



# Impact of COVID-19 on Mobile and Sim buying

As of April 11, 2020



# HYPOTHESIS

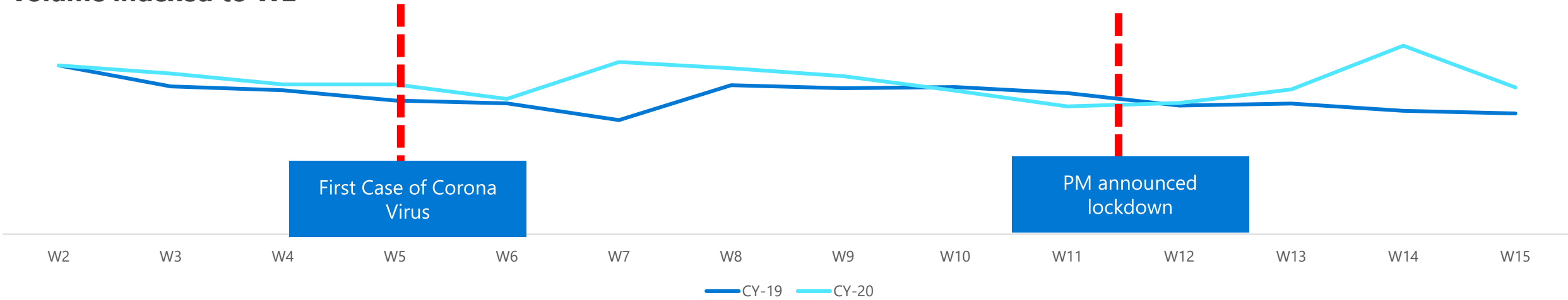
Lockdown and the current economic-pandemic situation means changes to the status quo –

1. Changes to consumer preferences and shopping behaviour
2. Changes to the need and availability
3. Changes to the competition landscape

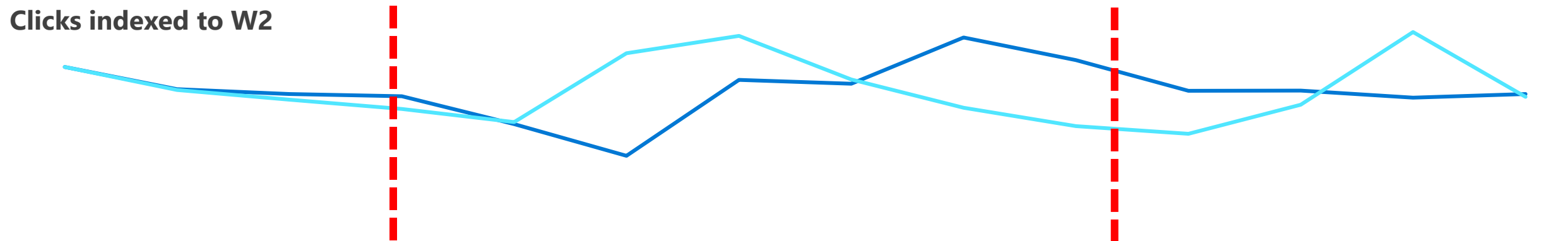
How has telecom (mobiles and sim) buying impacted and changed since the beginning of 2020?

# Slight spike in the recent weeks driven by recent launches and consumers engagement with service providers

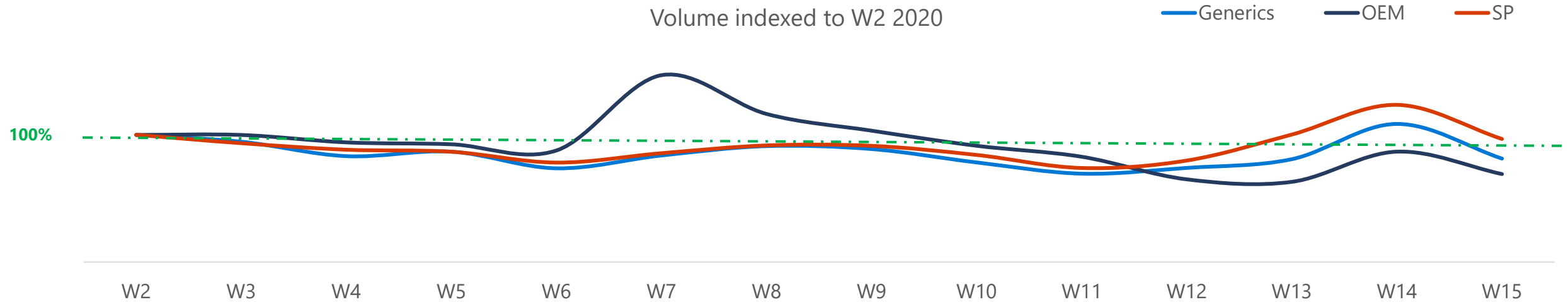
Volume indexed to W2



Clicks indexed to W2



# Consumers are engaging more with service providers and performing more generic searches looking for better deals



- ### Top 10 Generic Queries
- mobile phone deals
  - mobile phones
  - sim only deals
  - mobile phones
  - mobile phone
  - mobiles
  - best mobile phone deals
  - sim free mobile phones
  - phone deals

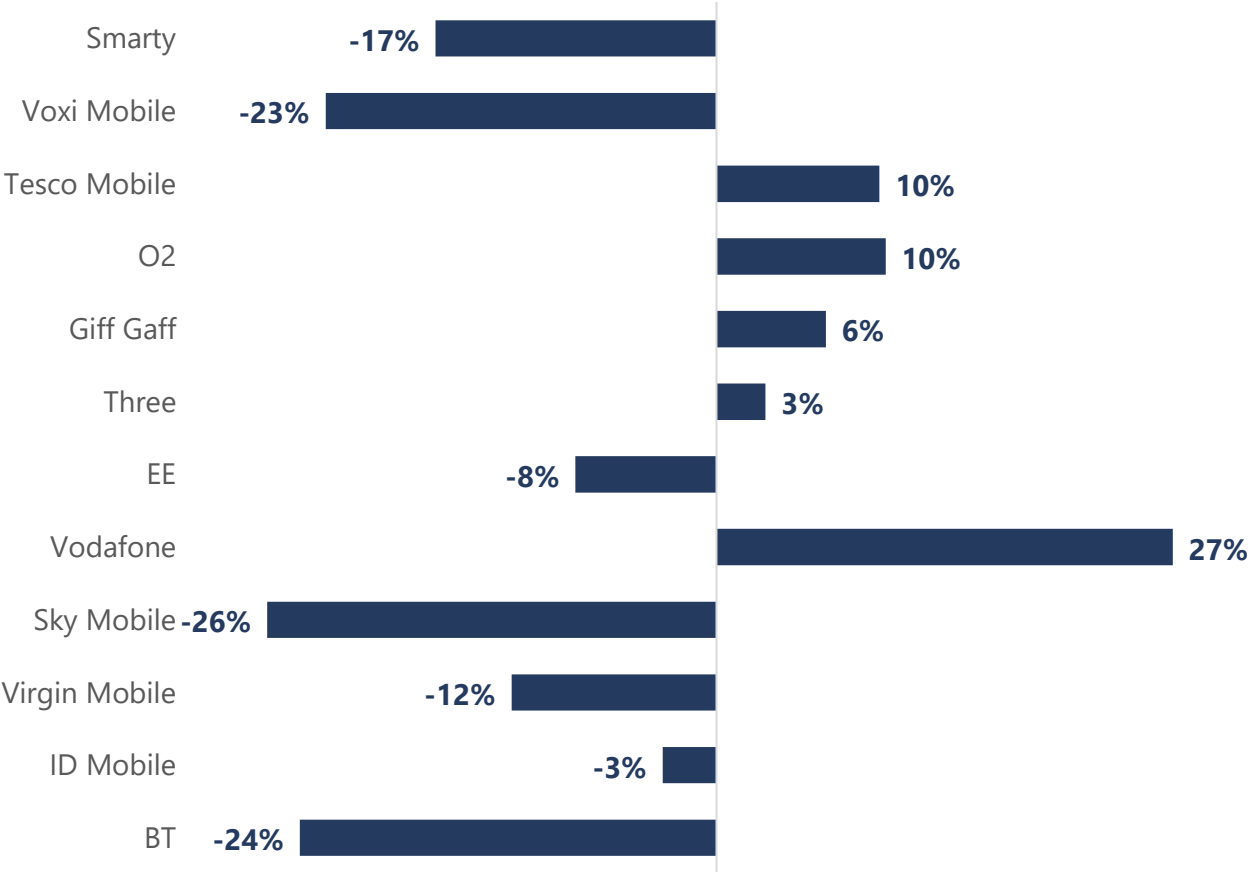
Source: Internal Microsoft Data,, All Device  
 \*SP: Service Provider  
 OEM: Original Equipment Manufacturer



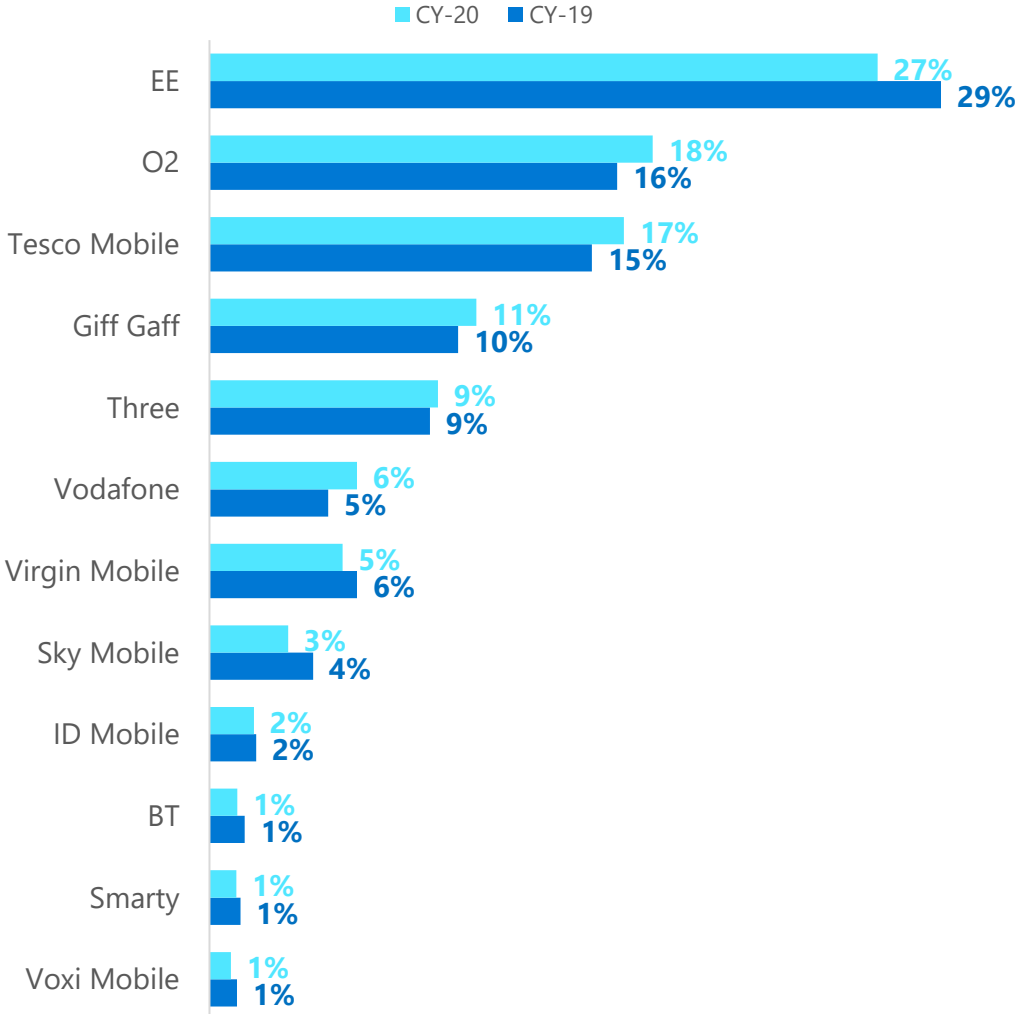
# Service Providers

# Remain visible & stay connected as consumers shift brands

Service Provider brand searches  
W12-W15 compared to W2 – W5 2020

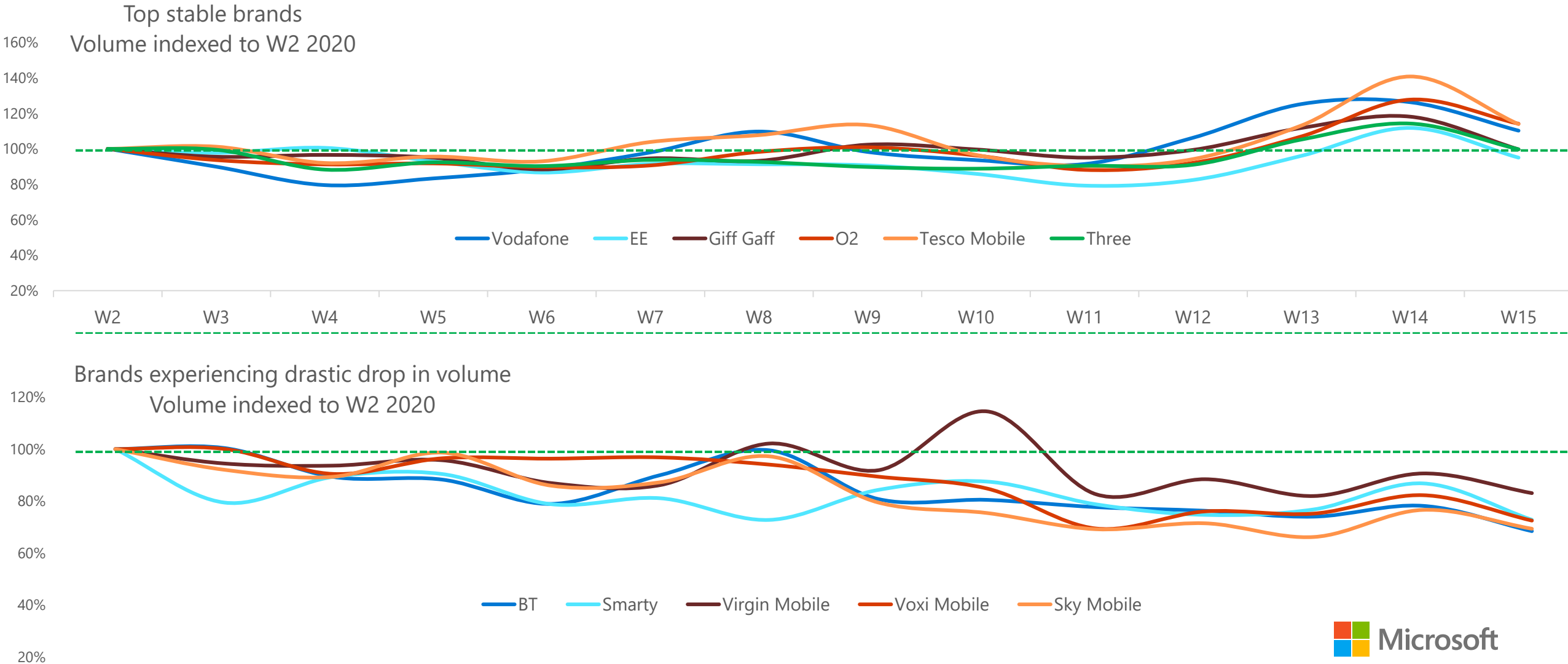


YoY service provider brand searches (W12 – W15)



Source: Microsoft Internal Data, O&O Search Data, All Device  
W2 starting 5<sup>th</sup> Jan 2020, W12 starting 15<sup>th</sup> Mar 2020

# Changing competition landscape, highly influenced by the deals & rewards



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

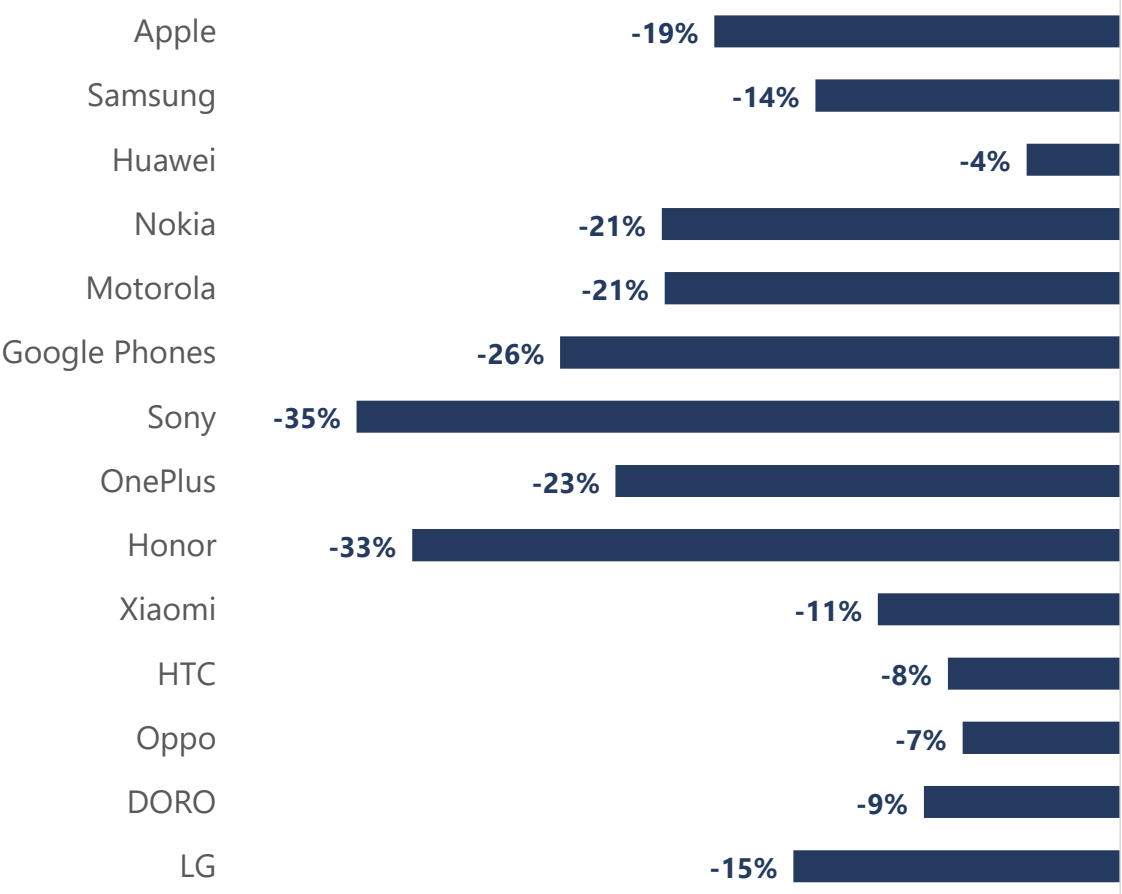
OEMs



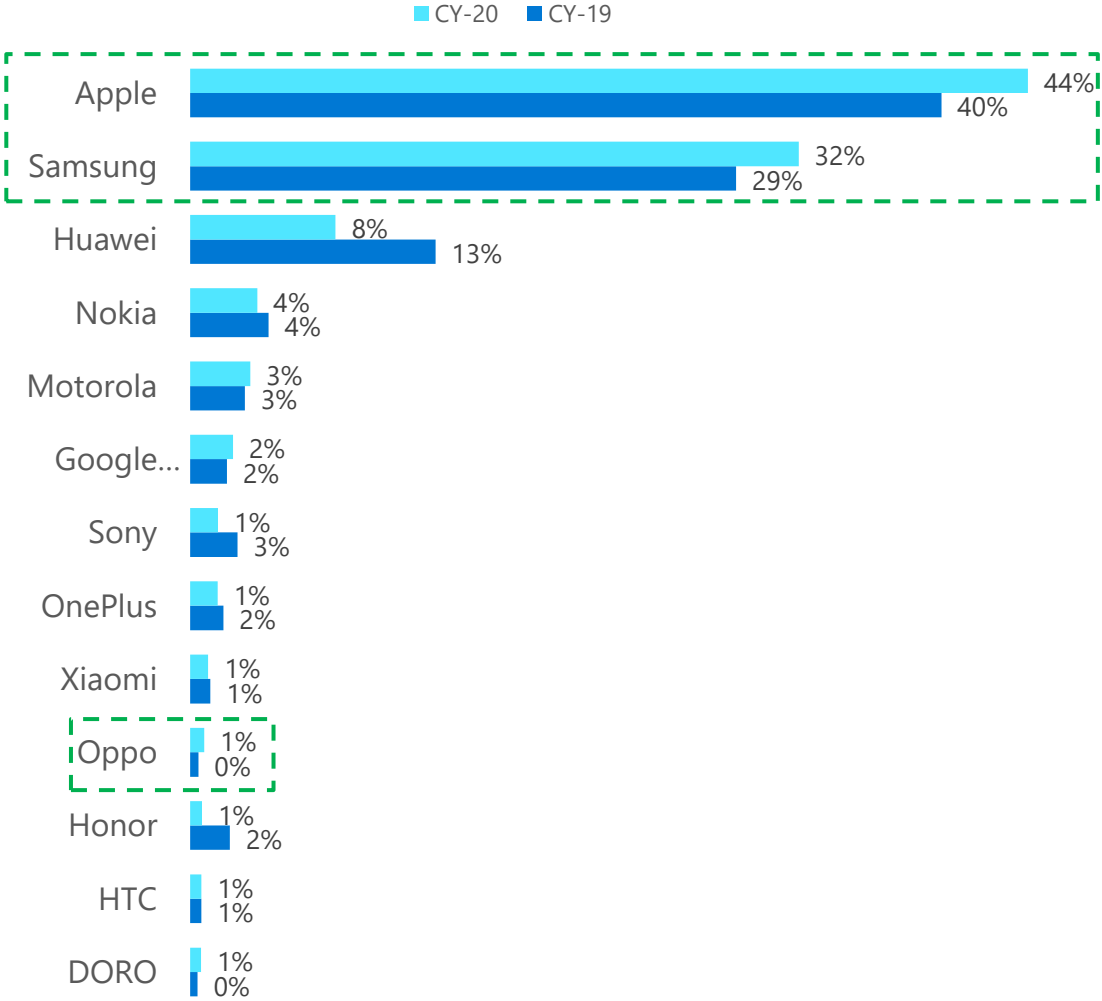
# Pandemic has affected all brand- some brands more than others

## But popular brands have grown stronger in their share

OEM brand and model searches  
W12-W15 compared to W2 – W5 2020



YoY OEM brand & model searches (W12 – W15)



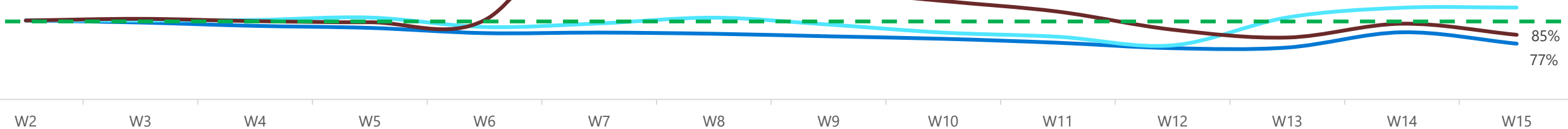
Source: Internal Data, O&O Search Data, All Device  
W2 starting 5<sup>th</sup> Jan 2020, W12 starting 15<sup>th</sup> Mar 2020

# Overall lower phone (model + brand) searches across the brand spectrum

## But new phone launches continue to create intermittent peaks

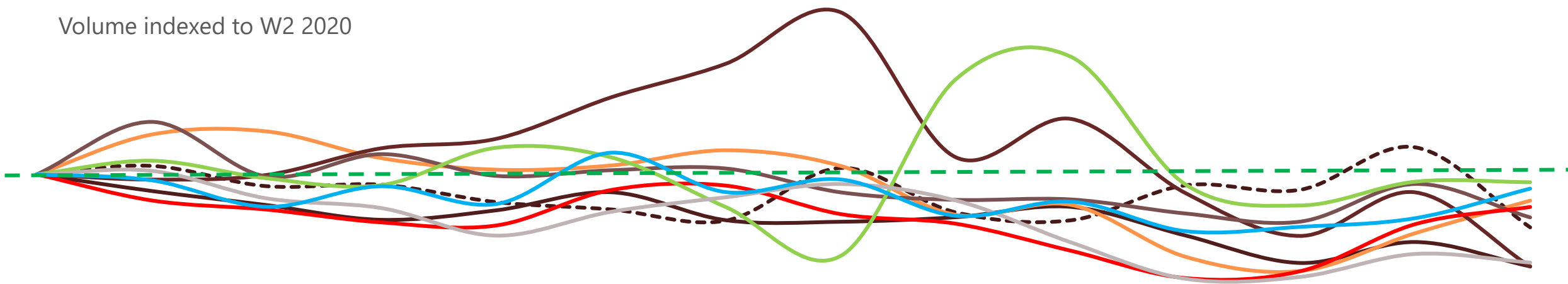
Volume indexed to W2 2020

— Apple — Huawei — Samsung



Volume indexed to W2 2020

--- Others (Doro,HTC,LG) — Google Phones — Honor — Motorola — Nokia — OnePlus — Oppo — Sony — Xiaomi



# Grab greater engagement at cheaper cost on brand searches

Avg. CPC & CTR Comparison (W12 – W15 over W2 – W5)

## Service Providers

Avg CTR : 6%

Avg CPC : -27%

## OEMs

Avg CTR : 5%

Avg CPC : -9%

## Generics

Avg CTR : -2%

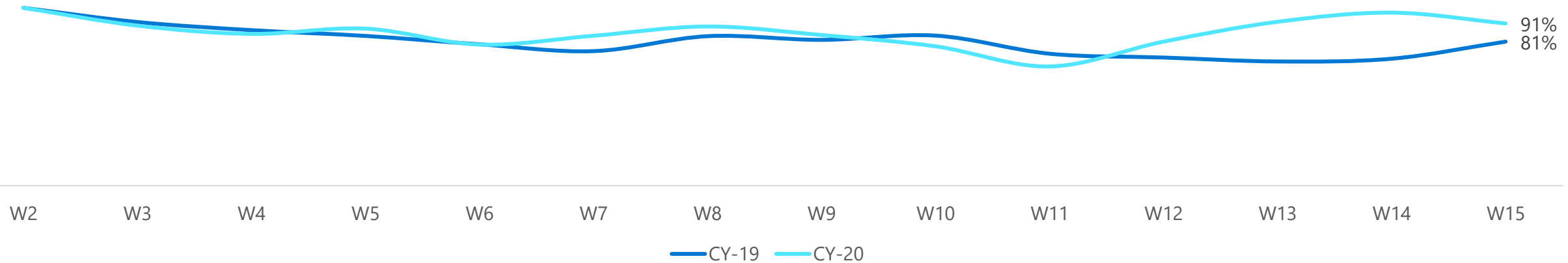
Avg CPC : 2%

# SIMO-PAYG

[Sim only – Pay as you go]

# SIMO-PAYG popularity has further raised since lockdown

Volume indexed to W2 2020



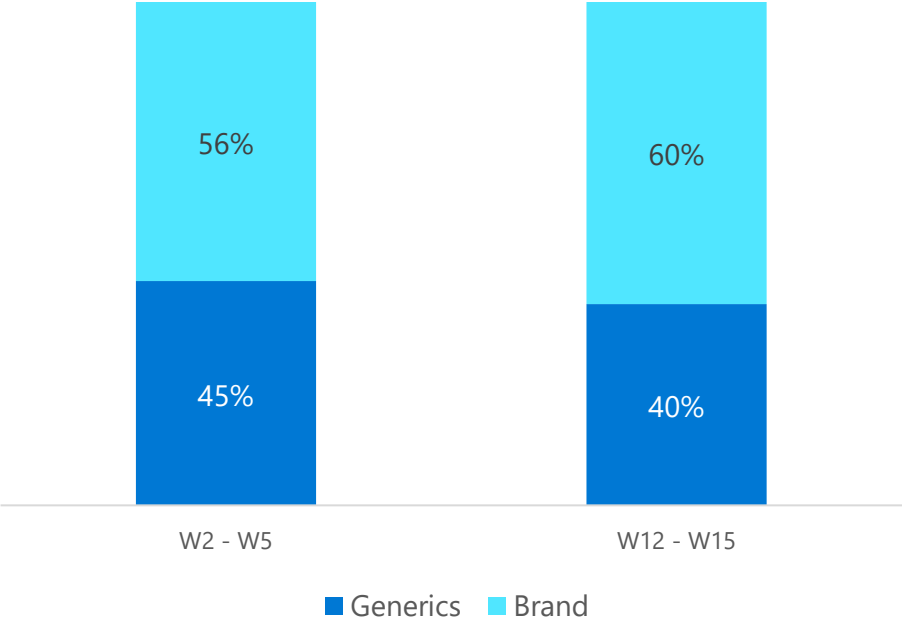
## Top 10 SIMO-PAYG Queries

vodafone top up	ee sim only deals
sim only deals	sim
o2 top up	giff gaff sim only
ee top up	best sim only deals
tesco mobile top up	sim only deals uk

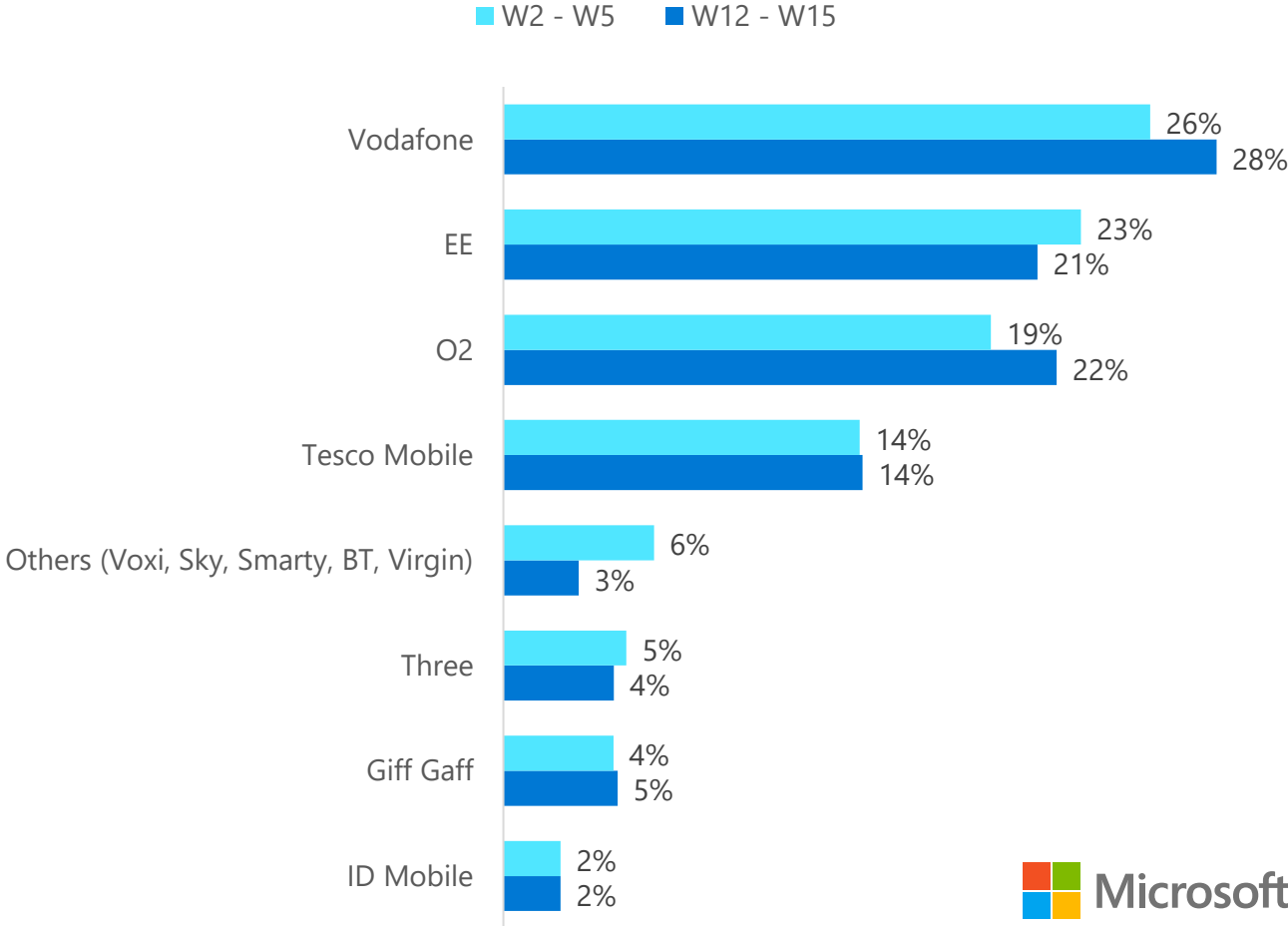
# “Top up” and “deals” are the key to SIMO-PAYG

While some are looking for best deals shifting brands, others need more top -up

Generics Vs. Brand Split for SIMO-PAYG



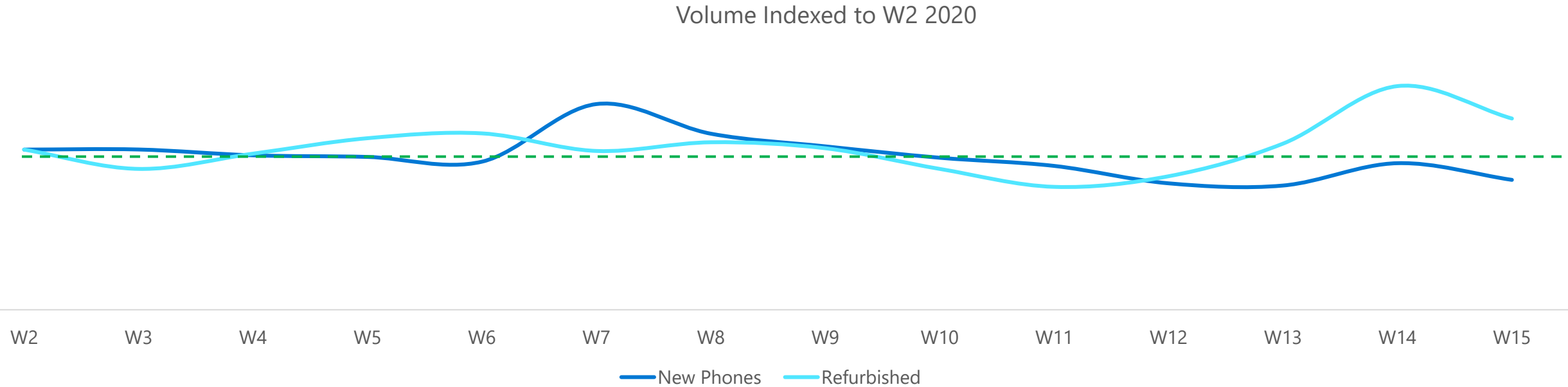
Service Provider SIMO-PAYG brand searches  
W12-W15 compared to W2 – W5 2020



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

# Used Phones

# Used-Refurbished phones got special attention since the lockdown, mostly Apple-iPhone led



## Category Definition:

**Refurbished category** includes and queries containing used/refurbished/secondhand/old and other related terms

**New Phone:** any OEM (mobile specific query) and model related queries without any refurbished category query

## Top 10 Refurbished Queries

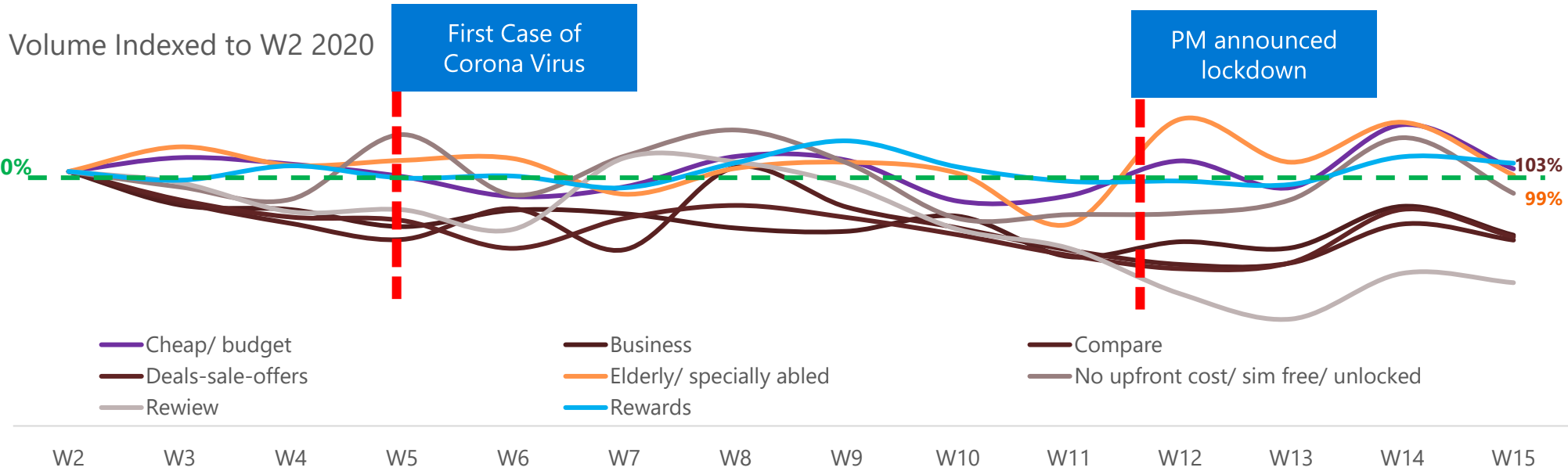
refurbished iphone  
apple refurbished  
refurbished iphones  
refurbished iphone 7  
apple refurbished uk

reconditioned iphone  
refurbished iphone x  
iphone x refurbished  
used iphone  
second hand iphone



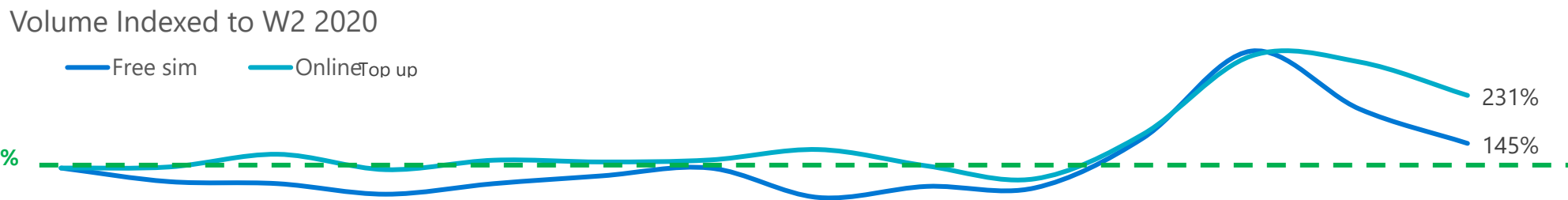
# General Sub-Trends

# Post lockdown, simple & cheap phones for older people and freebies were popular



**Trending trends**

- Phone for elders
- Cheap & Budget phones
- Free sims
- Online Top-ups
- Rewards & Perks



# SIMO-PAYG popularity has further raised since lockdown

## Expand further into generics

Generics are critical as consumers look for best deals across the spectrum of service providers, resellers and OEMs, esp. for SIMO-PAYG

## Revise and Revamp your ad copies

Reflect today's need and sentiments of consumers through your ad copies – deals, rewards-perks, offers-sale

## Easy to use phones for elderly audience

Since the lockdown, there is an increasing interest for simple, easy to use phones along with free sims and top ups

## Take benefit of cheaper clicks and changing competition landscape

With changing competition landscape and consumer behaviour, we are seeing greater avg. CTR and lower avg. CPC, esp. on brand terms

## Continuing SIMO-PAYG popularity

Alongside technology stagnation & and premium phone prices, the current situation and forth coming economic downturn is expected to boost this trend further

## Expand further into used phones segment

Used-Refurbished phones have received special attention since the lockdown, mostly Apple-iPhone led



Microsoft Advertising. Intelligent connections.