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)

Source: Internal Data
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

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/downtime.

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.

Source: Internal Data
## Top 10 queries across the consumer preference categories

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

Source: Internal Data
### Search volume and clicks split by brand vs. generics

<table>
<thead>
<tr>
<th>Period</th>
<th>Search Volume</th>
<th>Clicks</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY-19</td>
<td>60%</td>
<td>60%</td>
</tr>
<tr>
<td>CY-20</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>W2 - W8</td>
<td>61%</td>
<td>65%</td>
</tr>
<tr>
<td>W12 - W18</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>CY-19 (YoY W12 - W18)</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>CY-20 (YoY W12 - W18)</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>W2 - W8 (2020 Pre COVID-19 Vs. Lockdown period)</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>W12 - W18 (2020 Pre COVID-19 Vs. Lockdown period)</td>
<td>60%</td>
<td></td>
</tr>
</tbody>
</table>

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

Source: Internal Data
## 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

- BT: -4%
- Generics: -20%
- Sky: 27%
- Virgin: 44%
- Post Office: 70%
- EE: 16%
- Vodafone: 32%
- Now: -17%
- John Lewis: 24%
- uSwitch: 23%
- TalkTalk: -9%
- Plusnet: -21%
- Others: 14%

Growth during Lockdown over Pre covid-19 period

- BT: 2%
- Generics: -29%
- Sky: -3%
- Virgin: 16%
- Post Office: 24%
- EE: -11%
- Vodafone: -4%
- Now: 5%
- John Lewis: 0%
- uSwitch: -23%
- TalkTalk: -27%
- Plusnet: -66%
- Others: -5%

Source: Internal Data.
Slightly greater consumer engagement during the mid-week

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

Source: Internal Data,
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.

Be present. Speed is important

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

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, ...

Incremental bidding for mid-week

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