



Home appliances trends (United Kingdom, France and Germany)

As of April 11, 2020

HYPOTHESIS

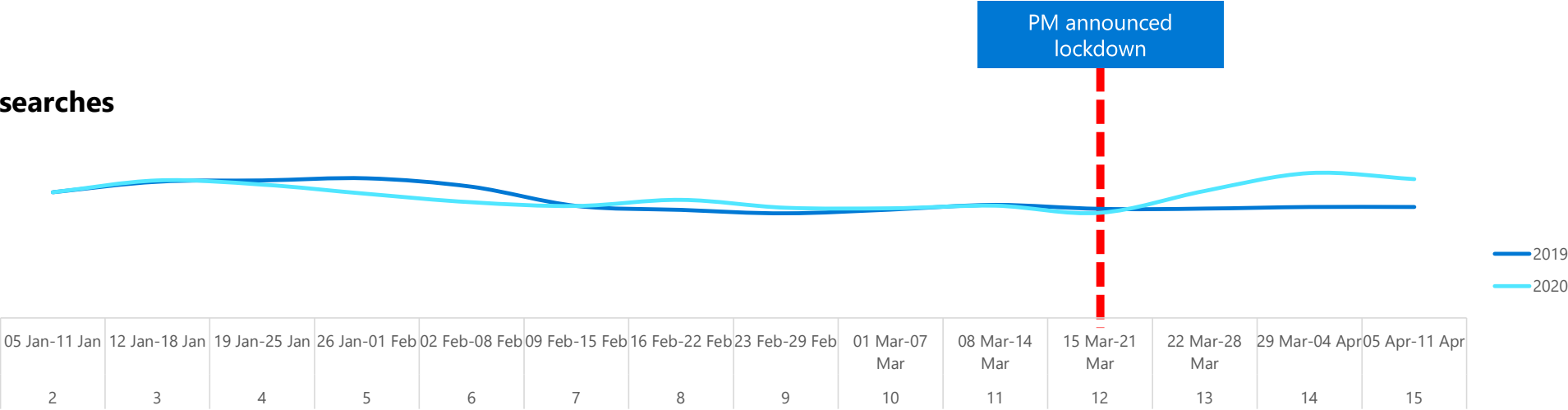
Lockdown and current economic-pandemic situations force consumers to stay indoors. This scenario implies that a sheer portion of their time is now going to household tasks like cleaning and cooking.

Consequently, people might be more prone to search for and buy home appliances than in the past.

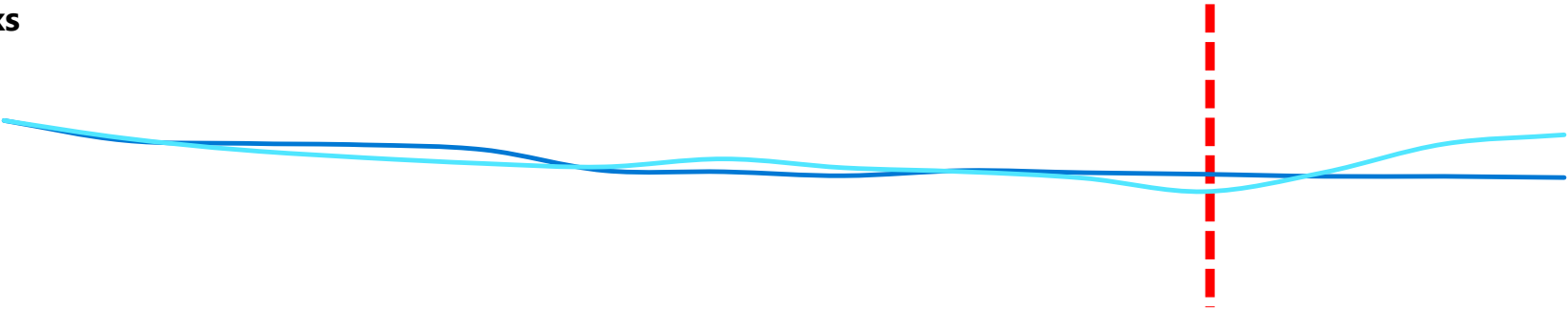
United Kingdom (UK)

Searches and clicks **grew after the initial lockdown announcement**
searches are slowing slightly but **clicks are growing** showing **strong commercial intent**

Indexed searches



Indexed clicks

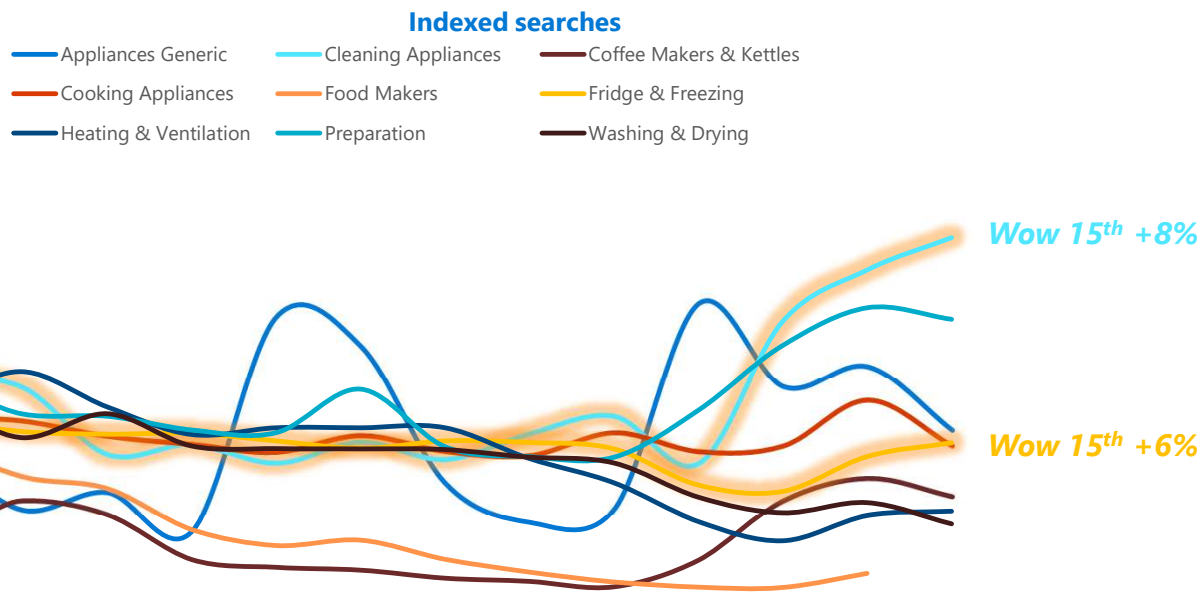


Source: Internal Data, O&O Search Data, All Device



Mainly driven by **cleaning, fridge & freezing** and **heating/ventilation**

The remaining categories experienced a slow down during the recent weeks but remained stable



05 Jan-11	12 Jan-18	19 Jan-25	26 Jan-01	02 Feb-08	09 Feb-15	16 Feb-22	23 Feb-29	01 Mar-07	08 Mar-14	15 Mar-21	22 Mar-28	29 Mar-04	05 Apr-11
Jan	Jan	Jan	Feb	Feb	Feb	Feb	Feb	Mar	Mar	Mar	Mar	Apr	Apr
2	3	4	5	6	7	8	9	10	11	12	13	14	15

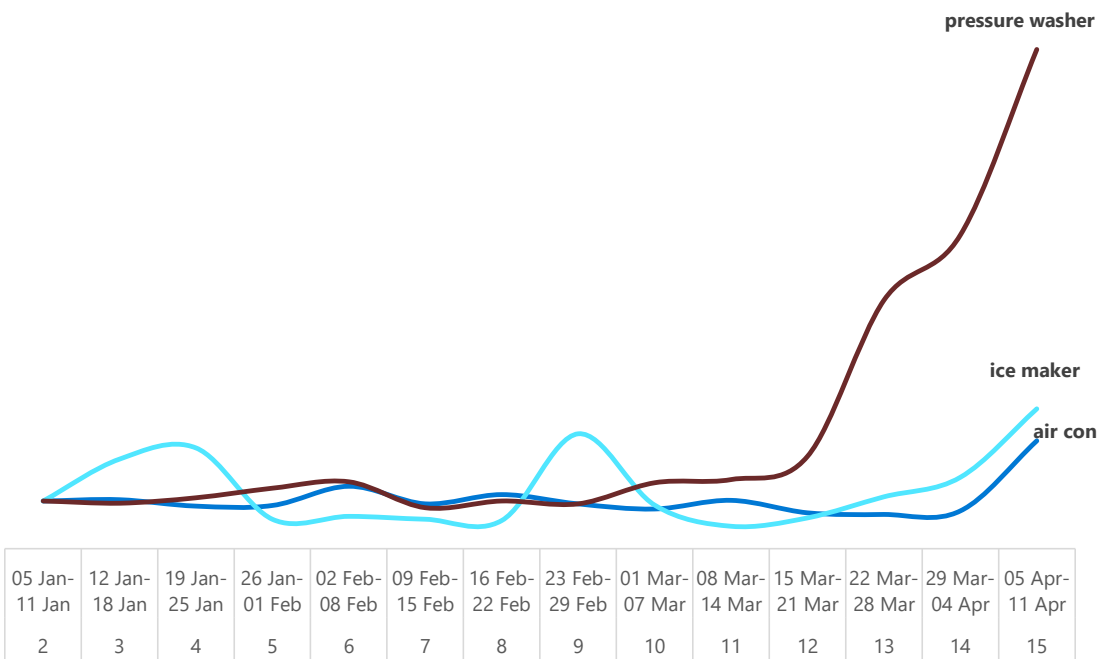
Category	Query sample
Appliances eneric	electrical goods, electrical shops
Cooking Appliances	microwave, air fryer
Heating & Ventilation	air conditioning, air purifier
Cleaning Appliances	{brand}, vacuum cleaner
Food Makers	soup maker, ice cream maker
Preparation	mixer, kitchen aid
Coffee Makers & Kettles	{brand}, coffee machine
Fridge & Freezing	fridge, refrigerator
Washing & Drying	washing machine, dishwasher

Source: Internal Data, O&O Search Data, All Device*



The recent category growth was **driven by specific products** with considerable uplift for **'pressure washers'**

Indexed searches



Category	Driver	Top query	Week over week*
Cleaning Appliances	pressure washer	best pressure washer	+35%
Fridge & Freezing	ice maker	ice maker	+47%
Heating & Ventilation	air con	portable air conditioning units	+263%

Source: Internal Data, O&O Search Data, All Device
*Considering Week 14th and 15th

Several queries seeing **continuous weekly click growth** with **cost per click (CPC) dropping** significantly in some cases due to lack of competition

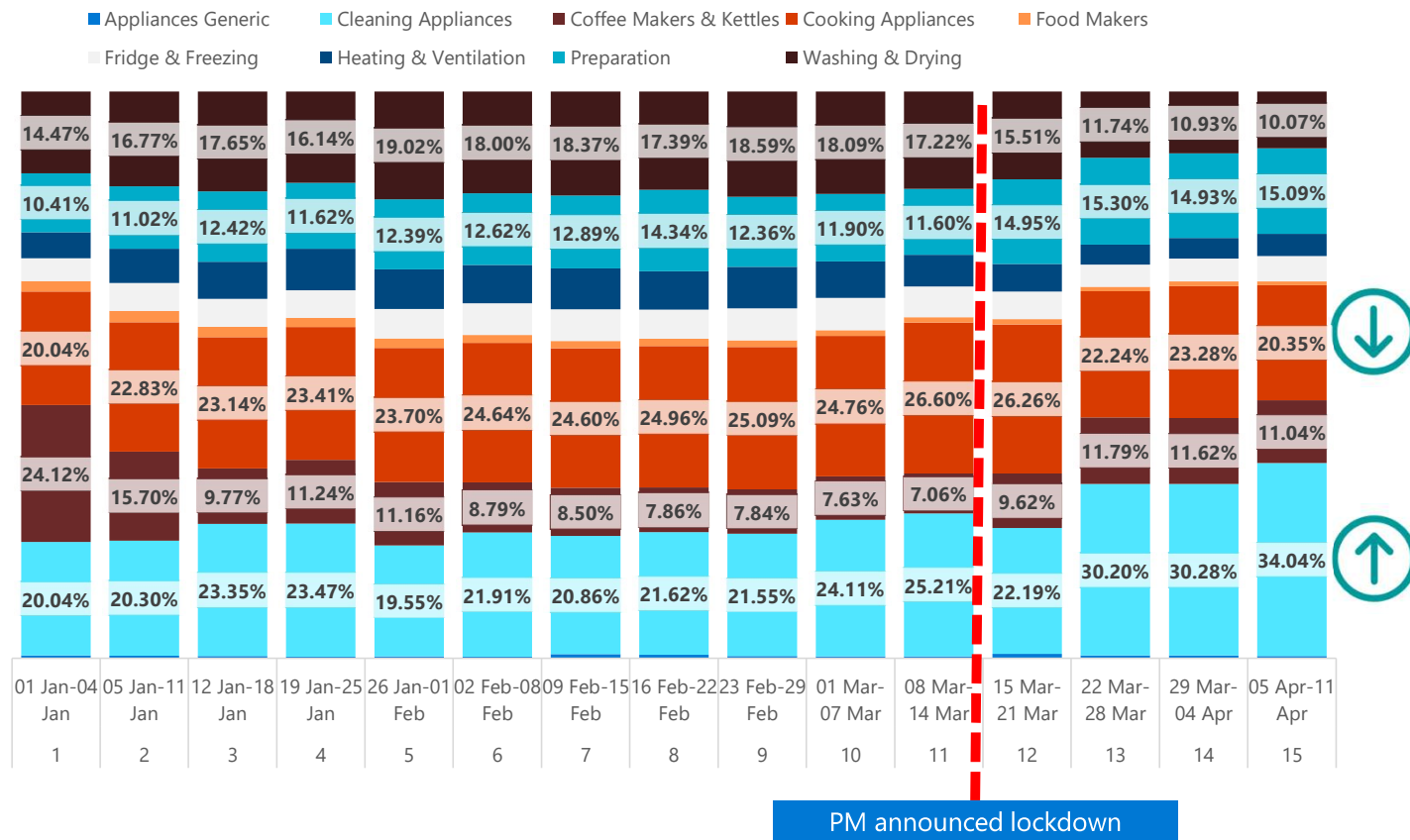


Category	QueryPhrase	Week over week CTR	Week over week CPC
Washing & Drying	used washing machines	372.73%	-23.96%
Coffee Makers & Kettles	{brand} coffee machines	324.43%	-24.24%
Fridge & Freezing	{brand} fridge	264.25%	-12.73%
Fridge & Freezing	cheap fridges sale	251.23%	-35.19%
Fridge & Freezing	cheap mini fridge	225.96%	-4.79%
Cleaning Appliances	{brand} products	207.43%	-16.48%
Heating & Ventilation	cooling fan	190.07%	-72.56%
Heating & Ventilation	beer cooler	175.65%	-56.09%
Cleaning Appliances	{brand}	172.22%	-47.43%
Cooking Appliances	cheapest microwaves	169.54%	-41.82%
Cleaning Appliances	pressure washers reviews	166.67%	-41.39%
Washing & Drying	cheapest dryer	145.00%	-91.38%
Coffee Makers & Kettles	coffee machine sale	130.53%	-19.75%
Cooking Appliances	{brand} microwaves	115.91%	-36.26%
Cooking Appliances	pot slow cooker	112.61%	-76.61%
Cleaning Appliances	best {brand} vacuum	109.52%	-18.21%
Heating & Ventilation	drinks cooler	104.73%	-71.35%
Preparation	{brand} mini mixer	102.78%	-9.06%

Source: Internal Data, O&O Search Data, All Device
*Considering Week 14 and 15

Consumer search focus has shifted significantly since lockdown

Total searches split by the different categories



With searchers confined indoors we are seeing a **shift in consumer focus** towards **'cleaning appliances'** and away from **'cooking appliances'**

UK: Top 5 year over year volume searches by category

Appliances Generics	Cleaning Appliances	Coffee Makers & Kettles	Cooking Appliances	Food Makers	Fridge & Freezing	Heating & Ventilation	Preparation	Washing & Drying
electrical goods	{brand} steam cleaners	pod coffee machines	{brand} electric cooker	waffle iron	ice maker machine	best dehumidifier	kitchen mixer	washing machines best buy
electrical shops	{brand} pressure washer special offers	pink kettle	{brand} microwaves	yogurt maker	fridge {brand}	dehumidifier {brand}	{brand} attachments	hotpoint {brand} dishwasher
{brand} electricals online	best vacuum	coffee machines uk	mini ovens electric	ice cream maker	double fridge	{brand} humidifier	{brand} artisan mixer	buy washing machine
{brand} electrical goods	best pressure washers	{brand} kettle	electric cookers 60cm	waffle maker	new fridge	portable air conditioning units uk	{Other brand} uk	hotpoint condenser dryer
{brand} electrical store	{Other brands}	best coffee machines	white microwave	ice cream makers	fridges uk	portable heater	stand mixers	{brand} washing machines

UK: Top 5 volume searches by category

Appliances Generics	Cleaning Appliances	Coffee Makers & Kettles	Cooking Appliances	Food Makers	Fridge & Freezing	Heating & Ventilation	Preparation	Washing & Drying
{brand} electrical goods	{brand}	{brand}	microwave	ice cream maker	fridge	dehumidifier	mixer	washing machines
electrical shops	{brand} pressure washer	coffee machines	microwave ovens	waffle maker	mini fridge	humidifier	blender	{brand} washing machine
{brand} electricals online	best vacuum cleaner	kettle	induction hob	yogurt maker	fridges	air conditioning units	{brand}	washing machine
{brand} electrical goods	{brand} vacuum cleaner	kettles	air fryer	waffle iron	refrigerator	air purifier	{other brand}	dishwasher
{brand} goods	pressure washer	best coffee machine	microwaves	ice cream makers	under counter fridge	air conditioning	{brand} mixer	tumble dryers

Source: Internal Data ,O&O Search Data, From Week 10th until Week 15th

UK hypothesis test conclusions

- In the UK, the hypothesis proved partially correct with some categories increasing as expected but with some not experiencing the same expected growth
- With people confined to indoors we are seeing an increase in searches for products aimed at improving and gaining efficiency with regards to their quality of life. This can be seen through an increase in searches for “cleaning appliances” and “heating & ventilation” products. Another increase we are seeing is in the “fridge freezing” category, presumable as people intend to stock up on frozen foods to minimise necessary shopping trips
- With the increase in commercial searches and clicks we are seeing reduced CPCs presenting an additional opportunity to drive more conversions by reaching mainline position 1 for the same advertising spend

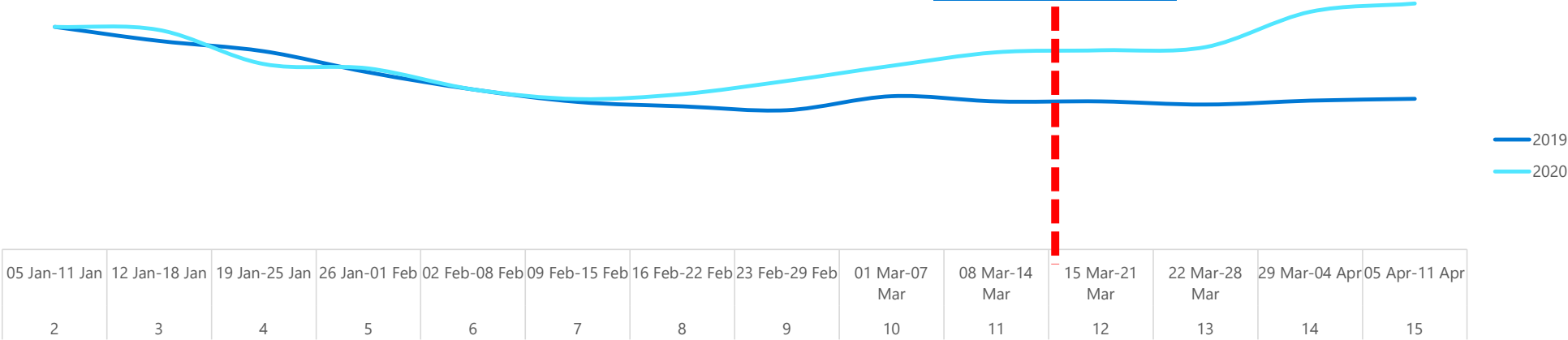
France

Searches and clicks rose **as approaching to the lockdown**

However, slightly slow down in searches last week. Despite, clicks still on an upward trend

Indexed searches

National lockdown



Indexed clicks



Source: Internal Data, O&O Search Data, All Device



Mainly led by cleaning and heating/ventilation

The remaining categories remained stable over the latter weeks

Indexed searches

- Appliances Generic (Electromenager Generique)
- Coffee Makers & Kettles (Café et Bouilloires)
- Fridge & Freezing (Frigo Congelateur)
- Washing & Drying (Lavage Sechange)
- Cleaning Appliances (Entretien)
- Cooking Appliances (Cuisine)
- Heating & Ventilation (Ventilation)

Wow 15th +20%

Wow 15th +5%

Wow 15th +13%

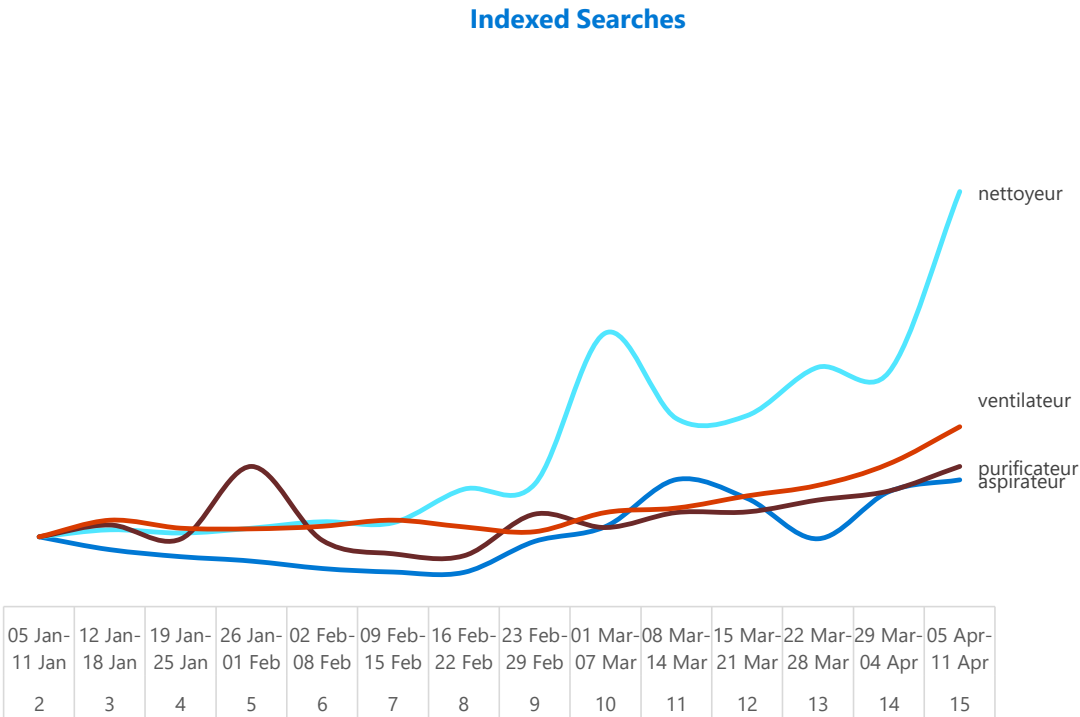
Category	Query sample
Appliances Generic	électro ménager
Cooking Appliances	mixeur, robot cuiseur
Heating & Ventilation	traitement de l'air, ventilateur
Cleaning Appliances	aspirateur, aspiratuer sans sac
Coffee Makers & Kettles	machines à café, cafetière filtre
Fridge & Freezing	refrigerateur, frigo
Washing & Drying	lave ligne, sèche linge

Source: Internal Data, O&O Search Data, All Device*

Last increment **driven by specific products**

With considerable uplift for nettoyeur and purificateur

Indexed Searches



Category	Driver	Top Query	WoW*
Cleaning Appliances	nettoyeur	nettoyeur haute pression karcher	+95%
Cleaning Appliances	aspirateur	aspirateur	+8%
Heating & Ventilation	purificateur	purificateur air	+34%

Source: Internal Data, O&O Search Data, All Device
 *Considering Week 14th and 15th

Most of the category has a stable trend in clicks and searches

Furthermore, several queries result convenient while CTR is on the rise



Category	QueryPhrase	Week over week CTR	Week over week CPC
Washing & Drying (Lavage Sechange)	lave linge {brand}	700.00%	-35.00%
Fridge & Freezing (Frigo Congelateur)	frigo americain {brand}	366.67%	-72.97%
Cooking Appliances (Cuisine)	yaourtiere {brand}	358.23%	-14.59%
Heating & Ventilation (Ventilation)	thermostat radiateur electrique	312.50%	-17.71%
Cooking Appliances (Cuisine)	crepiere electrique	286.65%	-22.57%
Washing & Drying (Lavage Sechange)	lave linge 3kg	270.83%	-99.51%
Fridge & Freezing (Frigo Congelateur)	frigo americain {brand}	264.10%	-2.50%
Cleaning Appliances (Entretien)	lance nettoyeur haute pression	263.16%	-63.41%
Cleaning Appliances (Entretien)	aspirateur sans fil pas cher	245.24%	-71.98%
Heating & Ventilation (Ventilation)	ventilateur ordinateur	229.11%	-56.54%
Fridge & Freezing (Frigo Congelateur)	temperature congelateur	228.51%	-84.53%
Cooking Appliances (Cuisine)	sterilisateur uv	217.38%	-34.48%
Cleaning Appliances (Entretien)	aspirateur centralise	212.71%	-27.01%
Cooking Appliances (Cuisine)	friteuse {brand}	211.94%	-56.86%
Cooking Appliances (Cuisine)	blender {brand}	190.10%	-38.03%
Fridge & Freezing (Frigo Congelateur)	petit congelateur coffre	180.36%	-66.28%
Fridge & Freezing (Frigo Congelateur)	frigo bar	179.45%	-17.90%
Fridge & Freezing (Frigo Congelateur)	frigo trimixte	179.07%	-71.41%

Reading example

(fake figures just for example) :

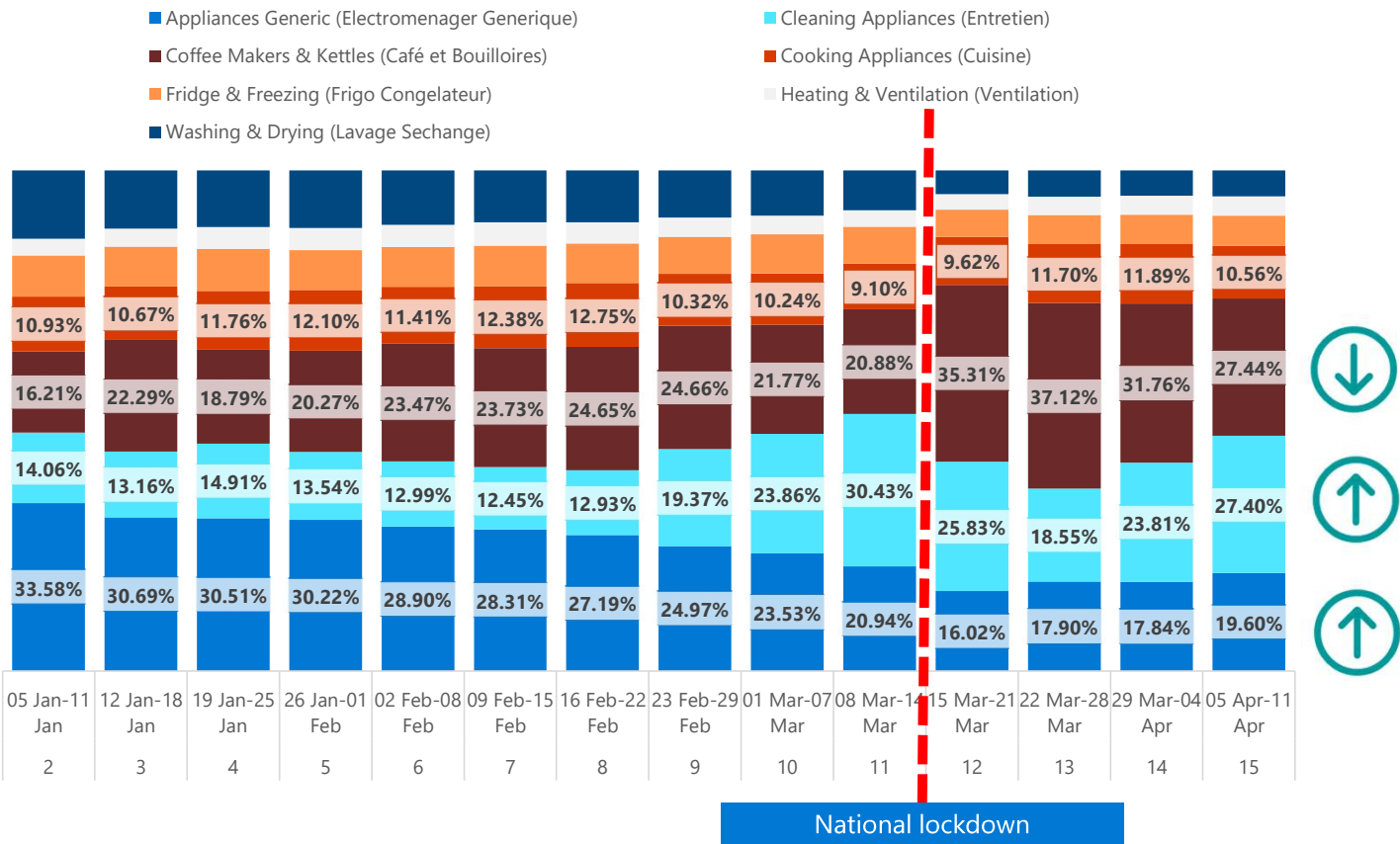
-if CTR was 1% on week #14 and was 8% on week #15, we show this as +700%.

-if CPC was 1€ on week #14 and was 0.65€ on week #15, we show this as -35%.

Source: Internal Data, O&O Search Data, All Device
*Considering Week 14th and 15th

Changing preferences and search patterns

Total searches split by the different categories



Cleaning appliance has increased its share of volume since the beginning of the lockdown. Similar trend for appliances generic. The remaining categories recorded small fluctuations over time.

Source: Internal Data, O&O Search Data, All Device

FR: Top 5 year over year volume searches by category

Appliances Generics	Cleaning Appliances	Coffee Makers & Kettles	Cooking Appliances	Fridge & Freezing	Heating & Ventilation	Washing & Drying
{brand} electromenager	aspirateur sans sac	code {brand}	robot pâtissier {brand}	congelateurs	ventilateur plafonnier	meilleur lave ligne
electromenager ligne	aspirateur eau poussieres	commande capsules {brand}	mixeur	frigo congel	ventilateur brumisateur	lave ligne 3kg
electromenager cuisine	aspirateur {brand}	cafe {brand}	robot multifunction cuiseur	frigo americain pas cher	ventilateurs	{brand} lave vaisselle
envie electromenager	{brand} nettoyeur haute pression	{brand} commande capsules	crepiere electrique	frigo trimixte	deshumidificateur professionnel	nettoyer lave vaisselle
eelectroomenager	aspirateur sans fil	commande {brand}	blender magimix	congelateur	thermostat four	nettoyage lave vaisselle

FR: Top 5 % volume searches by category

Appliances Generics	Cleaning Appliances	Coffee Makers & Kettles	Cooking Appliances	Fridge & Freezing	Heating & Ventilation	Washing & Drying
{brand} electromenager	aspirateur	{brand}	blender	frigo	ventilateur	lave vaisselle
electromenager	aspirateur sans sac	{brand} commande	mixeur	refrigerateur	thermostat	lave ligne
{other brand} electromenager	aspiratuer robot	{brand} capsules	yaourtiere	congelateur {brand}	purificateur air	lave vaisselle encastrable
{other brand} electromenager	aspirateur sans fil	capsules {brand}	robot pâtissier	congelateur	ventilateur plafond	seche ligne
miele elctromenager	nettoyeur haute pression	{brand} fr	friteuse electrique	frigo americain	humidificateur air	lave vaisselle pas cher

Source: Internal Data ,O&O Search Data, From Week 10th until Week 15th

Conclusions for France

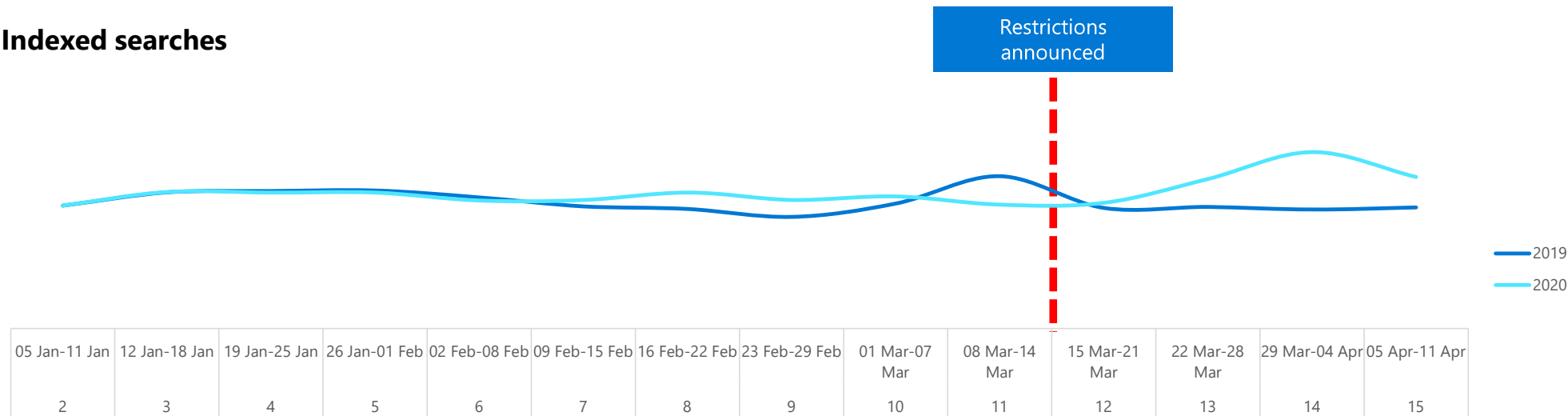
- In France, the hypothesis proved correct.
- As coffees (places not drink) are closed, we saw a spike in “Coffee Machines and Kettles”. “Cooking appliances” also grew a lot, as French people have both time and will to cook (as a hobby). The “Fridge & Freezing” category also grow, which makes senses when some people want to have a food “stock”.
- With more people at home and health/sanity concerns, “cleaning” and “ventilation” categories also grew a lot.

Germany

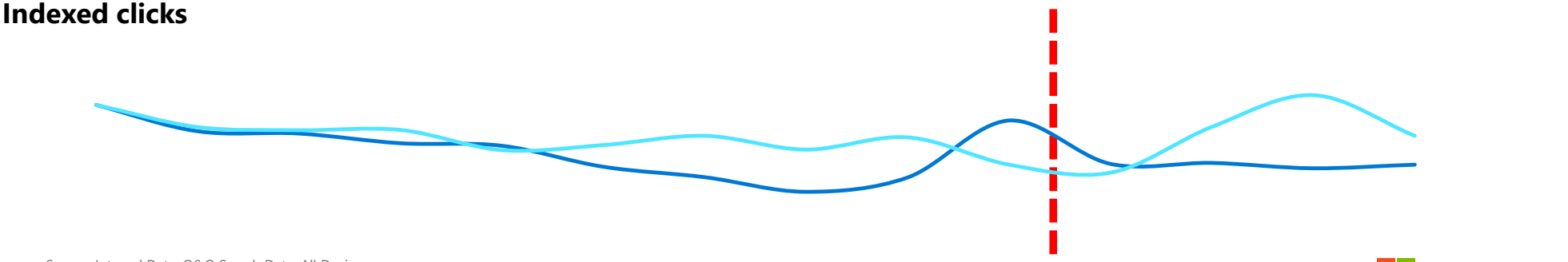
Searches and clicks rose **immediately after the restrictions**

However, slightly slow down in searches and clicks last week

Indexed searches



Indexed clicks



Source: Internal Data, O&O Search Data, All Device

Despite an overall downturn, **appliances generic & heating/ventilation are rising** as per the recent weeks

Indexed searches

— Appliances Generic — Cleaning Appliances — Coffee Makers & Kettles
 — Cooking Appliances — Food Makers — Fridge & Freezing
 — Heating & Ventilation — Preparation — Washing & Drying



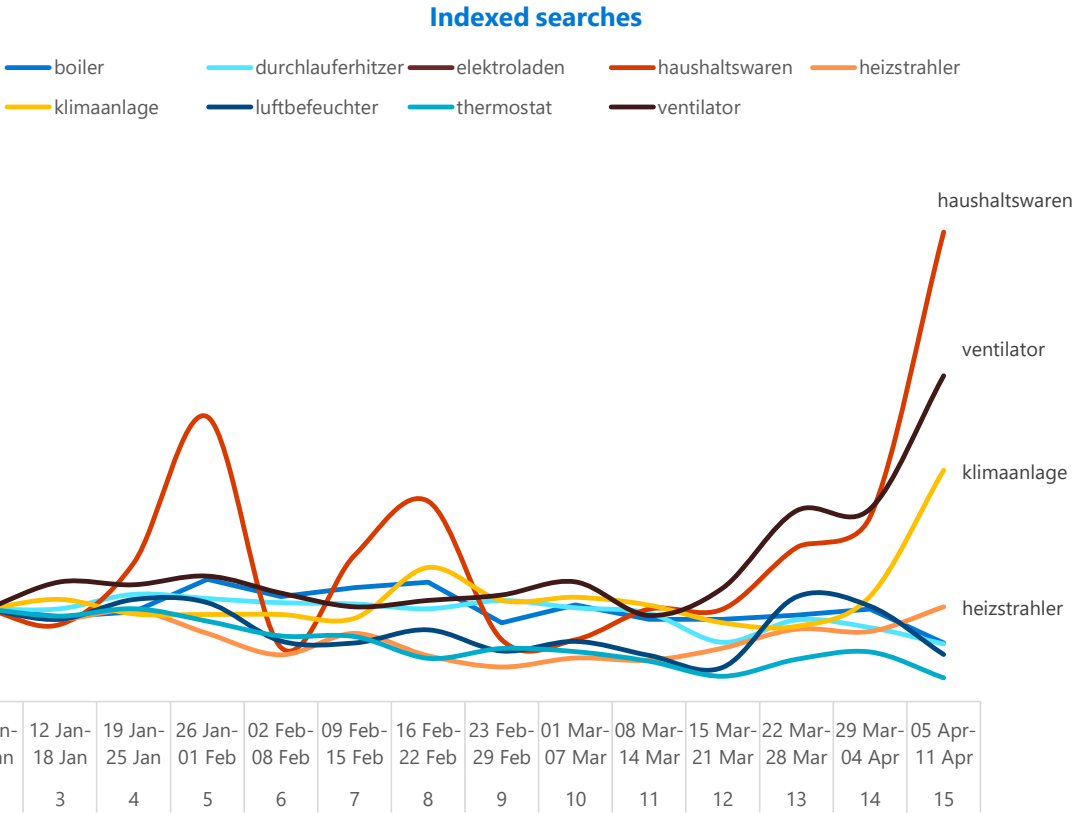
05 Jan- 11 Jan	12 Jan- 18 Jan	19 Jan- 25 Jan	26 Jan- 01 Feb	02 Feb- 08 Feb	09 Feb- 15 Feb	16 Feb- 22 Feb	23 Feb- 29 Feb	01 Mar- 07 Mar	08 Mar- 14 Mar	15 Mar- 21 Mar	22 Mar- 28 Mar	29 Mar- 04 Apr	05 Apr- 11 Apr
2	3	4	5	6	7	8	9	10	11	12	13	14	15

Source: Internal Data, O&O Search Data, All Device*

Category	Query sample
Appliances Generic	Elektrogeräte
Cooking Appliances	Mikrowelle
Heating & Ventilation	Klimaanlage, Luftbefeuchter
Cleaning Appliances	Staubsauger, Hochdruckreiniger
Coffee Makers & Kettles	Kaffeemaschine, Kaffeevollautomat
Fridge & Freezing	Kühlschrank, Gefriertruhe
Washing & Drying	Waschmaschine, Trockner

Uplift mainly driven by specific products

With considerable growth for 'Klimaanlagen'



Category	Driver	Top query	Week over week*
Appliances Generic	haushaltswaren	haushaltswaren	+154%
Heating & Ventilation	ventilator	ventilator	+66%
Heating & Ventilation	klimaanlage	mobile klimaanlage	+225%
Heating & Ventilation	heizstrahler	heizstrahler	+34%

Source: Internal Data, O&O Search Data, All Device
*Considering Week 14th and 15th

Most of the categories have a stable trend in clicks and searches

Furthermore, several queries show convenient cost per click (CPC) while click through rate (CTR) is on the rise.

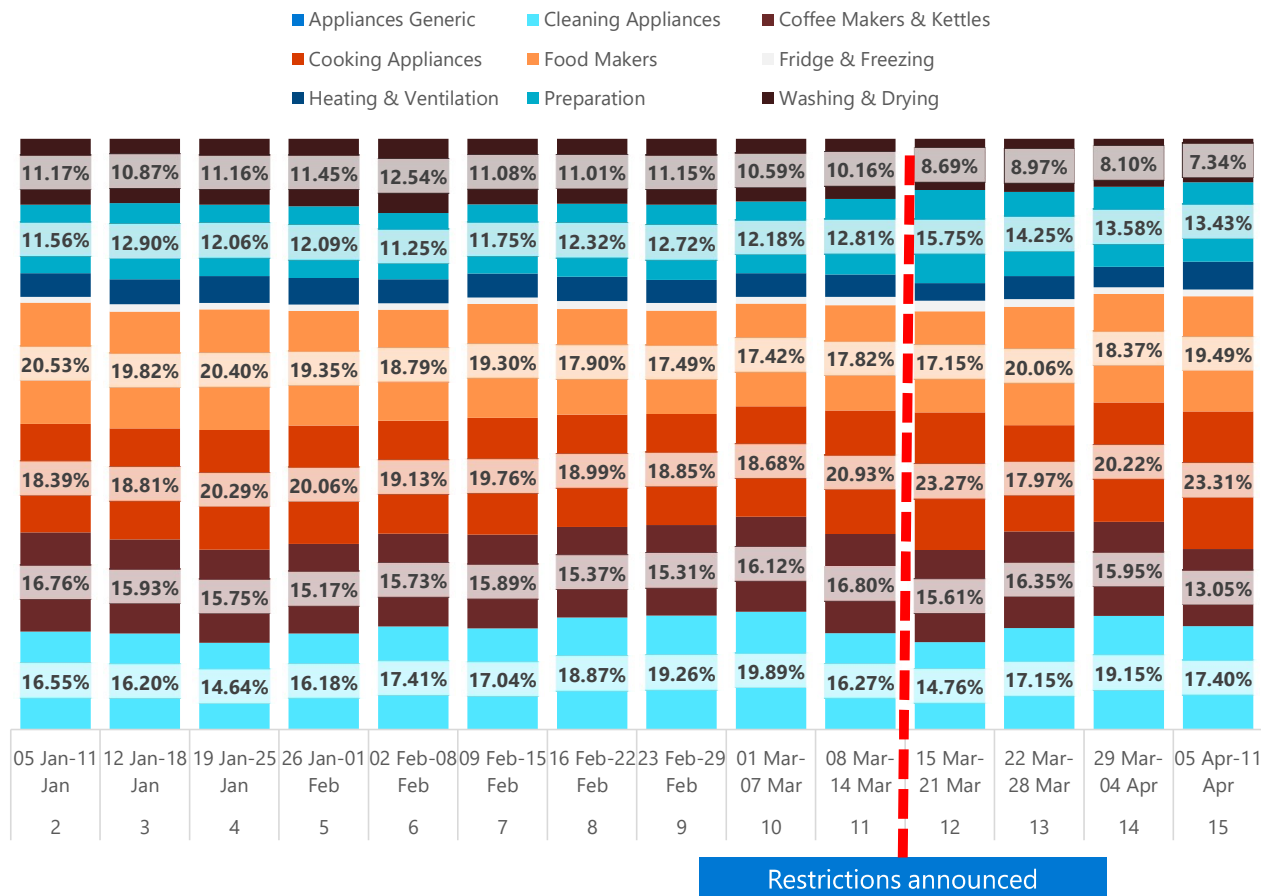


Category	QueryPhrase	Week over week CTR	Week over week CPC
Cooking Appliances	kleiner backofen	874.23%	-58.38%
Cleaning Appliances	staubsauger kabellos	491.95%	-81.75%
Coffee Makers & Kettles	krups kaffeemaschinen	322.22%	-47.28%
Cooking Appliances	holzkohlegrill edelstahl	272.57%	-58.32%
Cooking Appliances	specksteinofen	257.59%	-20.49%
Coffee Makers & Kettles	kaffeemaschinen mit mahlwerk	217.46%	-14.40%
Washing & Drying	lg waschmaschinen	216.67%	-51.26%
Cooking Appliances	minibackofen mit umluft	206.67%	-69.69%
Coffee Makers & Kettles	{brand} espressomaschine	203.57%	-39.63%
Food Makers	sandwichmaker rezepte	186.93%	-20.26%
Washing & Drying	waeschetrockner test	185.12%	-13.09%
Cleaning Appliances	beutelloser staubsauger	183.56%	-26.73%
Coffee Makers & Kettles	kaffeevollautomat reduziert	170.87%	-8.50%
Cooking Appliances	neff backofen bedienungsanleitung	169.32%	-62.58%
Washing & Drying	waschmaschinen test 2019	165.55%	-12.76%
Cooking Appliances	multikocher	142.48%	-38.08%
Cleaning Appliances	akku stielstaubsauger test stiftung warentest	131.65%	-9.62%
Cooking Appliances	toaster test	123.51%	-62.96%

Source: Internal Data, O&O Search Data, All Device
*Considering Week 14th and 15th

Changing preferences and search patterns

Total searches split by the different categories



None of the categories is a huge player when it comes to % of searches captured. The categories considered slightly fluctuated over time, without any significant drop/increase. Share of searches are more equally distributed than in other markets

Top 5 YoY Volume Searches by Category

Cleaning Appliances	Coffee Makers & Kettles	Cooking Appliances	Food Makers	Fridge & Freezing	Heating & Ventilation	Preparation	Washing & Drying
akku staubsauger test 2019	kaffeevollautomat angebot des tages	induktionskochfeld test stiftung warentest	eierkocher testsieger stiftung warentest	gefriertruhen	klimaanlage testsieger stiftung warentest	nudelmaschinen stiftung warentest	{brand} waschmaschinen
akku hochdruckreiniger	{brand} kaffeemaschine	{brand} testsieger mit hohem wirkungsgrad	waффeleisen testsieger stiftung warentest	gefriertruhe	luftbefeuchter stiftung warentest	kitchenaid toaster	waschtrockner stiftung warentest
test akku staubsauger	kaffeevollautomaten testsieger 2019	spirituskocher	{other brand}	gefrierkombination	durchlauferhitzer 220v steckdose	mixer	{brand} waschmaschinen stiftung warentest
test hochdruckreiniger	{other brand} kaffeemaschine	eismaschinen test stiftung warentest	sandwichmaker	{brand} - gefrierkombination	split klimaanlage	mixer stream	waeschetrockner testsieger stiftung warentest
handstaubsauger akku	kaffeevollautomaten angebote schnaeppchen	campingkocher	waффeleisen	{brand} - gefrierkombination test	mobile klimaanlage	{brand} vakuumierer	waschmaschine toplader

Top 5 % Volume Searches by Category

Cleaning Appliances	Coffee Makers & Kettles	Cooking Appliances	Food Makers	Fridge & Freezing	Heating & Ventilation	Preparation	Washing & Drying
{brand} staubsauger	kaffeevollautomaten	weber grill	{brand}	{brand} - gefrierkombination	durchlauferhitzer	{brand}	waschmaschine
vorkwerk staubsauger	{brand} kaffeevollautomat	mikrowelle	{brand}	Gefriertruhe	ventilator	kitchenaid	{brand} waschmaschine
staubsauger	kaffeemaschinen	wasserkocher	{brand}	Gefrierkombination	luftbefeuchter	mixer	waschmaschine kaufen
Hochdruckreiniger	kaffeevollautomaten testsieger 2019	grill	{brand}	{other brand} gefrierkombination	klimaanlage	{brand} crystal	wäschetrockner
Staubsauger stiftung warentest sehr gut	kaffeemaschine	dunstabzugshauben	waффeleisen	gefriertruhen test stiftung warentest	{brand} eltron durchlauferhitzer	mixer stream	waschtrockner

Source: Internal Data ,O&O Search Data, From Week 10th until Week 15th

Conclusions for Germany

- Cleaning and heating & ventilation were the major drivers for the uplift in searches across most of the markets.
- In particular, Britons and German users seemed to prefer portable air conditioner. On the other hand, French consumers were more interested towards purifier when it comes to heating/ventilation.
- While for the cleaning category, pressure washer was gaining traction in searches in France and Britain. However, higher growth rate was recorded in France (+148% week over week).