Brand vs. Generic: A multi-market analysis

DE, ES, FR, IT, NL, U.K.
Hypothesis

The combination of falling consumer confidence & challenges with earnings is likely to have had an impact on how consumers search for products and services to buy online.

How has this impacted the overall brand awareness and trust? Are people relying on brands they trust rather than generic products looking for the better deal?
Consumer Confidence dropping as Corona Virus impacts

Source: OECD, April 2020
Consumers have clear ideas about how they expect business to respond

Consumers are expecting corporations to promote their brands differently and to take the lead role in response

**Brand Advertising is expected to change**

% who agree / disagree that brands should advertise as normal

<table>
<thead>
<tr>
<th></th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Disagree (Strongly/Somewhat) 32%</td>
</tr>
<tr>
<td>Germany</td>
<td>Disagree (Strongly/Somewhat) 24%</td>
</tr>
<tr>
<td>Italy</td>
<td>Disagree (Strongly/Somewhat) 25%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Disagree (Strongly/Somewhat) 30%</td>
</tr>
</tbody>
</table>

**Businesses to lead the response to Corona Virus**

% who approved how they have handled the outbreak

<table>
<thead>
<tr>
<th></th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Corporations 65%</td>
</tr>
<tr>
<td>Germany</td>
<td>Corporations 65%</td>
</tr>
<tr>
<td>Italy</td>
<td>Corporations 78%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Corporations 53%</td>
</tr>
</tbody>
</table>

Source: Global Web Index (GWI), Corona Virus Research, March 2020
Brand purpose is no longer about brand health. It’s about public health. This is bigger than marketing – it’s providing a public service.

Brands are expected to play an active role and contribute to a global crisis

**% who agree / disagree that brands should offer flexible payments**

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Disagree (Strongly/Somewhat) 10%</td>
</tr>
<tr>
<td>Germany</td>
<td>Disagree (Strongly/Somewhat) 9%</td>
</tr>
<tr>
<td>Italy</td>
<td>Disagree (Strongly/Somewhat) 4%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Disagree (Strongly/Somewhat) 7%</td>
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</table>

**% who agree / disagree that brands should offer free services**

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Respondents</th>
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</thead>
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<tr>
<td>France</td>
<td>Disagree (Strongly/Somewhat) 8%</td>
</tr>
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<td>Germany</td>
<td>Disagree (Strongly/Somewhat) 26%</td>
</tr>
<tr>
<td>Italy</td>
<td>Disagree (Strongly/Somewhat) 6%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Disagree (Strongly/Somewhat) 9%</td>
</tr>
</tbody>
</table>

Source: Global Web Index (GWI), Corona Virus Research, March 2020
“To put it frankly, when a lockdown is instituted, and most activity stops, the brand-consumer relationship significantly changes. ...Brands may be wary of association, but just as dangerous is the association with not contributing to a global crisis. ...While it shouldn’t be the focus right now, brands that do this will emerge as leaders after the crisis.”

- Chris Beer, GWI
EMEA Overview
How our users interacts with brands on the Microsoft Advertising Network

Across all markets, search engines are among the most used sources of information about brands and products

### Brand Discovery

*Which channel do you use to discover new brands?*

<table>
<thead>
<tr>
<th>Country</th>
<th>Search engines (% of Respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>51%</td>
</tr>
<tr>
<td>Germany</td>
<td>47%</td>
</tr>
<tr>
<td>Italy</td>
<td>53%</td>
</tr>
<tr>
<td>Spain</td>
<td>49%</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>44%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>48%</td>
</tr>
</tbody>
</table>

### Product Research

*Which channel do you use when actively looking for information about a brand?*

<table>
<thead>
<tr>
<th>Country</th>
<th>Search engines (% of Respondents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>64%</td>
</tr>
<tr>
<td>Germany</td>
<td>71%</td>
</tr>
<tr>
<td>Italy</td>
<td>64%</td>
</tr>
<tr>
<td>Spain</td>
<td>63%</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>70%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>65%</td>
</tr>
</tbody>
</table>

Source: Global Web Index (GWI), Q4 2019, Online Shoppers on the Microsoft Advertising Network
Brand searches have picked up since March 2019
All up EMEA Brand traffic increased from introduction of Restrictions. Clicks however declined.

Microsoft Internal, Mar-19 to Mar-20
Brand searches and clicks % of total have declined

Looking at March 2020 (Restrictions month) YoY the % of Brand Searches and Clicks over the total have decreased in all markets except Italy and Spain.
Brand CTR and CPC year on year (YoY) are linear in most markets

Avg CTR for Brand searches in March 2020 (Restrictions month) was linear in all markets except the UK (+1.3% Pts YoY). Avg CPCs grew slightly in all markets.
EMEA Overview – Conclusions and Recommendations

1. **Strong generics coverage more important than ever**
   After the lockdown we saw an increase in searches across EMEA, but the branded search share declined YoY in most markets, as did branded clicks. As people spend more time inside and online, they research more and explore new categories where they may not have a strong brand preference or even awareness. To stay top of mind for consumers and generate clicks, strong generics coverage is more important than ever.

2. **Brand protection: top brands will need to work hard to protect their turf**
   As consumers are researching and looking for information more than before they will also discover new brands, and their ‘consideration set’ could very well change. This emphasises the need for top brands to think about how to stay relevant by, for example, analysing converting queries, revisiting ad copy and manage bids.

3. **Updated bid strategy needed**
   Although brand CPC has increased YoY across most markets, we do see lower CPCs than pre-lockdown for many categories, which presents a relative opportunity for advertisers.

*Please review specific conclusions and recommendations in each of the market sections*
United Kingdom
Brand clicks seasonality by vertical

Brand CLICKS Seasonality by Vertical
(UK, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
Brand CPC seasonality by vertical

Brand CPC Seasonality by Vertical
(UK, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness

Microsoft Internal, Mar-19 to Mar-20
Consumer Electronics, Food & Groceries and Jobs & Education are showing the highest YoY increase in Brand traffic as % of total traffic.

<table>
<thead>
<tr>
<th>L1 Supply Vertical</th>
<th>Brand Traffic as % of Tot Traffic YoY % Var</th>
<th>Brand Imp % of Tot Imp YoY % Var</th>
<th>Brand CLICKS as % of Tot CLICKS YoY % Var</th>
<th>CTR YoY % PTS Var</th>
<th>CPC YoY % Var</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparel</td>
<td>-11%</td>
<td>-10%</td>
<td>-9%</td>
<td>1%</td>
<td>16%</td>
</tr>
<tr>
<td>Arts &amp; Entertainment</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>54%</td>
</tr>
<tr>
<td>Beauty &amp; Personal Care</td>
<td>2%</td>
<td>0%</td>
<td>4%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Business &amp; Industrial</td>
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<td>-2%</td>
<td>-4%</td>
<td>2%</td>
<td>-14%</td>
</tr>
<tr>
<td>Computers &amp; Consumer Electronics</td>
<td>15%</td>
<td>5%</td>
<td>10%</td>
<td>2%</td>
<td>119%</td>
</tr>
<tr>
<td>Dining &amp; Nightlife</td>
<td>-5%</td>
<td>-7%</td>
<td>-2%</td>
<td>5%</td>
<td>-4%</td>
</tr>
<tr>
<td>Family &amp; Community</td>
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<td>6%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>Finance</td>
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<td>-13%</td>
<td>-1%</td>
<td>2%</td>
<td>14%</td>
</tr>
<tr>
<td>Food &amp; Groceries</td>
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</tr>
<tr>
<td>Health</td>
<td>2%</td>
<td>5%</td>
<td>6%</td>
<td>2%</td>
<td>-23%</td>
</tr>
<tr>
<td>Hobbies &amp; Leisure</td>
<td>3%</td>
<td>1%</td>
<td>-8%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>Home &amp; Garden</td>
<td>2%</td>
<td>1%</td>
<td>-7%</td>
<td>0%</td>
<td>14%</td>
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<td>Internet &amp; Telecom</td>
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<tr>
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<td>1%</td>
<td>7%</td>
<td>7%</td>
<td>-54%</td>
</tr>
<tr>
<td>News, Media &amp; Publications</td>
<td>-2%</td>
<td>13%</td>
<td>9%</td>
<td>1%</td>
<td>-1%</td>
</tr>
<tr>
<td>Occasions &amp; Gifts</td>
<td>-4%</td>
<td>1%</td>
<td>-2%</td>
<td>0%</td>
<td>-3%</td>
</tr>
<tr>
<td>Real Estate</td>
<td>1%</td>
<td>0%</td>
<td>-22%</td>
<td>0%</td>
<td>-7%</td>
</tr>
<tr>
<td>Retailers &amp; General Merchandise</td>
<td>7%</td>
<td>7%</td>
<td>-1%</td>
<td>1%</td>
<td>34%</td>
</tr>
<tr>
<td>Sports &amp; Fitness</td>
<td>-4%</td>
<td>1%</td>
<td>-5%</td>
<td>0%</td>
<td>87%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>-9%</td>
<td>-10%</td>
<td>-7%</td>
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<td>-17%</td>
</tr>
<tr>
<td>Vehicles</td>
<td>0%</td>
<td>-4%</td>
<td>-17%</td>
<td>1%</td>
<td>14%</td>
</tr>
<tr>
<td>Total</td>
<td>0%</td>
<td>-3%</td>
<td>-6%</td>
<td>1%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Key Takeways

- **Brand traffic**: Total Brand traffic increased by 15% points between March 2019 to March 2020, driven by Food & Groceries & Jobs & Edu.
- **Total traffic split**: looking at brand traffic as a % of total, Consumer Electronics grew by 15%. Brand clicks as % of total decreased for Jobs & Education and Food & Groceries whilst grew by +10% on Consumer Electronics.
- **Cost**: Avg Brand CPC grew across all verticals with a +119% on Consumer Electronics.

Recommendations

- The overall increase in traffic shows increased engagement with the category, and the increase in brand traffic indicates higher interest in certain brands.
- However, advertisers are not responding to this trend and brand impressions have not increased by the same rate. This resulted in lower brand clicks.
- Advertisers should make sure they are fully covering their brand traffic and connect with their Sales reps to identify the best tactics to keep CPC low while increasing coverage.
France
Brand searches seasonality by vertical

Brand SEARCHES Seasonality by Vertical
(FR, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
Brand clicks seasonality by vertical

Brand CLICKS Seasonality by Vertical
(FR, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
Brand CPC seasonality by vertical

Brand CPC Seasonality by Vertical

(FR, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness

Microsoft Internal, Mar-19 to Mar-20
## KPI: BRAND % of Total YoY Variance (Mar 2020 vs Mar 2019)

Food & Groceries, Real Estate and Vehicles are showing the highest YoY increase in Brand traffic as % of total traffic.

<table>
<thead>
<tr>
<th>L1 Supply Vertical</th>
<th>Brand Traffic as % of Tot Traffic YoY % Var</th>
<th>Brand Imp % of Tot Imp YoY % Var</th>
<th>Brand CLICKS as % of Tot CLICKS YoY % Var</th>
<th>CTR YoY % PTS Var</th>
<th>CPC YoY % Var</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparel</td>
<td>-15%</td>
<td>-15%</td>
<td>-15%</td>
<td>0%</td>
<td>24%</td>
</tr>
<tr>
<td>Arts &amp; Entertainment</td>
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<td>-4%</td>
<td>-7%</td>
<td>1%</td>
<td>-8%</td>
</tr>
<tr>
<td>Beauty &amp; Personal Care</td>
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<td>-15%</td>
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<td>4%</td>
</tr>
<tr>
<td>Business &amp; Industrial</td>
<td>8%</td>
<td>2%</td>
<td>-15%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Computers &amp; Consumer Electronics</td>
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<td>-5%</td>
<td>-12%</td>
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<td>37%</td>
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<tr>
<td>Dining &amp; Nightlife</td>
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<tr>
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<td>0%</td>
<td>-2%</td>
<td>1%</td>
<td>17%</td>
</tr>
<tr>
<td>Finance</td>
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<tr>
<td>Food &amp; Groceries</td>
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<td>22%</td>
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<td>-13%</td>
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<td>Hobbies &amp; Leisure</td>
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<td>3%</td>
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<tr>
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<td>-1%</td>
<td>-17%</td>
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<tr>
<td>Internet &amp; Telecom</td>
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<td>-10%</td>
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<td>-8%</td>
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</tr>
<tr>
<td>Law &amp; Government</td>
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<td>11%</td>
<td>4%</td>
<td>1%</td>
<td>-16%</td>
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<tr>
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<td>15%</td>
<td>10%</td>
<td>-17%</td>
<td>3%</td>
<td>-16%</td>
</tr>
<tr>
<td>Retailers &amp; General Merchandise</td>
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<td>1%</td>
<td>-3%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Sports &amp; Fitness</td>
<td>-9%</td>
<td>-11%</td>
<td>-20%</td>
<td>1%</td>
<td>9%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
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<td>-1%</td>
<td>-13%</td>
<td>1%</td>
<td>-2%</td>
</tr>
<tr>
<td>Vehicles</td>
<td>13%</td>
<td>9%</td>
<td>-19%</td>
<td>3%</td>
<td>14%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1%</strong></td>
<td><strong>0%</strong></td>
<td><strong>-12%</strong></td>
<td><strong>1%</strong></td>
<td><strong>5%</strong></td>
</tr>
</tbody>
</table>
Key Takeways and Recommendations

### Key Takeways

- **Brand traffic**: Total Brand traffic increased by 23% points between March 2019 to March 2020, driven by Food & Groceries and Law & Government.

- **Total traffic split**: looking at brand traffic as a % of total, Food & Groceries grew by 27%. Brand clicks as % of total also increased for all examined verticals.

- **Cost**: Whilst Avg Brand CPC grew by just 4% for News, media & Publications, we have seen a strong decrease in CPC for Law & Government (-16%) and Food & Groceries (-13%).

### Recommendations

- The overall growth in traffic shows increased engagement with the category, and the increase in brand traffic indicates higher interest in certain brands.

- The parallel growth in Brand impressions proves that advertisers are taking advantage of this surge and are making sure brand traffic is covered.

- Advertisers should make sure they are fully covering their brand traffic and connect with their Sales reps to identify the best tactics to keep CPC low while increasing coverage.
Germany
Brand searches seasonality by vertical

![Image of a chart showing brand searches seasonality by vertical (DE, Indexed to monthly avg)]
Brand clicks seasonality by vertical

Brand CLICKS Seasonality by Vertical
(DE, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness

Microsoft Internal, Mar-19 to Mar-20
Brand CPC seasonality by vertical

Brand CPC Seasonality by Vertical
(DE, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
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- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness

Microsoft Internal, Mar-19 to Mar-20
## KPI: BRAND % of Total YoY Variance (Mar 2020 vs Mar 2019)

Arts & Entertainment, Dining & Nightlife, Finance and Internet & Telecom are showing the highest YoY increase in Brand traffic as % of total traffic.

<table>
<thead>
<tr>
<th>L1 Supply Vertical</th>
<th>Brand Traffic as % of Tot Traffic YoY % Var</th>
<th>Brand Imp % of Tot Imp YoY % Var</th>
<th>Brand CLICKS as % of Tot CLICKS YoY % Var</th>
<th>CTR YoY % PTS Var</th>
<th>CPC YoY % Var</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparel</td>
<td>-8%</td>
<td>-7%</td>
<td>-6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Arts &amp; Entertainment</td>
<td>36%</td>
<td>13%</td>
<td>6%</td>
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</tbody>
</table>
### Key Takeways

- **Brand traffic**: Total Brand traffic increased by 34% points between March 2019 to March 2020, driven by Law & Government and Art & Entertainment.

- **Total traffic split**: looking at brand traffic as a % of total, Arts & Entertainment grew by 36%. Brand clicks as % of total also increased for all the examined verticals.

- **Cost**: Whilst Avg Brand CPC grew by just 3% for Law & Government, we have seen a strong increase in CPC for Arts & Entertainment (+53%) and Consumer Electronics (+30%).

### Recommendations

- The overall growth in traffic shows increased engagement with the category, and the increase in brand traffic indicates higher interest in certain brands.

- The parallel growth in Brand impressions proves that advertisers are taking advantage of this surge and are making sure brand traffic is covered.

- Advertisers should make sure they are fully covering their brand traffic and connect with their Sales reps to identify the best tactics to keep CPC low while increasing coverage.
The Netherlands
Brand searches seasonality by vertical

Brand SEARCHES Seasonality by Vertical
(NL, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
Brand clicks seasonality by vertical

Brand CLICKS Seasonality by Vertical
(NL, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
Brand CPC seasonality by vertical

Brand CPC Seasonality by Vertical
(NL, Indexed to monthly avg)

0% 20% 40% 60% 80% 100% 120% 140% 160% 180%
march april may june july august september october november december january february march

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
KPI: BRAND % of Total YoY Variance (Mar 2020 vs Mar 2019)

Health, Finance and Business & Industrial are showing the highest YoY increase in Brand traffic as % of total traffic.

<table>
<thead>
<tr>
<th>L1 Supply Vertical</th>
<th>Brand Traffic as % of Tot Traffic YoY % Var</th>
<th>Brand Imp % of Tot Imp YoY % Var</th>
<th>Brand CLICKS as % of Tot CLICKS YoY % Var</th>
<th>CTR YoY % PTS Var</th>
<th>CPC YoY % Var</th>
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Key Takeways and Recommendations

Key Takeways

- **Brand traffic**: Total Brand traffic increased by 9% points between March 2019 to March 2020, driven by Health and Law & Government.
- **Total traffic split**: looking at brand traffic as a % of traffic, Health grew by 22%, Jobs & Education by 11%. Brand clicks as % of total also increased for Health and Jobs & Education.
- **Cost**: Whilst Avg Brand CPC grew by just 4% for Health, we have seen a strong decrease in CPC for Jobs & Education (-18%) and Law & Government (-8%).

Recommendations

- The overall growth in traffic shows increased engagement with the category, and the increase in brand traffic indicates higher interest in certain brands.
- The parallel growth in Brand impressions proves that advertisers are taking advantage of this surge and are making sure brand traffic is covered.
- Advertisers should make sure they are fully covering their brand traffic and connect with their Sales reps to identify the best tactics to keep CPC low while increasing coverage.
Brand searches seasonality by vertical

Brand SEARCHES Seasonality by Vertical
(IT, Indexed to monthly avg)

Apparel
Business & Industrial
Family & Community
Gambling
Home & Garden
Law & Government
Real Estate
Arts & Entertainment
Computers & Consumer Electronics
Finance
Health
Internet & Telecom
News, Media & Publications
Retailers & General Merchandise
Beauty & Personal Care
Dining & Nightlife
Food & Groceries
Hobbies & Leisure
Jobs & Education
Occasions & Gifts
Sports & Fitness
Brand clicks seasonality by vertical

Brand CLICKS Seasonality by Vertical
(IT, Indexed to monthly avg)
Brand CPC seasonality by vertical

Brand CPC Seasonality by Vertical
(IT, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Home & Garden
- Law & Government
- Real Estate
- Travel & Tourism

Microsoft Internal, Mar-19 to Mar-20
## KPI: BRAND % of Total YoY Variance (Mar 2020 vs Mar 2019)

Jobs & Education, Internet & Telecom and Sport & Fitness are showing the highest YoY increase in Brand traffic as % of total traffic.

<table>
<thead>
<tr>
<th>L1 Supply Vertical</th>
<th>Brand Traffic as % of Tot Traffic YoY % Var</th>
<th>Brand Imp % of Tot Imp YoY % Var</th>
<th>Brand CLICKS as % of Tot CLICKS YoY % Var</th>
<th>CTR YoY % PTS Var</th>
<th>CPC YoY % Var</th>
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</table>

Microsoft Internal, Mar-19 to Mar-20
Key Takeways

- **Brand traffic**: Total Brand traffic increased by 60% points between March 2019 to March 2020, driven by Jobs & Education.

- **Total traffic split**: looking at brand traffic as a % of traffic, Jobs & Education grew by 11%, Consumer Electronics by 7%. Brand clicks as % of total also increased for Food & Education.

- **Cost**: Whilst Avg Brand CPC grew by 18% for Consumer Electronics, we have seen a decrease in CPC for Jobs & Education (-18%) and Food & Groceries (-4%).

Recommendations

- The overall growth in traffic shows increased engagement with the category, and the increase in brand traffic indicates higher interest in certain brands.

- The parallel growth in Brand impressions proves that advertisers are taking advantage of this surge and are making sure brand traffic is covered.

- Advertisers should make sure they are fully covering their brand traffic and connect with their Sales reps to identify the best tactics to keep CPC low while increasing coverage.
Spain
Brand searches seasonality by vertical

Brand SEARCHES Seasonality by Vertical
(ES, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Gambling
- Home & Garden
- Law & Government
- Real Estate
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
Brand clicks seasonality by vertical

Microsoft Internal, Mar-19 to Mar-20

Brand CLICKS Seasonality by Vertical
(ES, Indexed to monthly avg)
Brand CPC seasonality by vertical

Brand CPC Seasonality by Vertical
(ES, Indexed to monthly avg)

- Apparel
- Business & Industrial
- Family & Community
- Health
- Internet & Telecom
- News, Media & Publications
- Retailers & General Merchandise
- Arts & Entertainment
- Computers & Consumer Electronics
- Finance
- Hobbies & Leisure
- Jobs & Education
- Occasions & Gifts
- Sports & Fitness
- Beauty & Personal Care
- Dining & Nightlife
- Food & Groceries
- Home & Garden
- Law & Government
- Real Estate
- Travel & Tourism

Microsoft Internal, Mar-19 to Mar-20
## KPI: BRAND % of Total YoY Variance (Mar 2020 vs Mar 2019)

Finance and Food & Groceries are showing the highest YoY increase in Brand traffic as % of total traffic.

### L1 Supply Vertical

<table>
<thead>
<tr>
<th>Vertical</th>
<th>Brand Traffic as % of Tot Traffic YoY % Var</th>
<th>Brand Imp % of Tot Imp YoY % Var</th>
<th>Brand CLICKS as % of Tot CLICKS YoY % Var</th>
<th>CTR YoY % PTS Var</th>
<th>CPC YoY % Var</th>
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<tr>
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<tr>
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<td>Home &amp; Garden</td>
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<tr>
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### Key Takeways

- **Brand traffic**: Total Brand traffic increased by 25% points between March 2019 to March 2020, driven by Food & Groceries and Jobs & Education.
- **Total traffic split**: looking at brand traffic as a % of traffic, Jobs & Education declined by 12% whilst Jobs & Education and Food & Groceries grew by 11% and 12% respectively. Brand clicks as % of total also increased significantly for Food & Education and Jobs & Education.
- **Cost**: Whilst Avg Brand CPC grew by 29% for News, Media & Publications, we have seen a decrease in CPC for Jobs & Education (-29%) and Food & Groceries (-38%).

### Recommendations

- The overall growth in traffic shows increased engagement with the category, and the increase in brand traffic indicates higher interest in certain brands.
- The parallel growth in Brand impressions proves that advertisers are taking advantage of this surge and are making sure brand traffic is covered.
- Advertisers should make sure they are fully covering their brand traffic and connect with their Sales reps to identify the best tactics to keep CPC low while increasing coverage.
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