

Think with **Google**

2019 RESEARCH REVIEW:

Insights we uncovered in 2019 that will take you into 2020

This year consumer journeys became increasingly complex. New channels of media consumption emerged, traditional industries went digital, and standards in privacy and digital wellbeing were raised. This is a review of the insights we uncovered in 2019, based on Google and YouTube data and research. Our analysis uncovered five key themes that underpin the changes we saw this year, all of which are trends we expect to continue into 2020.

The background features a light gray color palette with various geometric shapes: squares, circles, and a bar chart at the bottom right. A dashed gray line forms a large rectangular frame around the central text. The numbers 1 through 5 are rendered in different colors: blue, green, red, yellow, and gray respectively.

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Consumer journeys are becoming increasingly complex

2

New media channels are emerging

3

Satisfying immediacy is often more important than loyalty

4

Traditional industries are transforming with digital

5

Standards are being raised in privacy and digital wellbeing

1

Consumer journeys are becoming increasingly complex

As digital touchpoints, channels, and choices continue to expand, consumer journeys have become ever messier, resembling a chaotic scavenger hunt. Performance channels are being used as upper funnel ones, while shoppers jump between the online and offline worlds. For marketers, making sense of how to engage their target customer has never been trickier.

Marketers often think of search as a lower-funnel channel. But people are just as likely to search early in the customer journey for deals, ideas, and inspiration



“Simple” + “ideas” mobile queries have **grown by over 60%** over the last two years (i.e. simple dinner ideas, simple costume ideas, simple drawing ideas).

Google



Mobile searches for “personalized” have grown **by over 60%** in the past two years (e.g., personalized gifts, personalized stockings, personalized blankets, personalized necklaces).

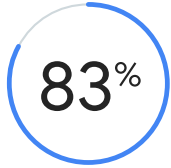
Google



Mobile searches for “rewards app” have grown **by over 90%** in the past two years.

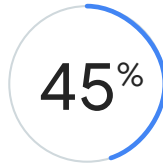
Google

In 2019, we saw the omnichannel trend continue



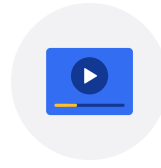
83% of U.S. shoppers who visited a store in the last week say they **used online search** before going into a store.

Google/IPSOS



About **45% of global shoppers** buy online and then pick up in-store, which offers them a more flexible way to purchase and receive their items.

Google/IPSOS



More than **55% of shoppers** say they used online video while actually shopping in a store.

Google/IPSOS

2 New media channels are emerging

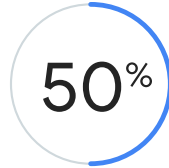
From growing use of podcasts and online video to newer technologies like augmented reality and voice, the media landscape continues to evolve. The people marketers are looking to engage have never been more connected. But it can be hard to know exactly where they're spending time online. As media consumption habits change, marketers need to be more informed than ever about where to connect with customers.

People are increasingly turning to image search for ideas and inspiration



Mobile searches for “image search” have grown **by over 60%** in the past two years.

2018 Google



of **online shoppers** say images helped them decide what to buy.

January 2019 Google Survey



of **online shoppers** say images inspire them to purchase.

January 2019 Google Survey

Online video continues to grow in importance, and the way people watch is changing as well



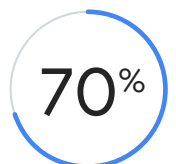
Watch time for shopping-related videos on YouTube grew in U.S. by **more than 5X** over the past two years.

June 2018 Google



Over the past three years, the number of YouTube channels with more than 1 billion views has grown by **5X**

March 2019 Google



of global YouTube watch time happens on smartphones and tablets

December 2018 Google Data

Other forms of media consumption, from voice to podcasts to online video on TV, are growing in popularity



of the global online population is **using voice search** on mobile.

December 2018 Global Web Index



Watch time of YouTube on TV screens now tops **250M hours per day globally**.

April 2019 Google



Mobile searches for “podcast(s)” have **grown by over 80%** in the past two years.

December 2018 Google

Smart speaker usage is growing as they become more connected to users’ lives

4X

Active users of the Google Assistant grew **4X** over the past year.

October 2019 Google Home



People used **Google Home devices** to look up over 16 million recipes last holiday season, with over a million of those searches happening on Christmas day.

October 2019 Google Home



The Google Assistant is now built into more than **1 billion devices**.

October 2019 Google Home

3

Satisfying immediacy is often more important than loyalty

Being there to satisfy people's immediate needs is the new battleground for brands. The winners will be those that save people time and get them what they want as quickly as possible.



of smartphone users expect to get **immediate information** while using their smartphone.

January 2019 Google/Ipsos



Nearly half of all shoppers say they **confirm inventory** before going to the store.

January 2019 Google/Ipsos



“Best” + “right now” mobile queries have grown **by over 125%** in the last two years (e.g., best online sales right now, the best phone out right now, best stocks to invest in right now, best SUV lease deals right now).

March 2019 Google

“Near me” searches are increasing across almost every category, with people combining locally sensitive searches with other intent signals



Mobile searches for “store open near me” (such as, “grocery store open near me” and “auto parts store open near me”) have grown by **over 250%** in the last two years.

March 2019 Google Data

>200%

“**Where to buy**” + “**near me**” mobile queries have grown by over 200% in the past two years (where to buy flowers near me, where to buy stamps near me, where to buy pumpkins near me).

March 2019 Google



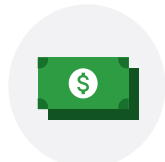
Mobile searches for “on sale” + “near me” (such as, “tires on sale near me” and “houses on sale near me”) have grown by **over 250% YOY** in the last two years.

March 2019 Google Data



Mobile queries that contain “insurance near me” have **grown by over 100%** in the past two years.

June 2019 Google



Mobile queries that contain “bank near me” have **grown by over 60%** in the past two years.

June 2019 Google



Mobile queries that contain “repair near me” have **grown by over 110%** over the past two years.

June 2019 Google

4

Traditional industries are transforming with digital

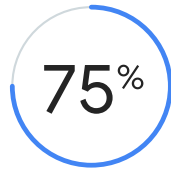
In 2019, we saw even more traditional industries going digital, as people went online to browse and shop.

Grocery



Mobile searches for “grocery app” have **grown by over 900%** in the past two years.

December 2018 Google



75% of online grocery shoppers say they are still shopping with the first retailer they tried for online grocery.

December 2018 Google/Bain



Only 3% of U.S. grocery shopping occurs online, but e-commerce penetration is **projected to triple** over the next 10 years.

February 2019 Bain & Company

Automotive



Mobile searches for “best” + “car(s)/truck(s)/suv(s)” have **grown by over 55%** in the past two years.

September 2018 Google



Mobile watch time of test drive videos on YouTube has **grown by over 70%** in the past two years.

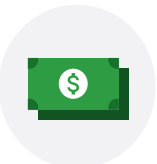
March 2019 Google



Mobile searches for “electric car(s)” **have grown by 85%** in the past two years (electric cars, best electric car, bmw electric car i8, electric car charging station, top electric cars).

December 2018 Google

Finance



Mobile searches related to financial planning and management **have grown 70%** over the past two years.

December 2018 Google



Mobile searches for “high yield” have more than **doubled over the past two years** (high yield savings, high yield cd, high yield bonds).

December 2018 Google



Mobile searches for “best credit card(s)” **have grown by over 70%** in the past two years (best way to pay off credit card debt, what is the best credit card, best credit cards for young adults, 10 best credit cards).

December 2018 Google

5

Standards are being raised in privacy and digital wellbeing

In 2019, it became evident that user privacy, trust, and wellbeing go hand in hand with effective advertising. To be successful, marketers need to work to win people's trust by raising industry standards and by providing more tools and insights to help them manage their digital wellbeing.



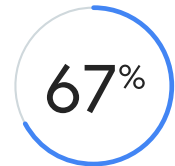
Last year, people made 2.5 billion visits to their Google Account pages, where they can view or adjust how their ads are personalized.

2018 Google Trends



Search interest in the U.S. for "my activity," where people can manage information saved to their Google Account has increased sixfold since 2016.

December 2018 Google Data



67% of parents are concerned about the amount of time their kids spend on devices.

April 2019 Google



Watch time of videos related to "quiet time" grew by 80% over the last year.

2018 YouTube

1 in 3

Americans have taken steps to improve their digital wellbeing in the past year, and more than 80% of them said this had a positive impact on their overall sense of wellbeing.

October 2019 Google



YouTube has delivered over 1 billion "take a break reminders" since the feature was introduced last year.

April 2019 Google