



UK Internet & Broadband Trends

As of May 03, 2020



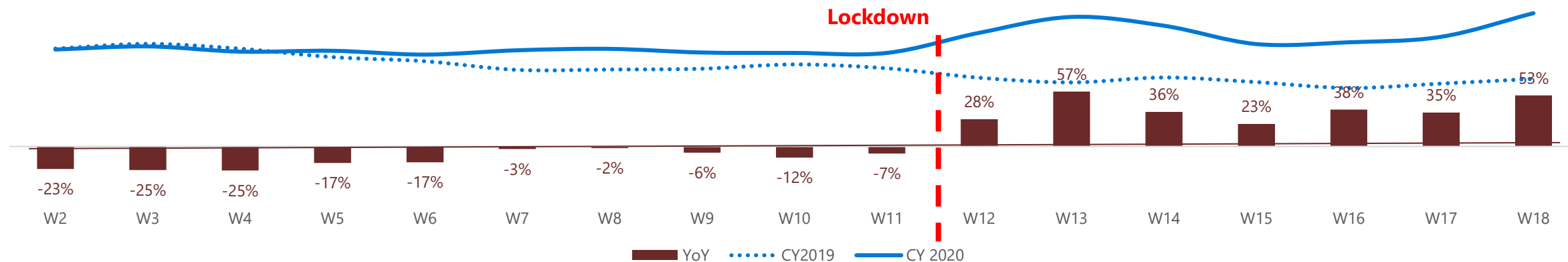
HYPOTHESIS

We saw increase in demand for broadband and internet services as working from home and home schooling increased with lockdown due to the COVID-19 situation.

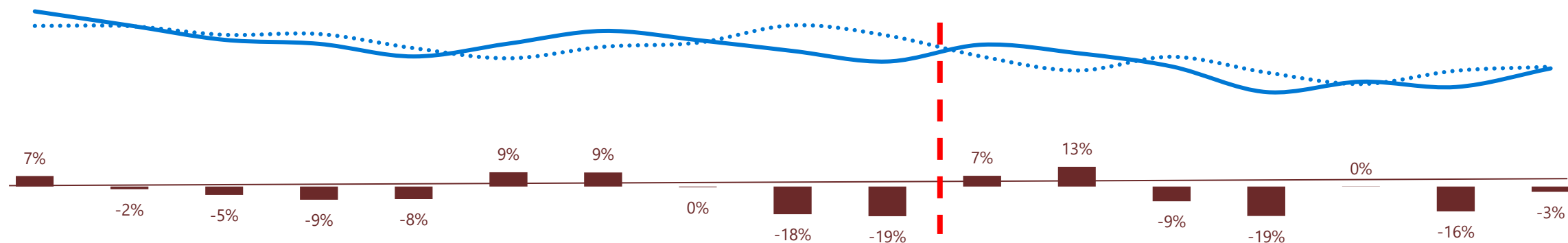
1. How has it changed over the last 6 - 7 weeks period?
2. Has there been any change in consumer behaviour or brand preferences while looking for these services?

Online consumer engagement continues to increase throughout lockdown

Search volume indexed to Jan (blue lines) and year-on-year growth (red bars)

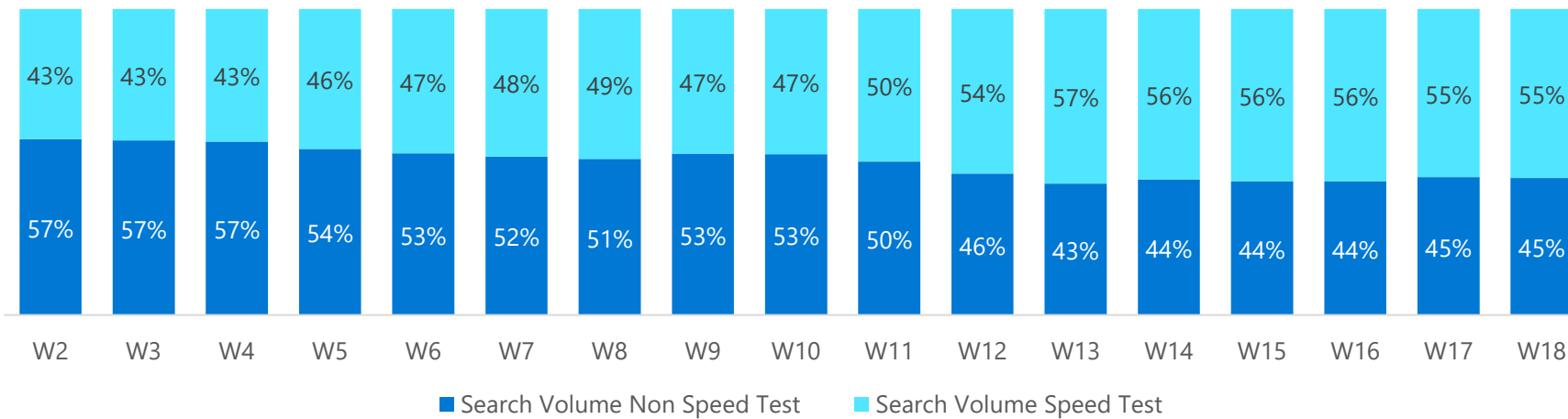


Clicks indexed to Jan (blue lines) and year-on year growth (red bars)

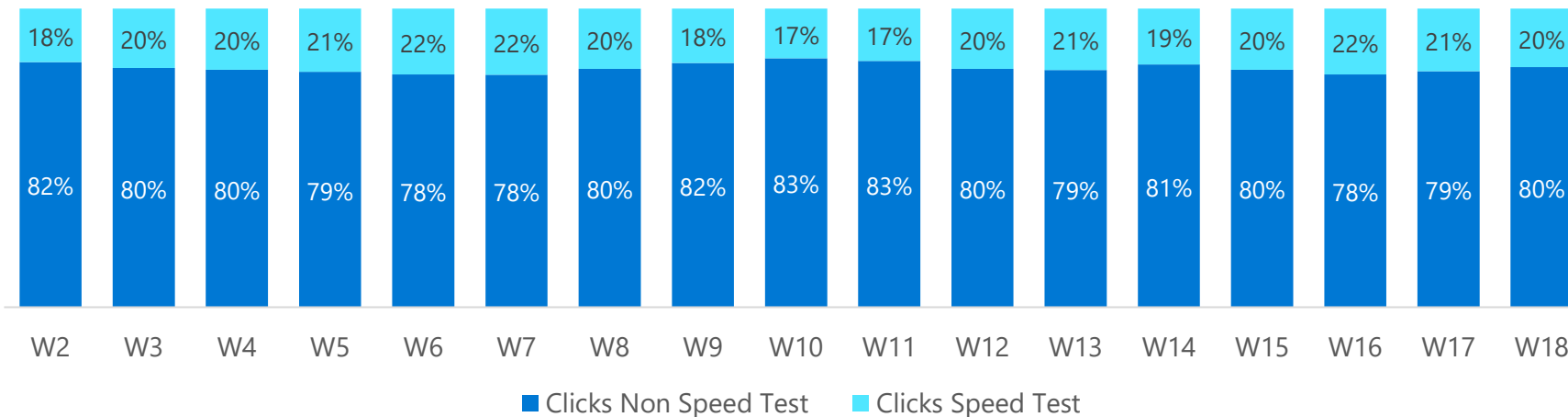


Uninterrupted broadband & service are consumer needs of the day

Search volume split by Speed Test vs. Non-Speed Test Category



Clicks split by Speed Test vs. Non-Speed Test Category



Search volumes are highly influenced by today's need for uninterrupted, high speed internet, but clicks are dominated by key broadband service and provider related terms

People are constantly checking for their internet speed as they work from home and home school more than ever before.

Query samples

Speed Test: "speed test, ookla speed check, adsl speed test,..."

Non-Speed Test: broadband provider", "compare broadband phone tv deals", high speed internet, broadband deals only,..."



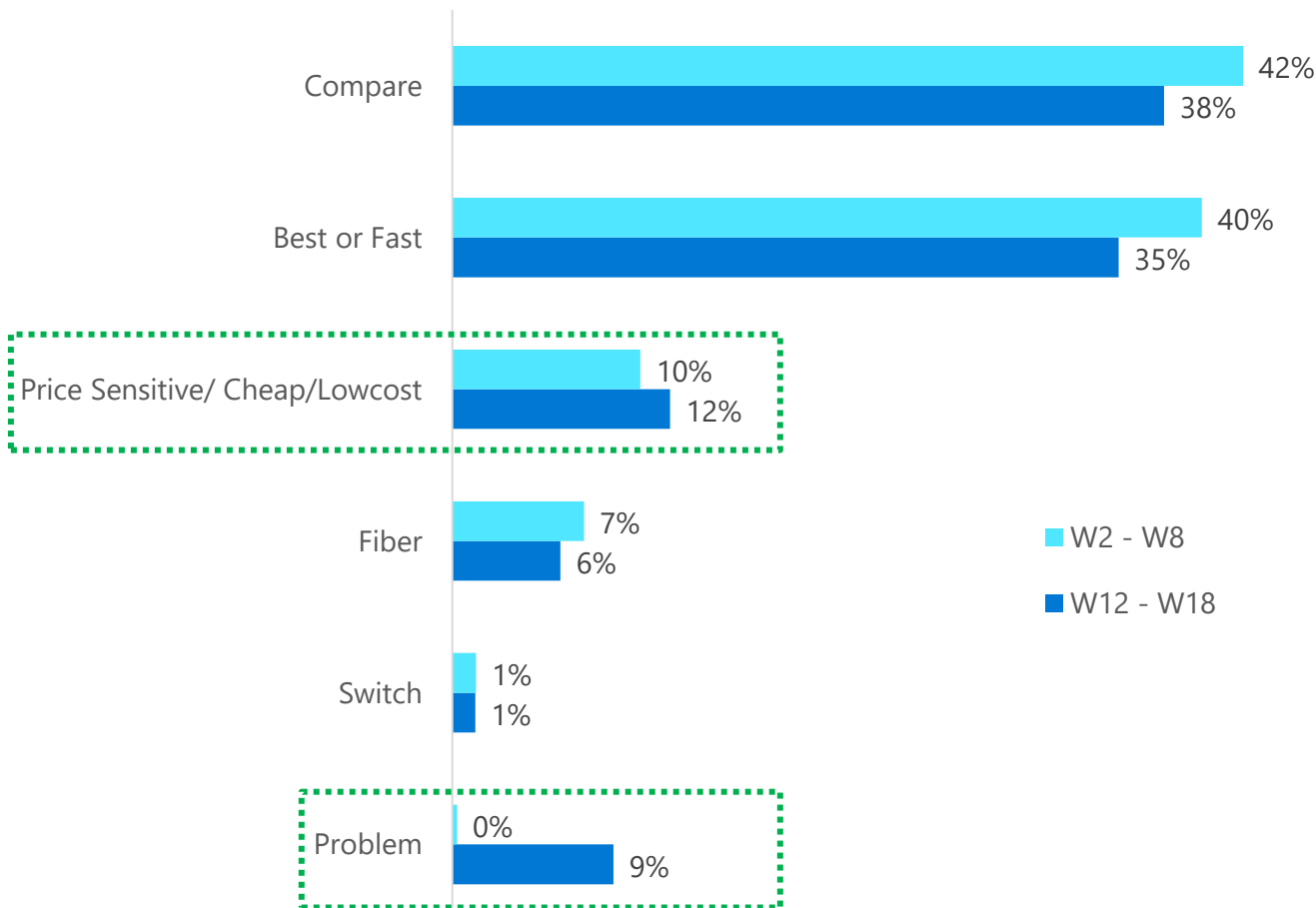
Deep dive into Non-Speed Test Category



Stay connected with your customers at the time of need

Consumers are more price conscious along with greater need for timely customer service

Search volume split by consumer preference



Whilst, comparing offers and finding the best or fastest services was of interest at the start of lockdown, there is now an increased need for cheaper deals and customer service - information/ updates when the service is low/ down.

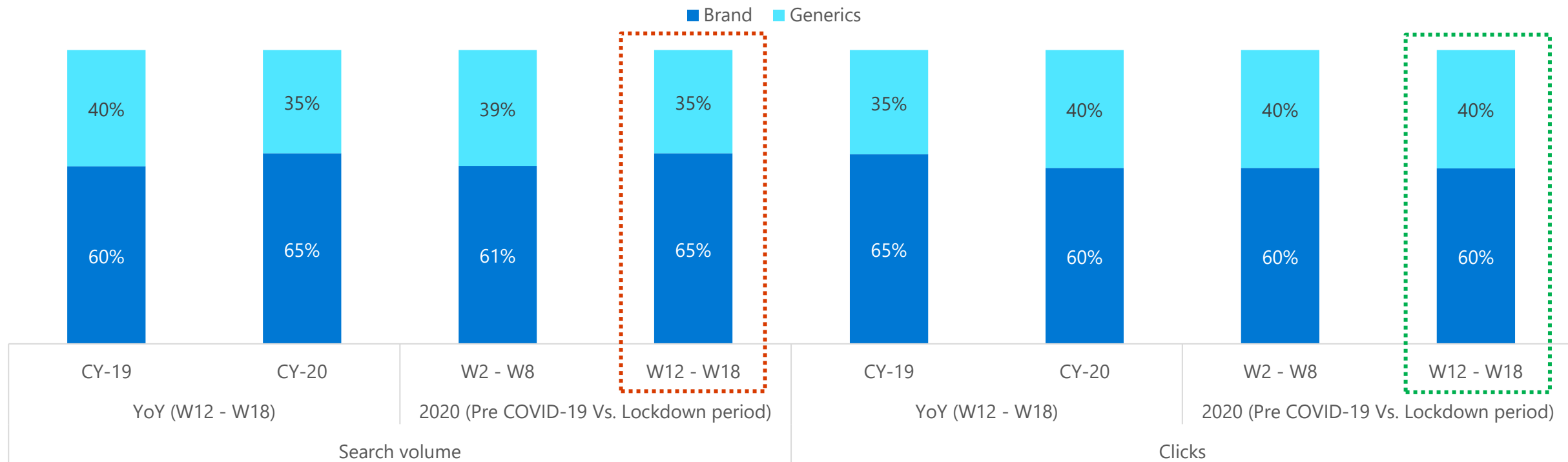
Consumers seemed to trust their service providers, sorting any intermittent concerns at this time of lockdown than switching providers. This could be down to the potential need for any in person installation and/or any delays or break in connection during the reduced in-person service.

Top 10 queries across the consumer preference categories

Best/Fast	Price Sensitive/ Cheap/Low Cost	Compare	Fibre	Problem
best broadband deals	cheapest broadband	compare broadband	fibre broadband	sky internet problems
best broadband	cheap broadband deals	broadband comparison	fibre broadband deals	sky broadband down
best broadband deals new customers	cheap broadband	compare broadband deals	fibre optic broadband	virgin internet down
best broadband provider	cheapest broadband deals	compare market broadband	bt fibre broadband	bt internet problem
best broadband phone deals	cheap internet	broadband compare	fibre broadband my area	virgin media internet problems
best internet provider	broadband prices	compare internet providers	sky fibre broadband	bt broadband issues
best broadband deals uk	broadband prices uk	compare broadband phone deals	broadband deals fibre	post office broadband problems
best internet deals	cheap internet deals	compare broadband packages	fiber broadband	sky internet problems
best broadband my area	cheapest broadband deals uk	broadband comparison sites	fibre optic broadband deals	virgin broadband down
best tv broadband deals	cheapest broadband phone deals	broadband deals compare	fiber optic broadband	virgin media internet down

Brand matters but generics play a critical role

Search volume and clicks split by brand vs. generics



Consumers are searching slightly less but engaging (clicks) consistently and slightly more through the period with generic queries relating to broadband and internet services

Top 20 generic queries

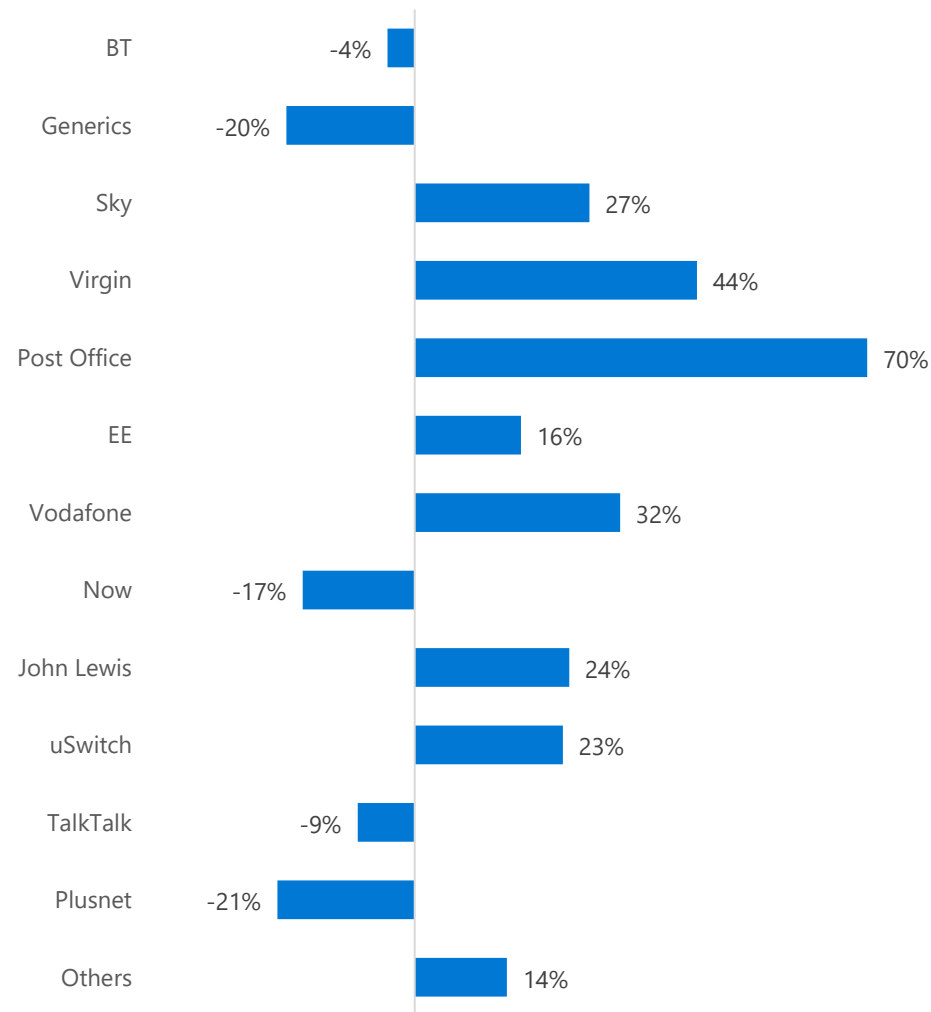
Top 20 generic queries

internet	best broadband deals new customers
broadband deals	cheapest broadband
Broadband	internet providers
best broadband deals	fibre broadband
broadband phone deals	cheap broadband deals
compare broadband	tv broadband deals
broadband comparison	cheap broadband
best broadband	phone broadband deals
broadband deals uk	broadband tv deals
compare broadband deals	best broadband provider

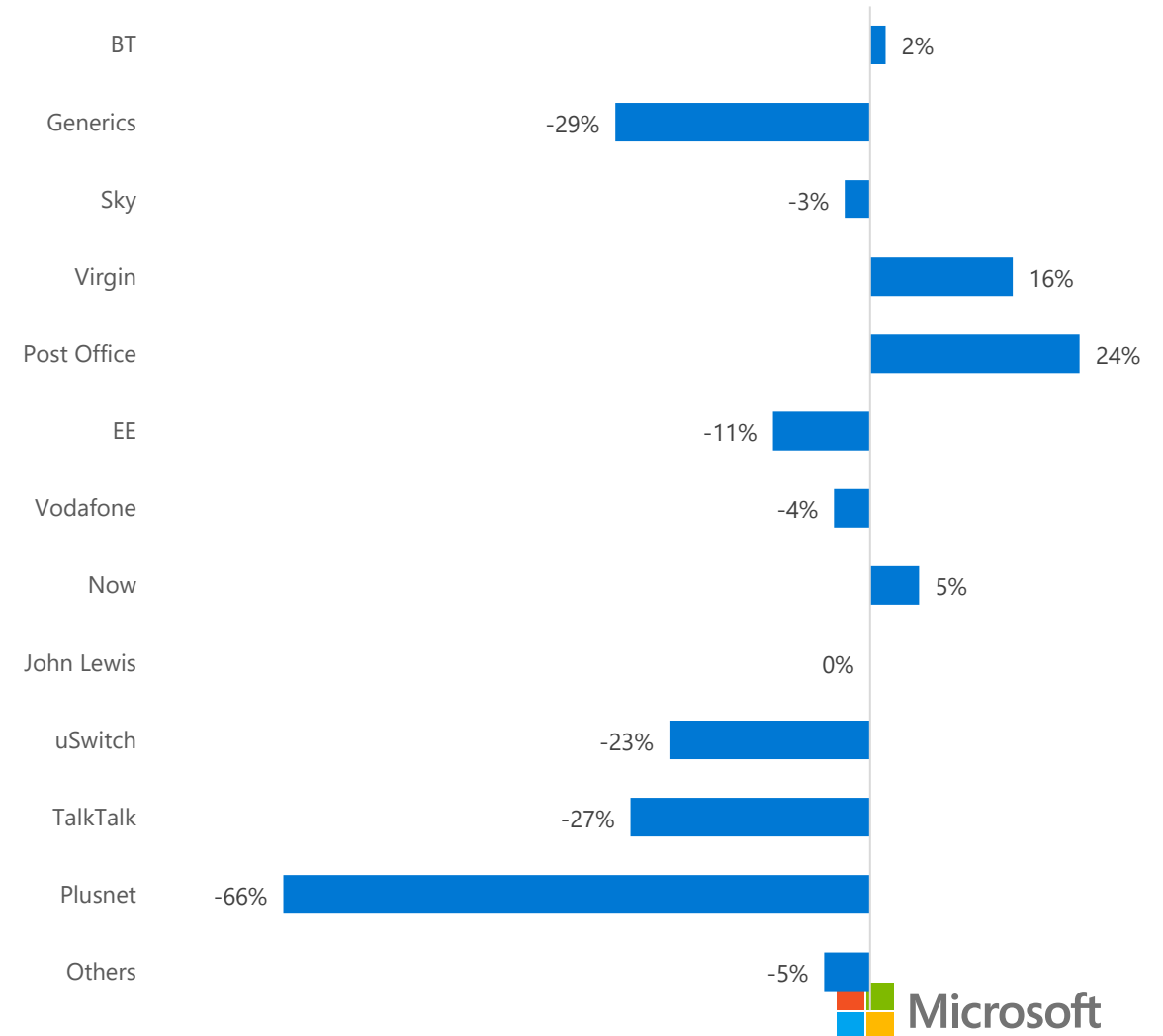


Changing brand preferences, influenced by deals & service

YoY growth for W12 – W18

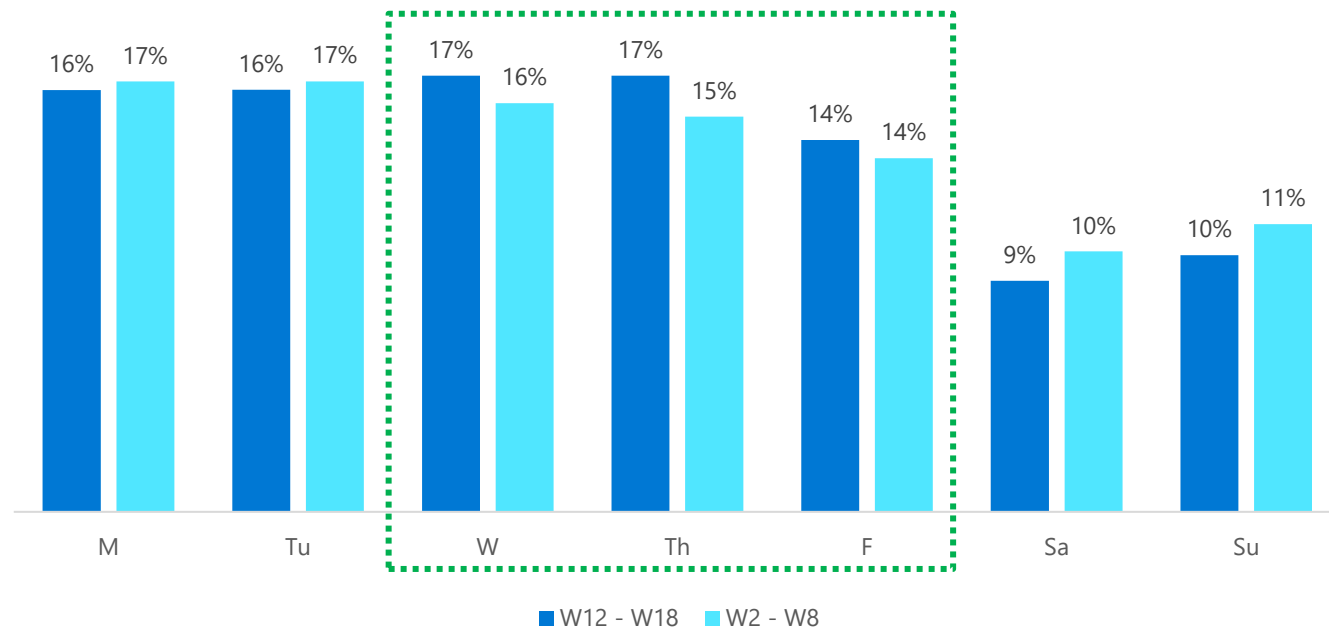


Growth during Lockdown over Pre covid-19 period



Slightly greater consumer engagement during the mid-week

2020 Pre COVID-19 vs. Lockdown period
Search volume share split by day of the week



Highlights and recommendations

Stay connected and reflect consumer sentiments and needs

1. **Be present** & review ad copy at this time of need with the latest offers.
2. Ensure we have all the relevant **ad extensions** for maximum visibility.
3. Track your visitors to **tailor your ads** for new vs. existing customers in the market where appropriate.
4. Include any possible information on **installation** process during the lockdown period.

Generics are critical

Expand generic campaigns to capture new & existing customers looking for offers & service.
Leverage Dynamic Search Ads.

Retain your existing customers

Customer service is critical to avoid any switching.

Eg: Make it easy for customers to reach you through call extensions, offer upgrades based on the changing needs, keep them updated on any downtimes, ...

Be present. Speed is important

Consumers are checking for speed more than ever as they work from home and home school

Incremental bidding for mid-week

Consumer engagement is slightly greater from Wed-Fri specifically during the COVID-19 period