

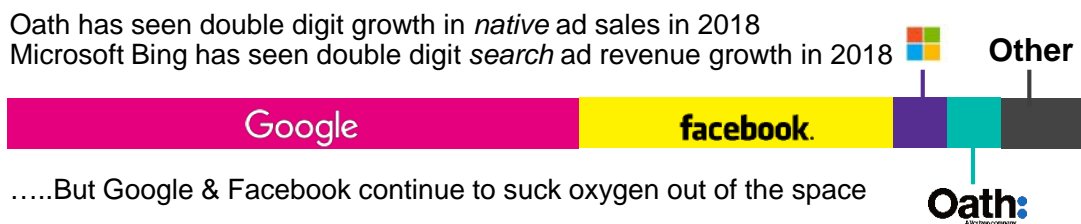
# Microsoft & OATH Partner To Combat the Duopoly In Digital Ads

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## Intro

**Competition.** It brings out the best in people and in business. Never has this been more needed than in the digital ad space, so today we are going to look at the impact of some recent announcements with the periphery players

## Digital Ad Marketplace Spotlight (% of revenue FY'18)



## The News

### Microsoft & Oath partner to combat Google & Facebook digital ad dominance



On 1/17 MSFT and Oath announced consolidation of it's Search (Yahoo/AOL) Ads under Bing while Oath extends its own native ad reach into Microsoft MSN, Outlook, and Xbox platforms

## Business Implications

- Bing** { Gains 1%-2% more search market share to capitalize on recent LinkedIn audience integration  
Receives more mobile traffic and a younger consumer pool
- Oath:** { Additional native inventory capitalizes on a niche where Oath is over performing revenue expectations  
Sunset of Gemini Ads search platform frees up development resources for new ad tech

## Media Implications

**SEARCH** Yahoo and AOL search inventory will move exclusively to Bing by March 31  
**+10%-15% increase in Bing search opportunity**

**NATIVE** Microsoft properties will boost Oath ad inventory while Oath O&O properties increase Bing Audience Network reach  
**+20% native inventory increase**

Oath Ad Platforms } Bing  
YAHOO! SEARCH MARKETING AOL Search. }  
msn Outlook Xbox  
Oath Ad Platforms  
Bing  
YAHOO!  
AOL.  
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## What You Need to Do

- Monitor your Bing Share of Voice metrics and prepare additional budget to move into the campaigns that see an increase in search opportunity
- If running Yahoo Search, begin sun setting budgets in March to follow consumer search interest to Microsoft's Bing platform
- Evaluate active Oath buys for site list & audience size variances derived from new Microsoft sites & placements entering network

## Predictions

- Microsoft** will continue to sign new partnerships to increase Bing's native ad reach and add differentiated targeting layers from what is available with Google (ie. LinkedIn)
- Oath** will increase speed of new ad format rollout with access to Microsoft technology