



Microsoft Advertising

How COVID-19 is affecting our Home & Garden search marketplace

Data through March 13th, 2020





Home & Garden has under-paced YoY since the beginning of February, and in recent weeks has diverged from seasonality.

Despite the overall decline, some categories have accelerated in performance in recent weeks.



Categories that require some level of outsourcing have seen the greatest drop offs, while equipment and supplies are growing in consumer interest.

Refocus efforts on smaller DIY projects with equipment and materials that can be easily purchased online.

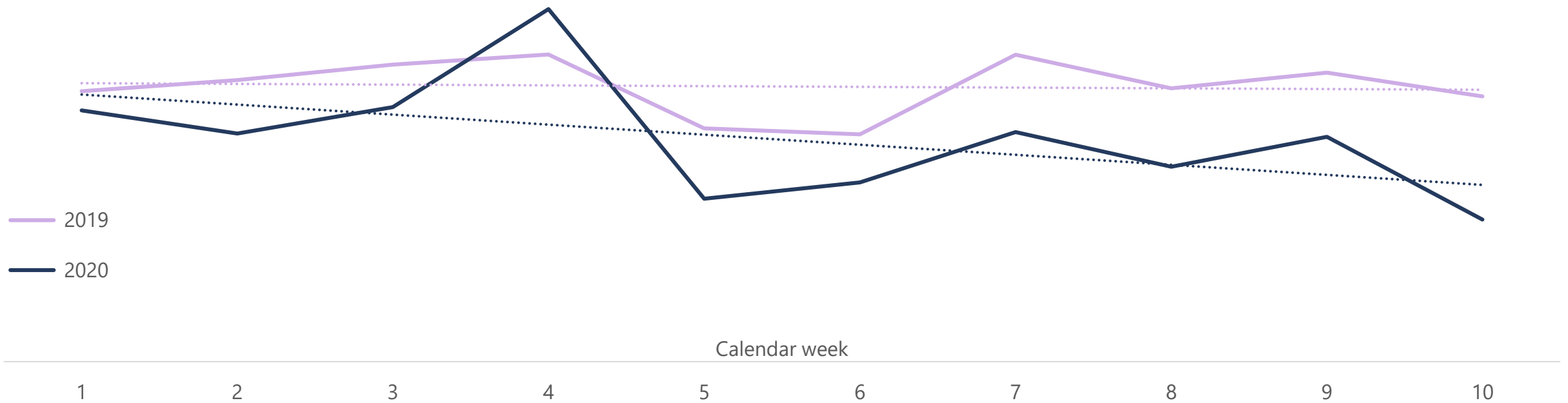


Unmapped Bathroom queries are growing despite the overall Bathroom sub-vertical being down.

Consumer concerns within this category have changed year over year (YoY), creating more net-new queries in the marketplace.

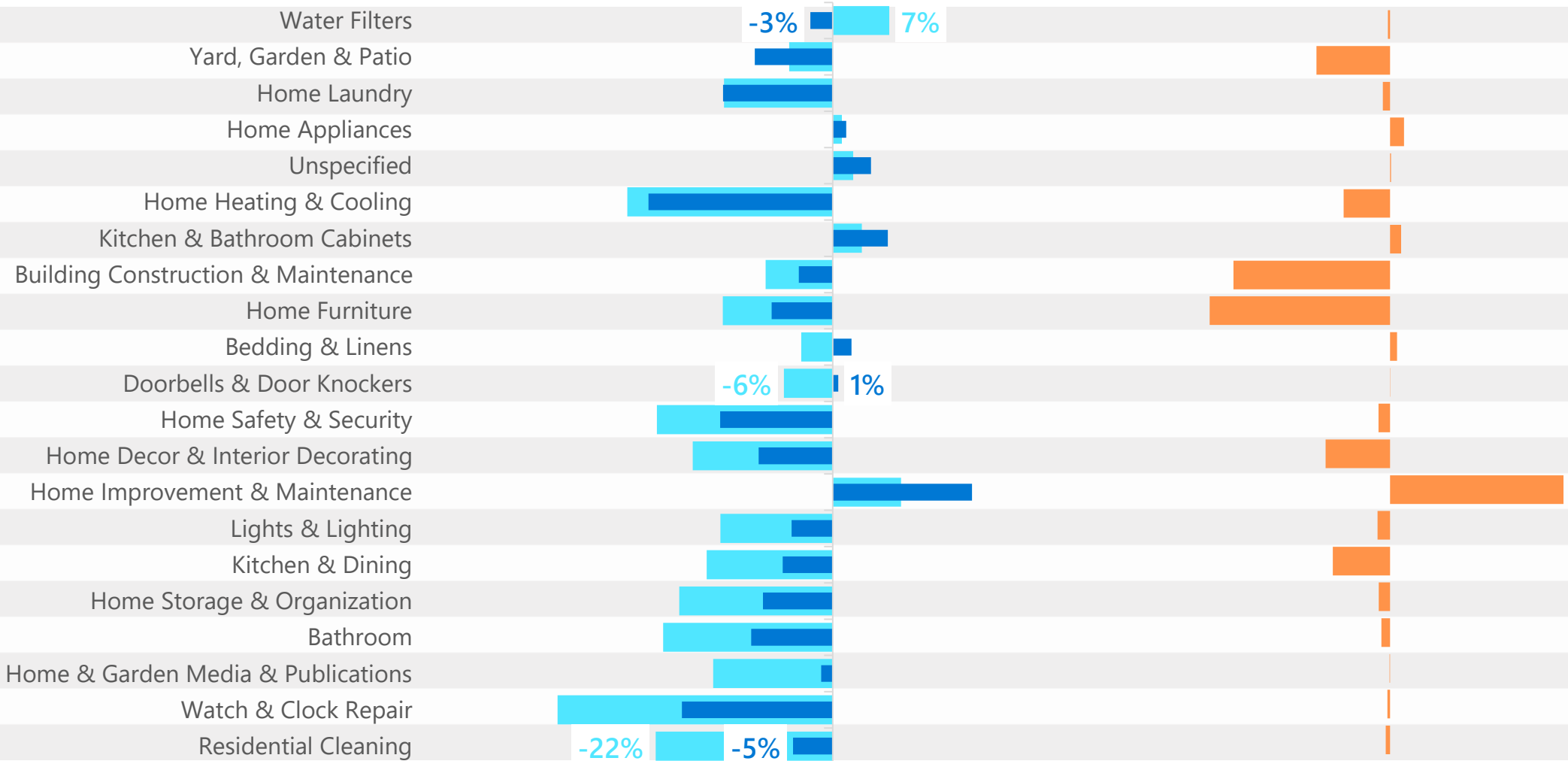
Home & Garden (H&G) clicks are declining week over week (WoW) at a faster rate than last year

Year-to-date (YTD) weekly H&G clicks



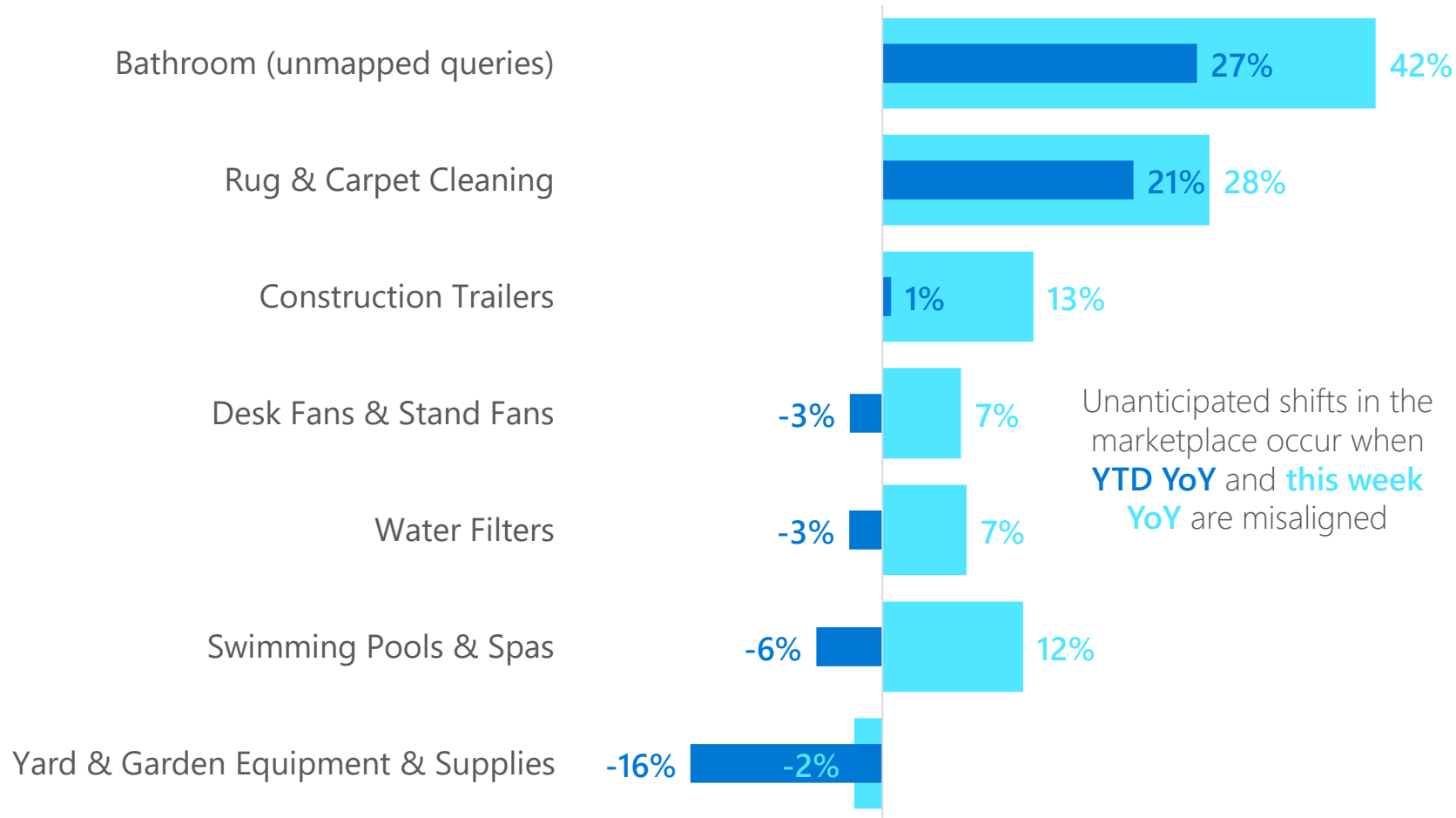
Unexpected shift in marketplace when **this week** and **YTD** misalign

Top sub-vertical click gainers and decliners: **this week YoY (%)**, **YTD YoY (%)**, **this week YoY (volume)**



Growth of unmapped Bathroom and Carpet Cleaning queries align with recent sanitation concerns

Top sub-vertical click gainers and decliners: [this week YoY \(%\)](#), [YTD YoY \(%\)](#)



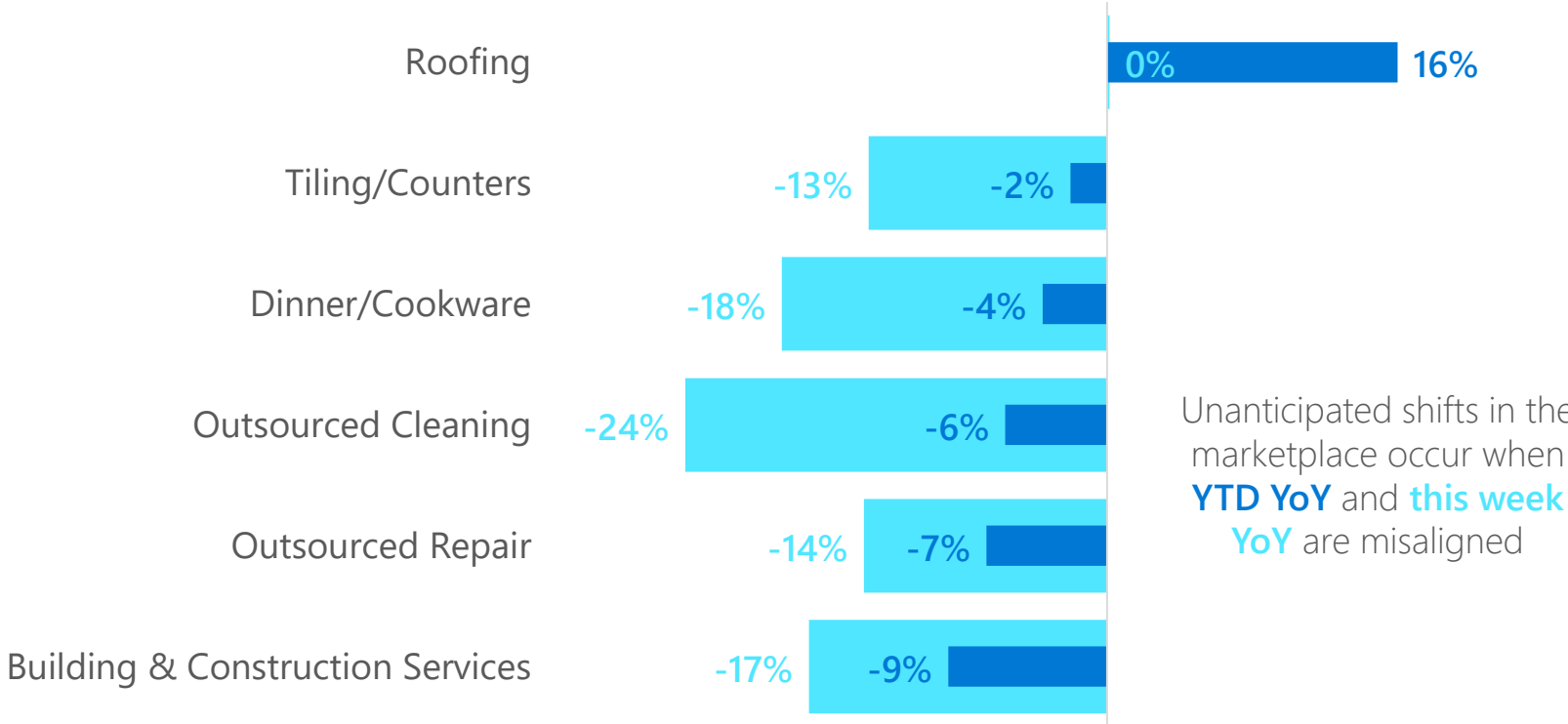
Unanticipated shifts in the marketplace occur when **YTD YoY** and **this week YoY** are misaligned

The rise of unmapped Bathroom queries translates to new queries in the marketplace, likely stemming from recent consumer concerns and overconsumption. Leverage broad match and mine SQRs to ensure the demand is met, and that adequate negatives are in place.

Fans and Water Filters are standard amenities when creating a home working space. Assume other simple home office updates to follow.

Major home remodeling projects have dipped as many require the aid of an outside contractor

Top sub-vertical click gainers and decliners: [this week YoY \(%\)](#), [YTD YoY \(%\)](#)

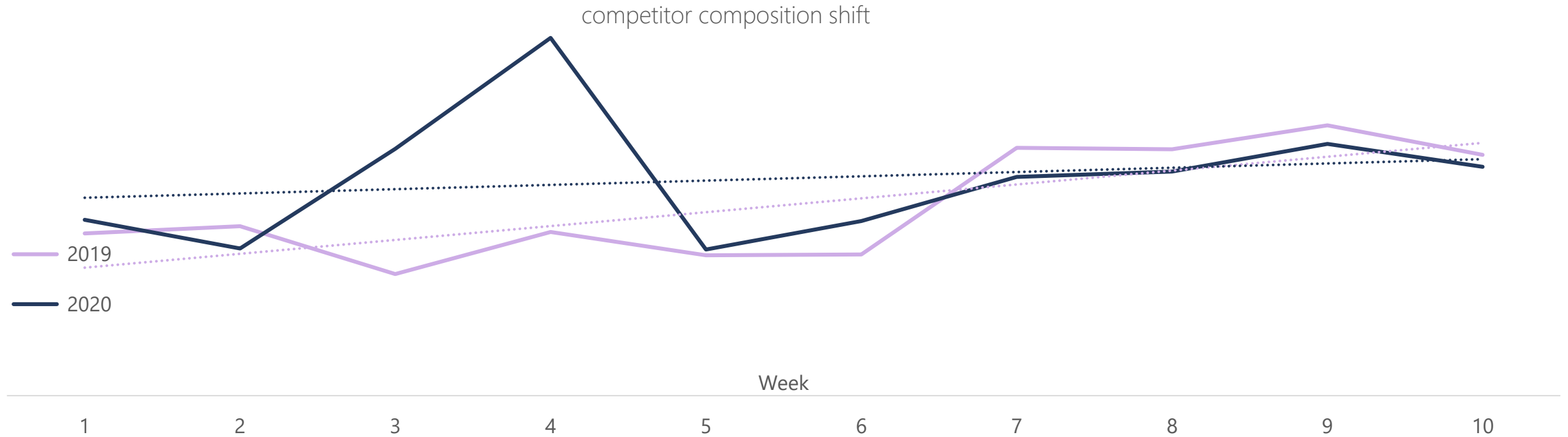


Unanticipated shifts in the marketplace occur when **YTD YoY** and **this week YoY** are misaligned

Spring typically marks a time for home renovation, but many projects require outside help. Refocus efforts on smaller DIY projects that can easily be actioned with products purchased exclusively online.

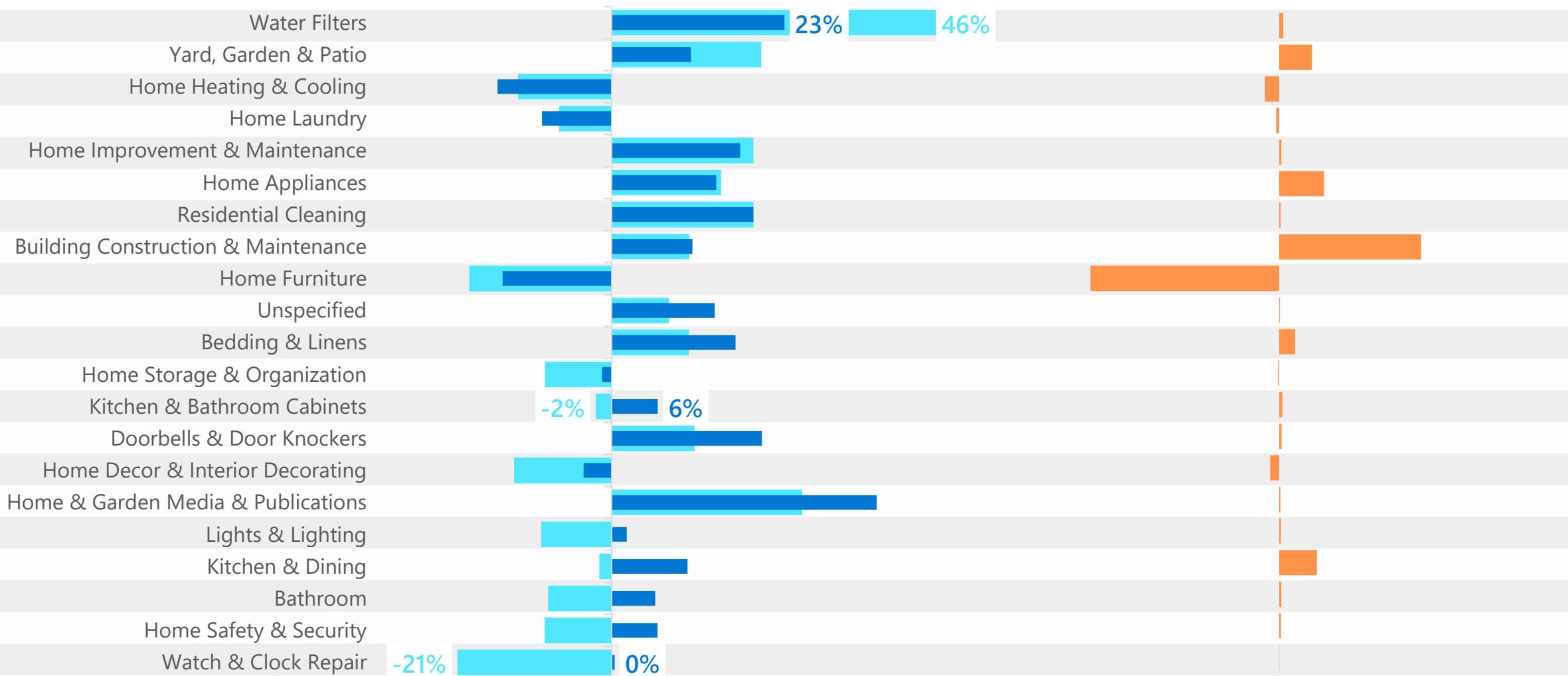
Total H&G Bing Shopping Campaign (BSC) clicks follow standard seasonality in most recent weeks

YTD weekly H&G BSC clicks



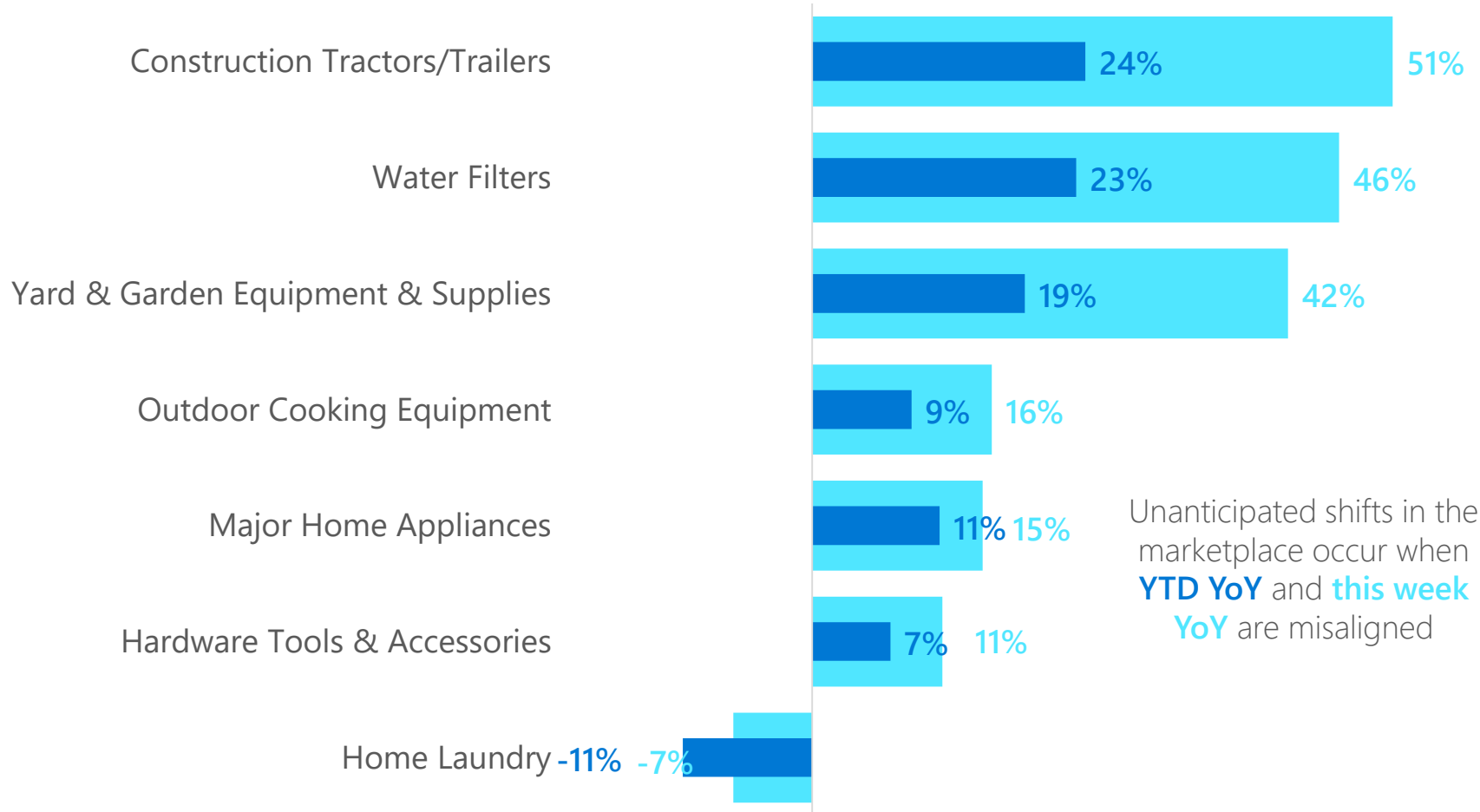
Unexpected shift in marketplace when **this week** and **YTD** misalign

Top BSC sub-vertical click gainers and decliners: **this week** YoY (%), YTD YoY (%), **this week** YoY (volume)



Equipment and essential home updates are accelerating ahead of spring seasonality

Top BSC sub-vertical click gainers and decliners: **this week YoY (%)**, YTD YoY (%)



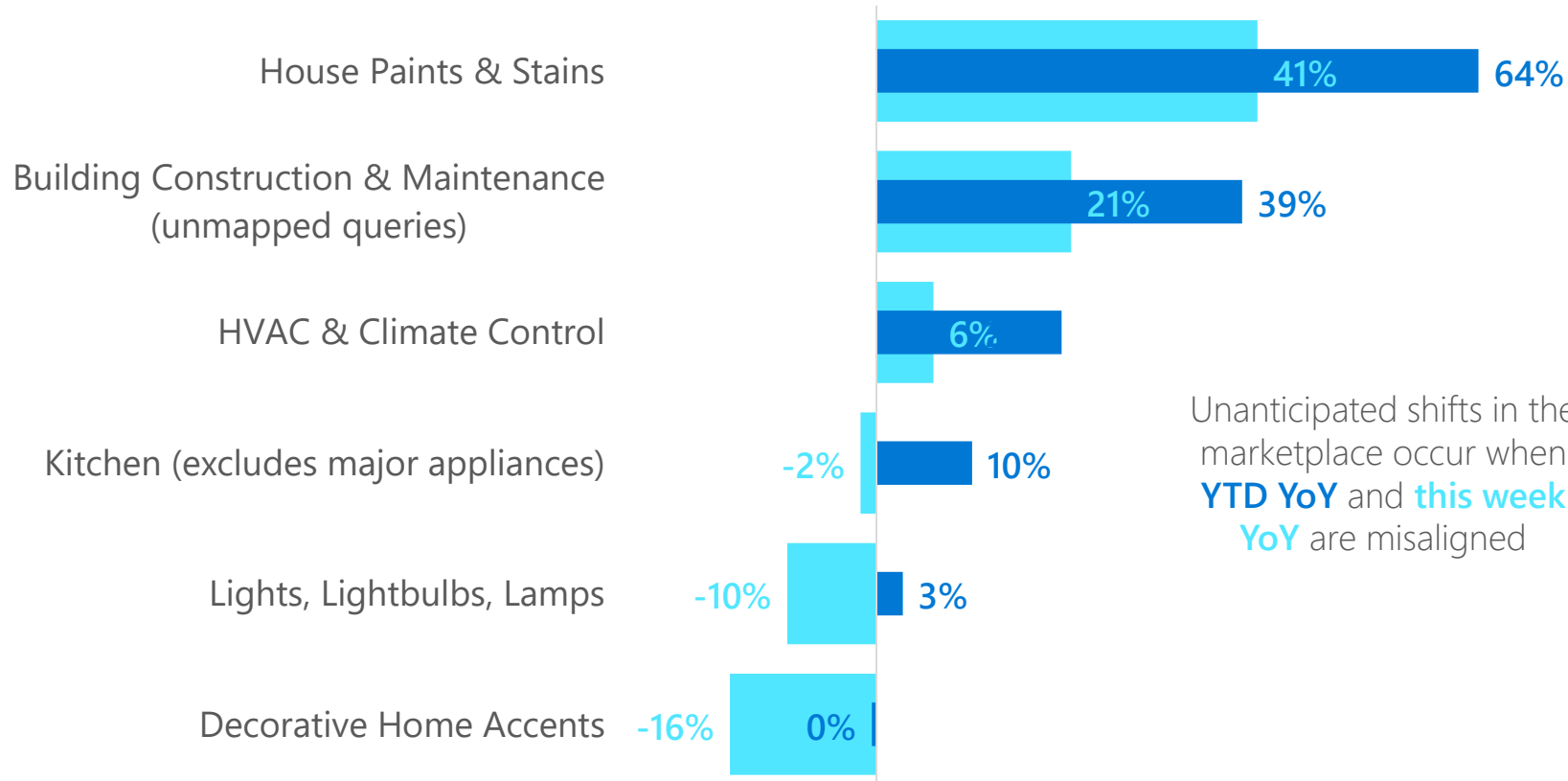
Unanticipated shifts in the marketplace occur when **YTD YoY** and **this week YoY** are misaligned

Recently, Equipment and Supplies are outpacing YTD performance as many of the products within these categories could be viewed as preparative.

The previously strong YoY performance of large ticket Home Appliances gained added momentum in the recent week, potentially stemming from a heightened sense of urgency.

Spring seasonal home renovation categories that were pacing ahead of LY have since slowed

Top BSC sub-vertical click gainers and decliners: **this week YoY (%)**, YTD YoY (%)



Unanticipated shifts in the marketplace occur when **YTD YoY** and **this week YoY** are misaligned

House Paints & Stains, a known entry point for renovation during the spring season, is now falling behind its strong YTD click pace.

All non-essential Kitchen products that were pacing ahead of last year are now trending downward (does not include large ticket items such as appliances and major furniture).

Smaller, ornamental Home Accents, such as candles and picture frames, were flat YTD YoY. However, clicks fell 16% in the most recent week.