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

Change: Clicks declined 4% more WoW this year vs. last year

This week, YoY
-9%

YTD, YoY
-4%

This year, WoW
-6%

Last year, WoW
-4%
-2%

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)

- Water Filters: -3%, 7%
- Yard, Garden & Patio
- Home Laundry
- Home Appliances
- Unspecified
- Home Heating & Cooling
- Kitchen & Bathroom Cabinets
- Building Construction & Maintenance
- Home Furniture
- Bedding & Linens
- Doorbells & Door Knockers: -6%, 1%
- Home Safety & Security
- Home Decor & Interior Decorating
- Home Improvement & Maintenance: 22%, 5%
- Lights & Lighting
- Kitchen & Dining
- Home Storage & Organization
- Bathroom
- Home & Garden Media & Publications
- Watch & Clock Repair
- Residential Cleaning: -22%, -5%

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 (%)

Bathroom (unmapped queries) 27% 42%
Rug & Carpet Cleaning 21% 28%
Construction Trailers 1% 13%
Desk Fans & Stand Fans -3% 7%
Water Filters -3% 7%
Swimming Pools & Spas -6% 12%
Yard & Garden Equipment & Supplies -16% -2%

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

YTD weekly H&G BSC clicks

competitor composition shift

This year, WoW
Last year, WoW
Change: Clicks declined 1% less WoW this year vs. last year

This week, YoY
YTD, YoY

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)**

- **Water Filters**
  - YoY: 23%
  - YTD YoY: 46%

- **Yard, Garden & Patio**
  - YoY: -2%

- **Home Heating & Cooling**
  - YoY: 6%

- **Home Laundry**
  - YoY: -2%

- **Home Improvement & Maintenance**
  - YoY: -2%

- **Home Appliances**
  - YoY: 6%

- **Residential Cleaning**
  - YoY: -2%

- **Building Construction & Maintenance**
  - YoY: -2%

- **Home Furniture**
  - YoY: -2%

- **Unspecified**
  - YoY: -2%

- **Bedding & Linens**
  - YoY: -2%

- **Home Storage & Organization**
  - YoY: -2%

- **Kitchen & Bathroom Cabinets**
  - YoY: -2%

- **Doorbells & Door Knockers**
  - YoY: -2%

- **Home Decor & Interior Decorating**
  - YoY: -2%

- **Home & Garden Media & Publications**
  - YoY: -2%

- **Lights & Lighting**
  - YoY: -2%

- **Kitchen & Dining**
  - YoY: -2%

- **Bathroom**
  - YoY: -2%

- **Home Safety & Security**
  - YoY: -2%

- **Watch & Clock Repair**
  - YoY: -21%

Equipment and essential home updates are accelerating ahead of spring seasonality

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

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.

Unanticipated shifts in the marketplace occur when YTD YoY and this week YoY are misaligned.
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 (%)

- **House Paints & Stains**: 41% (64%)
- **Building Construction & Maintenance (unmapped queries)**: 21% (39%)
- **HVAC & Climate Control**: 6%
- **Kitchen (excludes major appliances)**: -2% (10%)
- **Lights, Lightbulbs, Lamps**: -10% (3%)
- **Decorative Home Accents**: -16% (0%)

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.