical video game sales in the same week

Doom: Eternal (Xbox, PS4, PC) and Animal Crossing: New Horizons (Switch) contributed to over 68% towards this growth*

*Source: Sales figures pulled from Game Sales Data, ISFE. https://www.gamesindustry.biz/articles/2020-03-28-what-is-happening-with-video-game-sales-during-coronavirus
Lockdown laws coupled with the release of new games seems to have resulted in gaming traffic.
Console interest within Microsoft Advertising platform favoured towards Xbox

Console ownership and interest
% of gamers who use/are interested in purchasing the following consoles for gaming

Use now  Interested in purchasing

19% 38%
10% 25%
9% 26%

PS4  Xbox One  Nintendo Switch

Consoles by search volume on Microsoft Advertising

- Xbox: 19%
- Playstation: 29%
- Nintendo: 52%
Growth in searches seen across all major Gaming Consoles

Queries with highest uplift (compared to January)

"new [console] games" +220%
"new [console]" +89%
"[console] sales/deals" + 187%
"[brand] + [console]" +67%
"nintendo switch" +58%
"nintendo switch lite" +129%
"ps4" +56%
"ps4 pro" +43%
"xbox" +56%
"xbox one" +14%
"xbox one s" +29%
The arrival of a new console generation is a highly anticipated occasion in gaming with Sony's PlayStation 5 and Microsoft's Xbox Series X both scheduled for release in late 2020.

Comparing week ending April 17th to the first week of January:

- “ps5” searches up 244%
- “xbox series x” up 253%

Steadily rising traffic highlights the opportunity these new consoles will provide later this year.
New releases spurred gaming discussion on social media given lockdown

Since lockdown people have been forced to stay at home and Twitter has seen a:

• **+71%** increase in gaming-related conversations
• **+38%** increase in new unique authors

The chart shows strong correlation between rise in volume to the release of *Animal Crossing: New Horizons*, a Nintendo switch game with a heavy emphasis on fashion, interior design and landscaping with social features included.

Source: Twitter Internal data, Feb – April 2020.
Recent releases drove strong growth in search traffic on our platform

1. In Australia, both Doom and Animal Crossing were released in the same week as when social distancing measures began taking place.

2. Search volumes post release have increased **+142%** WoW and **+300%** WoW for “doom” and “animal crossing” respectively.

3. Final Fantasy VII Remake (PS4), released on April 10th, but began experiencing large volumes starting **10 days before release**, signalling strong user interest for pre-orders.

4. Refer to appendix for more on expected upcoming video game releases.
iii. Puzzles, Lego, Board Games

Non-digital family activities also saw great interest, with search volumes for “puzzles”, “board games” and “lego” skyrocketing mid-March onwards.
Puzzles, Lego and board games have seen a large rise in popularity due to isolation at home

“Jigsaw puzzles have been flying off the shelves for weeks”
- Jackson Heenan, stock controller at Mind Games Melbourne

Sales of board games and jigsaw puzzles soared 240% during official week of coronavirus lockdown in the UK. – The Guardian

“Lego sales have risen threefold in the past two weeks”
- Rachel Larkman, purchasing officer for John Lewis

Number 7 in the top 10 items shoppers search for on Amazon were “Puzzles for adults” – Wall Street Journal

“I can assure you over the next few months we will consider those jigsaw puzzles absolutely essential.” – Prime Minister Scott Morrison

Puzzles have surged in traffic as a result of COVID-19

"puzzles" search volume by week

Queries with highest uplift (compared to January)

"puzzle" +251%
"puzzles" +297%
"jigsaw puzzle" +>1000%
"jigsaw puzzle" +42%
"jigsaw puzzles australia" +>1000%
"ravensburger puzzles" +>1000%
Board Games have also seen strong growth in traffic post lockdown

“board games” search volume by week

Queries with highest uplift (compared to January)

“board games” +641%
“board games Australia” + >1000%
“catan/settlers of catan” +785%
“ticket to ride” +702%
“scrabble” +432%
“monopoly” +298%
“uno” + 415%
“cluedo” +560%
Lego products have also seen strong growth in both generic and theme-specific sets

“lego” search volume by week

Queries with highest uplift (compared to January)

“lego” +128%
“lego australia” +154%
“big w/kmart/target/myer lego” +>1000%
“minecraft lego” +>1000%
“harry potter lego” +914%
“lego technic” +185%
“lego city” +>1000%
“star wars lego” +73%
Key takeaways

1. As consumers spend more time at home with family, the need to invest in at-home entertainment options has taken priority over other categories.

2. Businesses have an opportunity to tap into this increased demand and connect consumers with right products.

3. Take advantage of your search campaigns to understand your customers better and plan your next steps.

4. Connect your customers with the right products on the first click.
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
Appendix
**Smartphones**

**Product Terms**
- Apple 58%
- Samsung 27%
- Oppo 6%
- Others 9%

**Retailers & Telcos**
- Big W 23%
- Jb Hifi 21%
- ebay 9%
- TGG 7%
- Others 28%

**Generics**
- 6%

**Top queries**
- iphone 11
- iphone
- iphone 8
- iphone 7
- samsung galaxy s10
- iphone 11 pro
- iphone xr
- phone
- iphone 11 pro max
- samsung phones

**Query type**
- Product Terms 87%
- Retailers & Telcos 8%
- Generics 6%

**Average CTR**
2.56%

**Weekly search trend**

Microsoft Internal Data | Smartphones | Jan to Apr 2020
Tablets

Top Retailer Brands
- Officeworks: 25%
- Jb Hifi: 22%
- Big W: 20%
- Harvey Norman: 15%
- TGG: 6%
- Others: 18%

Top Manufacturer Brands
- Apple: 85%
- Samsung: 14%

Top queries
- ipad
- ipad cases
- ipad pro
- apple ipad
- samsung galaxy s4...
- ipad mini
- smart notebook
- ipad air
- samsung tablet
- ipads

Query type
- Product Terms: 95%
- Retailer Brand: 5%

Query breakdown
- Apple: 73%
- Samsung: 12%

Weekly search trend
Average CTR: 2.69%
Laptops

Average CTR 2.57%

Top Manufacturer Brands:
- Dell 21%
- HP 20%
- MSFT 15%
- Lenovo 10%
- Acra 5%
- ASUS 6%
- Others, 16%

Top Retailer Brands:
- Harvey Norman 53%
- JB HiFi 19%
- Officeworks 16%
- Others, 5%
- TGG, 7%

Top queries:
- student discount laptops
- dell
- lenovo
- hp
- harvey norman computers
- desktop
- acer
- best laptop
- dell australia
- asus

Query type:
- Product Terms 93%
- Retailer Brand 5%
- Generics 2%
- Others, 5%

Query breakdown:
- Harvey Norman 53%
- JB Hifi 19%
- Officeworks 16%
- TGG, 7%
- Others, 5%

Top Manufacturer Brands:
- Dell 21%
- HP 20%
- MSFT 15%
- Lenovo 10%
- Acer 6%
- ASUS 6%
- Others, 16%

Gaming Laptops:
- Laptops / Desktops 93%
- Microsoft Internal Data | Laptops | Jan to Apr 2020

Average CTR 2.57%

Weekly search trend
Audio

Top Retailer Brands
- Jb HiFi: 41%
- Officeworks: 18%
- Kmart: 12%
- Harvey Norman: 9%
- Big W: 7%

Top Manufacturer Brands
- Bose: 24%
- Beats: 17%
- Jabra: 11%
- Sony: 11%
- JBL: 10%
- Others: 27%

Top queries
- Headphones
- Speakers
- Bose
- Speaker
- Bluetooth headphones
- Plantronics
- Beats
- Bluetooth speaker
- Wireless headphones
- JBL

Average CTR: 2.28%

Query type
- Generics: 55%
- Product Terms: 41%
- Retailers: 4%

Query breakdown
- Earphones / Headphones: 66%
- Speakers: 28%
- Sound Bars: 5%

Weekly search trend

Microsoft Internal Data | Audio | Jan to Apr 2020