Consumer trends in Home & Garden during COVID-19 (AU)
Summary of findings

On Mar 23rd Australia introduced strict lockdown laws. As a result we are required to spend most of the time inside our homes. This seems to have resulted in an increased interest in home and garden categories.

Weekly home & garden searches and clicks have gained significant momentum when compared to start of this year.

Australians are missing their café style coffee and therefore resulting in a strong spike in coffee machines.

As we enter into cooler months, searches for heaters and fireplaces are skyrocketing.
Spending more time at home has resulted in an increased interest in Home & Garden Categories

Home & Garden search trends
- Search Vol. YoY
- Clicks YoY
- Search vol.(indexed)

Week ending date
- Mar 11: Declared Covid-19 as a pandemic
- Mar 17: Companies introduced work from home guideline
- Mar 23: Non-essential business shut down

Microsoft internal data | Home & Garden | Jan - Apr 2020 | search volume
Spike in searches can be seen across categories

Queries with highest uplift (compared to Jan)

- Sofa bed/s +3,000+%  
- Bunk bed/s +2,000+%  
- Bunnings online +243%  
- Spotlight online +188%  
- Nespresso +154%  
- Spotlight +104%  
- Temple and webster +101%  
- Bunnings +89%  
- Adairs +82%  
- IKEA +77%
Strong spike across Home & Garden categories indicate people’s interest in improving their homes

Sub-category search growth compared to Jan

- Home Improvement: 94%
- Bedding & Linens: 86%
- Home Décor: 83%
- Home Furniture: 83%
- Home Heating & Cooling: 74%
- All Up: 65%
- Home Appliances: 38%
- Yard, Garden & Patio: 34%
- Others: 28%

Sub-category split (March-April search volume)

- Home Improvement: 23%
- Home Furniture: 20%
- Home Decor: 12%
- Home Appliances: 10%
- Yard, Garden & Patio: 10%
- Home Heating & Cooling: 4%
- Bedding & Linens: 1%
- Others: 20%
We have seen a strong demand for brands

<table>
<thead>
<tr>
<th>Home Furniture</th>
<th>Home Improvement</th>
<th>Home Decor</th>
<th>Home Appliances</th>
<th>Yard, Garden &amp; Patio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ikea</td>
<td>+124%</td>
<td></td>
<td>Spotlight</td>
<td>+190%</td>
</tr>
<tr>
<td>Fantastic furniture</td>
<td>+120%</td>
<td></td>
<td>West Elm</td>
<td>+111%</td>
</tr>
<tr>
<td>Amart</td>
<td>+91%</td>
<td></td>
<td>Kmart</td>
<td>+77%</td>
</tr>
<tr>
<td>temple and webster</td>
<td>+144%</td>
<td></td>
<td>Big W</td>
<td>+4%</td>
</tr>
<tr>
<td>Freedom Furniture</td>
<td>+67%</td>
<td></td>
<td>Target</td>
<td>+73%</td>
</tr>
<tr>
<td>Bunnings</td>
<td>+175%</td>
<td></td>
<td>Appliances online</td>
<td>+91%</td>
</tr>
<tr>
<td>Mitre 10</td>
<td>+130%</td>
<td></td>
<td>Harvey Norman</td>
<td>+77%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TGG</td>
<td>+129%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Kmart</td>
<td>+103%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Target</td>
<td>+131%</td>
</tr>
</tbody>
</table>

Top Brands (by search volume)
Uplift = Jan vs Apr search volume uplift

Microsoft Internal Data | Home & Garden | Jan vs Apr 2020 (1st two weeks) | search volume
Online marketplaces and department stores have witnessed substantial growth in consumer demand

<table>
<thead>
<tr>
<th>Online Marketplaces</th>
<th>Department Stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>ebay</td>
<td>kmart</td>
</tr>
<tr>
<td>+84%</td>
<td>+125%</td>
</tr>
<tr>
<td>amazon</td>
<td>big w</td>
</tr>
<tr>
<td>+129%</td>
<td>+32%</td>
</tr>
<tr>
<td>kogan</td>
<td>target</td>
</tr>
<tr>
<td>+128%</td>
<td>+138%</td>
</tr>
<tr>
<td>catch.com.au</td>
<td>Myer</td>
</tr>
<tr>
<td>+196%</td>
<td>+160%</td>
</tr>
<tr>
<td>graysonline</td>
<td>DJ</td>
</tr>
<tr>
<td>+163%</td>
<td>+138%</td>
</tr>
</tbody>
</table>

Top Brands (by search volume)
Uplift = Jan vs Apr search volume uplift
Home Appliances

Covid-19 has pushed us to cook more at home. As a result, home appliance searches have increased by 37% YoY

"Nielsen Homescan data revealed that Australians are getting more adventurous with their cooking ingredients. Baking is also high on the homestay agenda"*

Product Split by search volume (Mar-Apr 2020)

Large Kitchen Appliances

- Fridge: 42%
- Dishwasher: 21%
- Oven: 15%
- Cooktops & Stoves: 10%
- Rangehood: 8%
- Others: 5%

Fridge was the most searched item

Kitchen Appliances

- Coffee Machines: 22%
- Blenders & Mixers: 27%
- Soda Stream: 4%
- Food Processors: 4%
- Kettles: 6%
- Air Fryers: 8%
- Microwave: 8%
- Cookers: 9%
- Others: 12%

Coffee machines and Blenders & Mixers were the most searched items
Australia’s love for coffee is visible in the sudden spike in coffee machines searches.

Queries with highest uplift (compared to Jan)

- Nespresso online +1000+% 
- Slow cooker +252% 
- Microwave +228% 
- Nespresso.com +160% 
- Nespresso +154% 
- Rice cooker +137% 
- Kettle +117% 
- Toaster +116% 
- Food processor +106% 
- Kitchenaid +89%
Searches for fridges spiked as soon as lockdown laws were introduced, indicating people started to stock up food items.

- **Small fridge**: +6000+%
- **Dishwashers for sale**: +1000+%
- **Pizza oven**: +126%
- **Mini fridge**: +118%
- **Online appliances**: +99%
- **Stove**: +96%
- **appliances**: +93%
- **Bosch dishwasher**: +79%
- **Miele dishwasher**: +75%
- **Asko dishwasher**: +57%
Home Furniture

People spending more time at home seems to have a positive impact on home Furniture Searches.

Home Furniture searches grew by **141%** (Jan vs Apr)
Home Furniture searches spiked when people started to work from home

Queries with highest uplift (compared to Jan)

- Cheap bunk beds +12,000+%
- Coffee tables for sale +10,000+%
- Best mattress +8,000+%
- Sofas +4,000+%
- Sofa bed/s +3,000+%
- Bunk bed/s +2,000+%
- Fantastic furniture +790%
- Mattress +600%
- Ikea online +160%
- Temple & Webster +101%

Microsoft internal data | Home & Garden | Jan - Apr 2020 | search volume
*Pure Brand = terms like IKEA, Temple & Webster with no clear product intention
Home Heating & Cooling

As we move towards winter, demand for heaters and fireplaces are growing.
Home Heating related searches are growing as we enter into cooler months

Queries with highest uplift (compared to Jan)

- Gas heaters australia +2,000+%  
- Wood heaters australia +1,000+%  
- Fire pit/s  +867+%  
- Underfloor insulation +230%  
- Hydronic heating +221%  
- Jetmaster +169%  
- Fireplace/s  +139%  
- Rheem +52%  
- Brivis +45%  
- Stiebel eltron +30%
Key Takeaways

1. As consumers shift towards online, businesses have a huge opportunity to connect their customers with the right product and provide a great customer experience.

2. Defend your brand entity and be a part of the user journey as they find ways to adjust to this new world.

3. Take advantage of your search campaigns to understand your customers better and plan your next steps.

4. Connect your customers with the right products on the first click.