



# Year in Search Australia

Insights for Brands Report 2020

Think with **Google**







# Anticipate what matters to consumers to drive what matters for your business

Consumers' lives are touched by a variety of digital aspects in every waking minute. They are in a constant state of exploration and consumption as they decide what to watch, learn, read, buy, or do. For brands, these are important signals that need to be deciphered correctly. When it comes to serving consumers, it's not just showing up that matters, it's how you show up.

People want brands to be present at the right time, with the right message, and with the right solutions when it matters the most. Brands must optimise their strategies and products for those precise moments when consumers are actively looking for reliable answers.

At Google, we've partnered with [Trendwatching](#)\*, a leading independent consumer trends firm.

Expectation and anticipation are the common threads running through this report. The result is a Year In Search report that will help companies gain a better understanding of modern Australians and identify their current interests. In doing so, this will assist brands in anticipating what matters most to consumers, thus turning today's complex digital landscape into a growth opportunity.

# Top Five Australian Trends

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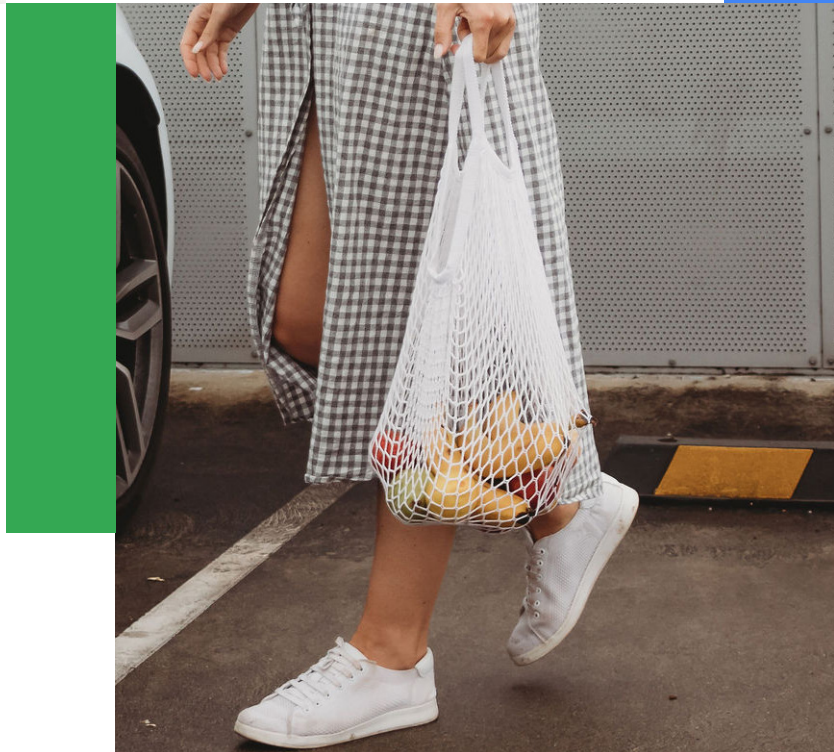


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# The expectation cycle





**A consumer's desire for greater innovation across industries is spurred by encounters with newer and better products and services**

A single, powerful reality sits at the heart of consumer behaviour: **the expectation cycle.**

What is this phenomenon? It is an ever-spiralling cycle of upward expectations among people that is spurred by the convenience of new products and services. Simply put, once consumers have a positive experience with a product or service, they begin to seek the same level of convenience and innovation across other categories.

An increase in expectations has implications for every business. It makes it essential for brands to keep in touch with growing desires for better products and services in the Australian marketplace. Innovative companies who know how to move quickly will be prepared to seize the opportunities that this cycle creates.

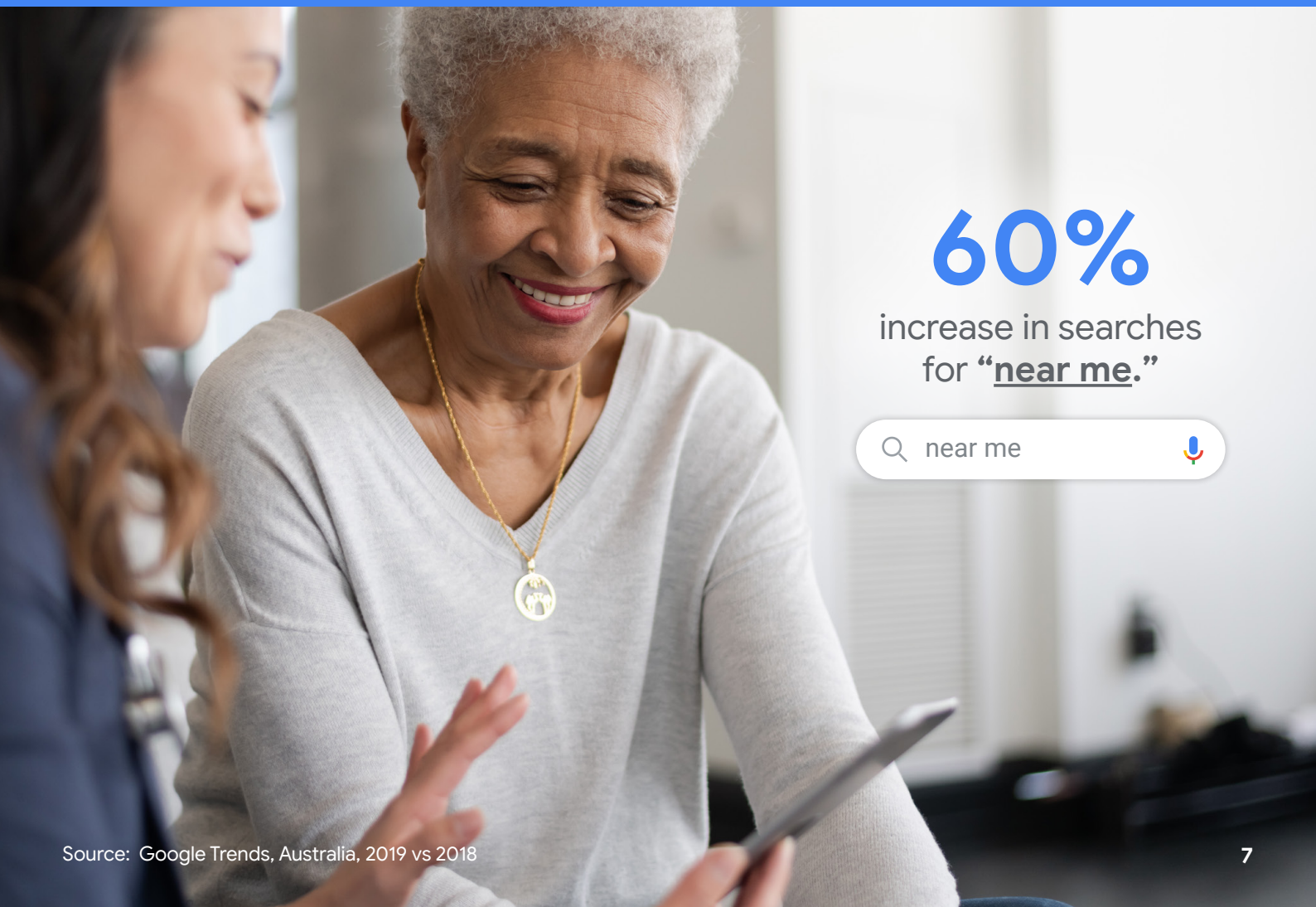




# A decade of on-demand urban convenience has created an identical mindset about consumer needs

Millions of consumers around the world have become accustomed to the convenience and near-instant gratification offered by a wide range of services. From Uber to Netflix to food delivery apps like Deliveroo, consumers now expect to be able to find what they want, when they want it, in a stress-free manner.

The result? These businesses have created expectations of ultra-convenient, on-demand-style services across varied industries, contexts, and needs.



60%

increase in searches  
for “near me.”

Q near me





Australians have an ever-growing expectation of an instant response. They seem unwilling to travel to or wait for a haircut, a massage, or even a cup of coffee or bubble tea. Instead, they look for nearby shops and specialists to fulfil those needs.



### Increase in “near me” searches for

Q bubble tea near me  + 120%

Q dessert near me  + 70%

Q barber near me  + 65%

Q alcohol near me  + 65%

Q shop near me  + 50%

Q massage near me  + 20%





# Capitalising on the expectation cycle

Brands across Australia have begun to build innovative business models around their consumers' on-demand needs. One such example is the **Wing app** - a commercial drone delivery service in Canberra. Using a drone, they offer their customers “store to door” delivery of items that include health and wellness products, food, and beverages.



While the sense of urgency about acquiring certain products and services isn't a new phenomenon, the extent to which it has seeped into the everyday life of Australians is palpable, especially when noting the rise in “**same day**” searches across categories.

Q same day loans



Q same day flowers



Q same day printing



Q same day dry cleaning



The expectation economy hints at the now-common consumer attitude, summed up as, “If I can get a taxi on-demand, why not everything else?”

## Personalisation has now become an expected part of the online shopping experience

Within today's dynamic online landscape, a person's experience often becomes personalised around their interests, preferences, past behaviours, and more. Businesses heighten the consumer's attention by offering products that are of specific interest to them. Netflix will suggest movies, and Spotify Discover Weekly will present a playlist of new music. This level of personalisation, at almost every step of a user's digital journey, is the second stage of the expectation cycle.

Unsurprisingly, Australian consumers increasingly expect the businesses that they engage with online to tailor their experience - and the value they provide - around their personalised needs and wishes.

# 71%

of all Australian consumers are likely to **purchase from a company whose mobile site or app offers them discounts or promotions based on past purchases**





Searches for broad terms like “**gifts**” have expanded into more niche categories based on the interests of the recipients.

Q gifts for a three year old boy + 250%

Q gifts for men who have everything + 150%

Q gifts for daycare teachers + 90%

Such exact searches also show how consumers now expect products to be available for each specific niche, interest, and occasion that is important to them individually.

Q funny secret santa gifts + 300%

Q outdoor gifts for kids + 100%



A noticeable impact of this trend peaks before Christmas as Australians use Search to find personalised gifts for their loved ones.

Q personalised underwear + 250%

Q personalised bobble head + 200%

Q personalised wine glasses + 130%



Australian mobile shoppers are more likely to buy from a mobile site or app if they receive personalised discounts, location-based information, and answers to their questions that are easy to find.

Customers find that they have, in advance, an expectation of satisfaction when they shop from that site or app. Building a sense of expectation also helps brands to create a loyal base of customers.

# 78%

of all Australian mobile shoppers are more likely to purchase from a mobile site or app that helps them find answers easily

# 68%

of them would prefer to purchase from an app or site that customises information according to their location





## Personalisation heightens a sense of expectation, even in areas as diverse as politics

Based on input from over 125,000 voters, the Australian Futures Project created [The Perfect Candidate](#) — a virtual politician whose views represented the concerns of voters at the local level. This virtual creation showed users how real political parties could align their policies to meet the “ideal requirements” in a chosen constituency.

Demonstrating that personalisation and expectation are not restricted to products and services, brands or politicians who wish to connect with people will need to become outstanding in their personal approach to the target market.



## The expectation economy is driven by consumers' high expectations of quality

When consumers experience a product or service that serves their needs in a fresher or better way, they acquire newer and higher expectations. Once acquired, those expectations become their benchmark for the future and create an internal need for better offerings across a range of brands and services.

Search trends indicate that buyers increasingly refuse to compromise on quality.

Q best near me



+ 65%

Q near me open now



+ 25%

For Australians, the quest for quality peaks when it comes to coffee. Nothing less than perfection is acceptable to them. The highest concentration of “**best coffee**” searches in the world come from Australia.





## The expectation cycle also applies to how users want to experience technology

Consumer expectations have escalated in an ever-connected world with voice assistants always on call. They expect to find what they want, how and whenever they want it.



# Over 70%

of consumers search online prior to making a purchase and expect to receive immediate information when using their smartphones



## Customers expect their chosen brands to speak like them

Customers expect their chosen brands to speak like them despite the variance within language across the country. Searches for “Petrol near me” show a clear regional skew. “Fuel near me” is prevalent in Western Australia and Queensland. “Petrol near me” is more common in South Australia and Victoria.



# 78%

of all consumers conduct online research before making a purchase. **To stay ahead of the curve, brands must build expectation and excitement** by tailoring campaigns around what Aussies love most about their shopping experiences.

**The expectation cycle** can be tapped into during annual events like the Black Friday, Christmas, and Boxing Day sales by encouraging customers to pamper themselves or those they love. Targeted videos and easy to find **Local Campaigns** or **Local Inventory** on Google help to keep them tantalised.

At all times of the year, brand success and loyalty will require **personalisation** for consumers, **convenience** in shopping and delivery, providing **quality** goods and services, and meeting **customer expectations**.



# Transparency triumph







**Consumers prefer to engage with companies who share essential information and are transparent about their business methods.**

The Australian consumer's heightened awareness about the environment, combined with a desire for more ethical practices, is changing the way they shop. Quality goods and ease of shopping are now part of their daily expectations, but knowing how a product is made has also become equally important to consumers.

# Australians want to know more about the products and services they engage with, so they can make informed decisions.



Consumers throughout Australia want to see behind the public face of a brand – searching for the truth about the raw materials, supply chains, and processes that are used by the businesses they engage with.

These can be broadly categorised into:

🔍 Product origins



🔍 Sourcing methods



🔍 Ingredients



🔍 How it's made







## How Olay empowers consumers through information

Brands can learn from the strategy used by Olay and their innovative way to connect with their consumers. Olay's digital campaign, launched in 2019, offers consumers links to information, instead of ads for their products. Searching a topic like **“dark circles under eyes”** now links to detailed information about the issue and possible solutions.

Provided with the information they need, consumers feel empowered and can make informed skincare-related decisions afterward.

Olay's new campaign has also seen revenues improve measurably due to the higher rate of in-site conversions.



Aussies want to know more about the ingredients they are consuming and the materials they are bringing into their homes. There is also a strong desire to know more about the background and ethical values of the businesses that they engage with.

# 80% agree

“It’s not good enough for businesses to just make money; they need to be doing some good in the world as well.”



Consumers in Australia are frequently more comfortable engaging with brands or businesses that align with their own beliefs and values. In fashion searches, consumers have indicated a growing interest in items of clothing that are ethically made from organic materials that are sustainably sourced.



How things are made — including the processes involved and the materials within a product — is a growing area of interest for shoppers.

Searches within the skincare category have grown. They include information about ingredients such as:


🔍 Nicotinamide 🎤 + 170%

🔍 Retinol 🎤 + 90%

🔍 Azelaic acid 🎤 + 80%

🔍 Hyaluronic acid 🎤 + 65%

🔍 Glycolic acid 🎤 + 30%

A photograph of a man and a woman outdoors. The man, wearing a grey cap and a blue jacket, is holding a small green plant in his hand. The woman, with long brown hair, is looking at the plant with a smile. The background is a soft-focus outdoor scene.

Searches for “how is \*\*\* made” have grown across several food, fashion, and household categories. These include:

🔍 how is vegan cheese made 🗣️

🔍 how is kombucha made 🗣️

🔍 how is palm oil made 🗣️

🔍 how is almond milk made 🗣️

🔍 how is tofu made 🗣️

🔍 how is cotton made 🗣️

🔍 how is vegemite made 🗣️

🔍 how is plastic made 🗣️

As a result of this consumer curiosity, brands have begun to pull back the curtains on their manufacturing processes and proudly share their ethical and sustainable methods.



## From black box to glass box brands: in today's transparent world, the internal culture of a business can be an opportunity to better connect with consumers



Concepts of transparency are turning the walls of every organisation to glass. Consumers can now examine the formerly-unseen inner workings of a business, including the internal culture and the ideas and ethics of the people who work within the four walls.

Transparency also allows consumers to become increasingly engaged by their newfound understanding of the internal culture of a brand or business. Emotional touchpoints are established as they begin to have opinions and feelings about the way business is conducted.



## Learn how The Ordinary sees transparency as a strategy and path to empowerment

A brand called The Ordinary is an example of how transparency can become a core selling point. Known for honesty and a no-frills approach, the skincare company sells the same ingredients that are in more expensive brands and formulas. The Ordinary offers their ingredients at a much lower price, allowing consumers to create blends and products that are tailored to their skin type.

By focusing on clear and understandable information on their packaging and online platform, consumers become empowered by obtaining the information and products they were seeking. They are also encouraged by The Ordinary to be creative in their combinations of ingredients, and not to settle for what pre-packaged cosmetics deem is appropriate.



## Transparency — a revolution that is here to stay

For some businesses, the arrival of the transparency revolution may feel a bit daunting. However, when you empower people with information — on your offering, processes, values and internal culture — you can strengthen your relationship with customers on more secure foundations. In today's world, the internal culture of a business becomes part of its public-facing brand.

Are you a 'glass house' brand? With today's consumption curiosity, brands that empower consumers with information will be better set up for success.



# Wellness engineers





**Australians are taking charge of their health. By using digital tools, they feel empowered as they acquire information, products, and services.**

The search for physical, mental, and emotional wellbeing is an ongoing part of the human story.

Consumers are turning to 'search' to explore ways of taking control of their lives and health. They are willing to do the background research to find products and services that can assist them in that quest.

As Australian customers become their own Wellness Engineers, brands and service providers must be prepared to respond with reliable solutions that help to enhance lives.



## Australian consumers are willing to experiment as they seek to enhance their health. Wellness options that were once considered fringe have now moved into the mainstream.

Researching ways to create better health includes a steady stream of searches about diet options and products including:

Q air fryer



+ 75%

Q keto recipes



+ 35%



Diet-related searches may continue throughout the year, but they peak noticeably during the period around Christmas.



Approaching personal changes as a Wellness Engineer means that consumers are seeking to quantify and track their physical activity

**140%**  
rise in searches for  
**“step tracker”**



The growing trend for experimentation leads many consumers to embrace emerging technologies that are still in their early days.

A willingness to embrace new ideas and technology has seen a surge in searches for items like **“blue light glasses”** grow by over 200%. In 2019, that search term overtook searches for “aviators”, previously one of the most popular styles of eyewear seen in search results.

## An open-minded approach to wellness has allowed Australians to become more aware of mental health issues

As consumers display an increased awareness and acceptance of mental health issues, they seek proactive ways of dealing with their mental well-being.

Search terms have also shifted. The generic term “stress” has given way to a reflection of more personal issues such as “anxiety”.

## Solution-seeking Aussies are more inclined to try alternative methods

Popular searches for unconventional remedies Include:

Q weighted blankets  + 120%

Q crystal for anxiety  + 40%

Mental health issues also include concerns about Australians who succumb to the always-on work culture. Australia has the highest concentration of searches for “anxiety” than any other place in the world.



## Australian consumers are looking for brands to help them with wellness enhancement

In an endlessly tracked and measured world, the desire to achieve maximum personal wellness is strong.

As an increasing number of Aussies endeavour to gain control of their own health and wellness, they use Search as a tool to stay informed, learn about emerging offerings, compare results, and purchase wellness-related products.

The critical implications for brands are clear. Consumers are on a wellness quest and will welcome brands that step forward and empower them to discover a better way of life — physically, mentally, emotionally and intellectually.

# Changing lifestyles





**Australian consumers are seeking to move past the social and psychological barriers associated with gender, identity, and age.**

Searches in 2019 point to an underlying truth about the changing lifestyles in Australia. Increasing numbers of people feel freer than ever to liberate themselves from prior social expectations and stereotypes. Instead, they are constructing identities and lifestyles of their own choosing.

Brands that assist these consumers in establishing their new lifestyles can reach out to previously untapped consumer bases and grow beyond their current limitations.



# Australian lives are enhanced when they are freed from age-related or gender stereotypes.



Traditional social expectations are being cast aside when Australians ignore the demographic determinism that states, **“If you’re a woman, you should act this way”** or **“If you’re over 50, you can’t do that”**.

Searches throughout 2019 have revealed that Australians are embracing a post-demographic mindset that refuses to be defined by outdated social conventions.



## Queries that move away from gender norms:

Q gender neutral



+ 45%

Q unisex clothing



+ 20%



Looking good is important no matter who you are, and diverse audiences are increasingly looking for the latest information about beauty, fashion, and hairstyles.

# 100%

increase in “skin care for men” queries

By refusing to accept societal expectations, Aussies are free to pursue their own interests, not what society dictates that they “should” be interested in.

## In a post-demographic world, consumers prioritise identity and self-expression



Increasingly liberated from outdated social expectations, consumers are prioritising self-expression and modes of consumption that empower the construction of their new, self-chosen identities.

Fashion has always been a powerful form of self-expression, and in a world of evolving identities, more Australians are choosing to wear what they want. Increased searches for more daring and flashy clothing suggest a desire to make a statement.

🔍 leopard print + 145%

🔍 neon dress + 125%

🔍 plaid pants + 120%





Changing lifestyles

Comfort matters  
to Australians, with a

**140%**

increase in searches  
for loungewear.

**45%**

increase in 2019 in searches  
for “merch” showcasing how  
people look for products that  
reflect their interests and  
people they admire.

## Consumers are crafting their own personal lifestyles and identities

What does this reveal for the post-demographic world as it relates to brands?

Consumers who feel free to construct identities and lifestyles of their choosing are loyal to their vision of who and what they want to be. Brands that empower that personal vision will be embraced.

**When purchasing from a new brand, more than half of all buyers look for brands that align with their personal vision and lifestyle**





# Sustainability's tipping point



**Greater concern for the environment amongst Aussies is reflected in search results.**



A landmark shift in consumerism is unfolding now as customers search for new modes of consumption that can coexist in harmony with the planet that we share.

For brands, this newly awakened reality offers an opportunity to help consumers reduce their impact on the environment and create a sense of responsible consumerism.



## Evolution of searches related to:

### Sustainability and upcycling

From

To

Many Australians are also looking for products that reduce their impact on the environment. Searches for such products include:

+ 550%

+ 225%

+ 120%

+ 110%

+ 55%



## Concern about the environmental impact of consumption is helping drive interest in local options

In today's global and hyper-connected economy, consumers have grown accustomed to purchasing products from around the world. Increasing the choices available to consumers has also allowed brands to grow in previously inaccessible markets. But, the negative impacts of such choice have been environmental, as seen in increased carbon emissions, rising pollution, and higher waste generation.

Consumers are increasingly aware of this reality and are seeking positive solutions to implement immediately. For many Australians, this has meant buying local.



### Growth in “Best Australian” searches for:

Q best aussie broadband		+ 90%
Q best australian podcasts		+ 70%
Q best australian dog food		+ 50%
Q best australian gin		+ 50%
Q best australian skincare		+ 25%



**In a more transparent world, consumers increasingly want to know if the businesses they buy from have an internal culture of sustainability**

For a growing number of consumers, sustainability is not just a buzzword, it is an important philosophy that drives many of their purchasing decisions, changing the way they assess and interact with brands. Searches throughout the year show that many Australians are eager to engage with businesses that are genuinely committed to environmentally responsible practices.

**Up to 300% increase in searches for:**

Q sustainable fashion brands  **+ 300%**

Q sustainable swimwear  **+ 250%**

Q sustainable salons  **+ 200%**

Q sustainable clothing  **+ 110%**

Q sustainable house designs  **+ 100%**

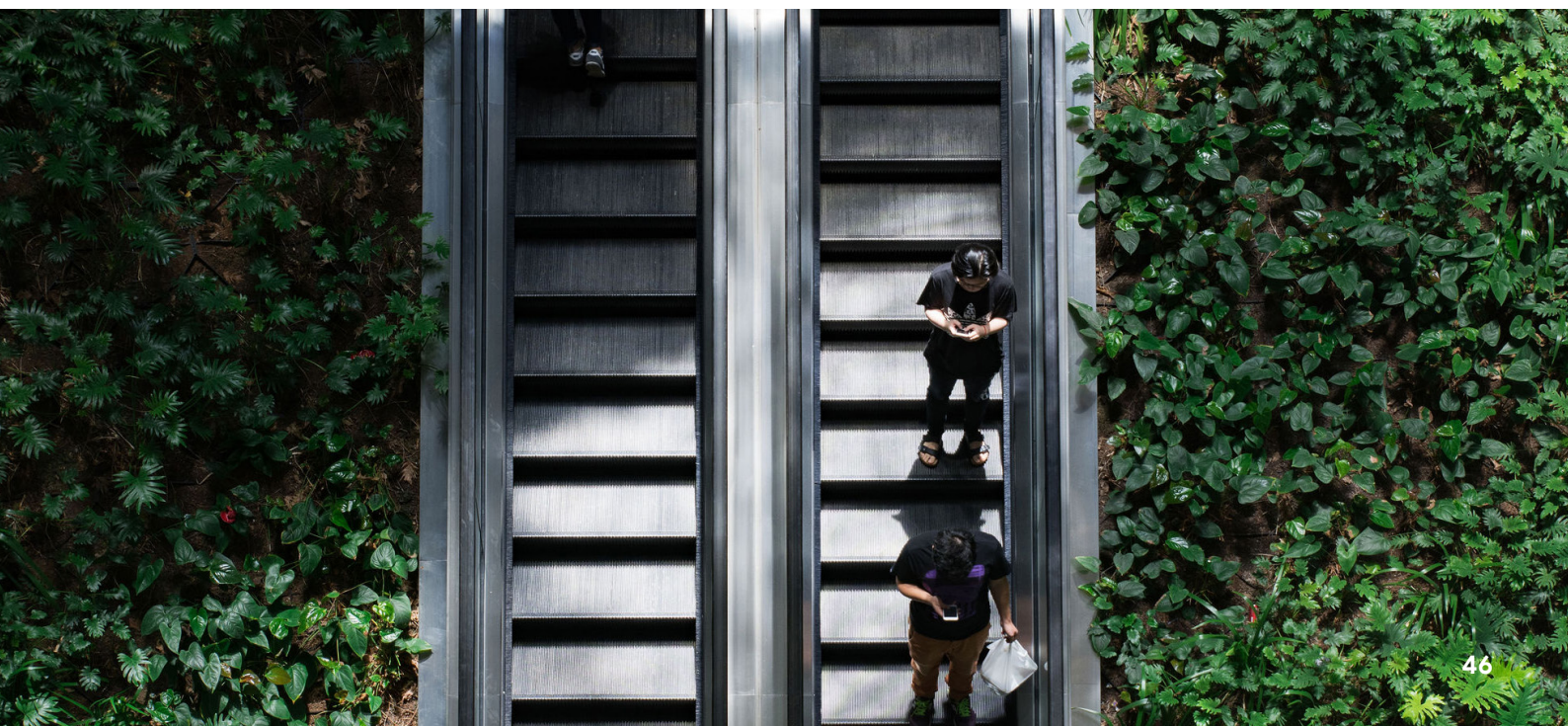
Q sustainable gifts  **+ 90%**

## Consumers won't expect your brand to be perfect. But they will expect you to be moving in the right direction

Search trends show how a rising number of consumers are now seeking eco-alternatives when they shop. They also wish to establish new patterns for the future that are low-impact and sustainable.

Consumers are not demanding perfection, but they do want assurances that brands are taking steps to minimise the negative impacts of their business processes.

2020 is an exciting time for consumer/brand connections. From rising expectations around transparency and sustainability to aspirations for improved wellness and changing lifestyles, there are significant opportunities for all brands to better connect with Australian consumers and their values, now and in the future.







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