



Broadband & Mobile Trends DE, ES, IT

As of April 25, 2020

Microsoft Advertising. Intelligent connections.



Summary – Key Findings and Actions



Initial Hypothesis

Since lockdown restrictions have taken place across Europe, users are forced to stay indoor and are spending more time online.

Working from home has become more popular and therefore reliable, high-speed connection and handsets are required.

- **How do consumers search for the needed broadband and mobile services?**
- Do they tend to favour faster and expensive providers or are rather seeking for quick and cheap options?



Key Findings

In line with expectations, we have seen **growth in both searches and clicks for this kind of services and products** across all countries examined (IT,ES,DE).

However, **there are local nuances.**

- Italian and Spanish users tend to search more for mobile brands and queries for fiber connections and sim card surged post lock-down
- In Germany instead we have seen a deeper interest for 5G and tech providers



Recommended Actions

Persistent advertiser opportunity across markets with not only search volume growth but clicks as well, which indicates a strong user's commercial intent.

We strongly advice our partners to:

- **Drive conversions** by reaching the Mainline and expanding their keyword mix in order to drive relevant traffic to their online stores
- Make sure their **brand traffic is fully covered** to defend their position



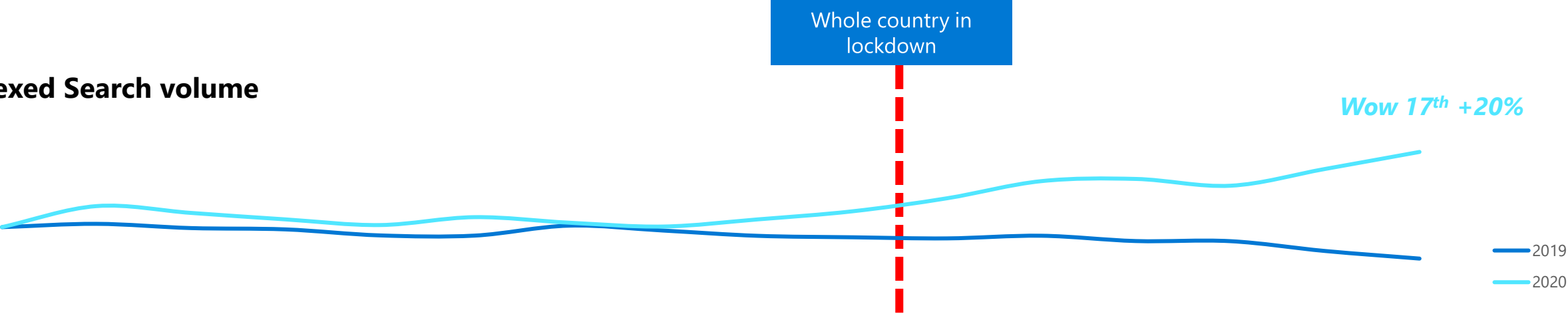
Italy



IT: Searches **grew as approaching the lockdown**

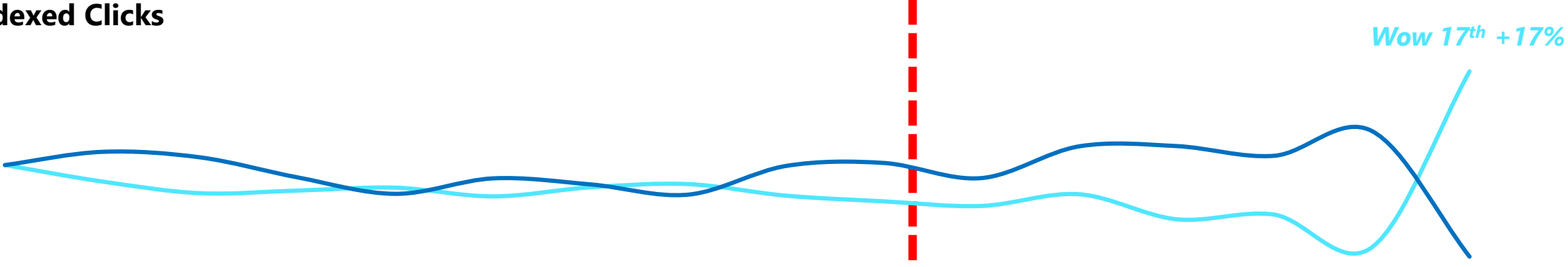
clicks rose with a similar pace, showing **strong commercial intent**

Indexed Search volume



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	12 Apr-18	19 Apr-25
Jan	Jan	Jan	Feb	Feb	Feb	Feb	Feb	Mar	Mar	Mar	Mar	Apr	Apr	Apr	Apr
2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

Indexed Clicks



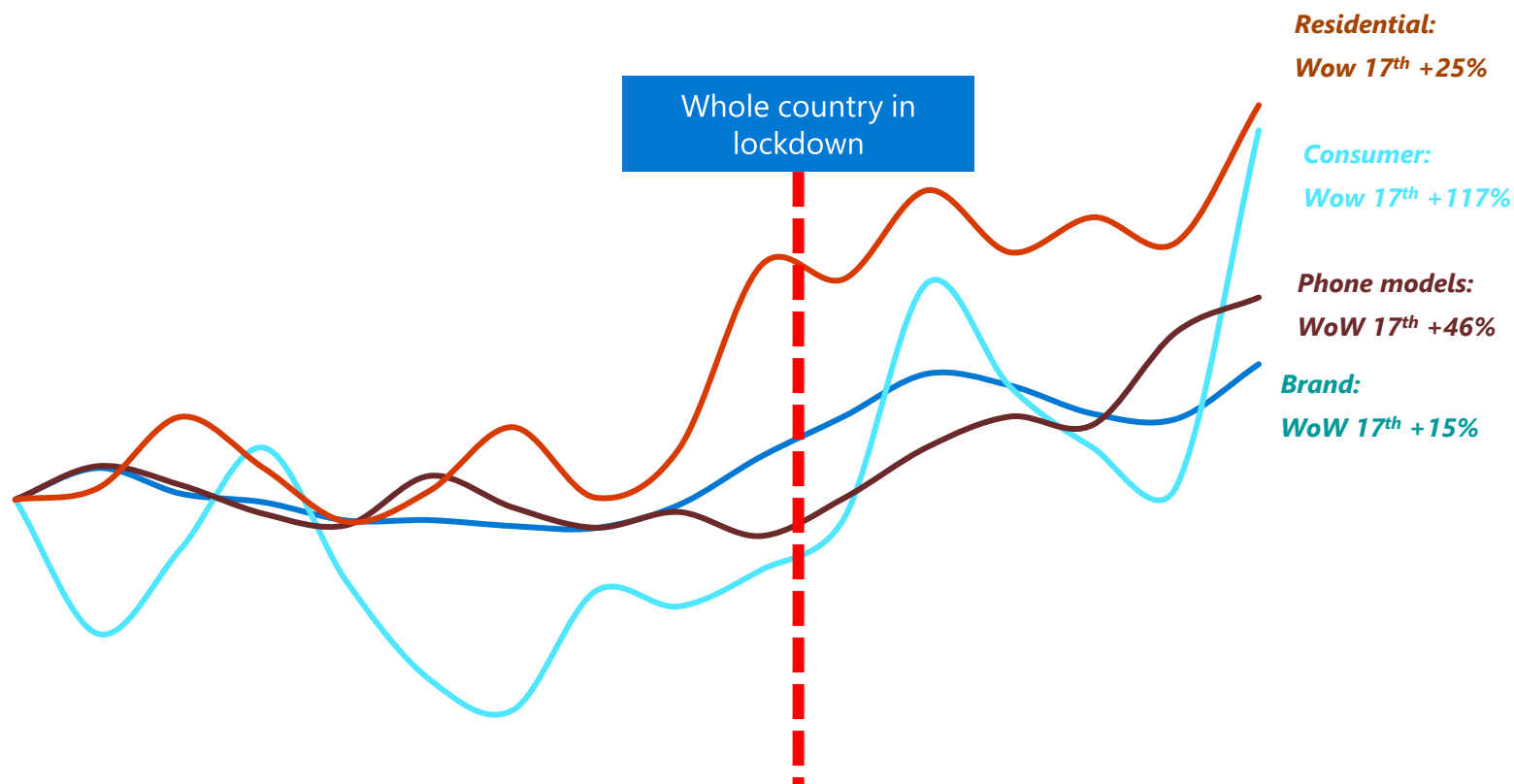
Source: Microsoft Advertising Internal Data, All Device



IT: Gradual uplift driven by all categories considered

However, **residential** and **consumer** are contributing to the rise as per the recent weeks

Search Indexed Volume



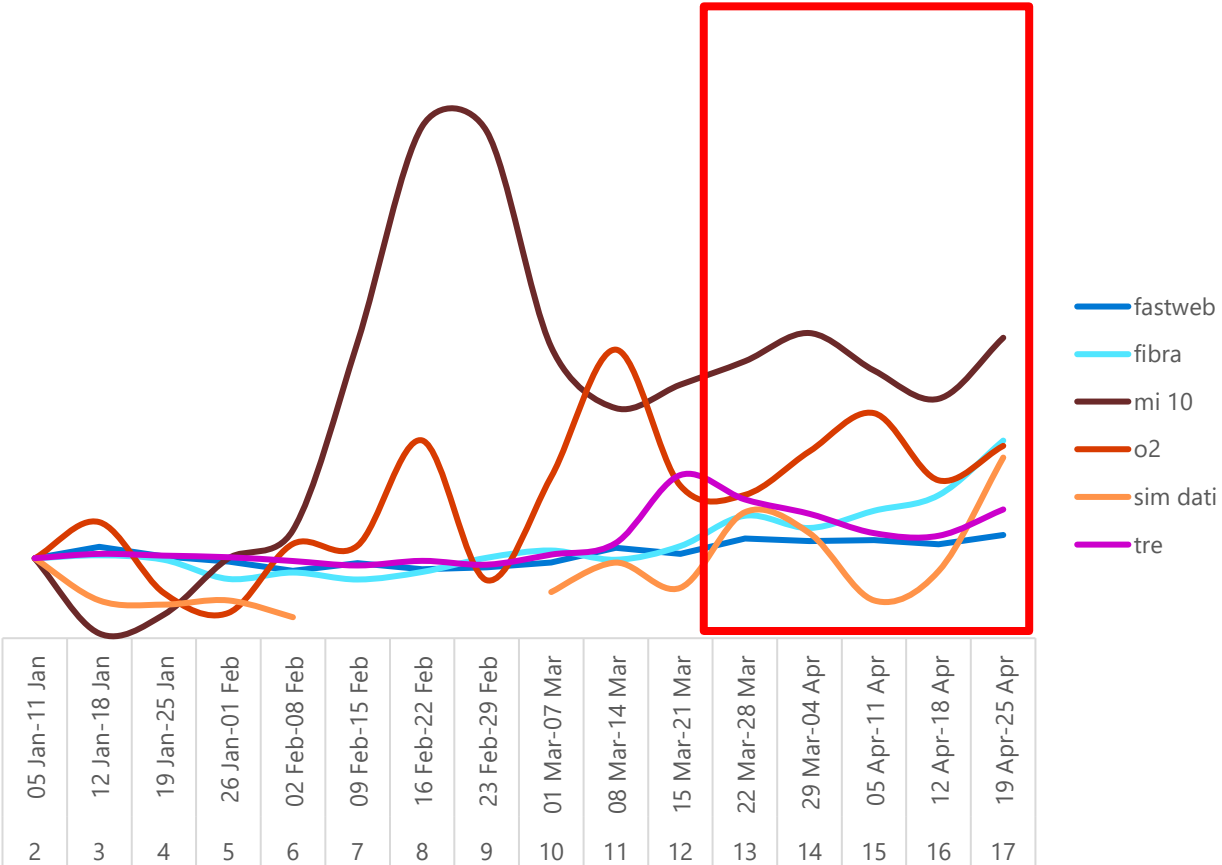
Category	Query sample
Residential	adsl senza telefono, internet fibra
Consumer	chiavetta internet, sim dati
Phone models	apple iphone, samsung galaxy
Brand	fastweb, linkem

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	12 Apr-18 Apr	19 Apr-25 Apr
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Source: Microsoft Advertising Internal Data, All Device

IT: The previous increment was mainly **driven by specific queries**

Search Indexed Volume



Category	Driver	Top Query	WoW*
Consumer	sim dati	sim dati	+168%
Mobile Brand	tre	wind tre business	+26%
Broadband Brand	fastweb	fastweb offerte	+10%
Residential	fibra	fibra offerte	+38%
Phone models	mi 10	xiaomi mi 10 pro	+25%

Source: Microsoft Advertising Internal Data, All Device
 *Considering Week 16th and 17th based on top query

IT: Several queries see **continuous weekly click growth** with **CPCs dropping** significantly in some cases due to lack of competition



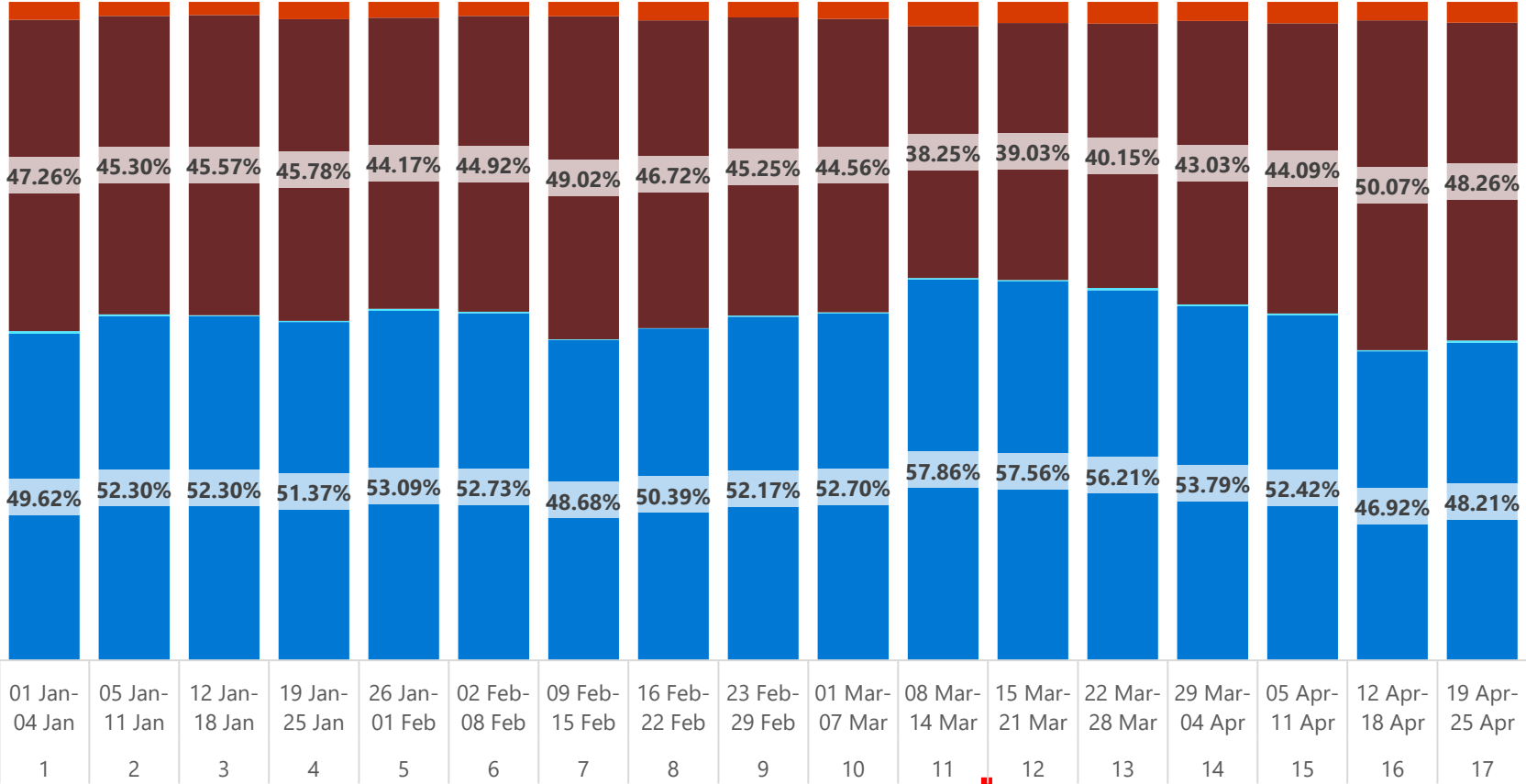
Category	Query	WoW CTR	WoW CPC
Phone models	samsung galaxy m20	291.30%	-29.24%
Residential	offertae adsl solo internet	220.00%	-32.08%
Phone models	xiaomi mi 10 pro	177.16%	-81.06%
Phone models	redmi note 7 prezzo	175.41%	-44.44%
Brand	samsung a30s	158.96%	-33.54%
Phone models	samsung j6 plus	132.88%	-77.78%
Brand	tre telefonia	128.57%	-54.09%
Brand	tre offerte	127.18%	-23.95%
Brand	offertae infostrada adsl	125.00%	-36.59%
Phone models	huawei y6 2018	110.70%	-10.87%
Phone models	samsung s8	99.47%	-14.53%
Brand	vodafone mobile	98.28%	-8.33%
Phone models	samsung smartphone	85.93%	-49.91%
Brand	copertura linkem	75.28%	-29.36%
Residential	test velocita adsl	64.97%	-11.64%
Residential	internet fibra	64.10%	-29.52%

Source: Microsoft Advertising Internal data, All Device
*Considering Week 16 and 17

IT: Changing Preferences and Search Patterns

Total searches split by the different categories

Brand Consumer Phone models Residential



Residential has increased its share of volume since the beginning of the lockdown, gaining percentage from brand. This trend is consistent with the need to stay indoors.

Whole country in lockdown

Source: Microsoft Advertising Internal Data, All Device



IT: Top 5 YoY Volume Searches by Category

Residential	Consumer	Brand	Phone models
adsl offerte senza telefono	offerte sim ricaricabili	tim adsl	lphone se
verifica copertura fibra	offerte mobile ricaricabile	fastweb copertura	Galaxy a40
fibra offerte	offerte mobile	tim fibra copertura	samsung s7 edge
offerte fibra	offerte sim	tim linea fissa	samsung s10e
fibra	internet sneza limiti	copertura fibra tim	lphone rigenerati

IT: Top 5 Volume Searches by Category

Residential	Consumer	Brand	Phone models
adsl	offerte mobile	fastweb	xiaomi
fibra	sim dati	tre	lphone se
fibra ottica	offerte mobile ricaricabile	3	lphone xr
copertura fibra	offerte internet mobile	tim internet	lphone x
offerte adsl	offerte sim ricaricabili	infostrada	samsung s10

ITALY

Main Takeaways



KEY FINDINGS

The initial hypothesis is confirmed by the high growth seen in search volume and clicks for Broadband & Mobile services and products.

- *Consumer* and *Residential* product categories have been the driving force in this growth with search and clicks soaring at faster rate than the other categories.
- Broadband services are driven by searches for *fibra* and *offerte adsl senza telefono*, and *offerte fibra*. Price sensitivity and the offers are showing momentum
- Traffic for mobile is driven by queries for establish brands but also generic searches like *sim dati* grew significantly (+168%) indicating the need for flexible and cheap connection without the terms and conditions of a cable service.

RECOMMENDED ACTION

Persistent advertiser opportunity across markets with not only search volume growth but clicks as well, which indicates a strong user's commercial intent.

We strongly advice our partners to:

- **Drive conversions** by reaching the Mainline and expanding your keyword set to drive relevant traffic to your stores
- Make sure your **brand traffic** is fully covered to defend and/or expand your position in the marketplace
- Leverage **generic search traffic** to push your offers and services. This holds true across both Broadband and Mobile categories.
- Keep an eye on **pricing**. Some high growth search queries have seen a decreasing average CPC which would easily lead to your expected ROI

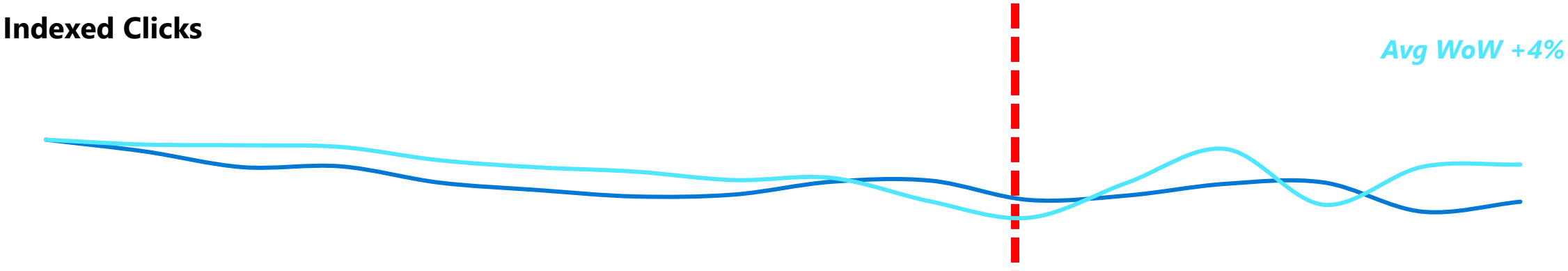
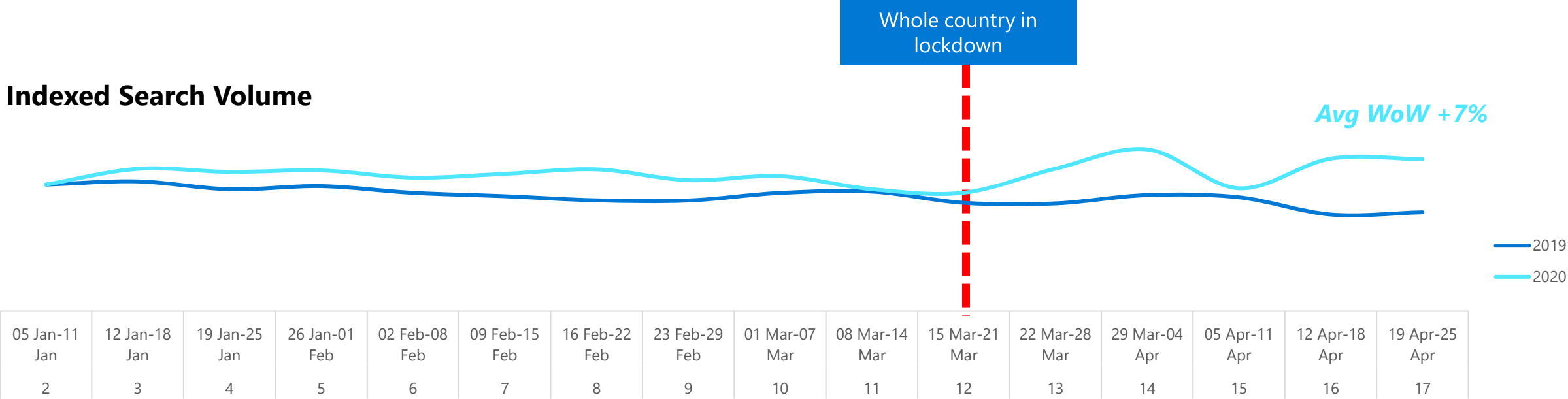


Germany



DE: Searches and clicks **fluctuated after the lockdown**

However, both metrics performed better than last year and were on a stable trend as per last weeks.

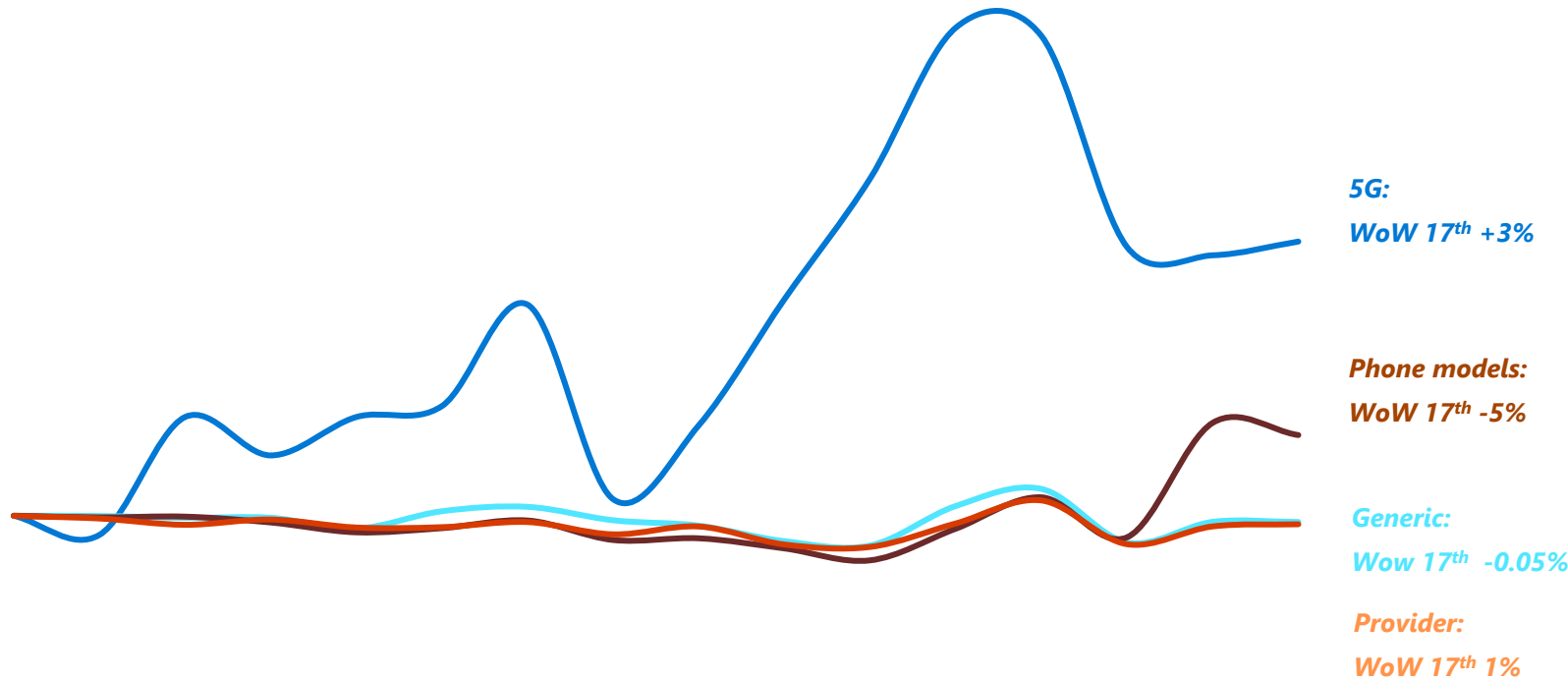


Source: Microsoft Advertising Internal Data, All Device



DE: **5G soared sharply** since providers have started to offer this service
 Remaining categories slightly slowed down during the recent weeks.

Search Indexed Volume



Category	Query sample
Generic	aktuelle smartphone, android handy
Phone models	iphone 8, samsung galaxy
Provider	aldi talk, o2
5G	5g handy, galaxy fold 5g

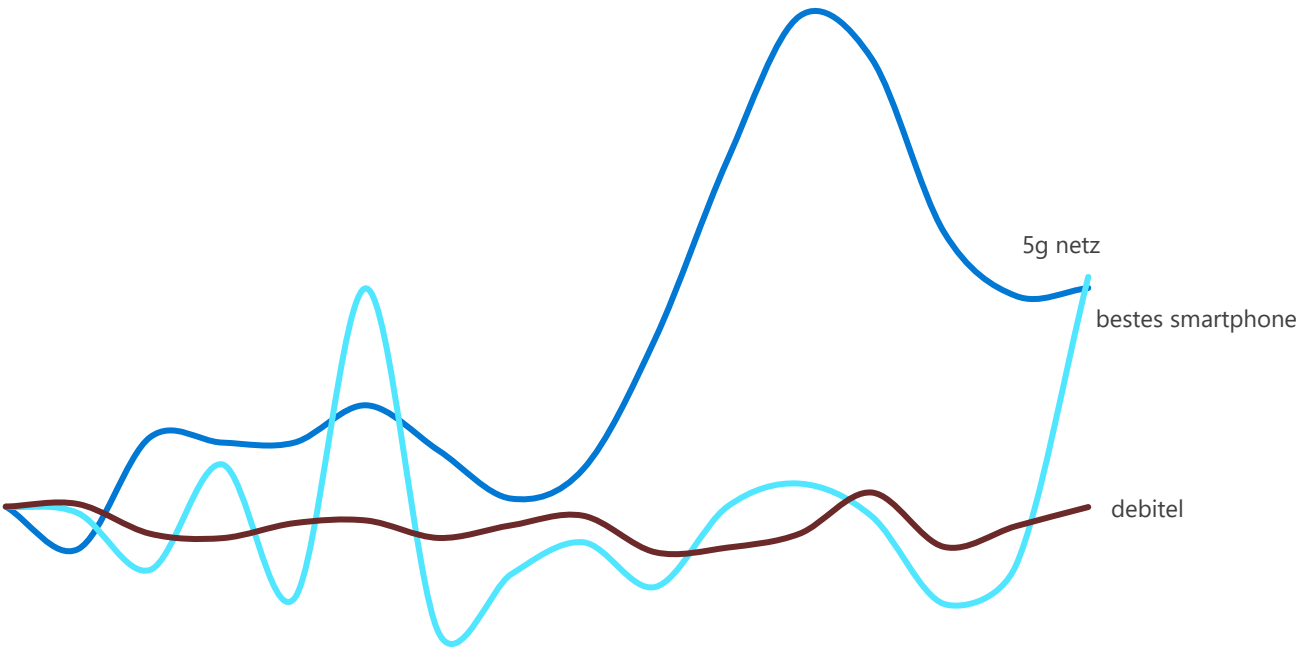
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2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17

Source: Microsoft Advertising Internal Data, All Device

DE: 5G increment was mainly **driven by generic queries**

Despite other categories marginally dropped in volume, some queries are still enjoying rising in consumer interest.

Search Indexed Volume



Category	Driver	Top Query	WoW*
5G	5g	5g netz	+3%
Generic	smartphone	bestes smartphone	+19%
Provider	debitel	debitel	+4%

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	12 Apr-18 Apr	19 Apr-25 Apr
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Source: Microsoft Advertising Internal Data, All Device
 *Considering Week 16th and 17th based on top query



DE: Several queries seeing **continuous weekly click growth** with **CPCs dropping** significantly in some cases due to lack of competition

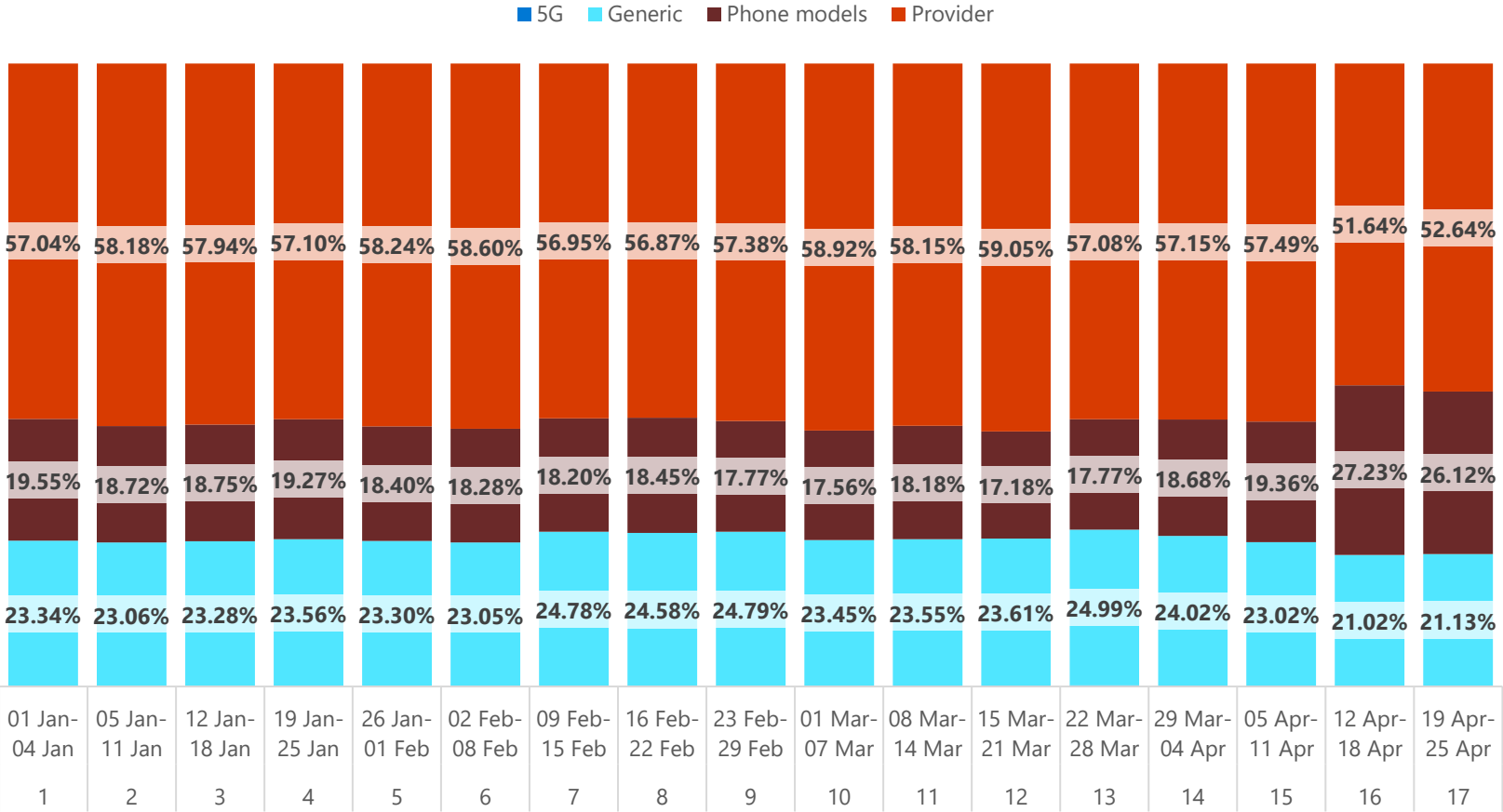


Category	Query	WoW CTR	WoW CPC
Generic	mini smartphone	413.33%	-30.00%
Generic	xiaomi mi 10 pro mit vertrag	408.70%	-33.93%
Generic	billigste sim karte ohne vertrag	342.35%	-93.58%
Provider	o2 telefonica	308.62%	-57.84%
Generic	handy und vertrag	303.67%	-52.13%
Generic	handystar betrug	275.55%	-54.22%
Generic	preiswerte handys ohne vertrag	227.71%	-55.42%
Generic	handy auf rechnung bestellen	225.00%	-97.11%
Generic	mittelklasse smartphone 2020	222.12%	-66.04%
Generic	smartphone versicherung	193.33%	-34.96%
Generic	telephone	190.76%	-20.32%
Phone models	iphone 3gs	186.79%	-33.71%
Generic	neue handys	184.62%	-93.87%
Generic	die billigsten handytarife ohne vertrag	177.17%	-11.27%
Generic	bestes smartphone 2019	153.45%	-49.68%
Phone models	apple iphone se2	143.00%	-17.44%
Generic	handy huawei	142.96%	-66.28%

Source: Microsoft Advertising Internal data, All Device
 *Considering Week 16 and 17

DE: Changing Preferences and Search Patterns

Total searches split by the different categories



Provider has decreased its share of volume since the beginning of the lockdown. On the other hand, phone models category gained volume as per the same period.

Whole country in lockdown

Source: Microsoft Advertising Internal Data, All Device



DE: Top 5 YoY Volume Searches by Category

5G	Generic	Phone models	Provider
5g netz	bester handyvertrag	Iphone se neu	aldi talk paket s
Iphone 5g	gigaset smartphone	Iphone se 2	aldi talk paket s
samsung galaxy fold 5g	handy prepaid	apple iphone se	aldi talk sim karte aktivieren
samsung galaxy fold 5g preis	Internet vertrag	refurbished iphone	O2 online
samsung galaxy s20 5g mit vertrag	handys kaufen	Iphone se	winsim tarife

DE: Top 5 Volume Searches by Category

5G	Generic	Phone models	Provider
5g netz	handy	Iphone	O2
samsung galaxy fold 5g	smartphone	Iphone se	aldi talk
Iphone 5g	handyvertrag	Iphone 8	mobilcom debitel
samsung galaxy fold 5g preis	handytarife vergleich	Iphone xr	winsim
samsung galaxy s20 5g mit vertrag	handy mit vertrag	Iphone se 2020	yourfone

GERMANY

Main Takeaways



KEY FINDINGS

The initial hypothesis is confirmed. Search volume and clicks for Broadband & Mobile services has fluctuated over time but on the overall outperforming last year numbers.

- Even if *Broadband* Provider category has decreased its share of volume since the beginning of the lockdown, it is still the largest category with over 50% of traffic.
- *Mobile* category gained volume, mainly thanks to searches for 5G and phone Models (iphones above all).
- Despite *Broadband* and *Providers* categories are slowing down, few specific queries are still on the rise.
- Along similar lines, consumers are expressing a slightly preference towards niche providers (e.i. *Debitel* registered a growth accounting to 4% in searches as per the most recent week)

RECOMMENDED ACTION

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- **Drive conversions** by reaching the Mainline and expanding your keyword set to drive relevant traffic to your store
- Leverage **generic search traffic** to push your offers and services. This holds true across both Broadband and Mobile categories.
- Average **pricing is decreasing across all the top growing queries in each category**. A careful advertising execution with reasonable bids would easily lead to the expected ROI.

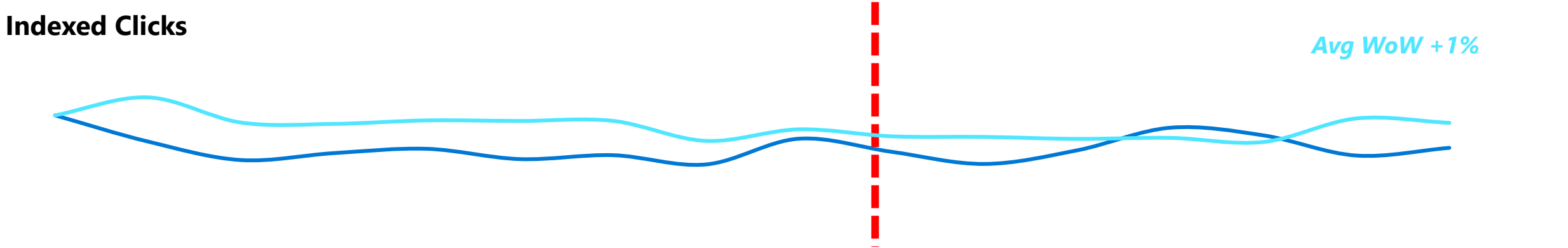
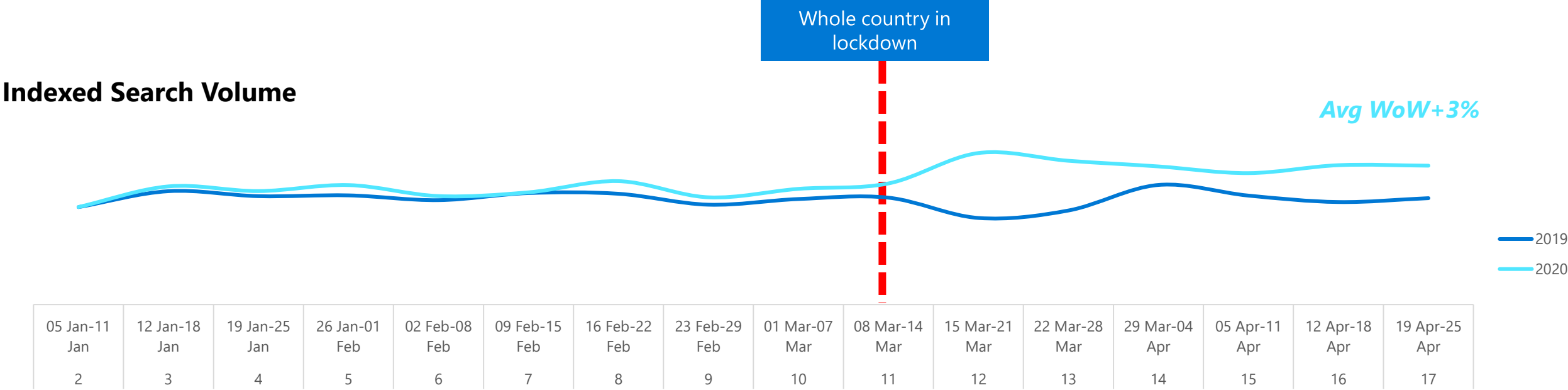


Spain



ES: Searches **grew after the lockdown**

Clicks varied over time with a clear upward trend as per the most recent weeks



Source: Microsoft Advertising Internal Data, All Device

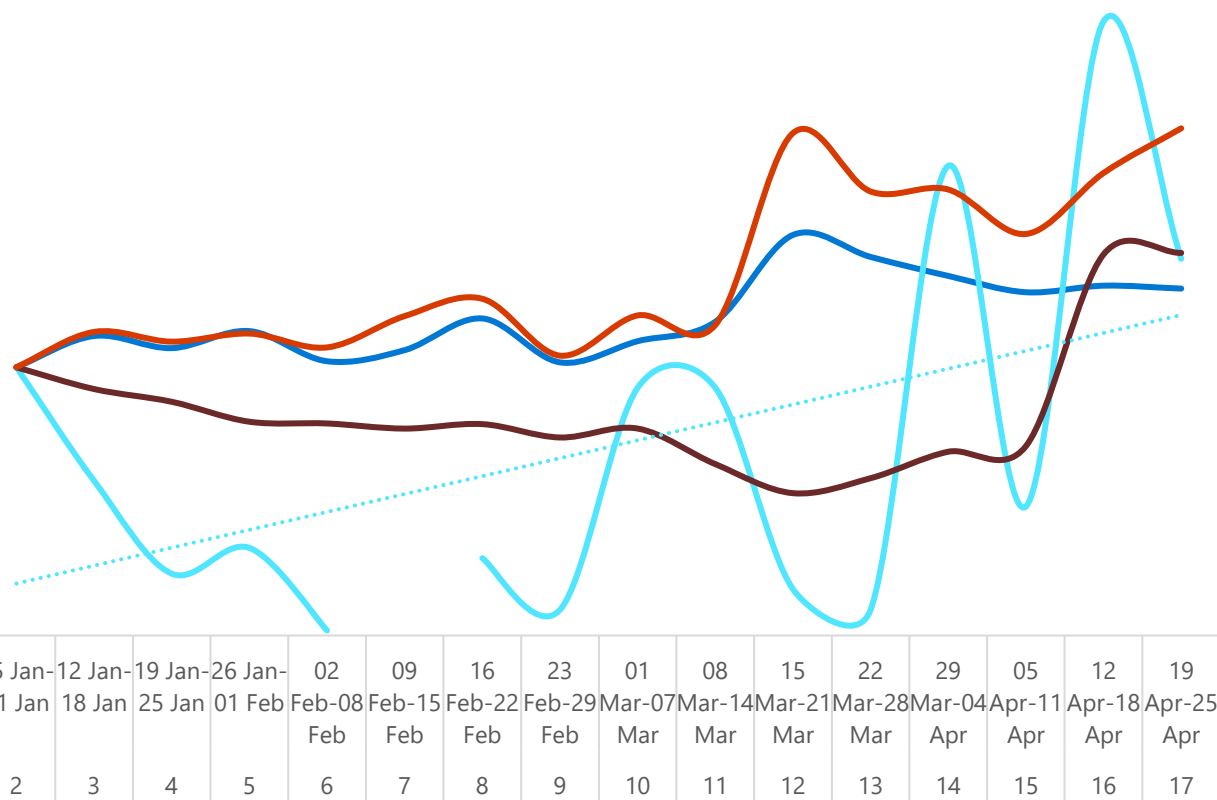


ES: **Residential** gained traction in searches since last weeks.

Consumer category fluctuated a lot over time. However, upward trend on the overall.

Search Indexed Volume

— Brand — Consumer — Phone models — Residential



Residential:
WoW 17th 10%

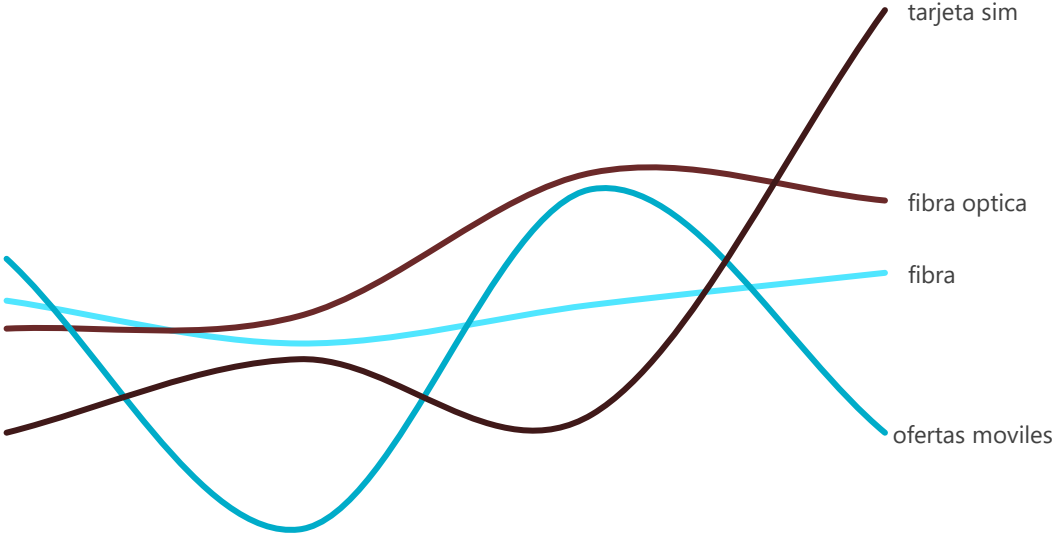
Category	Query sample
Brand	movistar, vodafone
Consumer	tarjet sim, ofertas moviles
Phone models	Iphone 11, samsung galaxy
Residential	fibra, internet en casa

Source: Microsoft Advertising Internal Data, All Device

ES: Residential increment was mainly **driven by a specific service (fibra)**

Despite other categories marginally dropped in volume, some queries are still enjoying the rise in consumer interest

Search Indexed Volume



29 Mar-04 Apr 14	05 Apr-11 Apr 15	12 Apr-18 Apr 16	19 Apr-25 Apr 17
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Category	Driver	Top Query	WoW*
Residential	fibra	fibra	+69%
Consumer	tarjeta sim	tarjeta sim	+244%

Source: Microsoft Advertising Internal Data, All Device
*Considering Week 16th and 17th based on top query



ES: Queries seen previously are witnessing a **continuous weekly CTR growth** with **CPCs dropping** significantly in some cases due to lack of competition

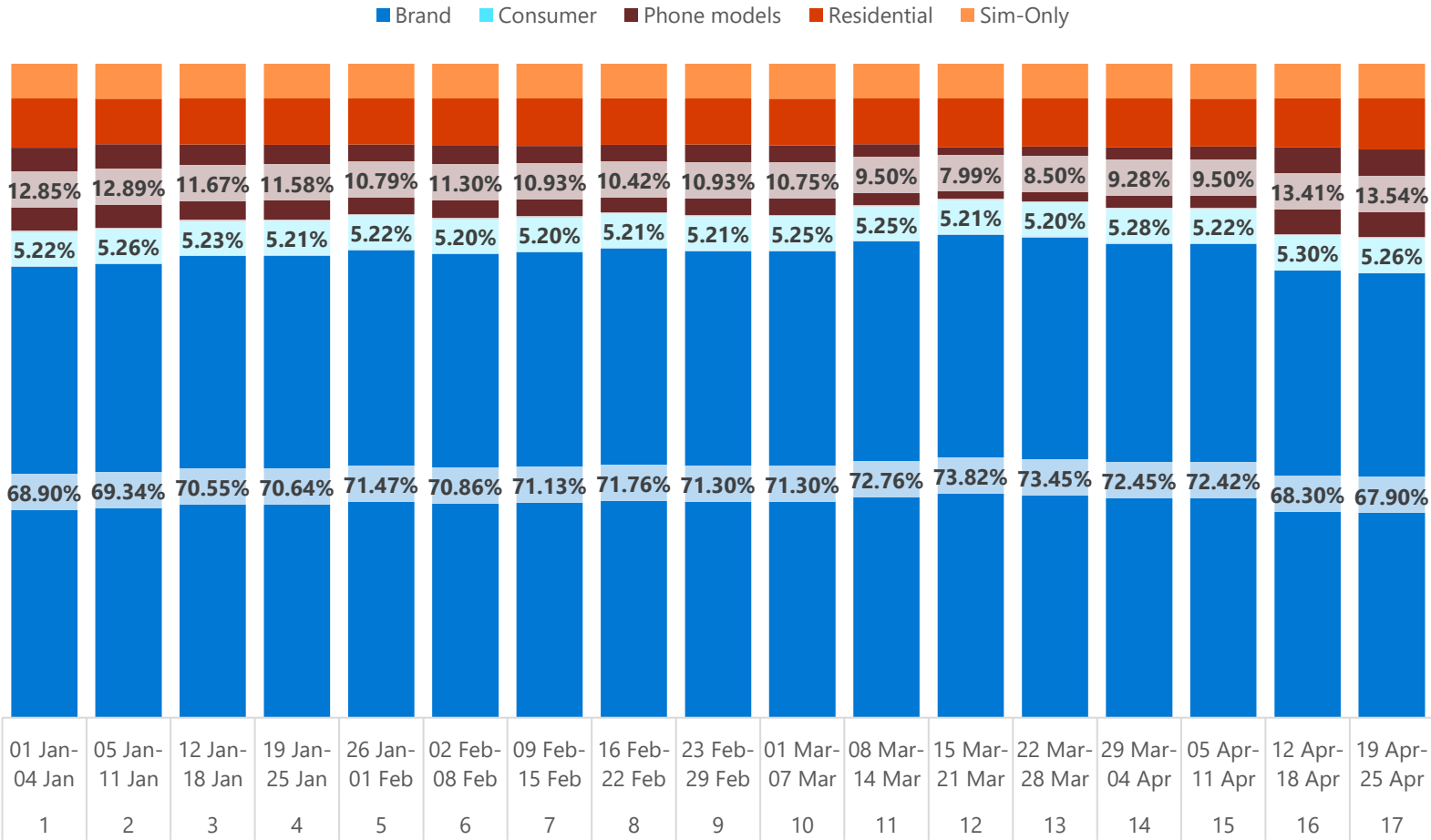


Category	Query	WoW CTR	WoW CPC
Residential	fibra	507.91%	-2.18%
Residential	ofertas internet en casa	400.00%	-90.40%
Brand	area de clientes vodafone	249.38%	-57.08%
Phone models	apple iphone	198.37%	-25.53%
Phone models	huawei y6 2018	168.97%	-72.95%
Brand	test movistar	112.22%	-2.82%
Brand	movistar canales	110.39%	-42.21%
Phone models	samsung s9 plus	100.00%	-16.98%
Residential	fibra y movil	90.48%	-50.39%
Brand	www movistar	87.65%	-33.49%
Residential	fibra orange	86.67%	-3.49%
Brand	telefono de movistar	85.82%	-21.86%
Phone models	xiaomi mi note 10	77.78%	-24.26%
Brand	tarifas movistar	77.48%	-28.00%
Phone models	iphone se2	64.36%	-46.77%

Source: Microsoft Advertising Internal data, All Device
*Considering Week 16 and 17

ES: Changing Preferences and Search Patterns

Total searches split by the different categories



Despite brand retaining most of the searches, it has decreased its share of volume slightly week-on-week. On the other hand, phone models gained volume over the same period.

Whole country in lockdown

Source: Microsoft Advertising Internal Data, All Device



ES: Top 5 YoY Volume Searches by Category

Residential	Consumer	Brand	Phone models
velocidad de internet	ofertas moviles	movistar	Iphone
fibra	tarjeta sim	vodafone	Iphone se
fibra optica	ofertas moviles media market	O2	Iphone se 2020
velocidad fibra	ofertas moviles xiaomi	vodafone empresas	Iphone x
internet en casa	oferta movil	vodafone es	huawei p30

ES: Top 5 Volume Searches by Category

Residential	Consumer	Brand	Phone models
velocidad de internet	tarjeta sim	vodafone spain	Iphone se
fibra optica	ofertas moviles	movistar tarif	apple iphone
velocidad fibra	oferta movil	tim	y6
fibra	ofertas moviles media market	test Movistar	samsung s10e
fibra movil	ofertas moviles xiaomi	vodafone moviles	huawei p30 lite

SPAIN

Main Takeaways



KEY FINDINGS

The initial hypothesis is confirmed. Search volume and clicks for Broadband & Mobile services has fluctuated over time but overall outperforming last year numbers.

- *Residential* category has been the seasonally driving force in this growth. Although *Consumer* fluctuated significantly, on the long-term it contributed to the increment.
- Spanish traffic tend to be heavily influenced by brand searches. However, despite brand retains most of the searches, it has decreased its share of volume over the last week. On the other hand, phone models gained volume as per the same period.
- Queries like *fibra* and *ofertas internet en casa* have seen dramatic growth in volume whilst CPC is decreasing. Price sensitivity and the offers are showing momentum.

RECOMMENDED ACTION

Persistent advertiser opportunity across markets with not only search volume growth but clicks as well, which indicates a strong user's commercial intent.

We strongly advice our partners to:

- **Drive conversions** by reaching the Mainline and expand your keyword set to drive relevant traffic to your stores
- Make sure your **brand traffic** is fully covered to defend and/or expand your position in the marketplace
- Leverage **generic search traffic** to push for your offers and services. This holds true across both Broadband and Mobile categories.
- Average **pricing is decreasing across all the top growing queries in each category**. A careful advertising execution with reasonable bids would easily lead to your expected ROI.

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BARRY MURRAY
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Retail



DOUWE VAN DER MEER
Analytical Lead WE



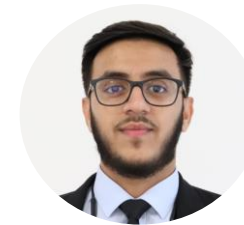
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