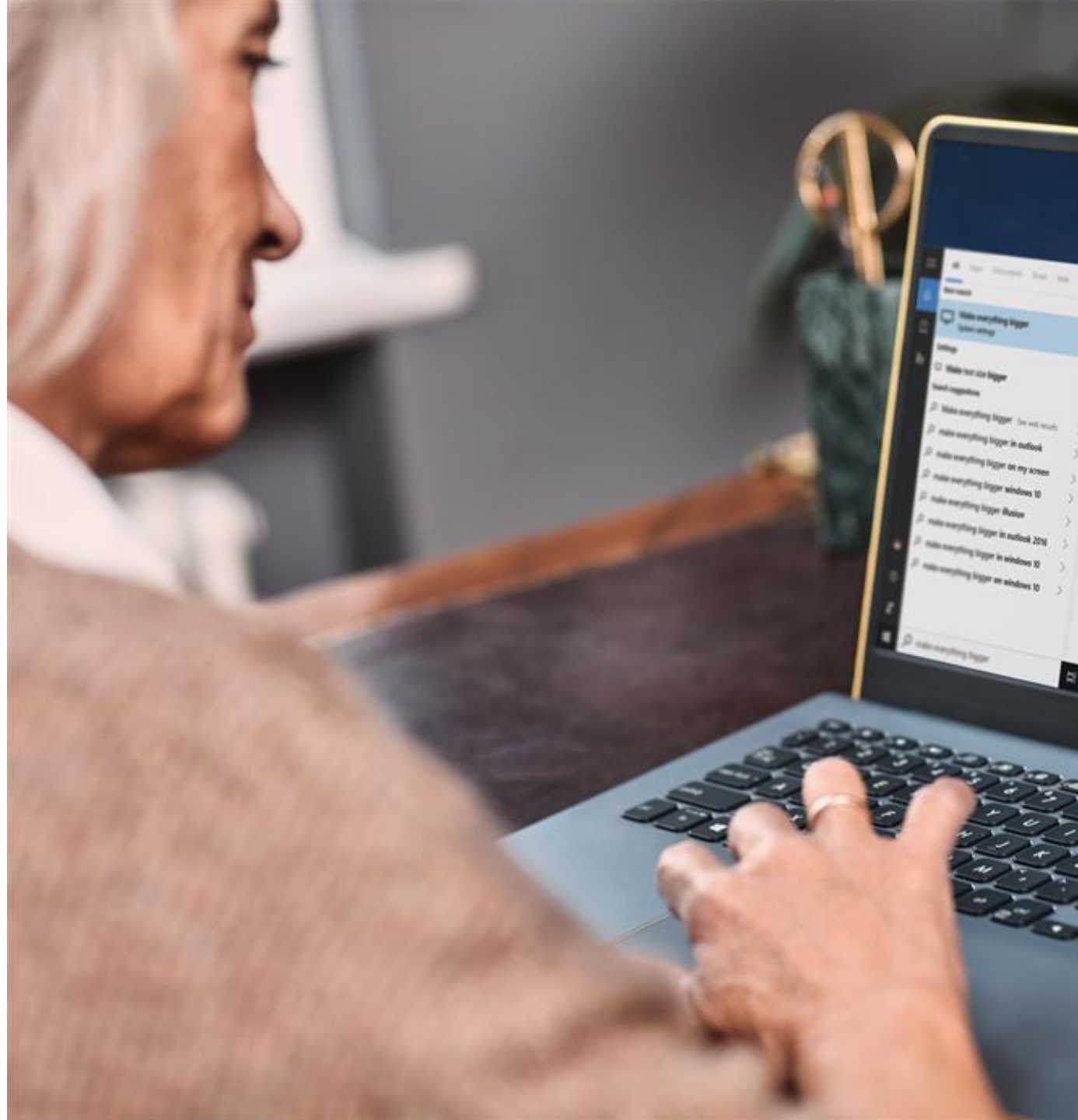




The changing online behaviour of a senior audience

UK



Hypothesis

- Current social restrictions encouraging consumers to stay indoors where possible has resulted in an increase in internet usage at home.
- UKOM data shows that 65+ have been increasing their time spent online since Jan 2020*, which may create new targeting opportunities for advertisers.
- So how have search behaviours of seniors evolved in 2020?

Insights Teaser



- European lockdowns are forcing consumers inside, consequently internet activity has risen
- UKOM data shows that people 65+ have increased time spent online by 12% YoY
- On the Microsoft Search Network, we saw a 73% YoY increase in searches among the 65+ in April



- For 65+ there is the unique combination of more searches & clicks and decreasing CPC's; making this an attractive audience for advertiser consideration.
- Searchers in this demographic are more likely to use different terms than younger ages, emphasizing the importance to tailor strategies for this audience



- Recommended focus areas for clients:
 - Real Estate
 - Health
 - Occasions & Gifts

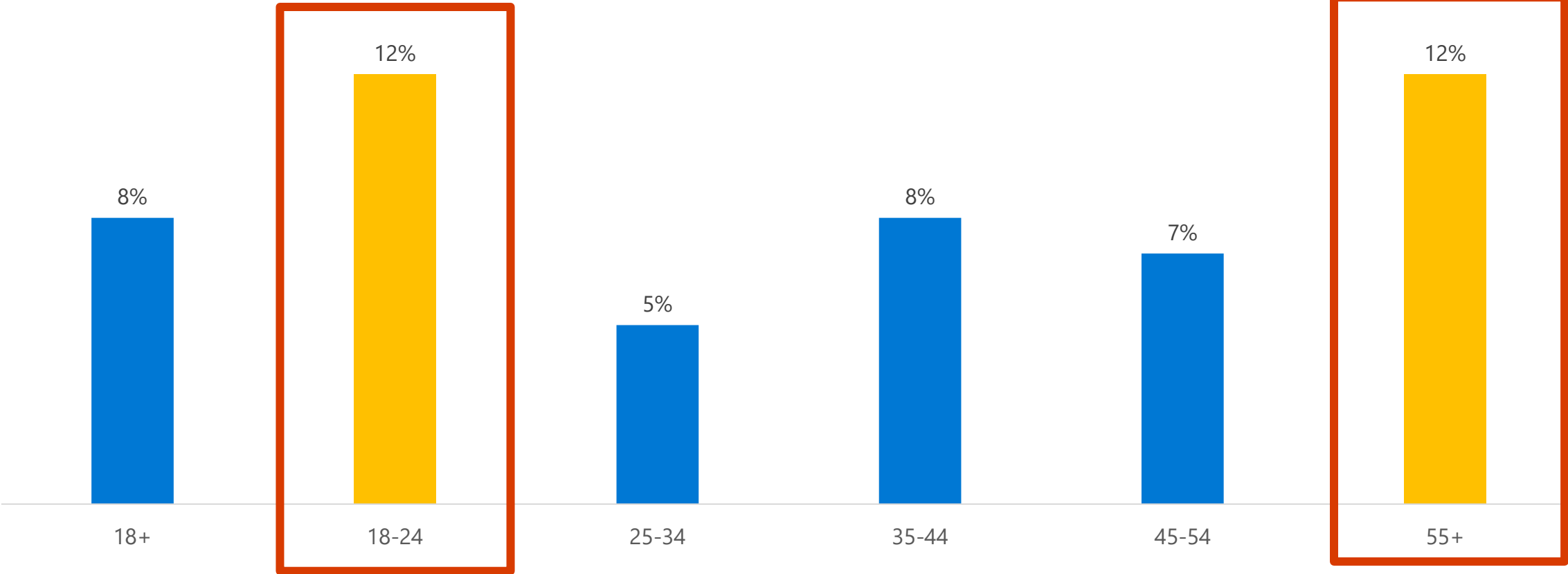
UK Overview



UKOM data shows all Britons are spending more time online

18-24 & 55+ are driving the highest growth rates

Time online % change: Jan-Mar 2020



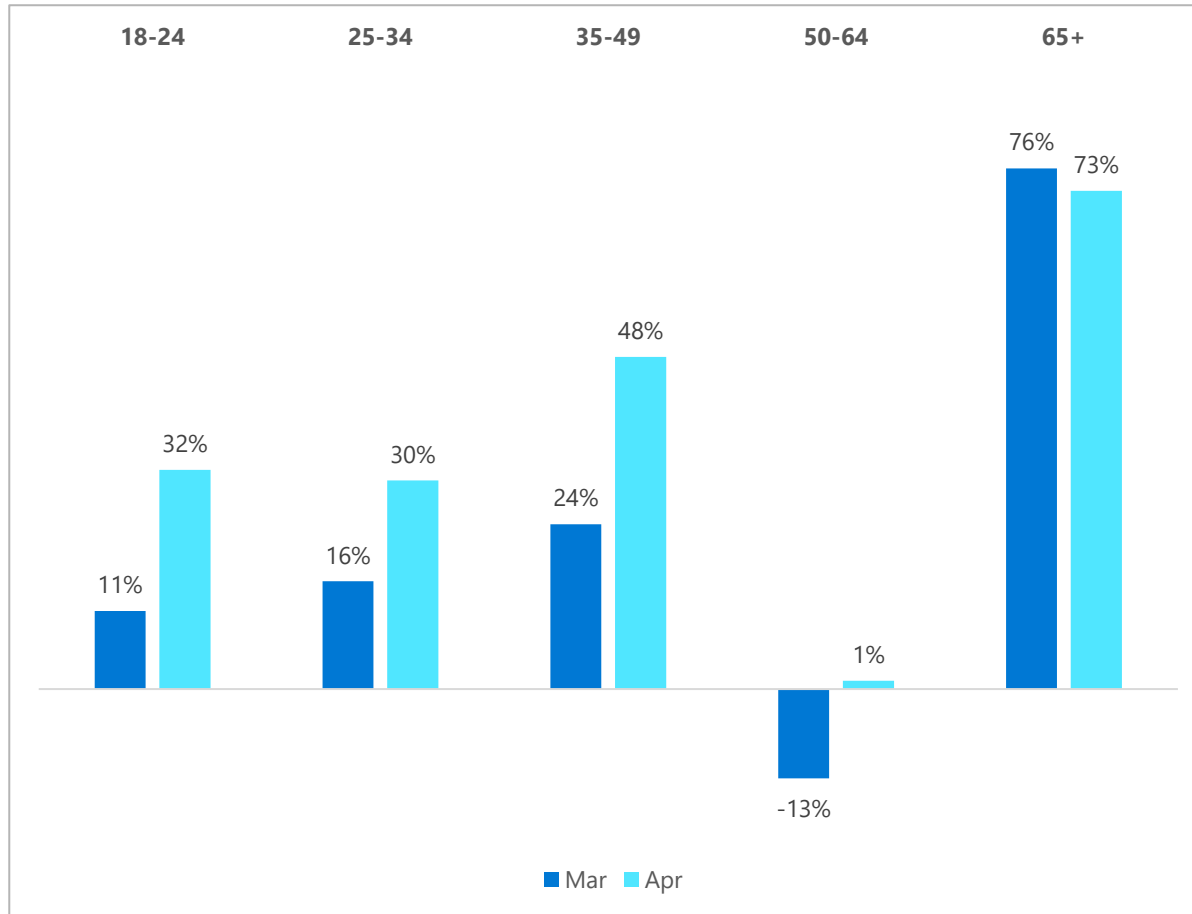
Source:UKOM from Comscore MMX Multi-Platform, Adults 18+, Jan & Mar 2020, UK



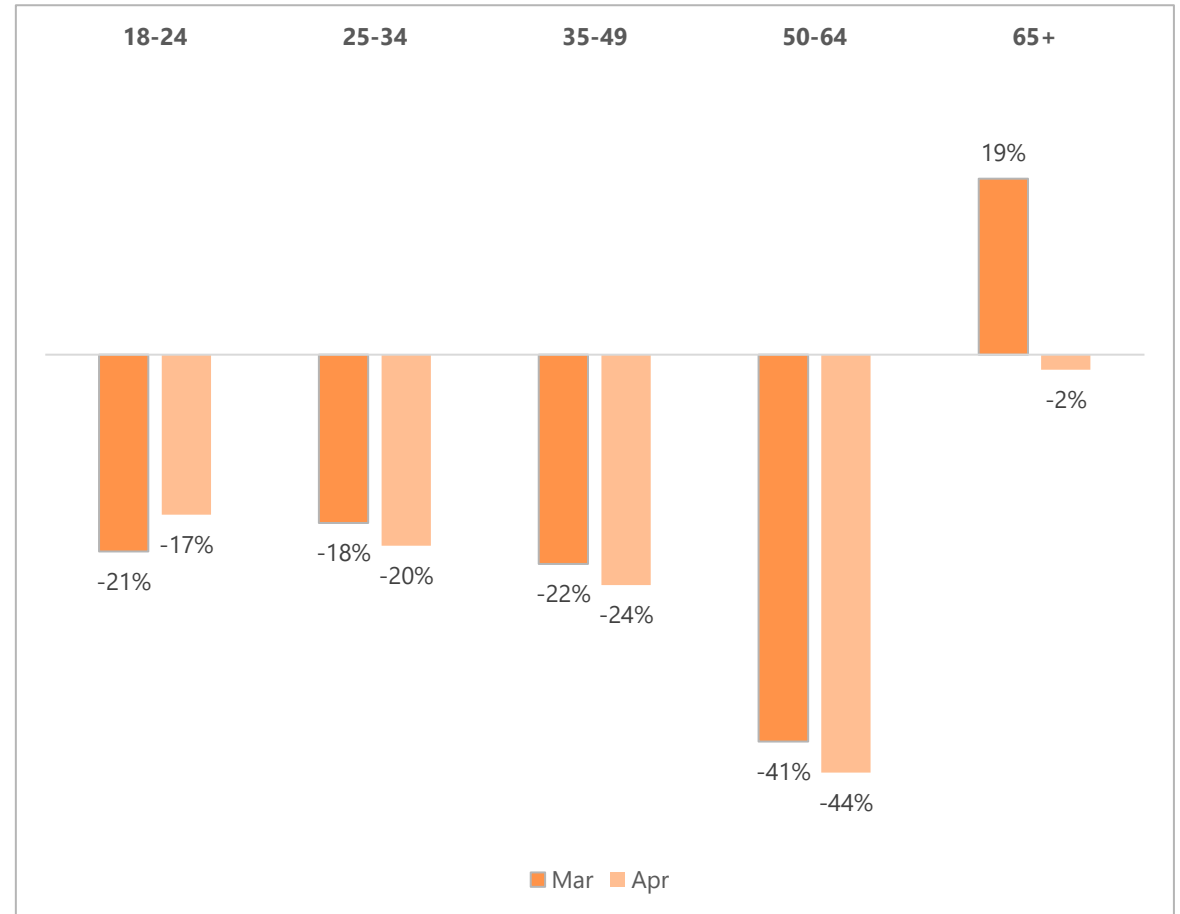
65+ consumers are doing significantly more searches year-on-year

Most age groups are searching more, but only 65+ are more likely to click than a year ago

YoY searches by age group



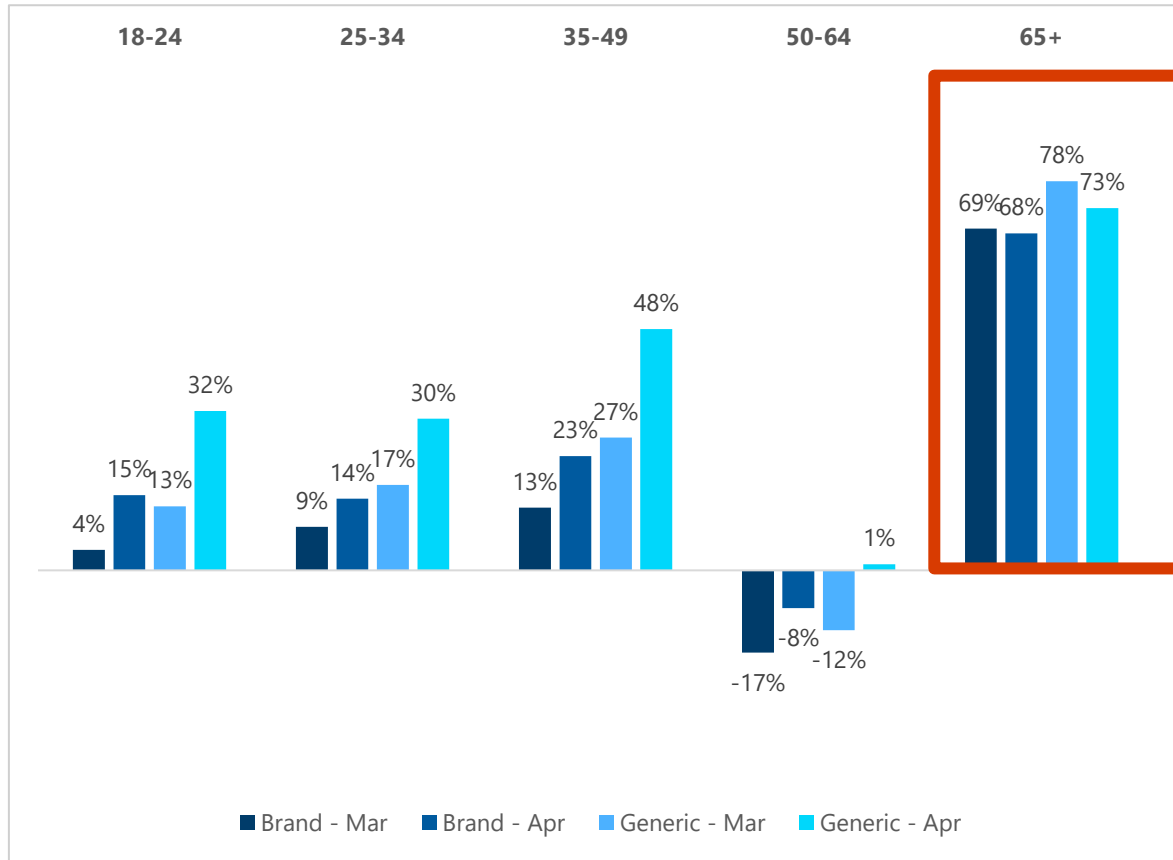
YoY clicks by age group



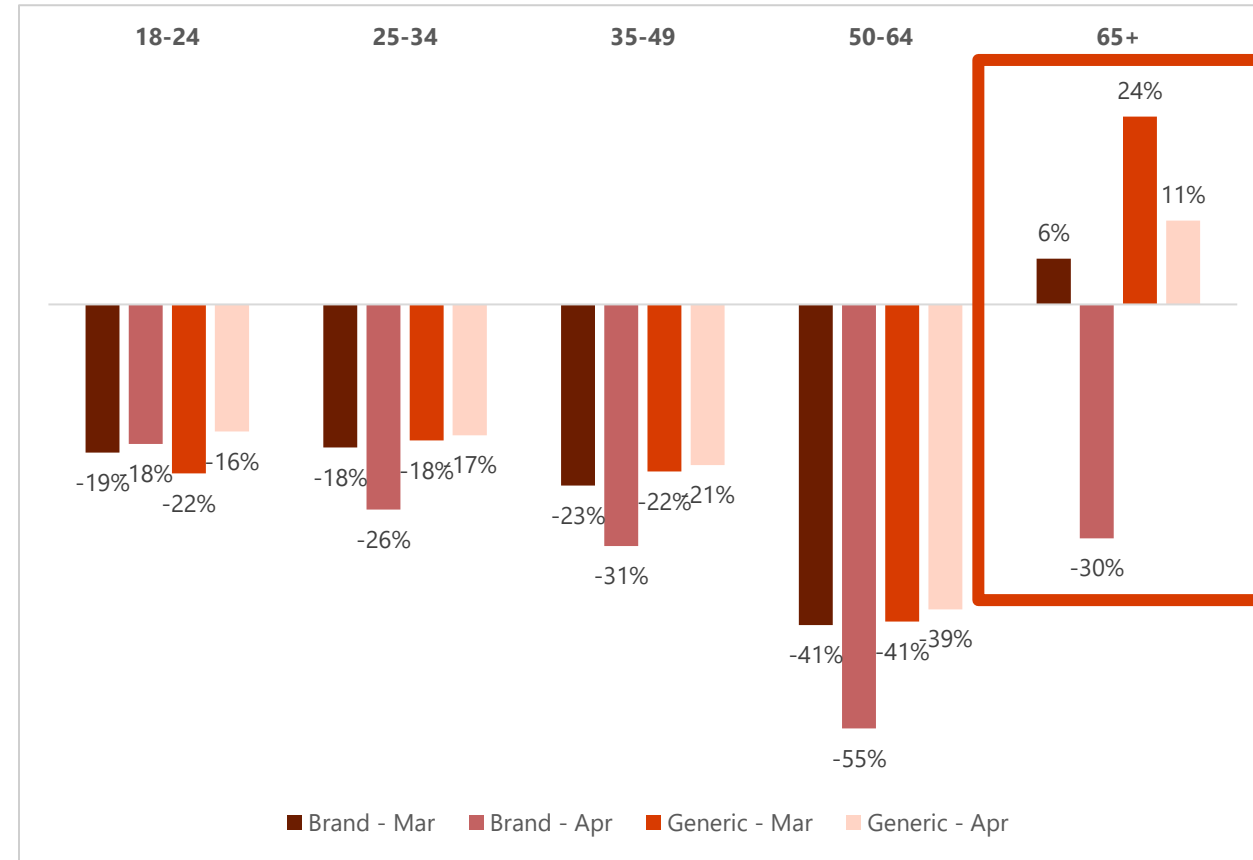
65+ have greatly increased their online footprint via clicks & searches

Generic search growth overtook brand. However, brand uplift in searches were noticeable among 65+ consumers as of March. Commercial intent was expressed both in generic and brand for this group solely, despite brand clicks being slightly down in April.

YoY searches by age group brand vs generic



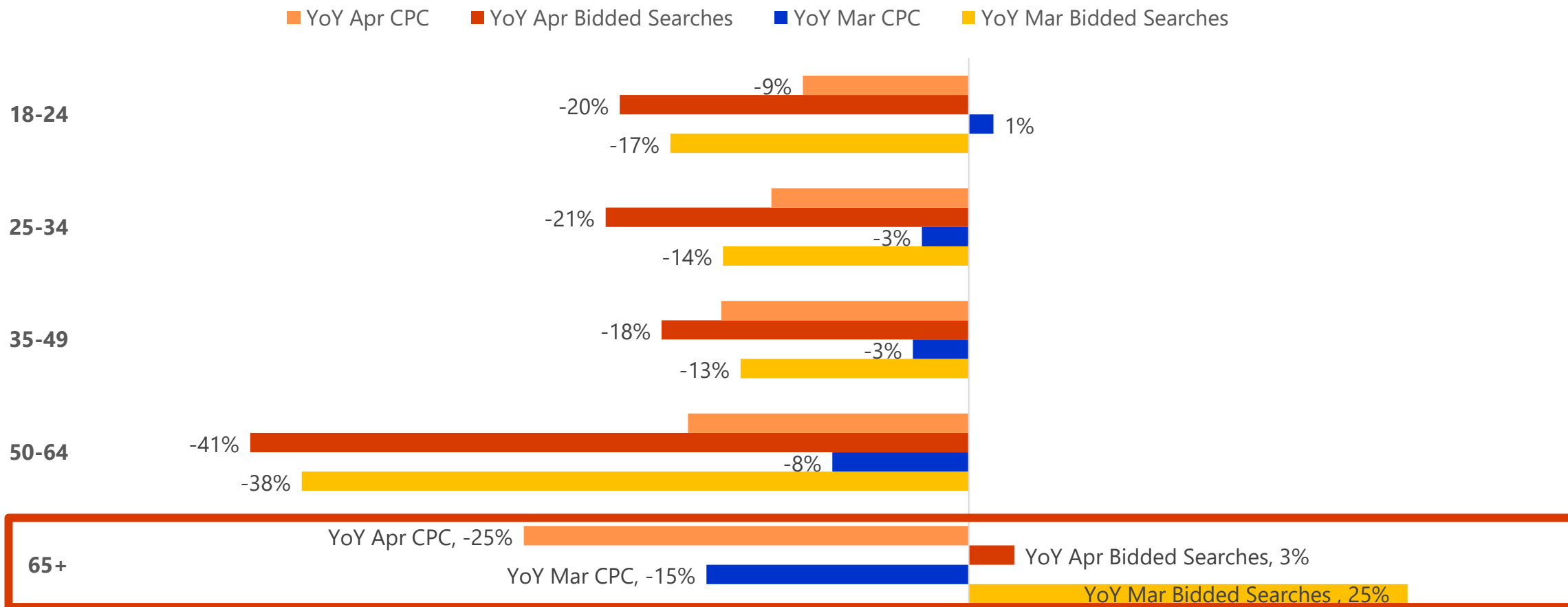
YoY clicks by age group brand vs generic



65+ bidded searches have grown year-on-year, whilst CPC has fallen substantially

65+ consumers expressed strong commercial intent compared to last year. CPC has fallen as advertisers have not reacted to the increased demand

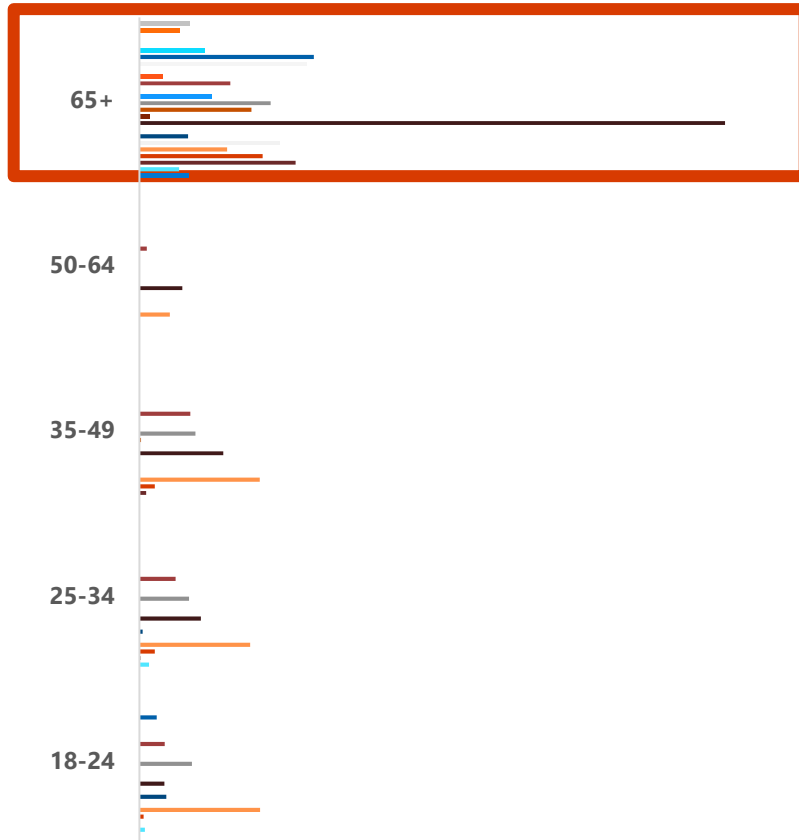
YoY March Bidded searches/CPC by age group



For 65+ almost all categories have grown bid searches year-on-year

Food & Groceries, Real Estate + Occasions & Gifts have grown by the largest amount

YoY March bid searches by age group distributed by L1*



- Vehicles
- Travel & Tourism
- Sports & Fitness
- Retailers & General Merchandise
- Real Estate
- Occasions & Gifts
- News, Media & Publications
- Law & Government
- Jobs & Education
- Internet & Telecom
- Home & Garden
- Hobbies & Leisure
- Health
- Gambling
- Food & Groceries
- Finance

Age Group	L1 Vertical	All Up Bidded Searches YoY
65+	Food & Groceries	334.45%
	Real Estate	99.65%
	Occasions & Gifts	95.79%
	Beauty & Personal Care	89.15%
	Dining & Nightlife	80.08%
	Hobbies & Leisure	74.92%
	Business & Industrial	70.32%
	Health	64.03%
	Jobs & Education	51.80%
	Computers & Consumer Electronics	50.10%
	Home & Garden	41.65%
	Retailers & General Merchandise	37.44%
	Vehicles	28.87%
	Apparel	28.22%
	Family & Community	27.69%
	Unspecified	23.29%
	Arts & Entertainment	22.59%
	Law & Government	13.21%
	Gambling	5.75%

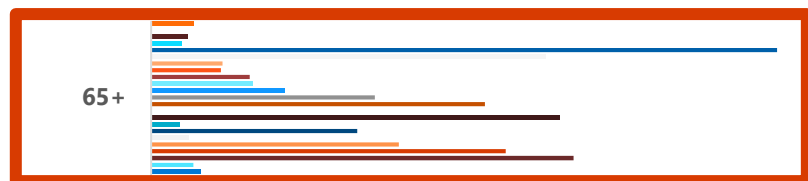
Source: Microsoft Internal data,, March 2020
 *Negative values excluded from the bar chart

Similarly clicks for the 65+ audience have increased across most categories

Clicks in the real estate category have more than doubled year-on-year for this segment



YoY March clicks by age group distributed by L1*



- Vehicles
- Travel & Tourism
- Sports & Fitness
- Retailers & General Merchandise
- Real Estate
- Occasions & Gifts
- News, Media & Publications
- Law & Government
- Jobs & Education
- Internet & Telecom
- Home & Garden
- Hobbies & Leisure
- Health
- Gambling
- Food & Groceries

Age Group	L1 Vertical	YoY All Up Clicks
65+	Real Estate	139.85%
	Beauty & Personal Care	94.38%
	Food & Groceries	91.23%
	Occasions & Gifts	88.15%
	Business & Industrial	79.20%
	Health	74.55%
	Computers & Consumer Electronics	55.31%
	Hobbies & Leisure	49.97%
	Family & Community	46.04%
	Home & Garden	29.77%
	Internet & Telecom	22.57%
	Jobs & Education	22.00%
	Unspecified	18.85%
	News, Media & Publications	15.93%
	Law & Government	15.53%
	Apparel	11.03%
	Vehicles	9.49%
	Arts & Entertainment	9.37%
	Dining & Nightlife	8.30%
	Sports & Fitness	8.16%
Retailers & General Merchandise	6.73%	
Finance	6.35%	

Source: Microsoft Internal data,, March 2020
 *Negative values excluded from the bar chart

L1 Analysis- criteria selections



year-on-year KPIs have been considered.

Age Group	Classification	Bidded Searches YoY	Clicks YoY	CTR YoY	CPC YoY
65+	Food & Groceries	334.00%	91.00%	-26.00%	44.00%
65+	Real Estate	100.00%	140.00%	52.00%	-51.00%
65+	Occasions & Gifts	96.00%	88.00%	23.00%	-16.00%
65+	Beauty & Personal Care	89.00%	94.00%	22.00%	12.00%
65+	Dining & Nightlife	80.00%	8.00%	-13.00%	10.00%
65+	Hobbies & Leisure	75.00%	50.00%	4.00%	20.00%
65+	Business & Industrial	70.00%	79.00%	9.00%	-33.00%
65+	Health	64.00%	75.00%	39.00%	-20.00%
65+	Jobs & Education	52.00%	22.00%	-7.00%	10.00%
65+	Computers & Consumer Electronics	50.00%	55.00%	25.00%	14.00%
65+	Home & Garden	42.00%	30.00%	9.00%	-3.00%
65+	Retailers & General Merchandise	37.00%	7.00%	4.00%	45.00%
65+	Vehicles	29.00%	9.00%	5.00%	15.00%
65+	Apparel	28.00%	11.00%	6.00%	20.00%
65+	Family & Community	28.00%	46.00%	61.00%	-3.00%
65+	Unspecified	23.00%	19.00%	12.00%	-25.00%
65+	Arts & Entertainment	23.00%	9.00%	21.00%	38.00%
65+	Law & Government	13.00%	16.00%	50.00%	-13.00%
65+	Gambling	6.00%	-3.00%	2.00%	33.00%
65+	Travel & Tourism	-4.00%	-29.00%	4.00%	-11.00%
65+	News, Media & Publications	-6.00%	16.00%	64.00%	25.00%
65+	Internet & Telecom	-7.00%	23.00%	36.00%	25.00%
65+	Sports & Fitness	-17.00%	8.00%	35.00%	17.00%
65+	Finance	-18.00%	6.00%	43.00%	-2.00%

L1 Analysis- criteria selections



CPC sign has changed to reflect positive contribution when a decrease occurred. All the KPIs have been normalized. The final score is given by the sum of each single components. Top 3 Vertical has been chosen.

Age Group	Classification	Scaled BSRPV	Scaled Clicks	Scaled CTR	Scaled CPC	Final Score
65+	Real Estate	0.34	1	0.87	1	3.21
65+	Health	0.23	0.62	0.72	0.68	2.25
65+	Occasions & Gifts	0.32	0.69	0.54	0.64	2.19
65+	Business & Industrial	0.25	0.64	0.39	0.81	2.09
65+	Family & Community	0.13	0.44	0.97	0.5	2.04
65+	Beauty & Personal Care	0.3	0.73	0.53	0.34	1.9
65+	Law & Government	0.09	0.27	0.84	0.6	1.8
65+	Food & Groceries	1	0.71	0	0.01	1.72
65+	Computers & Consumer Electronics	0.19	0.5	0.57	0.32	1.58
65+	Unspecified	0.12	0.28	0.42	0.73	1.55
65+	News, Media & Publications	0.03	0.27	1	0.21	1.51
65+	Finance	0	0.21	0.77	0.49	1.47
65+	Home & Garden	0.17	0.35	0.39	0.5	1.41
65+	Hobbies & Leisure	0.26	0.47	0.33	0.26	1.32
65+	Internet & Telecom	0.03	0.31	0.69	0.21	1.24
65+	Sports & Fitness	0	0.22	0.68	0.29	1.19
65+	Jobs & Education	0.2	0.3	0.21	0.36	1.07
65+	Dining & Nightlife	0.28	0.22	0.14	0.36	1
65+	Vehicles	0.13	0.22	0.34	0.31	1
65+	Apparel	0.13	0.24	0.36	0.26	0.99
65+	Travel & Tourism	0.04	0	0.33	0.58	0.95
65+	Arts & Entertainment	0.12	0.22	0.52	0.07	0.93
65+	Retailers & General Merchandise	0.16	0.21	0.33	0	0.7
65+	Gambling	0.07	0.15	0.31	0.12	0.65

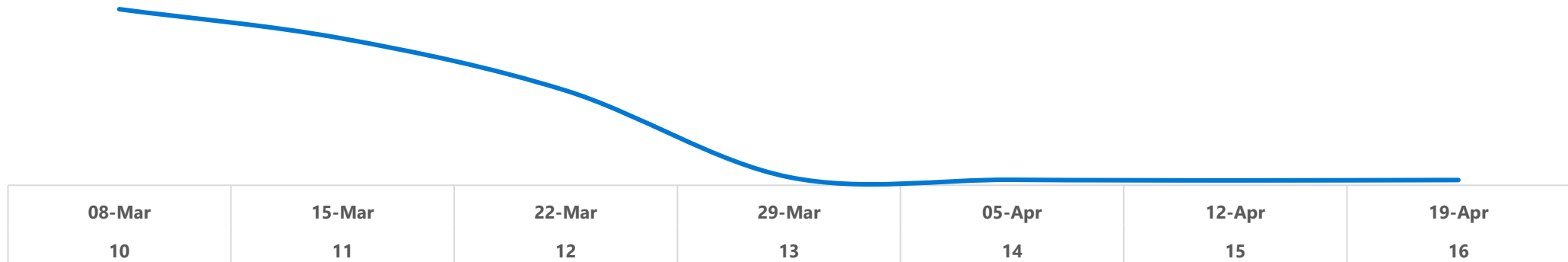
65+ Real Estate



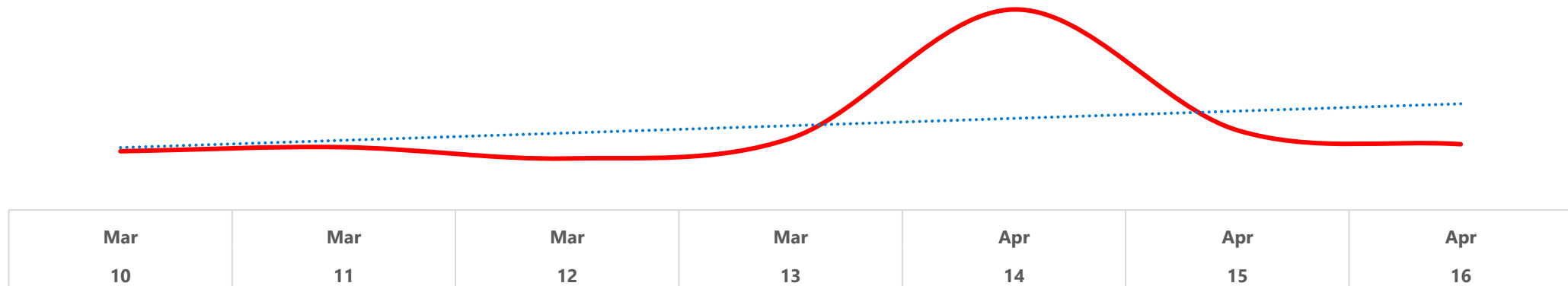
Real estate witnessed a huge gap between demand and supply

Advertisers have struggled to meet online demand as consumers interest grows gradually as per the same period.

DEMAND: Number of AdGroup



SUPPLY: Weekly Searches



Performance tracking queries 65+

Queries with most of the traffic skewed to age 65+ were labelled to track performance over time

Queries searches distribution by age group*



Queries	Age18 - 24	Age25 - 34	Age35-49	Age50-64	Age65+
bungalows sale my area	1.70%	11.17%	4.67%	28.57%	53.89%
land registry search	1.81%	9.84%	23.45%	32.12%	32.77%
property	4.58%	6.92%	11.93%	34.10%	42.47%
properties	12.96%	13.05%	23.95%	18.77%	31.28%
zoopla houses sale	2.99%	6.89%	17.07%	33.83%	39.22%
rightmove sale	3.04%	3.76%	22.72%	33.27%	37.21%
move	10.57%	15.98%	23.52%	23.20%	26.72%
sykes holiday cottages	1.47%	4.16%	16.75%	30.07%	47.56%
firstport	1.48%	11.87%	22.99%	23.49%	40.17%
rightmove uk property sale	0.98%	2.95%	22.11%	20.39%	53.56%
earlsferry scotland	0.67%	3.67%	16.33%	36.00%	43.33%

Source: Microsoft Internal data, PC only
*Based on last 30 days (01/04/2020-01/05/2020),

Queries sitting under the 65+ categories grew substantially in volume

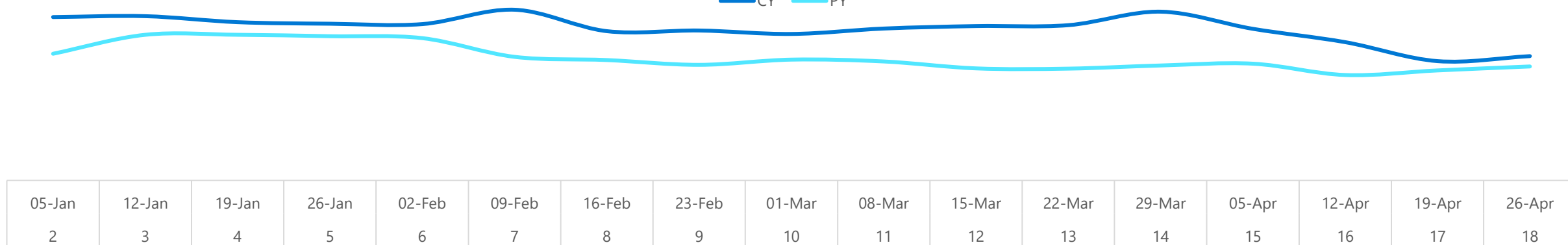
Queries labelled as 65+ **outpaced** the remaining set of queries as compared to last year, underlying a **strong upward trend**.

CY=CURRENT YEAR (2020) PY=PREVIOUS YEAR (2019)

Searches evolution queries 65+

Overall YoY +19%

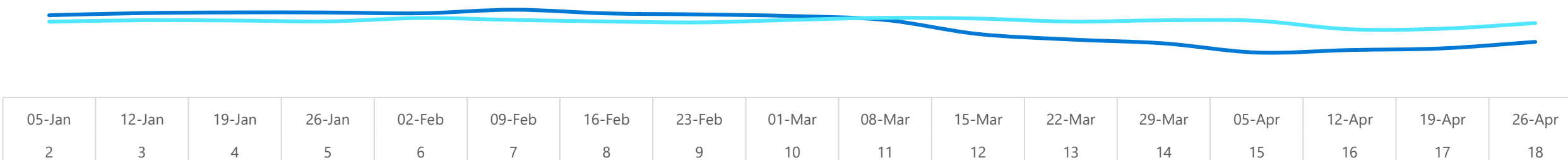
— CY — PY



Searches evolution all the rest

Overall YoY -7%

— CY — PY



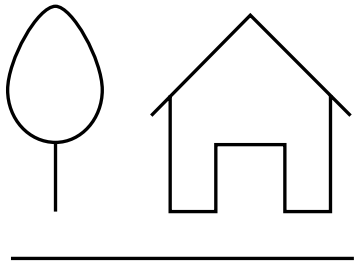
What senior users are likely to search for?

Elder consumers prefer **isolated accommodation** such as **bungalows** or **cottages**. Furthermore, they seem more inclined to include **“prices”** in their searches compared to other demographics.



Top 10 terms frequency

Terms 65+	Terms not 65+	Rank
sale	sale	1
property	property	2
rightmove	house	3
uk	homes	4
bungalows	houses	5
cottages	land	6
prices	uk	7
skyes	estate	8
agents	agents	9
council	rightmove	10



65+ Health



Performance tracking queries 65+

Queries with most of the traffic skewed to age 65+ were labelled to track performance over time

Queries searches distribution by age group*



Query	Age 18-24	Age 25-34	Age 35-49	Age 50-64	Age 65+
Bootsthe chemist	1.68%	3.74%	11.41%	31.36%	51.80%
chakras	4.71%	8.94%	22.27%	29.45%	34.63%
healthspan uk	1.63%	2.10%	6.61%	22.09%	67.58%
Specssavers	10.59%	14.94%	24.79%	24.14%	25.54%
nature's best	1.92%	3.84%	10.66%	24.51%	59.07%
healthspan	1.94%	4.43%	10.16%	23.31%	60.16%
vitamin d	6.11%	10.55%	22.60%	25.04%	35.69%
[BRAND] air purifier	2.69%	5.01%	14.06%	31.51%	46.73%
lavender anxiety	4.58%	7.52%	20.45%	30.44%	37.01%
bing fitness quiz	3.59%	7.70%	23.03%	29.63%	36.05%

Source: Microsoft Internal data, PC only
*Based on last 30 days (01/04/2020-01/05/2020),

Queries sitting under the 65+ categories recorded better growth in volume

Queries labelled as 65+ **performed slightly better** than the remaining set of queries as compared to last year.

Searches evolution queries 65+

Overall YoY+32%

— CY — PY



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
2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

Searches evolution all the rest

Overall YoY +28%

— CY — PY



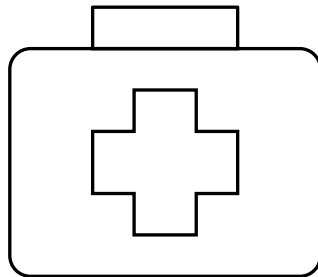
05-Jan	12-Jan	19-Jan	26-Jan	02-Feb	09-Feb	16-Feb	23-Feb	01-Mar	08-Mar	15-Mar	22-Mar	29-Mar	05-Apr	12-Apr	19-Apr
2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17



What senior users are likely to search for?

Elder consumers gives importance to **vitamin** and **tablets** as well as mobility and blood related searches. Since **best** is not so frequent among 65+, this category might be more sensible **to generic products** rather than branded ones.

Top 10 terms frequency



Terms 65+	Terms not 65+	Rank
uk	uk	1
symptoms	hospital	2
tablets	symptoms	3
vitamin	care	4
treatment	online	5
mobility	disease	6
blood	syndrome	7
online	glasses	8
pain	best	9
cream	nhs	10

Source: Microsoft Internal data, PC only
*Based on last 30 days (01/04/2020-01/05/2020),

65+ Occasions & Gifts



Performance tracking queries 65+

Queries with most of the traffic skewed to age 65+ were labelled to track performance over time

Queries searches distribution by age group*

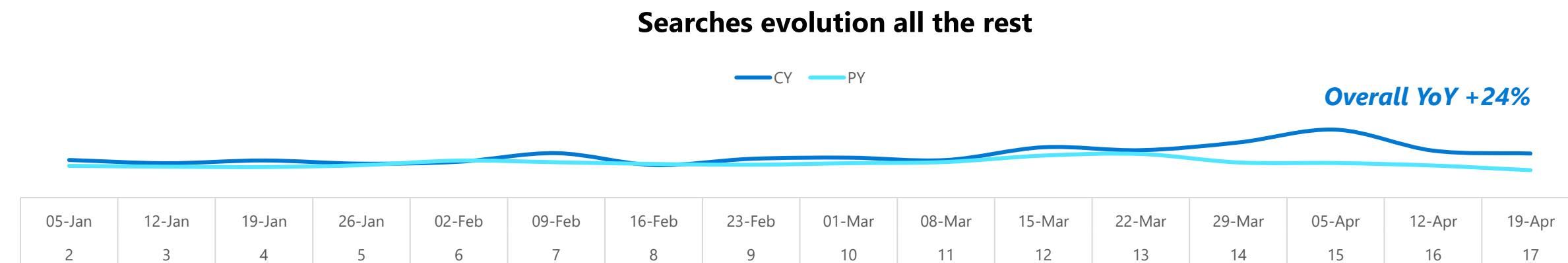
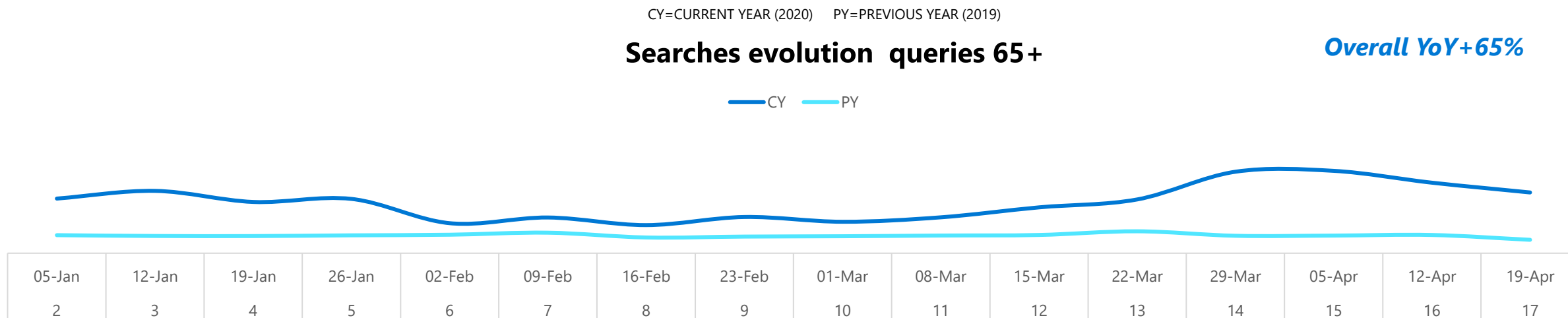


Query	Age18-24	Age25-34	Age35-49	Age50-64	Age65+
moonpig cards uk	2.82%	6.33%	15.57%	32.25%	43.04%
jacquie lawson cards	0.95%	2.10%	4.38%	13.47%	79.10%
birthday cards online	2.23%	4.72%	13.03%	27.28%	52.75%
flowers by post	3.88%	8.14%	18.03%	31.20%	38.76%
birthday cards	3.99%	10.56%	21.87%	23.48%	40.10%
marks and spencer flowers	2.24%	7.40%	17.08%	28.67%	44.61%
flowers delivered	4.29%	9.08%	18.21%	29.24%	39.19%
serenata flowers	5.14%	13.08%	22.44%	27.54%	31.80%
jackie lawson cards log on	0.63%	2.78%	3.17%	13.64%	79.78%
flowers by post uk free delivery	1.86%	4.94%	9.56%	28.84%	54.80%

Source: Microsoft Internal data, PC only
*Based on last 30 days (01/04/2020-01/05/2020),

Queries sitting under the 65+ categories recorded better growth in volume

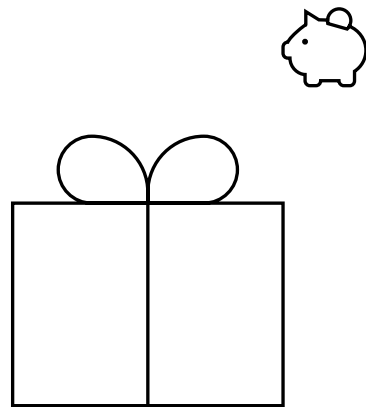
Queries labelled as 65+ **performed better** than the remaining set of queries as compared to last year.



What senior users are likely to search for?

Surprisingly, aged users consider “**online**” in their searches more than the other categories. **Free** is recurrent among 65+ searches as well, which might be an indication that elder **consumers have become more price-aware**.

Top 10 terms frequency



Terms 65+	Terms not 65+	Rank
cards	birthday	1
birthday	easter	2
flowers	gifts	3
uk	uk	4
online	flowers	5
easter	cards	6
gifts	wedding	7
card	delivery	8
delivery	card	9
free	day	10

Insights Teaser



- European lockdowns are forcing consumers inside, consequently internet activity has risen
- UKOM data shows that 18-24 & 65+ age groups have increased their time spent online by the most, 12% YoY



- For 65+ there is the unique combination of more searches & clicks, and decreasing CPC's; making this an attractive audience for advertiser consideration
- Searchers in this demographic are more likely to use different terms than younger ages, emphasizing the importance to tailored strategies for this audience.



- Recommended focus areas for clients:
 - Real Estate
 - Health
 - Occasions & Gifts



Microsoft Advertising. Intelligent connections.