

# Market Insight for Three in UK search

A market analysis of the UK mobile communications and broadband market.

## Task

**Three** is one of the UK's largest mobile operators. With about 10% of total business market share it is ranked 4 in the UK market. With a closer look at the organic Google keyword rankings, Three.co.uk has an SEO market share of around 3-4%, and is directly competing with EE.co.uk. The goal is to stabilize and increase the SEO market share. Three is looking for fresh ideas to achieve an increase in brand awareness in organic search results. The following comprehensive market analysis should deliver valuable insights to confirm existing perceptions and discover new potential.

## Idea and basic approach

The basic idea was to find individual strengths and even gaps to show specific opportunities for website improvement and further growth. The assumption is that relevant content will help to fill the existing gaps and to achieve an increased market share, helping Three to stay ahead of the competition.

## Execution

A pitch project was set up, which first required further investigation regarding the market and its competitors. Several dashboards were created to identify the market players, their market share and their individual performance in several market segments.

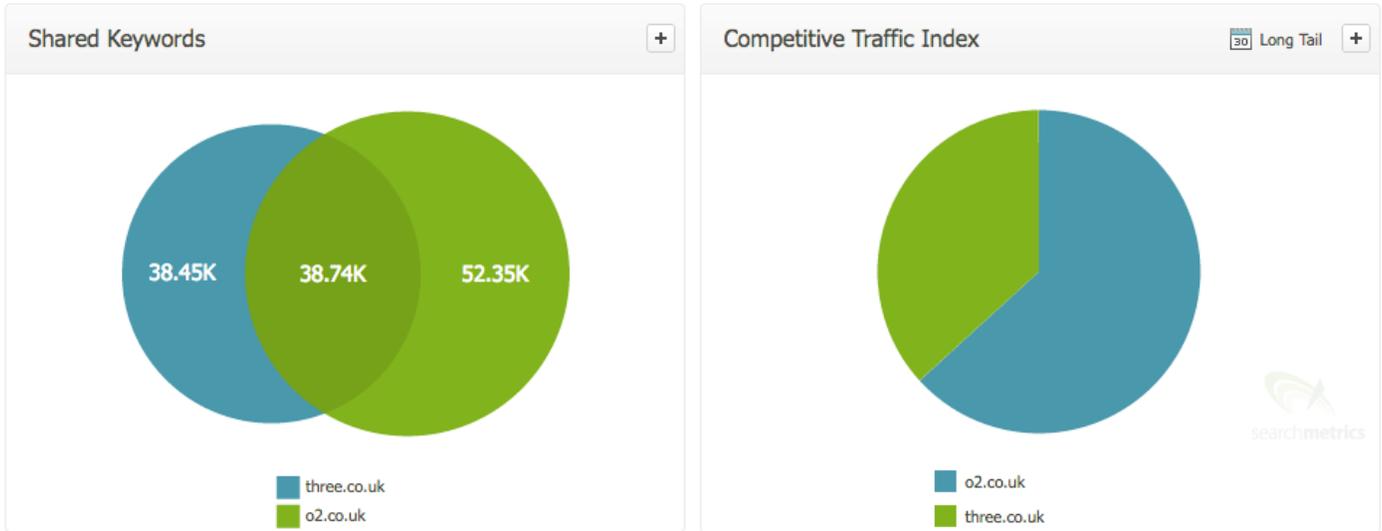
## The Market

The market for UK mobile operators is very heterogeneous, consisting of Vodafone, O2, EE (T-Mobile/Orange) and Three, each of whom runs their own network. There are even virtual network operators (Virgin, Tesco Mobile) which are also part of this analysis.

Beside the mobile operators, there are also retailers in the market. Examples of these are Carphone Warehouse, Amazon, Argos and GSM Arena. The third group of competitors are the numerous price comparison websites, such as uSwitch and MoneySuperMarket.

All players occupy different market segments depending on their business model. The mobile operators have their natural strength in products and services that are related to broadband, sim only and pay as you go (PayG). Retailers play their role as resellers for sim-free hardware of different brands. Price comparison services are agents for the network providers and strong in all generic and 'best deal'-related terms.

Based on the Searchmetrics Research Cloud data, the whole SEO market is covered by more than 500K keywords (including relevant brands) with a total search volume of more than 330 million monthly searches. O2 is Three's strongest competitor with the highest topical overlap of 32.6K keywords, followed by EE with an overlap of 32.1K keywords. The next mobile operator is Vodafone, which is at position 6 for shared keywords, after uSwitch, Carphone Warehouse and Amazon.

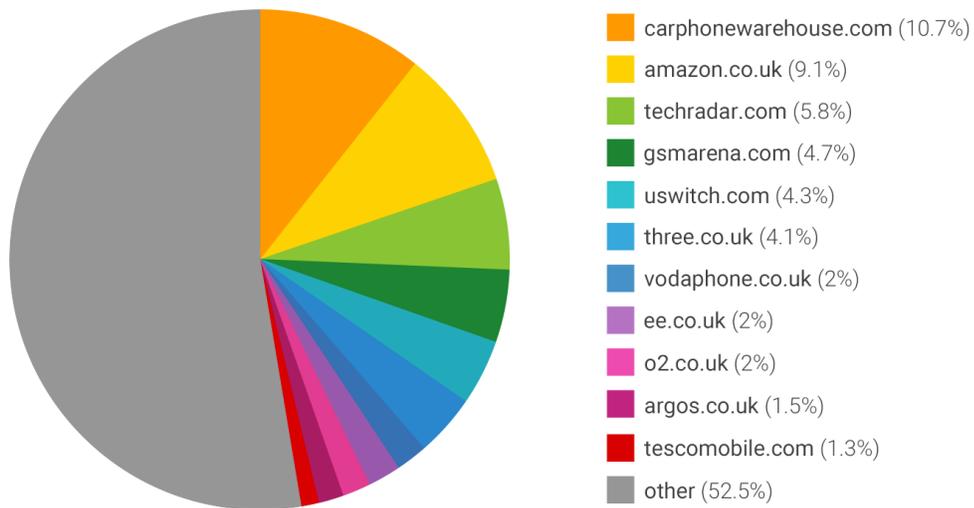


Shared Keywords between Three.co.uk and o2.co.uk, and competitive Traffic Index

### SEO Market Share

Carphone Warehouse leads the SEO market with a share of 10.7%, followed by Amazon (9.1%), Techradar (5.8%), GSMarena (4.7%) and uSwitch (4.3%). These are followed by the mobile operators: Three (4.1%), Vodafone (2.0%), EE (2.0%) and O2 (2.0%).

## Market Share Benchmarks



## SEO Market Share and Keyword Coverage of Direct Competitors (Mobile Operators)

#	Domain	Market Share %	Keyword Coverage %
1	EE.co.uk	4.3	77.6
2	Three.co.uk	4.1	74.8
3	Vodafone.co.uk	2.2	76.5
4	Tescomobile.com	1.7	54.4
5	o2.co.uk	1.6	79.2

## SEO Market Share and Keyword Coverage of Retailers

#	Domain	Market Share %	Keyword Coverage %
1	Carphonewarehouse.com	9.5	75.5
2	Techradar.com	8.3	59.5
3	amazon.co.uk	6.7	58.8
4	Gsmarena.com	4.9	10.7
5	uswitch.com	4.2	75.2

## SEO Market Segmentation

- Broadband (3G, 4G, Internet & Data)
- Sim Only
- Sim Free
- Pay as you go (PayG)
- Best Deals
- Brands

The mobile operators are relevant for the following topics: Sim Only, PayG and Broadband, even though all network operators were beaten in these segments by uSwitch and Tesco Mobile.

	Three	O2	EE	Vodafone	Tescomobile	uSwitch
Sim Only	10.3	4.2	6.7	7.8	3.1	14.2
Pay as you go	7.6	8.4	8.5	9.0	12.6	3.3
Broadband	3.2	1.6	4.4	6.5	0	19.2

Retailers and resellers follow a different business model and are consequently focused on brand and sim-free related topics, as well as offering the best advice.

	CPW*	uSwitch	Techradar	Amazon	GSMarena	Argos
Sim Free	24.2	0.3	0.1	8.8	0	12.3
Brands	7.7	0.2	1.9	5.4	4.8	2.0
Best Deals	10.8	17.2	5.6	0.6	0	1.9

\*CPW = Carphone Warehouse

## Market Potential

Three ranks for more than 77K keywords in the UK organic search results. More than 50% of these keywords were found on positions 11+. The additional traffic potential for all keywords is about 2.75 million per month, with a CPC-based equivalent of more than 3.4 million GBP per month. This is about 5 times the current level of traffic and 4.5 times the current SEO value.

Three is already providing relevant content for sim-only topics and is therefore very strong in this particular segment. In line with their business model, their strongest opportunities for SEO Market Share growth lie in topics related to Broadband and PayG.

