



MICROSOFT ADVERTISING

COVID-19 search trends

Health & Wellness

March 20, 2020

Microsoft Advertising. Intelligent connections.

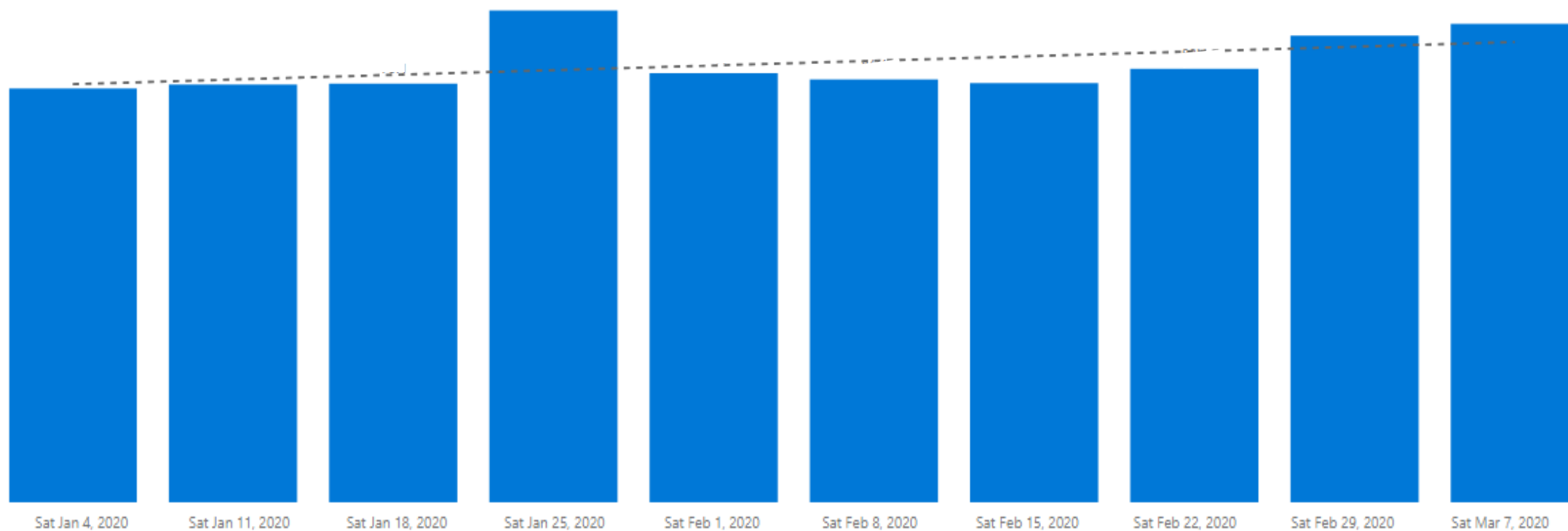


High-level takeaways

- There is an increase in Health-related searches coming from searches on Infectious Diseases and Viruses
- Cold Sores and Infusion Pumps searches also had increased volume during the week of March 7, 2020
- We are seeing more than a 5x increase in searches for Telemedicine and Telehealth compared to 2019, all driven by a large increase in search volume for both within the last 10 days

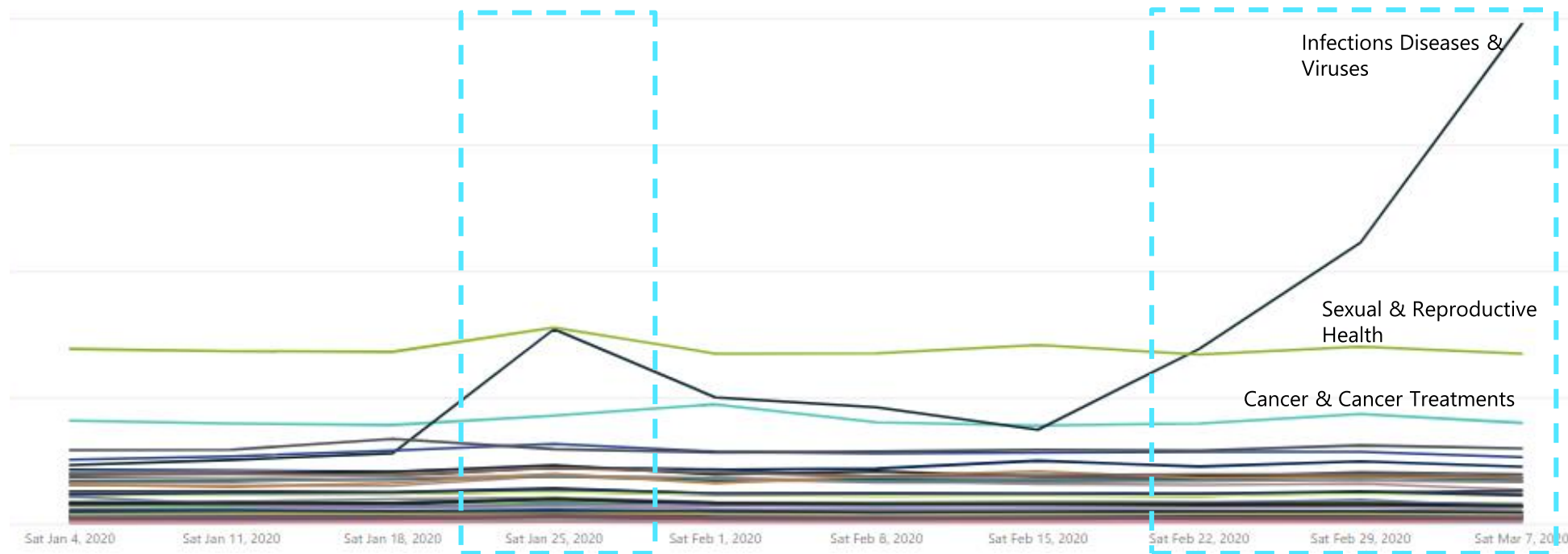
There is a slight increase in overall Health-related searches year to date (YTD)

YTD Health searches



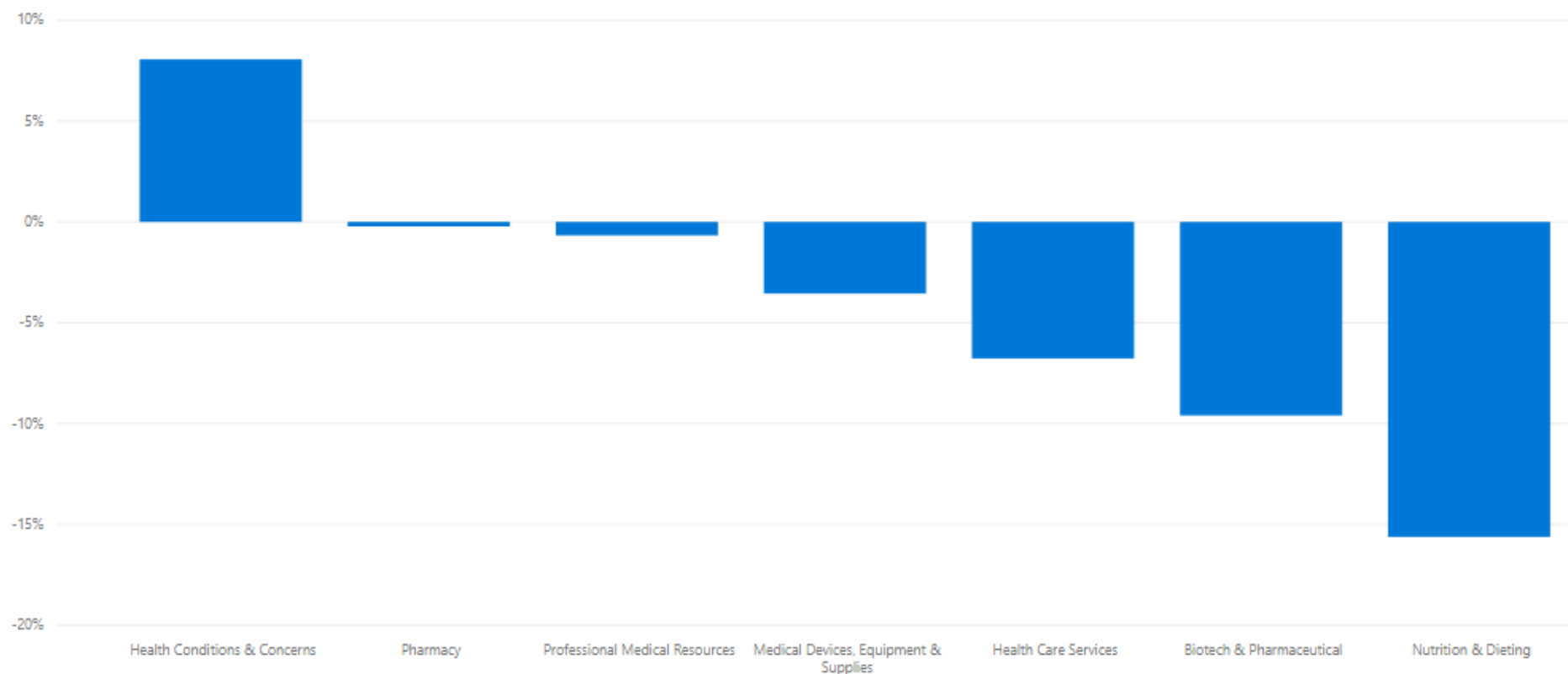
The increase is driven by searches on Infectious Diseases & Viruses

YTD Health searches by sub-vertical



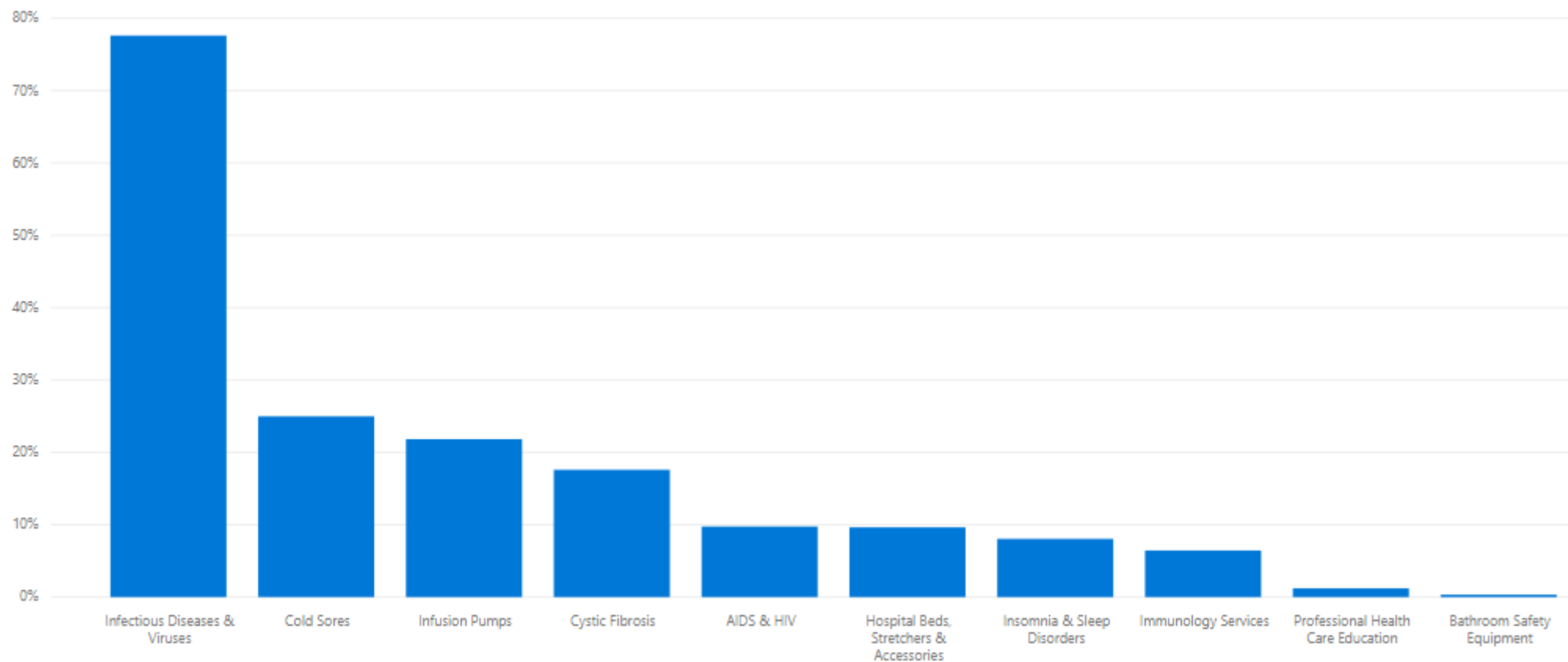
Week over week (WoW), there was an increase in Health Conditions & Concerns searches. All other categories experienced a decline in search volume.

WoW comparison: week of 7th March compared to the week of 29th February for total volume of Health searches



At a more granular level, the top 3 in increasing search volume WoW are Infectious Diseases & Viruses, Cold Sores, and Infusion Pumps

WoW comparison: week of 7th March compared to the week of 29th February for total volume of Health searches



The biggest decrease in searches WoW are within Smoking & Smoking Cessation, Diets & Diet Programs, and Medical Skin Care Services

WoW comparison: week of 7th March compared to the week of 29th February for total volume of Health searches – lowest 5 categories





Focus Topic: Searches on Telemedicine and Telehealth

There was a major spike in telemedicine searches within the last week

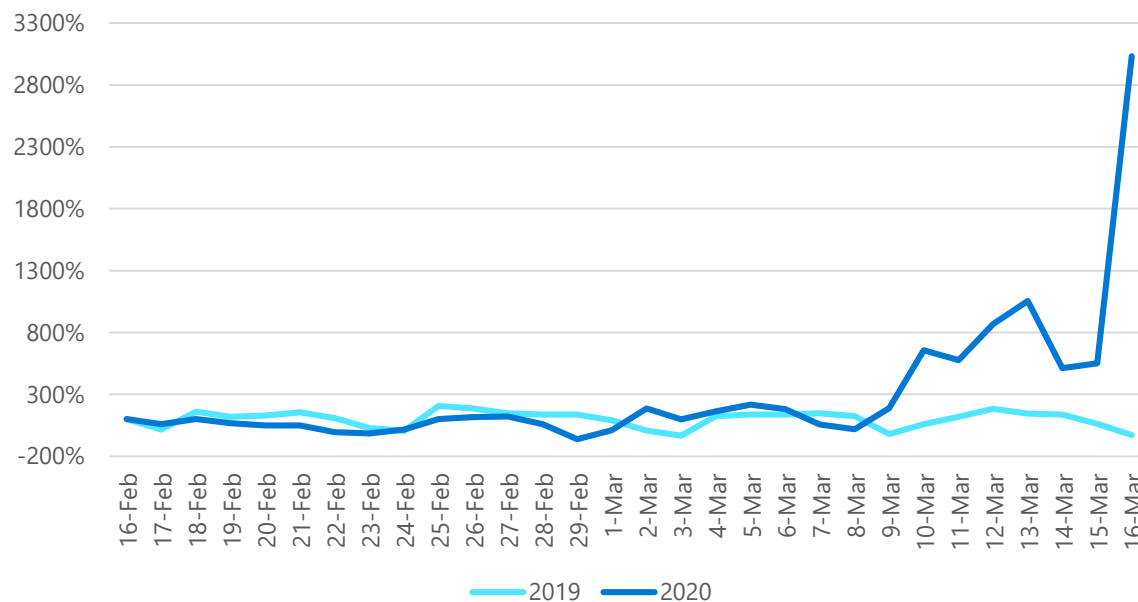


Search volume 2/16 - 3/16

+690%



Search volume change over last 30 days compared to February 16

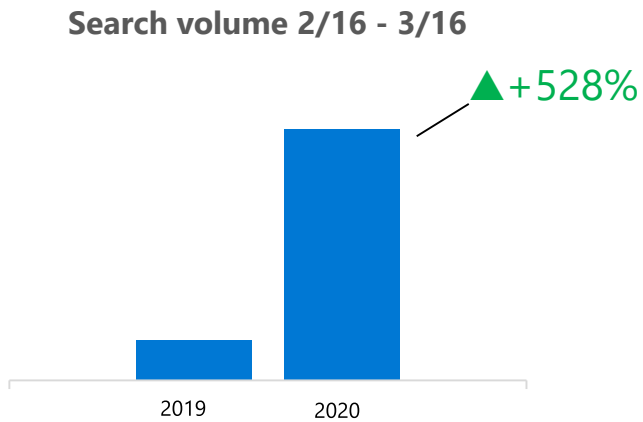


Top queries

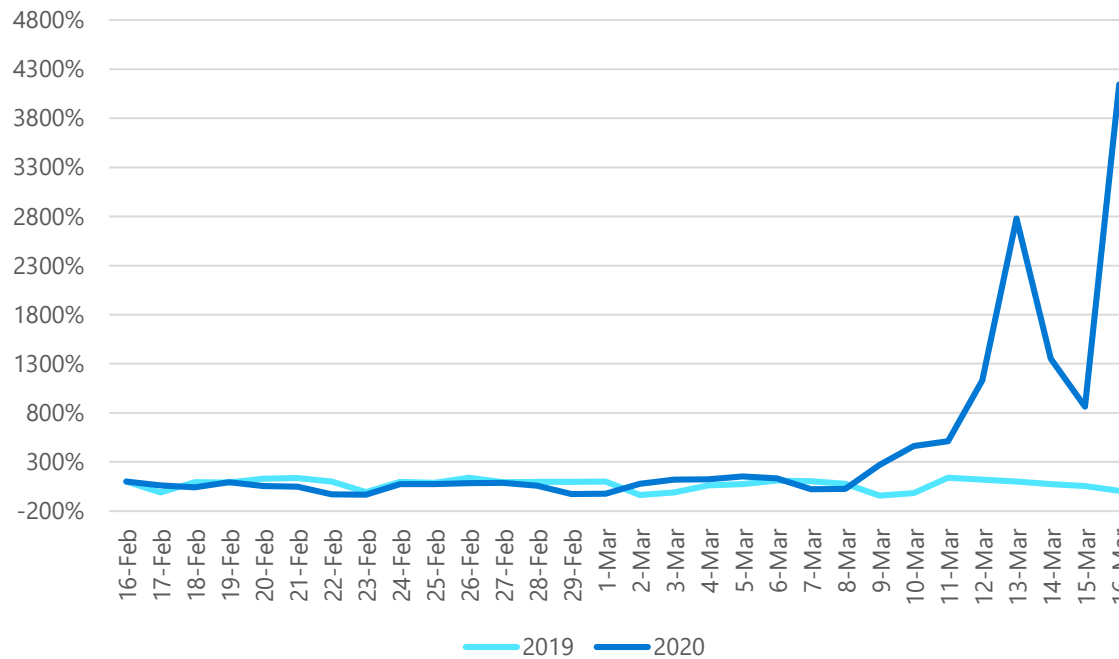
- telemedicine
- video conferencing*
- companies
- american telemedicine association
- telehealth telemedicine*
- telemedicine billing codes*
- telemedicine stocks*

* New top queries in 2020 compared to 2019

There is a similar positive trend for telehealth



Search volume change over last 30 days compared to February 16



Top queries

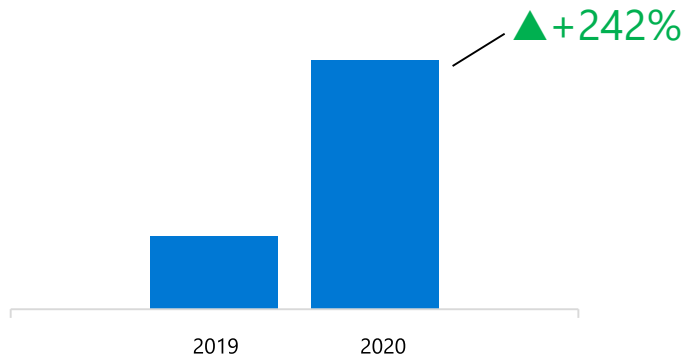
- telehealth
- telehealth services
- telehealth telemedicine
- telehealth ontario*
- hipaa compliant telehealth*
- telehealth consent form*
- [brand] telehealth*

* New top queries in 2020 compared to 2019

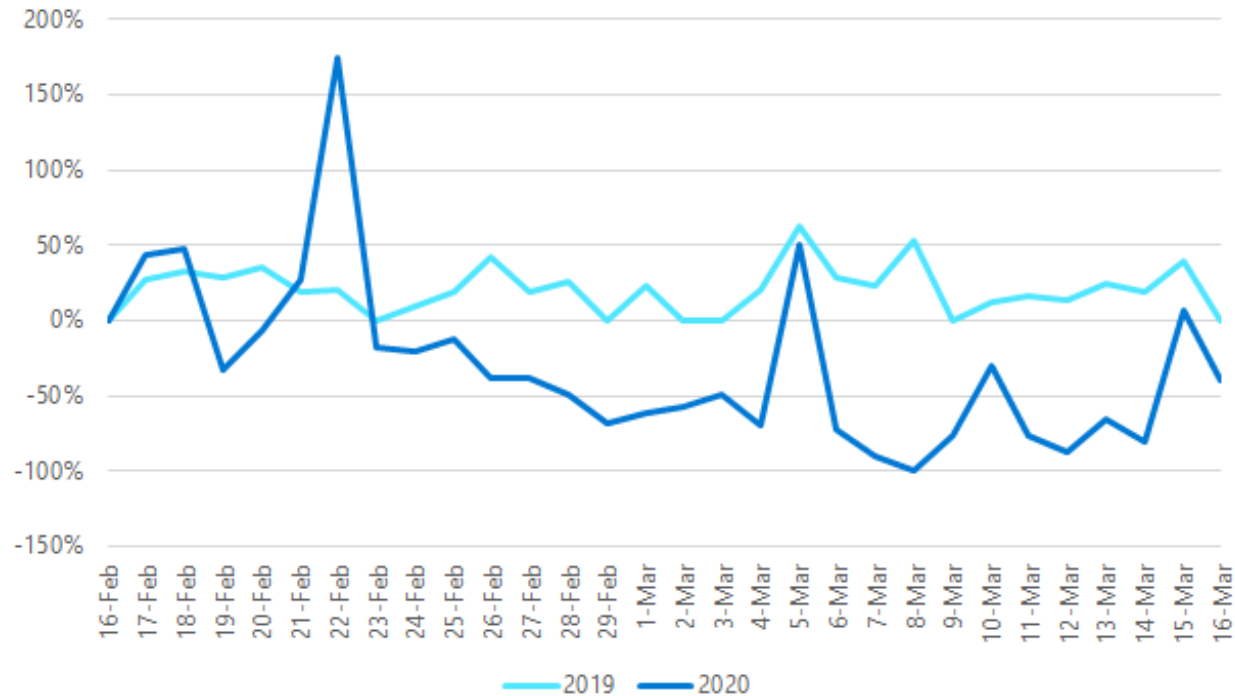


While digital health has seen a higher search volume year over year (YoY) as compared to 30 days following 2/16, this is a result of isolated spikes

Search volume 2/16 - 3/16



Volume Change over 30 Days compared to 2/16



Top queries

digital health records*

digital Health

thermometer*

information*

introduction*

digital health

entrepreneurship health*

digital health breathtaking*

* New top queries in 2020 compared to 2019