

Search trends in the time of COVID-19

How consumer intent has shifted across the globe



As the world responds to the outbreak of COVID-19, our thoughts are with the people affected and the medical professionals working around the clock to help those most in need. At Microsoft, we're working to do our part by ensuring the safety of our employees, striving to protect the health and well-being of the communities in which we operate, and providing technology, tips and resources to our customers to help them do their best work while remote.

To learn more about Microsoft's response to COVID-19 and for more information, please visit:

aka.ms/RespondingTogether



[Understanding our progress against COVID-19](#)

To help provide full transparency into COVID-19 trends around the world, we have created interactive visualisations based on publicly available data.

A few resources on how we're helping our communities include:

[Bing delivers new COVID-19 experiences including partnership with GoFundMe to help affected businesses](#)

[New app to help companies bring employees back to work in a safer environment](#)

[New solution helps healthcare providers rapidly scale patient screening and assessments for COVID-19](#)

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Planning for recovery. Empowering you to achieve more



As the pandemic continues to have a far-reaching impact across lives and livelihoods, many businesses are navigating uncharted waters. Yet plotting a course for surviving and thriving in a post-COVID-19 world is possible. In this eBook, our goal is to help you with digital marketing insights and strategies on how to pivot your business for success throughout the crisis and beyond.

Understanding how consumer behaviour continues to change

More people are working, shopping and learning from home. This, coupled with other lifestyle shifts, has led to an 18% growth in searches on tablets, while desktop searches are up 8% when compared with pre-COVID-19 levels. More people are also using search on the weekend, leading to a 12% increase in volume. That's two times the rate of the weekday search volume growth.

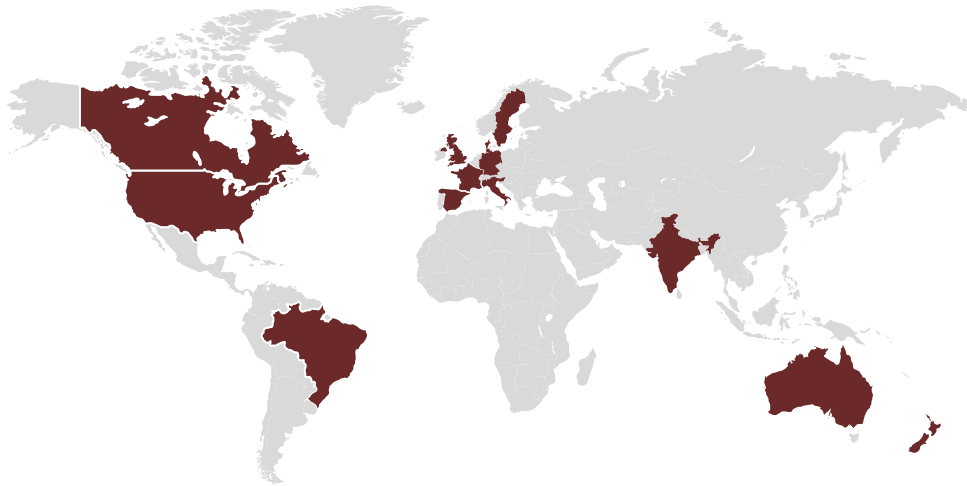
Consumers are also searching during non-business hours, specifically between 5 PM and 5 AM, at a rate twice that of regular business hours.

Plan your comeback to capture customers

Analysts are expecting recovery to be uneven, however, overall consumers in the U.S, Europe, South America and Asia are optimistic about the future. As countries across the globe reopen, every market's recovery plan will be on a case-by-case basis with the core goal of preventing 'a second wave'.

Even as companies work to navigate the crisis and stabilise their income, businesses need to start planning for the post-crisis phase now. The shift to digital is here to stay, as the pandemic has forced businesses to accomplish two years of digital transformation in the space of around three months. This change, spurred by the need for hygiene and contactless shopping, means the return to offline, in-store shopping will be slow and well below pre-COVID-19 levels.

Let's explore some of the key consumer shifts by market and by vertical and identify some of the strategies you can consider as businesses, brands and advertisers look to recover from this global challenge.



Australia
Brazil
Canada
France
Germany
Italy
Netherlands
New Zealand
Spain
Sweden
USA
UK

How consumer intent has shifted across the globe

It doesn't matter which vertical we consider and dig deep into, the global COVID-19 crisis has and continues to impact consumer behaviour in a multitude of ways. As markets have adapted, borders have closed, lockdowns have taken place, we have seen a shift in the way people search for the right information and the right product at the right time. In our first report we looked at some of the biggest markets in the world: Australia, Canada, the U.K. and the U.S. to identify changes in consumer behaviour during the time of

lockdown in each market. Since the pandemic hit almost every country around the world, we decided to look at a broader set of countries, identifying key vertical trends across the Americas, Europe and Asia Pacific.

As the world adapted to one of the biggest pandemics in modern times, we explore how consumers turned to search to explore, discover and purchase key necessities over the past several months. Within this research we want to provide some insight into three core phases, from response to reimagining.

We structured the report into three phases to help customers prepare for recover and reimagine phases.

1 RESPOND
Navigating the now

2 RECOVER
Planning the comeback

3 REIMAGINE
Shaping the new normal

Our first edition to address consumer trends during the COVID-19 pandemic can be found on our website at: [Consumer search trends in the time of COVID-19](#).



As we are all adapting during this time, consumer search behaviour is changing. We've seen increased desktop usage and observed strong growth in search volume. Let's explore some of the trends we are observing on the Microsoft Search Network.



1. Respond: Consumer trends

Looking at which categories have seen impacts in search behaviour as people continue to adapt to the changes in daily life

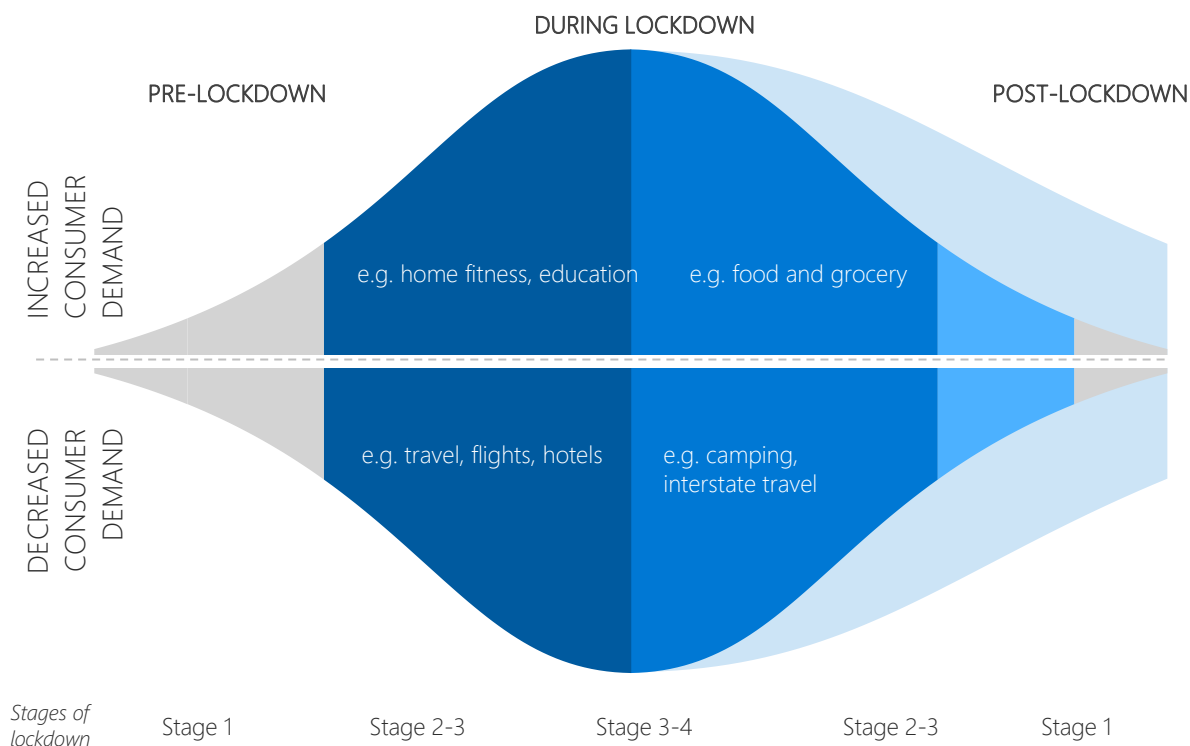
How will consumer demand change post lockdown?

In the first iteration of this eBook, which covered changes in search trends up to mid- April 2020, we looked at several categories that had been significantly affected by the situation. As a result, the search volume would either substantially drop (e.g. travel industry) or increase (e.g. teleconferencing, online fitness). In this study we are revisiting these categories and

looking at additional ones to understand further developments in consumer behaviour. As restrictions are being pulled back in many countries, we will start to see consumer demand fluctuate to pre-lockdown levels. This applies both to categories which have seen an increase and those with a decrease in demand over the last few months.

How will consumer demand change in the coming months?

The pre/during/post stages of consumer demand for products and services



Search trends during early recovery

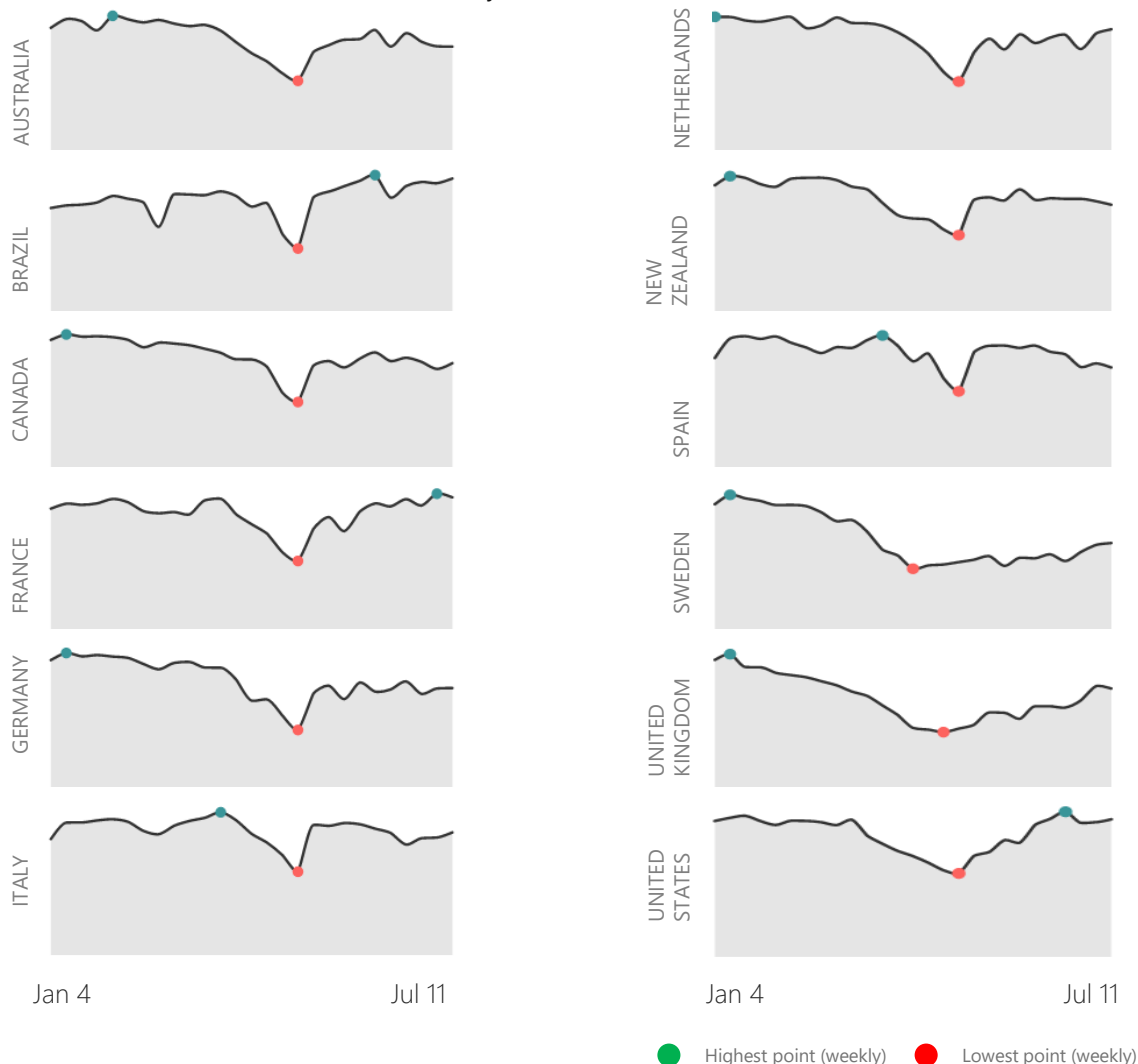
Travel has been one of the most impacted categories during the pandemic. The US and UK digital travel sales in 2020 will each fall by nearly 50% YoY. It's likely sales will not reach pre-pandemic levels until 2022 with less leisure and business travel in general as markets continue to be challenged by border closures, travel bans and relaxation

of restriction measures. In late June we saw early signs of recovery across some travel subcategories as measured by increase in search volume. While travel overall is still seeing a reduction of volume of 24% (June 2020 vs June 2019), there are several subverticals where we are seeing a reversal of downward trend.



Travel

Search volume trend line (weekly)



Given that safety is a number one priority for travellers and that options for international trips are limited, it's no surprise that local and domestic travel is the area where we're seeing most positive change. Those who will decide to travel will likely choose domestic car trips rather than international air travel.

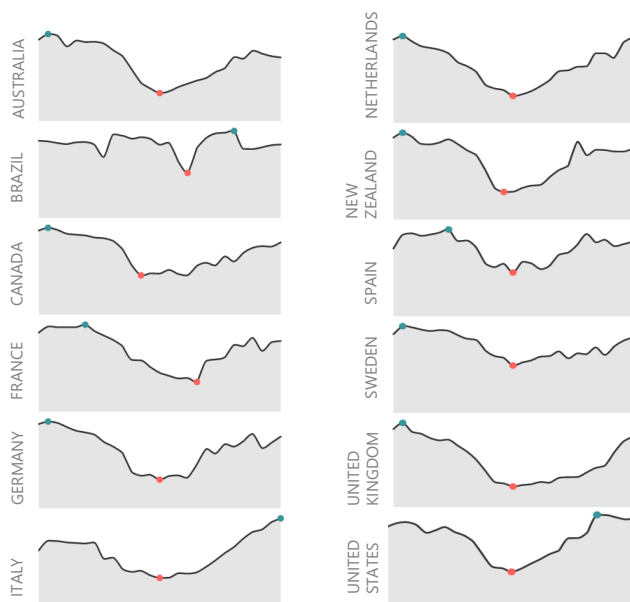
When US internet users when asked what types of vacations they planned to take in the next 12 months, 46% responded it would be a domestic trip and 20% said a 'staycation' in their local area. Within Europe we surveyed 10,000 Bing searchers and found that 25% would be booking holidays and weekend breaks as soon as

lockdowns are lifted. Across the Microsoft Search Network our data continues to show a rebound of volume across accommodation, car rental and booking services; for example, the accommodation category increased 78% MoM globally (May 2020 vs April 2020). When diving deeper into the US market our analytical team found that themes such as flexibility and safety are now very much top of mind and even outperform deals and discounts (interest measured by searches, clicks, click-through rate). They also reported that searches related to road trips perform strongly, suggesting interest in self-drive local holidays.



Accommodation

Search volume trend line (weekly)

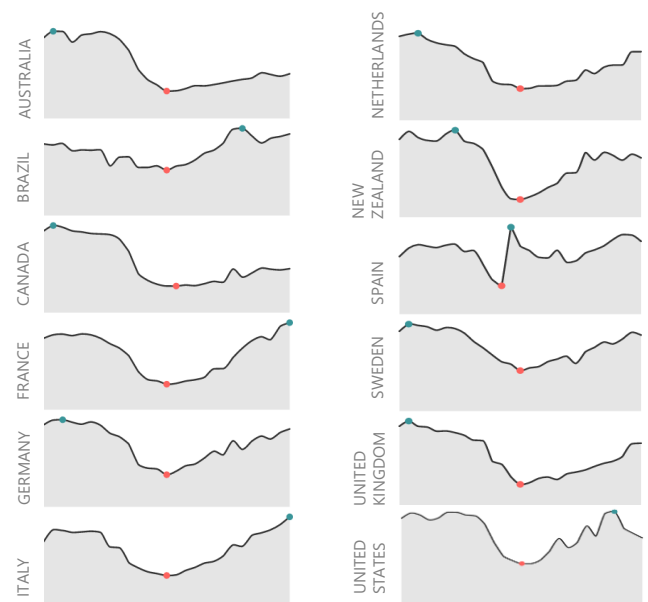


Jan 4 Jul 11 Jan 4 Jul 11



Car rental

Search volume trend line (weekly)



Jan 4 Jul 11 Jan 4 Jul 11

● Highest point (weekly) ● Lowest point (weekly)

In our [first edition](#) we listed retail categories such as home and garden, food and grocery and consumer electronics as examples of industries which gained most search volume post lockdown. While growth has softened now that the restrictions have started to be relaxed, in many countries featured in this document (in Australia, the UK and Canada) the search volumes are still way above the

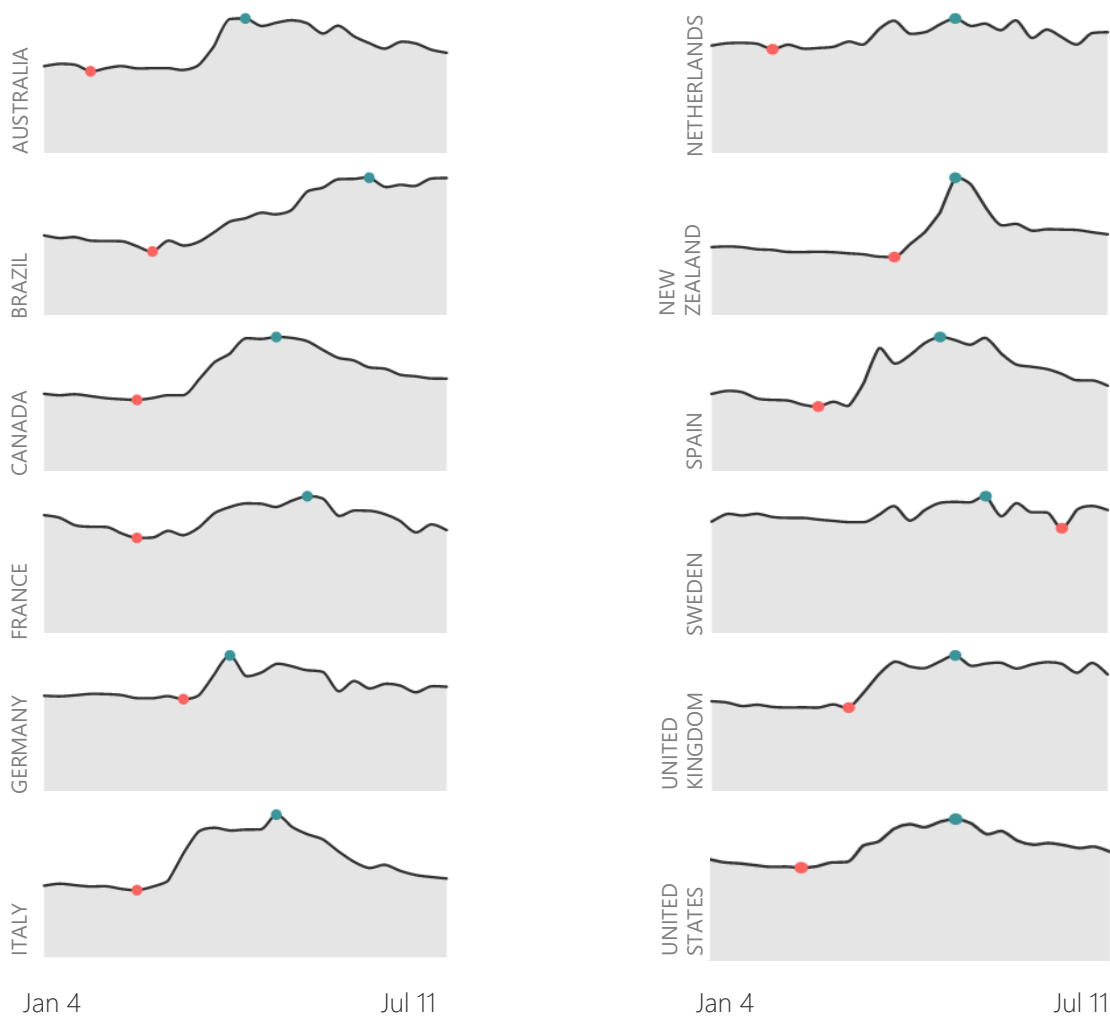
level from before the outbreak. This persisting trend may indicate many people are still avoiding public spaces or may be a sign of lasting changes in consumer behaviour.

Are we witnessing an acceleration in adoption of online shopping for the above-mentioned categories?



General retail

Search volume trend line (weekly)



● Highest point (weekly) ● Lowest point (weekly)

Respond



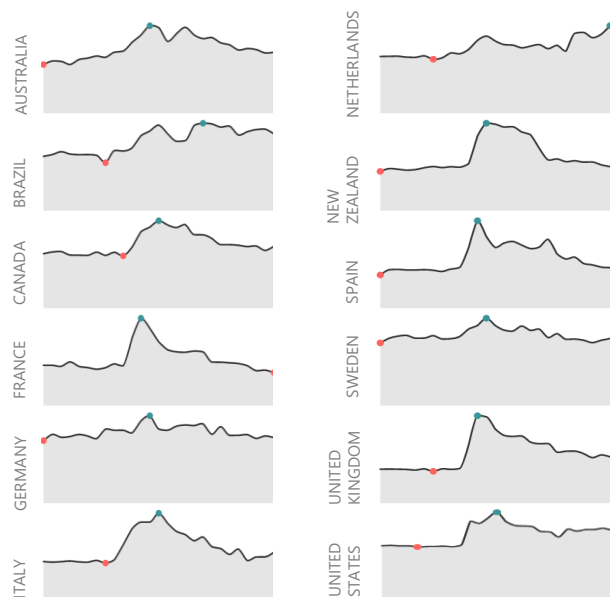
According to a recent survey, over 40% of digital grocery shoppers during the pandemic never used online grocery shopping prior to the lockdown. Additional surveys conducted by separate research firms found that 68% of new grocery eCommerce shoppers would continue to shop online in the future.

Food and grocery is not the only category seeing major shifts. Amazon Prime member data shows that while only 20% of users purchased home furniture and appliances digitally back in February 2020, in June that figure was already 32%. A similar trend was reported by Mercado Libre, which saw an 84% increase YOY in the category.



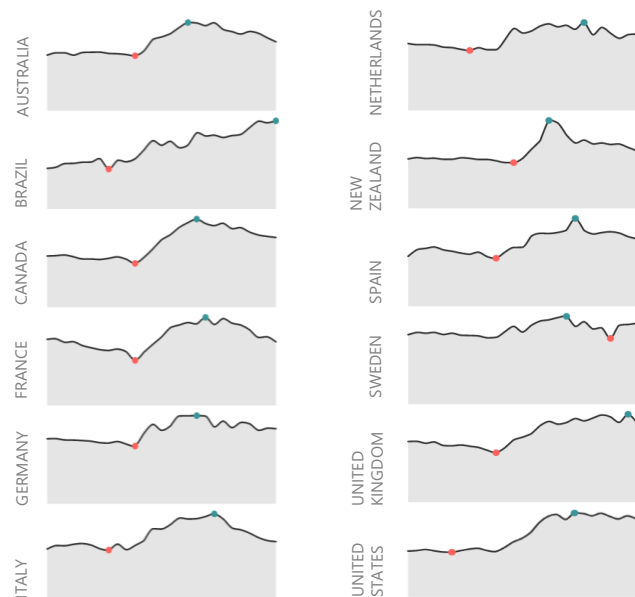
Food and grocery

Search volume trend line (weekly)



Home and garden

Search volume trend line (weekly)



Jan 4

Jul 11

Jan 4

Jul 11

Jan 4

Jul 11

Jan 4

Jul 11

● Highest point (weekly) ● Lowest point (weekly)

Respond

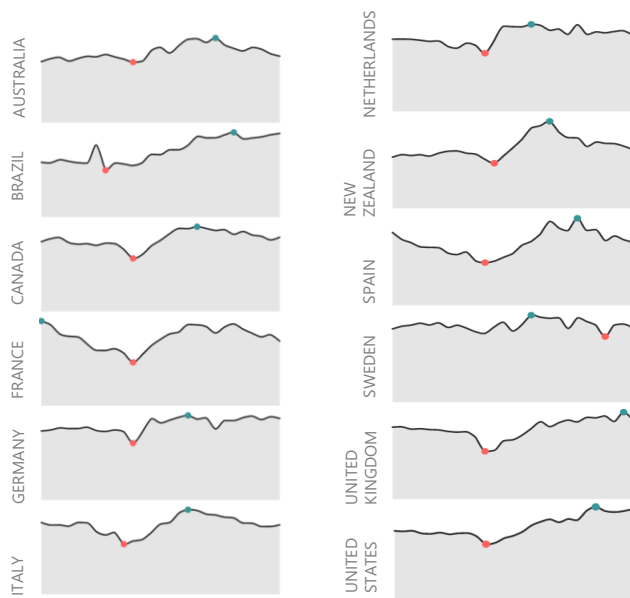
There are other shifts in consumer purchasing behaviour. Our internal research revealed an increase in 'buy online pickup in store' (BOPIS) interest. In the United States, weekend search volume has risen by 12% post lockdown, two times the growth we've seen on weekdays. Categories with the strongest growth are Home and garden, Grocery and pet supplies.

In general, with consumer shopping priorities shifting due to declining consumer confidence and job losses, retailers are facing challenging times. One of the categories which saw strong volumes post lockdown is apparel. While the online sector is forecasted to grow (+8% in 2020), the entire apparel and accessories industry may see a ~20% decline in 2020.



Apparel

Search volume trend line (weekly)



Jan 4

Jul 11

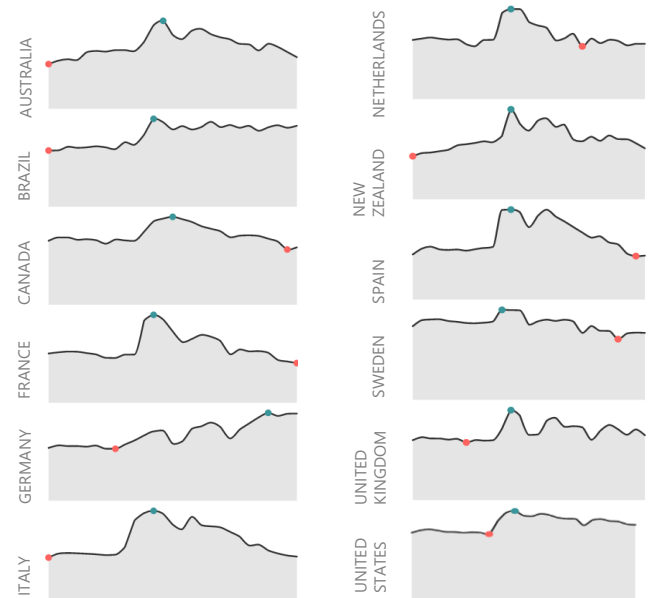
Jan 4

Jul 11



Consumer electronics

Search volume trend line (weekly)



Jan 4

Jul 11

Jan 4

Jul 11



Highest point (weekly)



Lowest point (weekly)



Respond

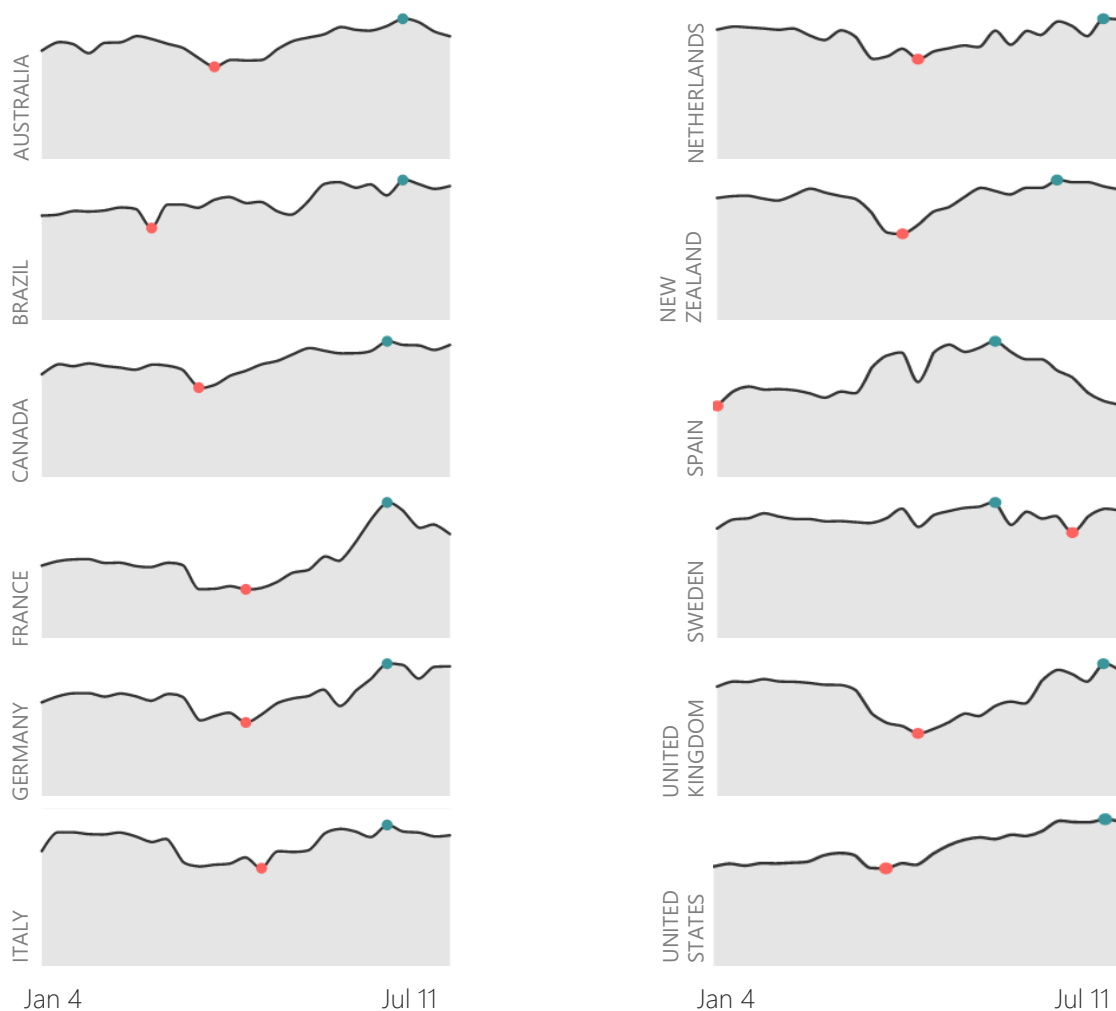
In many markets covered in this report the automotive category search volume has nearly returned to pre-COVID-19 levels. The outlook for the industry suggests, however, that hard times are not over. BCG's automotive and macroeconomics teams forecast that automotive sales most likely will decrease 14%-22% among the China, US and European markets in 2020. As the category undergoes this crisis, what is the search data telling us about consumer mindset? Firstly, both search and external data tell us there's been an increase in

demand for used vehicles. In Australia, for example, the used vehicle market saw a strong rebound in May with prices being almost back to pre-pandemic levels. In the US we saw an increase of 38% MoM for the auto category overall (May 2020 vs April 2020), which signals demand rebound. There are reasons to believe consumers continue to prefer driving over public transportation while health concerns remain. Nearly 40% of people surveyed in the US and the EU associate public transport with higher risk, and about 25% will use a private car as a means of transport more often in the future.



Automotive

Search volume trend line (weekly)



● Highest point (weekly) ● Lowest point (weekly)

Respond

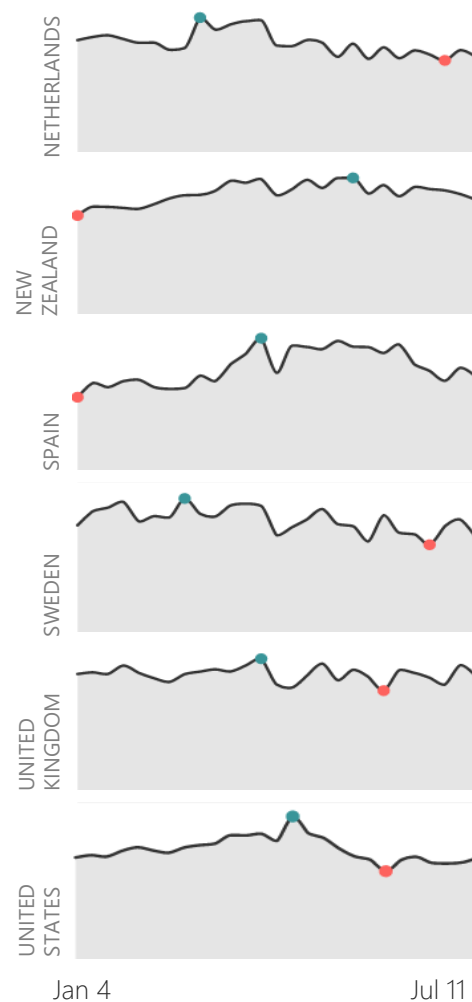
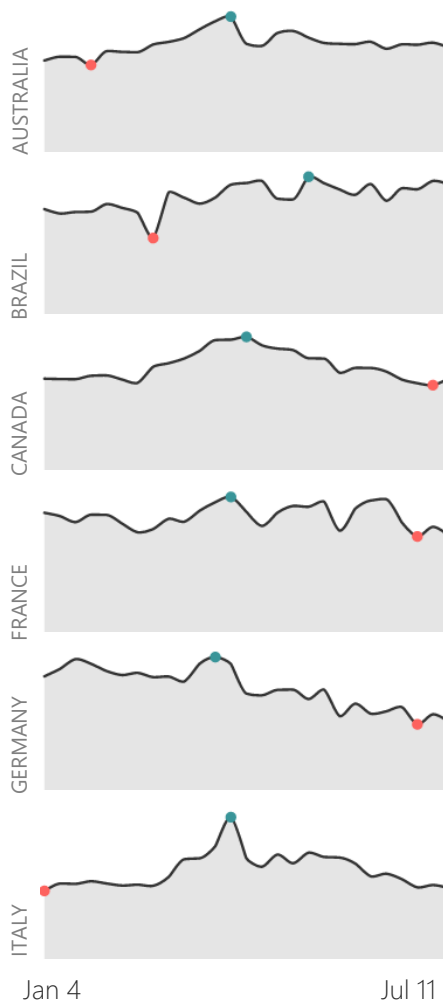
As the uncertainty about the outbreak and economic consequences swept through the stock markets, we saw a surge in query volumes related to investing, stock market and currency exchange. Later during the lockdown an increase in online banking queries was a visible trend as many people turned to their devices as a way of managing their day-to-day banking needs. We have seen a rise in comparison-related terms. Many consumers became more mindful in budget allocation and turned to

comparing and researching products more to secure the best deal and save money. The Netherlands, Spain and Germany saw considerable year-over-year growth in searches, with keywords like 'best' and 'comparison' trending. Overall in Europe we saw a 17% increase year-over-year in related search volume (Jan 1 to May 19, 2020 vs same period year before). Another micro-trend we identified is the increase in pet insurance searches in the UK immediately after lockdown, as many decided to adopt a pet during this period; markets such as Australia saw similar trends.



Financial services

Search volume trend line (weekly)



● Highest point (weekly) ● Lowest point (weekly)

Connecting the world

After the official lockdown and the widespread introduction of working from home, the demand for remote collaboration software skyrocketed globally. Many markets saw as much as a 10X increase in searches related to teleconferencing software.

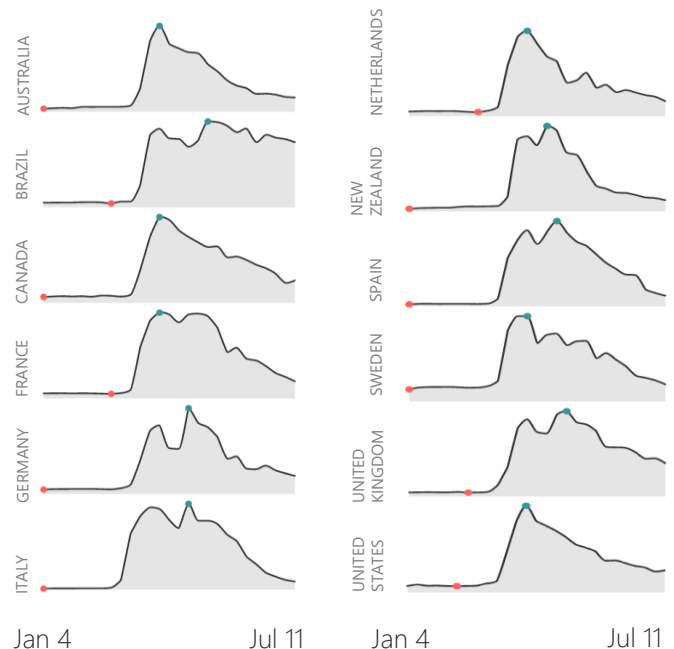
Although we were registering a softening in volume by June, there's no doubt the interest for remote collaboration remains high as the shift to working from home continues.

Microsoft Teams has been one of the leading platforms when it comes to enabling workplace shifts and now is being used by more than 75million daily users globally. Our Modern Workplace Transformation team based in Washington conducted a study looking into changes spurred by working remotely and found three interesting trends:



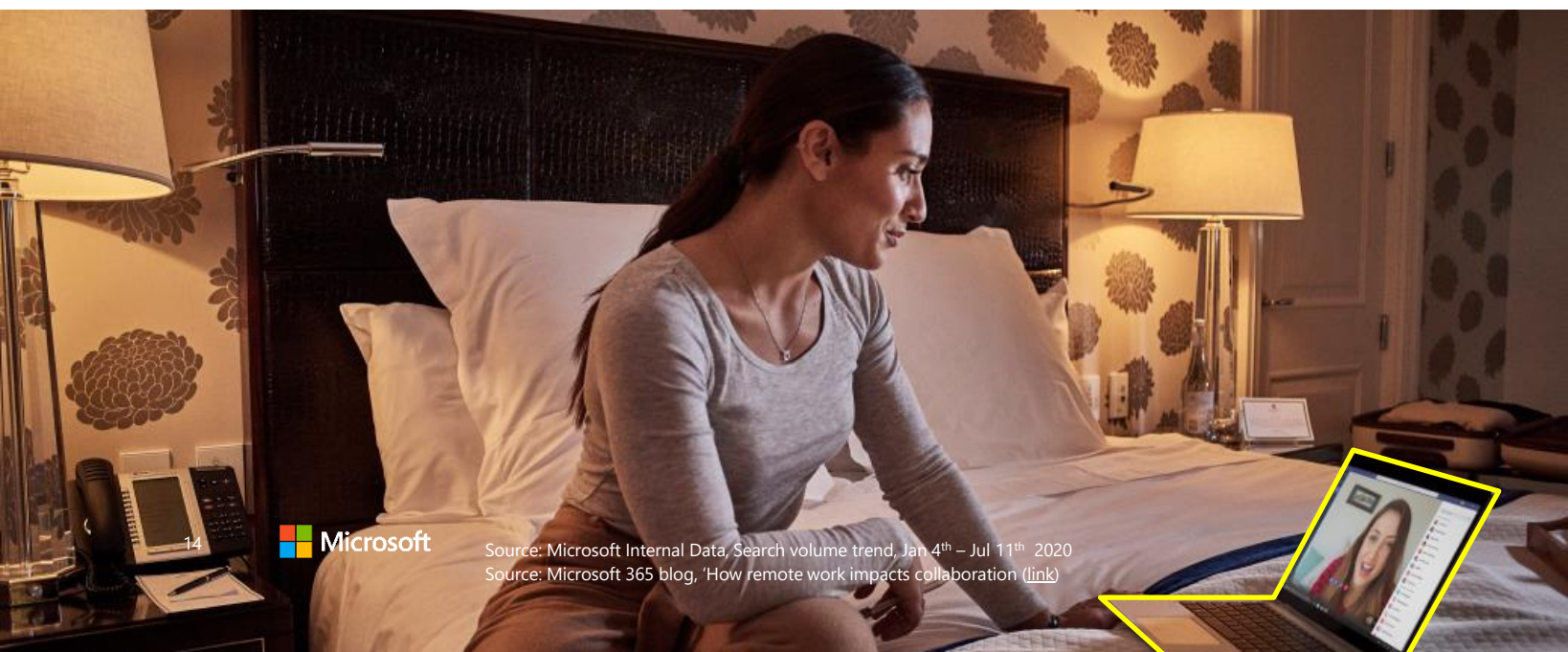
Teleconferencing

Comparing weekly highs and lows

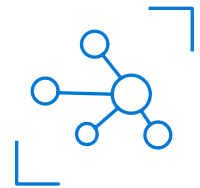


● Highest point (weekly) ● Lowest point (weekly)

- 1 22% more short meetings (30 minutes or less)
- 2 11% fewer-long meetings (greater than 1 hour)
- 3 72 increase in instant messages (in a 9AM-5PM period)



The great lockdown will accelerate digitisation



Over the next five years, we estimate that the global workforce can absorb around 149 million new technology-oriented jobs. Software development accounts for the largest single share of this forecast, but roles in related fields like data analysis, cybersecurity and privacy protection are also poised to grow substantially. Several years ago, LinkedIn operationalised the world's first Economic Graph to track workforce trends and provide a window into emerging skills gaps. The Economic Graph is a digital representation of the global economy based on more than 690 million professionals, 50 million companies, 11 million job listings, 36,000 defined skills and 90,000 schools. In short, it is all the data on LinkedIn and shows available jobs, their required skills and the existing skills job seekers have.

The Economic Graph also makes it possible to spot in-demand skills, emerging jobs and global hiring rates. These insights help connect LinkedIn members to better opportunities and assist governments and organizations as they create economic opportunity for the global workforce. As part of this new initiative, LinkedIn is sharing free, real-time labour market data and skills insights to help governments, policymakers

and business leaders understand what's happening in their local labour markets. This data can be accessed using a new interactive tool at [linkedin.com/workforce](https://www.linkedin.com/workforce). Data is available for more than 180 countries and regions (150+ cities, 30+ countries). Users can search by country or region and download the data sets.

Using the Economic Graph we identified 10 jobs that are in demand in today's economy and are well positioned to continue to grow in the future. These 10 jobs have the greatest number of job openings, have had steady growth over the past four years, pay a liveable wage and require skills that can be learned online. Digital marketing specialist, which includes search engine marketing, was #6 on the top 10 list.

The top 10 jobs in-demand in today's economy. Become a:

1. [Software Developer](#)
2. [Sales Representative](#)
3. [Project Manager](#)
4. [IT administrator](#)
5. [Customer Service Specialist](#)
6. [Digital Marketing Specialist](#)
7. [IT Support / Help Desk](#)
8. [Data Analyst](#)
9. [Financial Analyst](#)
10. [Graphic Designer](#)

Respond

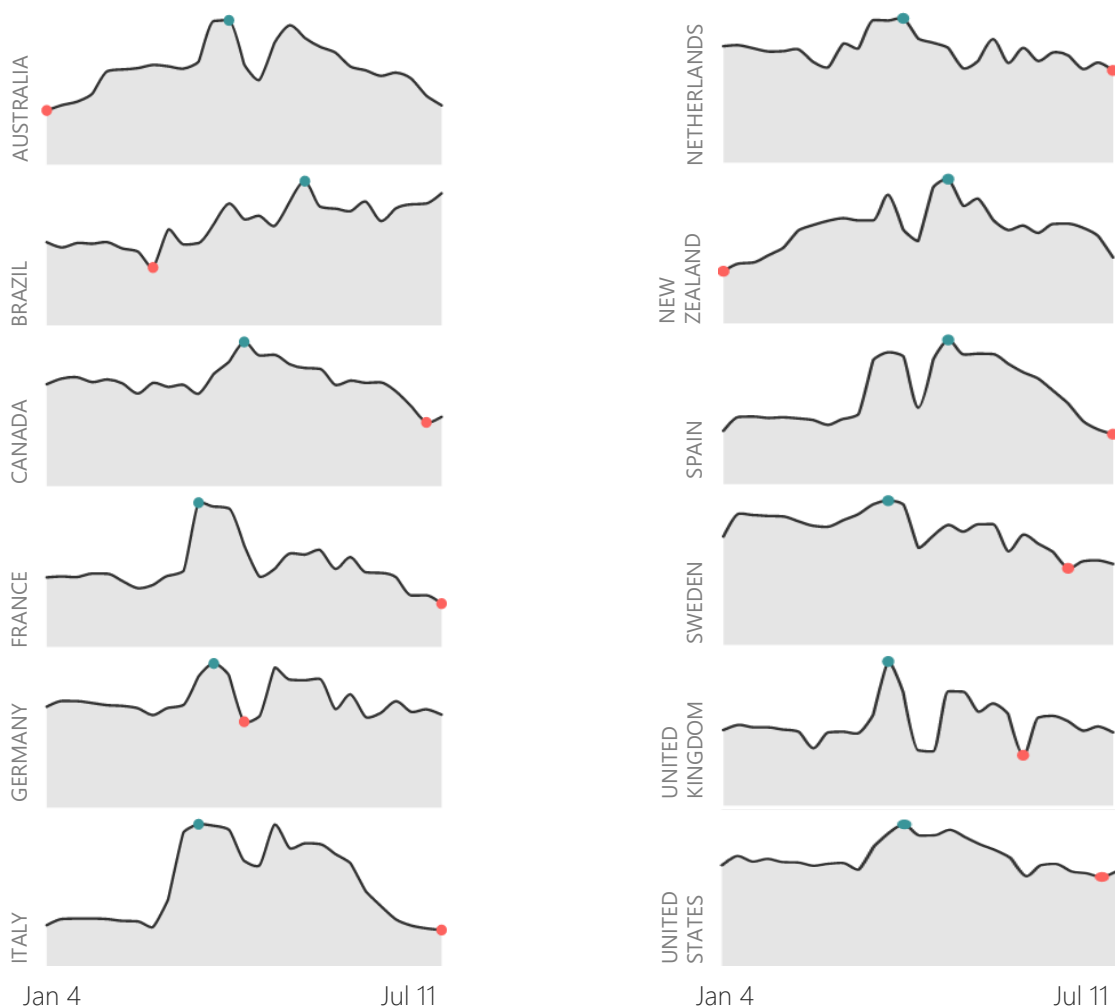
One of the main challenges parents and carers across the globe experienced during lockdown was the need to home school their children and create the right environment for remote-education. It's no surprise then that immediately after the restrictions had been introduced, we noticed a spike in online learning resources for children and adolescents. The challenges were also felt in the education community with schools and teachers facing the need to shift to

new remote education models in a matter of days. Many, however, see this period as a catalyst for a deeper transformation of education through technology. According to [Sean Tierney](#), Microsoft's director for teaching and learning strategy in Asia, there needs to be a systemic shift in which education will move away from "a teaching culture to a learning culture." Real-time data, innovations like artificial intelligence (AI), and a range of new devices and tools will help transform the roles and relationships of students, teachers and parents.



Jobs and education

Search volume trend line (weekly)



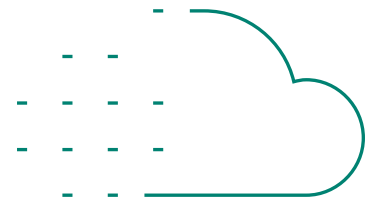
As the world continues to respond, let's look at some of the strategies and resources available in preparation for the recover phase.



2. Recover: Preparing for rebound

Empowering every person and
every organisation on the planet to achieve more

How can businesses embrace the digital transformation opportunity?



The lasting impact of the global pandemic is yet to be determined, with countless businesses, industries and people's lives forever changed. At Microsoft we are no different, with a core focus on our employees and our global partners and how we can help continue to achieve more every single day.

It is no surprise that COVID-19 will change the way we live, work and interact. We've seen a shift in focus for businesses needing to rapidly and digitally transform, with a core reliance upon digitally transforming operations and engagement.

As brands continue to develop and embrace new digital infrastructure, whether this is technology, tools or systems to transform their business, marketers have a unique moment to also transform - embracing this opportunity to transform marketing methods, processes and platforms for engaging customers; optimise operations; and to transform products and business models, all by businesses empowering their employees to achieve more.

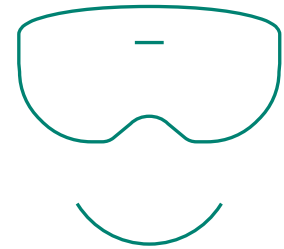
Four steps for businesses to consider during the recover and reimagine phases are:

“We've seen two years' worth of digital transformation in two months. From remote teamwork and learning, to sales and customer service, to critical cloud infrastructure and security — we are working alongside customers every day to help them adapt and stay open for business in a world of remote everything.”

Satya Nadella, Microsoft CEO, April 2020

- 1 EMBRACE OPPORTUNITIES**
from culture shifts and remote working through to collaboration platforms
- 2 DEVELOP SKILLS**
Including new workforce digital skill development, education, training and re-skilling opportunities
- 3 ORGANISATION DESIGN**
Such as employee and customer engagement, structure and productivity improvements
- 4 BUSINESS RESILIENCE**
Including businesses continuity, cybersecurity, analytical improvements and new business models

Helping 25 million people acquire new digital skills needed for the COVID-19 economy



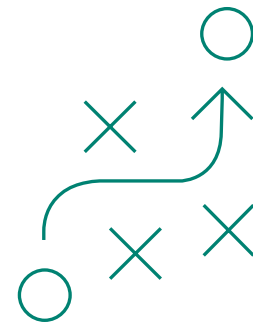
Around the world, 2020 has emerged as one of the most challenging years in our lifetime. In six months, the world has endured multiple challenges, including a pandemic that has spurred a global economic crisis. As societies reopen, it's apparent that the economy in July has not been what it was in January. Increasingly, one of the key steps needed to foster a safe and successful economic recovery is expanded access to the digital skills needed to fill new jobs. And one of the keys to a genuinely inclusive recovery are programs to provide easier access to digital skills for people hardest

hit by job losses, including those with lower incomes, women and underrepresented minorities. To help address this need, Microsoft is launching a global skills initiative aimed at bringing more digital skills to 25 million people worldwide by the end of the year. This initiative will bring together every part of our company, combining existing and new resources from LinkedIn, GitHub and Microsoft.

You can read more about the initiative on the [Official Microsoft Blog](https://aka.ms/skills) and at <https://aka.ms/skills>.



Navigating recovery for businesses and brands



The business and economic impact of the pandemic varies by industry and by the type of a company's products and services provided during the crisis. We have seen a huge variety of resources offering advice and guidance to help companies from small businesses through to large enterprises respond, recover and reimagine.

According to McKinsey, the COVID-19 core recovery emphasis will be on digital transformation. In this research they share a four-step plan that businesses can launch during the recovery period. We have seen digital adoption rates rise globally across many industries as they adapt to new consumption levels and new customer experiences. This leads to increased consumer expectations, whether that is within retail and a need for eCommerce solutions, finance with mobile and frictionless payment solutions, travel, on-demand entertainment, or fitness, e.g. remote workout programs.

The marketing and advertising landscape has seen a large shift in brands adapting their media mix, investment strategy and marketing technology. Through months of uncertainty, CMOs and marketers have proven resilient, creative and savvy. We have witnessed industry-leading creativity and how brands realigned their focus, values and emphasis on marketing with purpose. Businesses across the globe shifted operations and marketing tactics to help provide essential goods and services to act as a voice of reason at a time when disinformation is abundant.

An eMarketer report shares the eight initial pivots that businesses can adapt to in a COVID-19 world and how they can help drive long-term digital transformation:

- 1 The loss of in-person events
- 2 Reworking marketing budgets and channels
- 3 Shifting the message and tone
- 4 Buyer behaviour and spending
- 5 Intentional target and segment approaches
- 6 Sellers engaging prospects in new ways
- 7 Serving and supporting customers
- 8 eCommerce and digital transformation

Advertising in recession

Even as we wait to discover just how great the impact of the COVID-19 pandemic is going to be on economic activity, it now looks almost certain that there will be a recession. Though governments will move heaven and earth to ensure that it is as short and as shallow as possible, the temptation for many in the business world will be to cut

marketing and advertising costs to the minimum. Here are seven guidelines derived from adapting previous lessons to this very new situation. You can read more about the research from our friends at LinkedIn and the B2B Institute on the [LinkedIn Blog](#).

1 AVOID THE PANIC BUTTON

Don't make cuts unless short-term survival depends on it. Try and maintain your brand advertising.

2 RESIST THE SWITCH

Resist the pressure to switch advertising spend from brand solely to activation. It makes very little sense to do so, even in the short term. In many cases, customers are not reluctant to buy; they are unable to buy.

3 MAINTAIN YOUR SOV

Aim to maintain your share of voice, ideally at least at the level of your market share, where share of voice equals share of market.

4 THE OPPORTUNITY TO INVEST

If the resources can be found, consider the opportunity to invest in lower-cost long-term growth by increasing share of voice during the recession.

5 EMBRACE OPPORTUNITIES

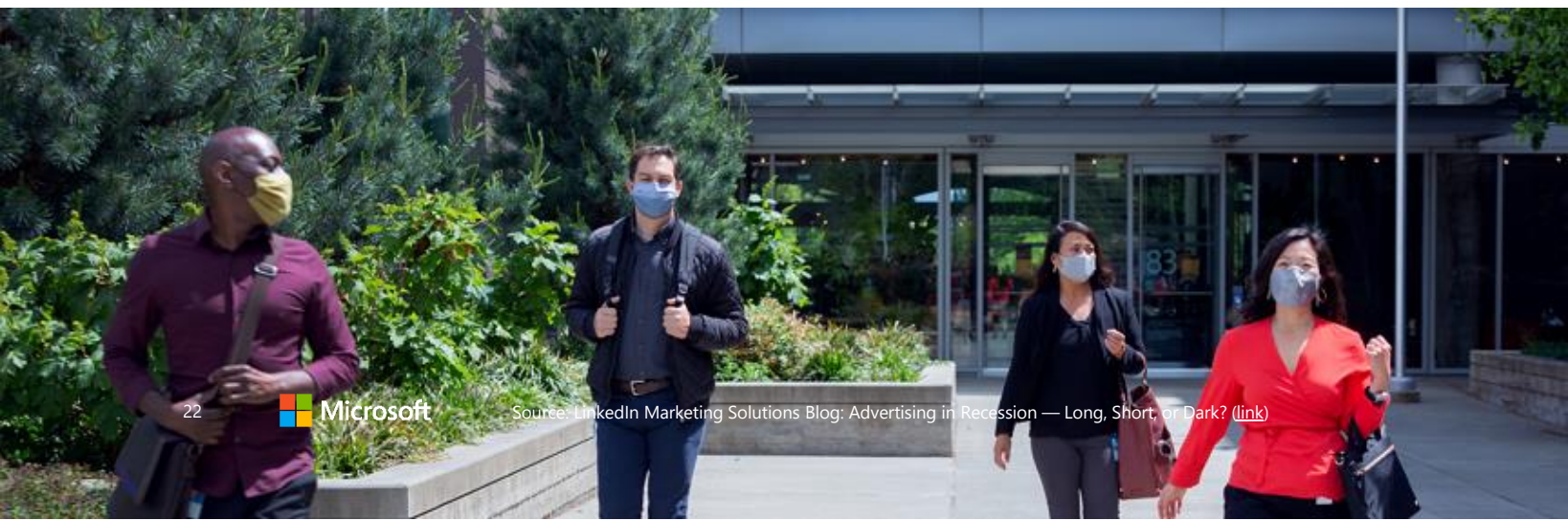
Do not be frightened to use emotional brand advertising during a recession-but ensure it is appropriate to the values of customers. Support the use of advertising that demonstrates humanity through warmth, generosity and humour.

6 RETAIN CONTINUITY

Do not abandon your existing brand campaign unless it is clearly unsympathetic to the mood of customers. There may be more value and reassurance in continuity than in change.

7 EMBRACE YOUR VALUES

Look for tactical opportunities to create goodwill through acts of humanity and generosity, especially if you were proclaiming these virtues before the emergency.



Best bets for retailers facing tough choices



Positioning to win, today and tomorrow

The overnight shift to a digital economy is driving retailers to make difficult decisions about how they adapt. It's digital transformation at an unprecedented velocity. To cope with change, industry experts are encouraging retailers to look to the next horizon of retail and reimagine their business. That's no simple task when faced with the day-to-day challenges of maintaining operations. Many retailers are asking what they can do that will benefit them today, but also transform their business for the future.

While difficult, it's important to consider both today and tomorrow. The innovations that retailers implement today can better position them to take advantage of the higher-intensity digital economy going forward. According to Capgemini Research Institute, 59% of consumers worldwide said they had high levels of interaction with physical stores before COVID-19, but now less than a quarter see themselves in that high-interaction category. In the next six to nine months, just 39% of consumers expect a high level of interaction with

physical stores. However, most retailers cannot afford to make the next investment one that will benefit them in a digital future nearly a year out. What we see retailers asking themselves is:

"What can I do that will help me right now, but will also position me well in the long term?"

The immense value of search

Product search can be easy to overlook. It's a fundamental aspect of most eCommerce sites that, all too often, works well only for top products when the search queries are similar to the product description.

However, consider that 80% of shoppers will abandon a website that returns poor results, as reported by Business Insider. With consumers spending fewer overall dollars and spending more of those dollars through your eCommerce channel, the importance of capturing every customer search should be a priority. Otherwise, it's money left on the table. There are few things more painful for retailers than bringing customers to your site but then



missing out on dollars they want to spend with you because they couldn't find what they were looking for. [Microsoft Bing for Commerce](#) is a new technology that provides the next evolution of product search. It's a SAAS solution for retailers that brings the power of Microsoft's AI to your product search as well as your personalisation and product recommendations.

Over the years we've built an unmatched data graph. By bringing this data together with customer data, we can create incredible personalised results with new levels of relevancy. AI also supports more accurate natural language processing capable of capturing more of the searches you're missing today, such as uncommon phrasing, misspellings and more. Leaving money on the table results from using dated search technology and being limited to insights from your data set alone. The twin engines of AI from Microsoft and a decade of worldwide consumer search insights can help you capture the recent wave of consumers who are newly open to new brands.

If you have a search technology team in-house, these twin engines are available to the retail industry for the first time to help you turbocharge an opportunity you didn't have the tools to unlock before. Today you may not be seeing the customers you are 'leaking' because you didn't know that today's search technology fails the long tail of customers. But there is money in the long tail.

Providing valuable recommendations requires you to know your customers, and many retailers are seeing entirely new audiences. According to a new survey published by delivery specialist Ware2go, more than half (55%) of consumers said they've recently purchased from a retailer they've never bought from before. Microsoft Bing for Commerce can help retailers quickly improve their customer knowledge with AI. By learning from millions of Bing shoppers all over the globe, you can create highly personalised experiences and recommend new products determined by a customer's brand preferences, price sensitivity, seasonality, location and more.

AI for Retail: Learn the scenarios that are driving today's digital consumer. You can [download a Microsoft AI retail playbook](#) to learn more.





Make your new customers, customers for life



A study conducted by BCG showed that implementing personalised experiences onsite or in marketing can have a strong effect on revenue with one study finding it drove a 25% revenue lift.

Bigcommerce.com reports that recent data also shows personalisation efforts can reduce bounce rates by 20 – 30 percent.

We have seen Microsoft Bing for Commerce help brands stay effortlessly on the latest edge of personalisation and product recommendations that can meet the needs of new customers and engender long-term loyalty. In these unprecedented times, you are right to seek high impact, high certainty results, for now, and a better

future. New choices mean risk, yet risks can be managed. Marketers continue to shift their attention to refocus on what really counts: people. Through the combination of search and native advertising brands have captured user intent from search with user profile data across the Microsoft graph. This provides a powerful match between a person's needs and a brands offering to deliver greater performance across their marketing channels. For more information you can visit our website or learn more about additional details on [Retail Industry vertical solutions](#) and learn more about the [Microsoft Audience Network](#).

Search is more important than ever



Looking across the variety of advertising channels, we have seen marketers shift their priority of digital budgets across search, display, TV and OOH (out of home). According to eMarketer, in their revised forecasting, search advertising will be the least impacted advertising channel even though overall many ad markets will decline slightly, driven by some key vertical reductions e.g. travel.

It is important for businesses to consider holistic customer experience strategies as a top priority. Getting the customer experience right is an ongoing process which also includes ensuring consistent experiences regardless of which search engine a consumer searches on. Devising a strong, consistent, cross-search-engine strategy to capture consumer intent will be a key marketing tactic that sets apart businesses that aim to recover quickly and capture search intent opportunity. As highlighted in the “Respond” section of this eBook we’ve seen consumers turn to search to research, understand and purchase necessary products and services throughout the pre- during-and post

lockdown periods. The pandemic outbreak forced many physical businesses to either close or shift their operations online through eCommerce.

Regardless of the business size, product or service, consumers have continued to turn to search to find, purchase and engage with brands online. The IAB (Interactive Advertising Bureau) continues to report that desktop usage has risen, meaning its important for brands to capture the opportunity to reach consumers across different search engines, of which Microsoft Advertising plays a key role. The article [“All-Weather Marketing”](#) from LinkedIn Marketing Solutions discussed the importance of not cutting advertising budget during an economic downturn.

The research states:

Advertising is ‘game theoretical’. Brands need to reach more customers than your competitors in order to grow. If your competitors pull back and you push forward, you will reach most of the market and increase your market share. In fact, it may sound counter-intuitive, but the best time to advertise is when no one else is advertising.

Holistically the search advertising market is forecasted to decline by 0.2% worldwide. Many markets are slowing down primarily due to significant impacts on key vertical ad spend such as within travel e.g. flights, cruises and accommodation.

Some search engine revenues will likely be impacted negatively by the shift of advertisers marketing strategies. Brands, advertisers, agencies have all seen significant impacts on the mobilisation of their teams, reduced workforces and almost every advertising businesses 'adjusting to the new normal'.

However, as consumers search more on their desktop, we are seeing brands capturing the opportunity to reach consumers use a variety of search engines e.g. Bing, AOL, Yahoo, OneSearch and Ecosia in which they may not previously been optimising towards. By tapping into the 650 million searchers across the Microsoft Search Network this can help build their business and brands, at the right time when consumers are looking for their brand. There has been some significant acceleration in the inevitable shift to digital. Businesses have needed to

adapt to the increased reliance upon digital channels in driving sales – for example; cafes and restaurants moving to online ordering and takeaway. As we continue to make our way through the socially distant life, advertising agencies and clients continue to face levels of uncertainty. The shift to more remote work is going to change the lives of marketers and technology workers in subtle and dramatic ways. Companies will be looking geographically at a much broader talent pool. New marketing agencies will become 100% remote, and there will be substantial adjustments in the office-free future, around mentoring, employee development and collaboration, among other areas.

With digital ad spending predicted to grow only 2.4% worldwide this year, and whilst the pandemic has significantly disrupted the global advertising market, brands that can take advantage of the broad array of solutions available could steal market share from competitors. To learn more about some of the Microsoft Advertising solutions from search to our [Microsoft Audience Network](#) you can visit: Microsoft.com/Advertising



Did you know?

Microsoft Advertising has more than 30 partners powering search advertising solutions across our owned and operated brands like:



Windows

Edge



Bing



msn

YAHOO!

Aol.

Microsoft Advertising also has search partners that include:



DuckDuckGo



Gumtree

THE WALL
STREET
JOURNAL

nine
.com.au

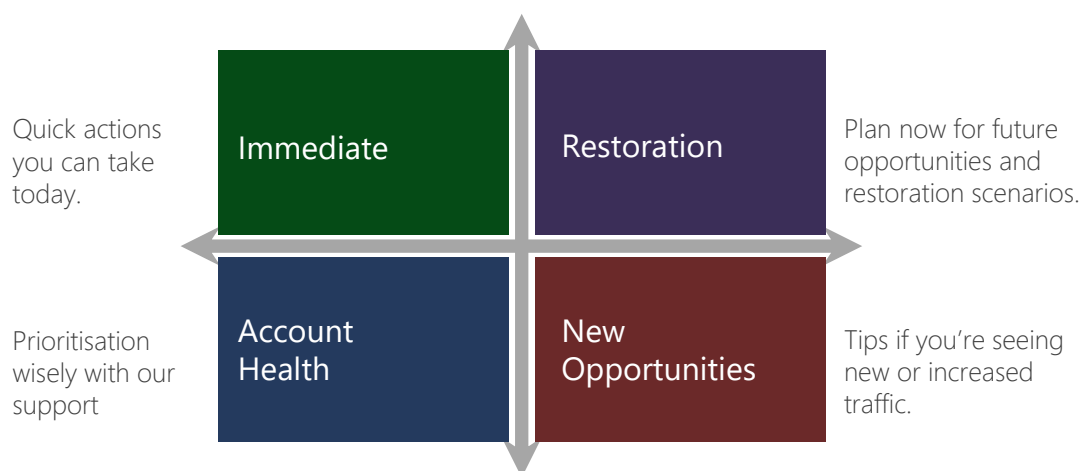
The digital marketer's guide to advertising during and after COVID-19

We all continue to respond to the new normal of social distancing, business interruptions and travel restrictions. In this report we also share some of the dynamic shifts in consumer search behaviour. Across the globe we see retailers and thousands upon thousands of businesses move from brick and mortar to online for almost everything. As a result of this shift, search has continued to be a lifeline for people and businesses, providing useful information, connection and data (for example, [Bing COVID tracker](#)). All of this is shining a light on the value of search, both organic and paid, during challenging times.

The Microsoft Advertising team has produced a 'digital advertiser's guide to COVID-19' helping businesses react and respond to trends in consumer behaviours and consider different search strategies and tactics.

You will find valuable insights and resources with immediate actions you can take today, identify future opportunities, improve performance with account health checks and discover restoration scenarios and strategies.

You can download the complete [Digital Advertiser Guide](#) or one of these key strategies via the Microsoft Advertising website at aka.ms/MSACOVIDGuide

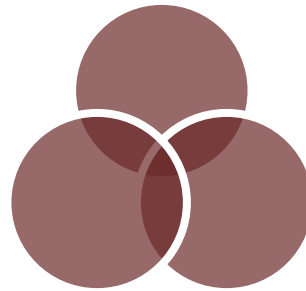


3. Reimagine: Marketing with Purpose

How you can earn trust,
build loyalty and
create business value



Be responsible, be valuable, be inclusive.



In today's ever-changing world it is important to build a brand that's welcomed into people's lives by earning their trust and upholding their values. It starts with respecting their right to privacy, which builds brand equity. Trust grows into loyalty when we recognise people's values and responding authentically.

Be responsible

Trust is not static. Companies need to constantly earn people's trust by taking responsibility. Start by actively engaging with people and being transparent about your practices on privacy and data collection. Ensure you protect people's data with the highest security. Remain in compliance with the laws where you do business, including data and privacy as well as other important laws on accessibility. Have a strong set of principles that govern how you advance data and technology whilst respecting people's rights.

Be valuable

People buy from companies that stand for something larger than just what those companies sell. People want brands to stand for what they believe in and understand who they are. If brands do not achieve this,

people vote with their wallets. Values drive value. It begins with shifting your company from being product centric to people centric. Ensure you go deep into diversity to uncover what all people value, not just your intended audience. Identify your purpose as a company and how you support people's values. By aligning your purpose with what people value, you create shared meaning, which helps you to co-author a trusting relationship that leads to loyalty.

Be inclusive

Inclusion is a modern marketing imperative. It means considering multiple dimensions of diversity to create culturally accurate representation in your advertising. A brand which considers inclusion in advertising strives to provide authentic connection, demonstrate open-mindedness and convey equity. It's an opportunity for you to build a more meaningful relationship with people and show them that you value them. When you open your brand experience to diverse human experiences, people will be more open to connecting with you. When people feel included, joy and trust follow, which leads to brand love, loyalty and an increase in purchase intent.

Brand strategies to help people survive and thrive



In the spirit of building resilience during this unprecedented global health emergency let us consider learning from different disciplines so we can reduce blind spots, optimise our effectiveness, and produce marketing with purpose, that has meaning in nature. This is an inclusive approach to business such that when more perspectives are considered, better decisions are made. We can apply key lessons from psychology, first responders themselves and the art of storytelling. The you apply these lessons to your business during a time of crisis, to better meet the changing needs of your customers and community.

In 1943 the scientific journal Psychology Review published "A Theory of Human Motivation" by Abraham Maslow, which offers a key lesson that business leaders could use to navigate a global or local emergency. This theory is still referenced today in psychology and sociology and is about what motivates humans to take a particular action first. It centres around

fulfilling innate human needs to ensure survival. [Maslow's Hierarchy of Needs](#) is used to understand why and in what order humans partake in behaviours.

Considering that all of us, no matter what part of the world we live in today, are experiencing a threat to our survival due to COVID-19, it would behove any business to consider how to play a positive role in the global health emergency. When we apply Maslow's Hierarchy of Needs, the two initial areas where businesses can focus efforts to provide value during a crisis: (a) Products, services, operations or experiences that support biological life; and (b) Products, services, operations experiences that support the community to sustain a way of life. In other words, how can you help satisfy the hierarchy of human needs. It not only will help people survive the pandemic, but could help your business survive by being of valuable service.

5 mindset shifts every brand can make for inclusive marketing

Friendships take work. But most of us would agree that the best of them are not only worth our investment they're invaluable. Having friends who empathise with us, consider our needs, have our back when the going gets tough and just 'get us' is what makes life meaningful, right? Never has there been a more poignant time in the world to value one another, when we're striving to stay connected while physically isolated in order to prevent the spread of COVID-19. Genuine care, support and inclusion of one another, especially the marginalised, have never been more important to the survival of our human race.

We conducted a series of research studies to explore consumer psychology when it comes to inclusion in advertising as well as what it takes to build trust. And what we learned has led us to an inescapable conclusion: We as brands should stop considering humans in only the context of business needs.

Consider what people are experiencing in the world around them and what they value, and then invite them to build a relationship with you with shared meaning and common values. That's genuine friendship. Consider how your brand purpose can serve and take action to make the world a better place in a way that's authentic to the brand. This is good for society and meaningful to people, who in turn can choose your products. By doing this, you can not only drive value in your business; you can shape culture, change communities, evolve with the world, and find long-lasting, meaningful relationships, both in business and personally. You're the catalyst for change.

PEOPLE WANT:

- 1 INCLUSION**
Not just to be included.
- 2 POSITIVE-IMPACT PRODUCTS**
Not cheap, unsustainable ones.
- 3 EQUITABLE EXPERIENCES**
Not just compliance.
- 4 BRANDS THAT TAKE A STAND**
- 5 THE TRUTH**

Consumers want to live more sustainably



In a survey we ran to 10,000 Bing searchers we asked consumers what, if anything, they were planning to change after lockdown. The most popular answer was living more sustainably.

As the world has shifted to staying in, eating and cooking at home and travelling and flying less, we continue to see the benefits from an environmental perspective that this has had on the planet. Prior to COVID-19 that 60%+ of Millennials and GenZ audiences expressed preference for brands that support a social cause. Almost three in four people globally say it is now more important to them that

companies embrace sustainability than it was before COVID-19. Whilst we all know this is right for our future, is this the catalyst we needed to make this the new normal? Brands and advertisers need to consider carefully how they market and present their brands and products in the future. Microsoft Advertising set a target of planting 250,000 trees in 2020 in partnership with Ecosia. You can learn more in our blog post [Creating a greener future one tree at a time](#). And learn more about Microsoft's sustainability commitment announced in January 2020 to get to [carbon negative by 2030](#).

92%

of consumers say they have a more positive image of a company when the company support social or environmental issues.

Personalisation, privacy and trust in the age of the empowered consumer

Marketers are increasingly focused on personalising customer interactions — everything from emails to product recommendations to in-store and online experiences. Marketers, however, aren't the only ones driving the use of personalisation; consumers are beginning to demand it.

There's often a disconnect between marketers and consumers about what enables the personalised experiences people love. Although consumers enjoy and have come to expect some level of personalisation in the ways brands interact with them, many don't understand that they must provide personal data in order to receive personalised experiences.

Personalisation can be a powerful marketing tool and enhance the customer experience. Too much personalisation can seem intrusive and even creepy, however, leaving customers feeling as if their privacy was

violated. Impactful personalisation must have purpose and add value for your customers — and that requires understanding your own brand, its values and its purpose. Knowing what your customers expect from the interactions with your brand and what they find valuable will help you make data-driven decisions about how you engage. When you can tailor personalisation to meet consumer expectations at every touchpoint, you deepen your connection with your customers, strengthen their loyalty and trust, and ultimately achieve better business outcomes.



You can learn more about data privacy trends and purposeful personalisation by reading our white paper at:

aka.ms/InBrandsWeTrust

Maximising purchase consideration through the trust curve



“It takes 20 years to build a reputation, and 5 minutes to ruin it.”

Warren Buffett

Buffett’s insight applies to all relationships. Those between friends and family as well as the relationship a brand has with its consumers. In fact, we talked about the importance of trust in Marketing with Purpose makes a difference, where 85% of consumers will only consider brands they trust when making a purchase¹ and 69% would never purchase from the brand again once they’ve lost trust in that brand.²

Unsurprisingly, trust is pivotal between a brand and its consumers. Like any friendship, every interaction you have accrues to maintaining trust. For brands, that interaction includes both the acquisition and the retention of consumers. It’s not enough to settle for one interaction between your brand and consumers; you must maintain trust to keep them coming back to your brand.

The top reasons that consumers lose trust in a brand are:

- 1 Poor quality**
“I did not believe in the company’s morals and ethics.”
- 2 Not able to deliver on advertised messages or dishonest advertising**
“They didn’t back up what they were trying to sell.”
- 3 Not aligned to consumer values or is unethical**
“Product did not meet the vision the company created.”

Trusted brands must first meet the fundamental needs of security, data protection and privacy. Marketers today recognise these needs as the cost of doing business, but many stop there. There is an opportunity to go beyond these foundational needs to create a relationship with consumers that can deliver greater business value. To learn more, visit:

aka.ms/MarketingwithPurpose

Our trust principles

Microsoft operates on a foundation of trust. We are working to earn your trust every day by focusing on six key principles:

1. Control

We will put you in control of your privacy with easy-to-use tools and clear choices .

2. Transparency

We will be transparent about data collection and use so you can make informed decisions .

3. Security

We will protect the data you entrust to us through strong security and encryption .

4. Strong Legal Protections

We will respect your local privacy laws and fight for legal protection of your privacy as a fundamental human right .

5. No Content-Based Targeting

We will not use your email, chat, files or other personal content to target ads to you .

6. Benefits to You

When we do collect data, we will use it to benefit you and to make your experiences better .

You can find out more about our commitment to privacy at privacy.microsoft.com.



Marketing with Purpose makes a difference

At Microsoft Advertising we're invested in helping our clients and partners create brands that are welcomed into people's lives, as well as become brands people rely on. That feels especially important during these challenging times, as services are disrupted, people learn to work productively from home and restrictions limit activities we all took for granted. In these critical moments, how you show up matters. We know there's uncertainty, and with that comes a need to focus on what is most important. That applies to life in general but also to how we help you focus to move your business forward. Our Microsoft mission of "enabling every person and every organisation on the planet to achieve more" has never felt more important than it does today, as we focus on helping you respond to today's environment.

There are a few important things that have taken place in our industry over the past several years. The decline of trust in the digital space. The increase in people's sentiment that the brands they welcome into their lives must provide value and align with their values. The opportunity and duty we have as marketers for making our marketing

inclusive and accessible. Our learning that as you build trust as a company, you increase brand love, which builds loyalty and increases consideration.

Trust helps brands connect with people. It goes beyond protecting people's data. It's about understanding their values and making people feel recognised and respected. When you broaden your view on trust, you build loyalty and create business value. Especially in these challenging times, a trusted relationship for the long term is paved with empathy, genuine service and knowing your brand's purpose in the interconnected world.

That's [Marketing with Purpose.](#)



Empowering you to achieve more

Subscribe today to the Microsoft Advertising Insider newsletter, and Microsoft Advertising will plant 10 trees on your behalf:

[Subscribe to Microsoft Advertising Insider >](#)

Insights and blogs

COVID-19 insights and resources for advertisers

As consumers remain home, search has grown in importance. Our goal is to provide you with regularly updated insights and trends to allow you to make informed decisions for your business.

[Click to visit](#)

Microsoft Advertising blog

A comprehensive range of blogs that discuss issues relevant to advertising, search and our solutions

[Click to visit](#)

The digital advertiser's guide to COVID-19

A guide with insights and quick actions you can take today. Identify future opportunities and restoration scenarios, and get tips to implement if you're seeing new or increased traffic

[Click to visit](#)

Building business value through trust, love and loyalty

Trust, love, and loyalty all help drive purchase consideration for a brand and are closely related.

[Click to visit](#)

Building trust, marketing with purpose

As our world evolves, companies and brands are looking for new ways to connect with their audiences in more deep and meaningful ways.

[Click to visit](#)

Marketing with Purpose

Trust, loyalty and love create a sweet spot for purchase consideration. Learn how you can drive business results by making people feel seen and respected through inclusive marketing and purposeful personalisation.

- ✓ It's best to be a brand worth trusting
- ✓ Giving back is good for business
- ✓ Every human being has a unique story

[Learn more](#)

Educational Resources

Microsoft Advertising Learning Lab

A hands-on learning environment to help you understand the features and functionality of Microsoft Ads.

[Learn more](#)

LinkedIn Learning

Develop talent and keep skills current with online learning.

[Learn more](#)

Microsoft Learn

A hands-on learning environment to help you arrive at your goals faster, with more confidence and at your own pace.

[Learn more](#)

Microsoft Trust Centre

Tips for how to build trust by focusing on data integrity, security, privacy and compliance.

[Learn more](#)



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With more than 12 years' experience at some of the largest digital marketing companies in the world, Jagoda is part of the Advertising Analytics and Insights Group within APAC. A passionate, data-driven marketer with a wealth of industry expertise and research and performance marketing experience.



Adam Goodman

Regional Marketing Lead, APAC
Microsoft Advertising
[in in/angoodman](https://www.linkedin.com/in/angoodman)

With experience covering three major continents, Adam leads the delivery of the commercial marketing efforts for Microsoft Advertising in Australia and New Zealand. Has more than 16 years of digital marketing experience including disciplines covering sales, analytics, marketing and end-to-end customer personalisation.



As the world responds to the outbreak of COVID-19, our thoughts are with the people affected and the medical professionals working around the clock to help those most in need.

Thank you.



Microsoft Advertising. Intelligent connections

