

INSIGHTS

# DIGITAL 100

2020's most important consumer trends

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“Economic downturn, preference shifts and digital acceleration are the three forces that are impacting the market landscape across industries.

The fastest-growing websites in our Digital 100 were responsive to changing shopper behaviour and needs during these uncertain times. The brands focused on mobile optimisation and high impact marketing campaigns on search and social channels to acquire and retain customers.”

# Methodology

This report's insights are based on SimilarWeb data, particularly traffic patterns for the 10 fastest-growing sites, with an average of at least 100K visits, in Australia, across key industries.

The analysis is conducted by looking at five industries and websites with the largest year-over-year change (2019 vs. 2020) in total website visitors on desktop and mobile devices.

# Introduction

In our exclusive Digital 100 Insights Report, SimilarWeb examines some of the industries, brands, and strategies that defined 2020 and the potential lasting impacts of these trends on the economy.

It offers insight into what digital brands can do to strategically take advantage of the recent consumer behavior changes due to COVID-19.

Given the accelerated shift from bricks-and-mortar to online in 2020, digital intelligence is no longer a nice-to-have. Rather, it is a business necessity for companies and brands to prosper in the years ahead.



## INSIGHT

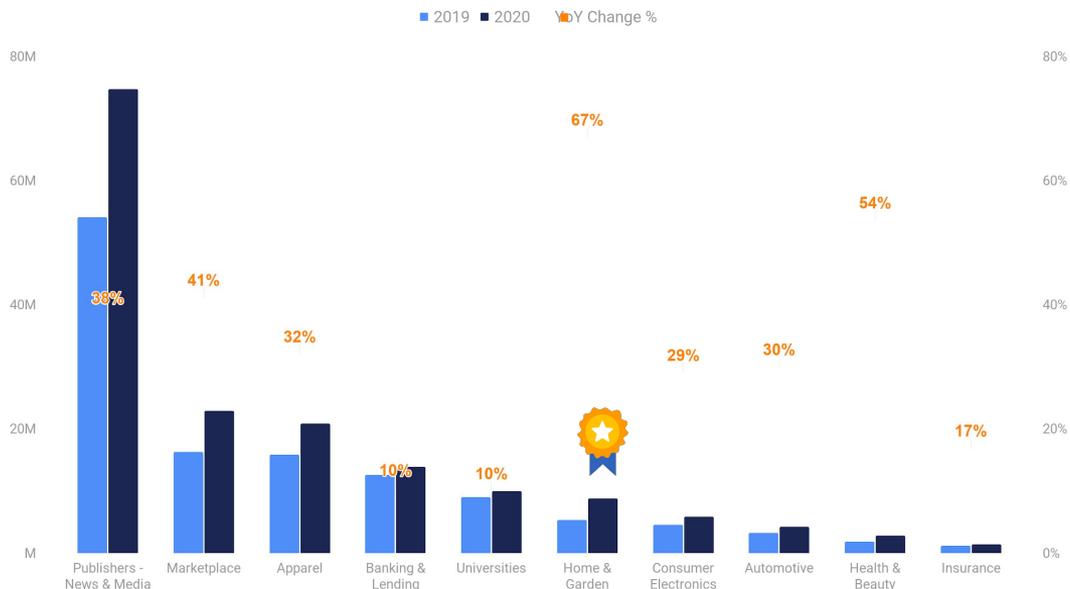
Aussie consumers are accelerating the adoption of digital channels, a trend seen across the globe during the pandemic.

- Total online visits across the ten industries reached 16.5 billion during 2020; this is a 33% YoY increase in online traffic. User engagement through mobile devices increased by 5%, taking mobile traffic share to 59%.
- Online Publishers remained the largest industry by traffic volume. News and Media websites saw 38% growth during 2020. The fastest growing categories were Home and Garden +67%, Health and Beauty +54% and Retail with +41% YoY growth in traffic.
- Finance (Banking, Lending and Insurance) and University websites were least impacted by these market changes.



Mobile Traffic Share 59.83%(2020)  
+5.10% YoY

### Top 10 Industries - AU : YoY Traffic Growth





## Home furnishings on the rise

Work-from-home (WFH) has become the norm due to nationwide lockdowns and social distancing regulations. As a result, these lifestyle changes have impacted both the Australian household furniture and gardening industries.

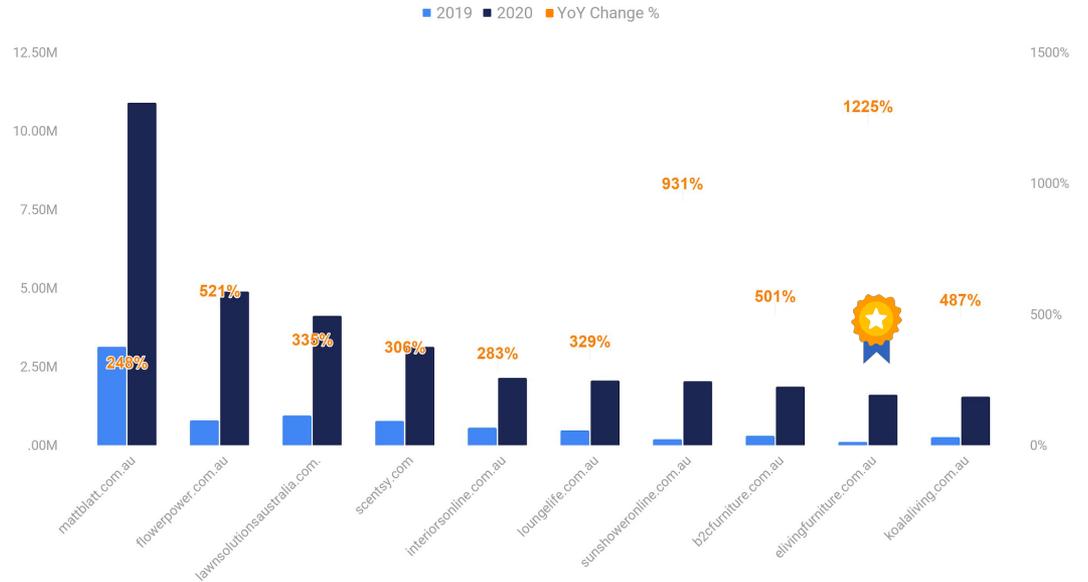
Competitive rivalry is increasing as businesses focus on online channels to boost sales.



## INSIGHT

- The fastest growing gardening and lawn care websites were Sunshower Online +931%, Flower Power +521%, and Lawn Solutions Australia +335%.
- Furniture retailer eliving furniture emerged as the fastest-growing furniture website with 1225% growth in visits.
- The revival of Matt Blatt is a highlight of the furniture category - with an online-only offering, Matt Blatt is poised to disrupt traditional business models in this category.
- Keyword analysis shows "Sofa", "Office Chairs", "Dining Chairs", "Plant Pots" and "Desk" were the top five product searches driving traffic to these websites.

### Top Home & Garden Websites - AU : YoY Traffic Growth





## Beauty Industry proves its resilience

The health and beauty category recorded tremendous growth in visits and engagement during the pandemic. Lockdowns and strict social distancing regulations for hairdressers and beauty salons drove consumers online for self-care, skin, and hair care products. Youtube emerged as the most important channel for acquiring and nurturing beauty shoppers.

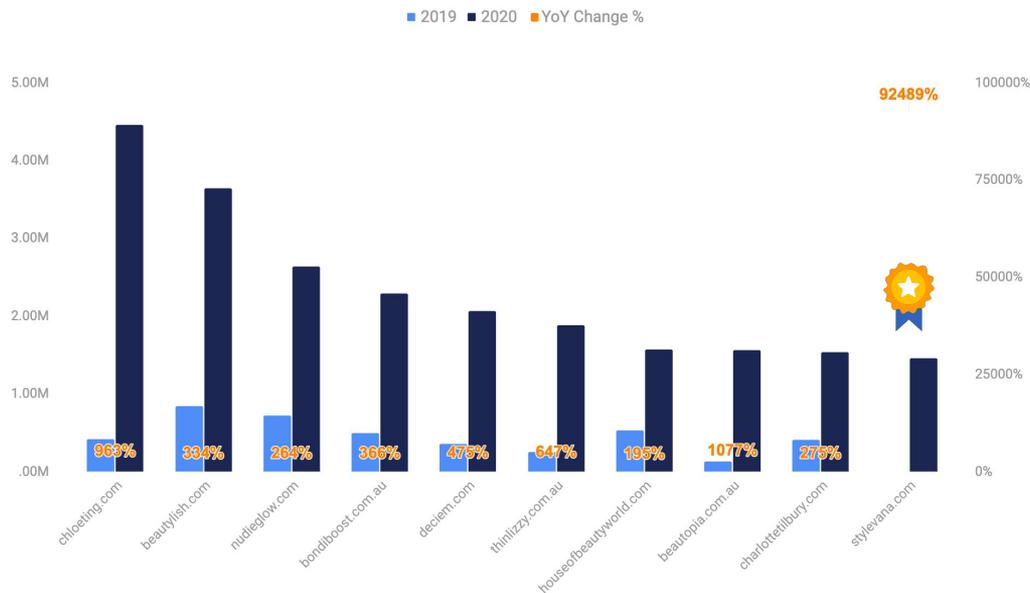


## INSIGHT

- K-beauty (Korean beauty) products emerged as a key trend stylevana recorded the largest 924x growth in visits YoY , while Australia's leading Korean beauty brand "Nudie glow" saw 264% growth in visits.
- Deciem's "The Ordinary" emerged as the most popular brand overall, with its direct to consumer website seeing 475% growth in visits YoY.
- Keyword analysis for health and beauty websites shows that searches with keywords like "Acid" and "Vitamin" increased by 627% YoY. Question queries (Searches with How, What etc.) increased by 106% YoY. This evolving search behaviour during the shopper journey shows beauty consumers of today are more informed and engaged than ever before - particularly as these questions would have typically been asked at salons in person.

**Brands must prioritise content creation to build authority on search engines and multimedia channels like Youtube for traffic acquisition.**

### Top Health & Beauty Websites - AU : YoY Traffic Growth





## Profound effects of lockdown on shopping behaviour

The fastest-growing retail websites in the Australian market are Online Toy stores. This is essentially pandemic-driven growth as parents sought creative ways to keep youngsters entertained throughout the lockdowns. Another noticeable trend in the retail category is the growth of "As Seen on TV" and infomercial web stores as people spent more time in front of the television.

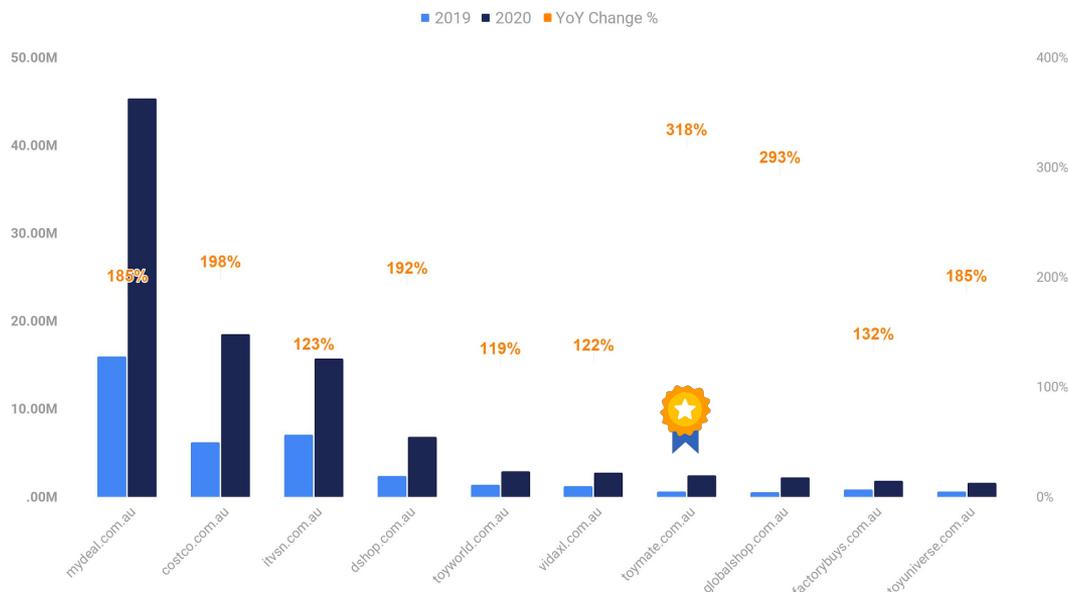


## INSIGHT

- Multi-brand toy stores that offer a wide variety of toys, from arts & crafts to educational and building toys, emerged as the fastest-growing websites. toymate recorded the largest YoY growth in the visits (+318%); similarly, other toy stores like Toy Universe and Toyworld recorded a 100% + increase in visits.
- Mydeal and Costco are the movers and shakers in the retail category; both websites have a decent audience size of 500k+ monthly unique visitors and recorded 2x growth in unique visitors YoY.

**These emerging players can take market share from current category leaders; hence it would be interesting to see if they can carry this momentum in 2021.**

### Top Retail Websites - AU : YoY Traffic Growth





## Top themes defining the fashion industry

Cult Branding, Product Differentiation, and Athleisure are the key trends in the extremely competitive apparel industry.

Fast movers use aggressive price cuts and high-impact online marketing campaigns on social networking platforms and search engines to acquire and retain customers.



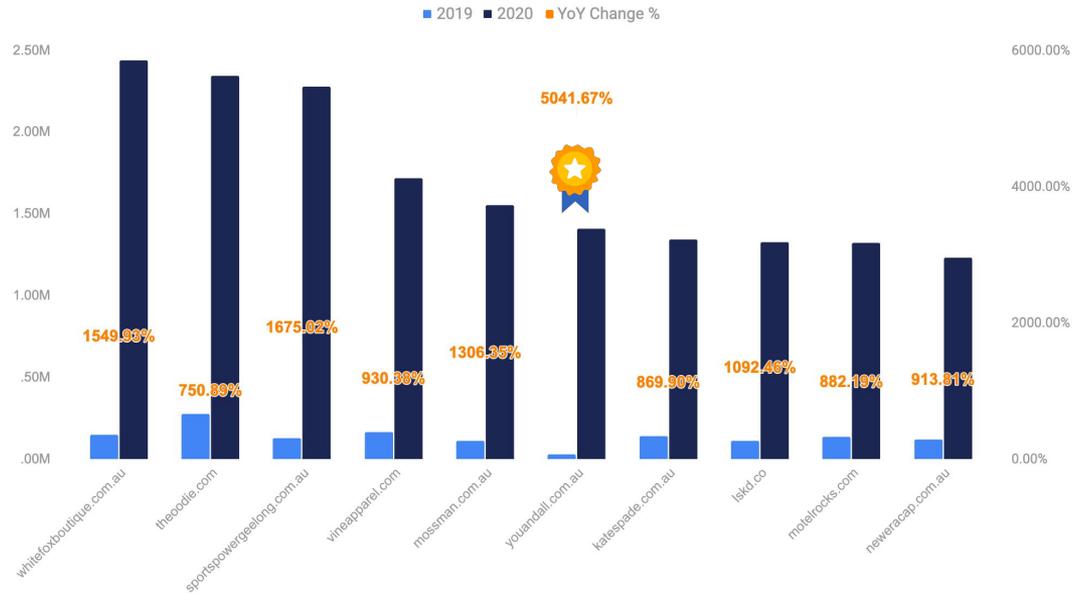
## INSIGHT

- With 1550% YoY growth, White Fox is becoming an Aussie cult fashion brand; their website has the highest traffic share from the 18 - 24 age group. youandall, with 5042% YoY growth, had the highest growth, using a differentiation strategy by targeting the plus-size market segment.
- Local Athleisure and streetwear brands like Sportswear Geelong and LSKD from Queensland are rising, indicating increasing demand for casual and comfortable clothing during lockdowns.

### Growth Tactics

- Facebook was the second biggest channel driving traffic to these websites after search engines. Fast moving websites are 3x more reliant on social channels for traffic acquisition than the apparel industry average.
- Paid keyword analysis shows these websites actively target transactional keywords like “Discounts”, “Cheap” and “Sale” to acquire new customers.

### Top Apparel & Fashion Websites - AU : YoY Traffic Growth





## Increasing demand for used cars and its spillover effect

As commuters shun public transport in the age of social distancing, there is an increasing demand for buying and selling “used cars”.

Four out of the top ten fastest-growing websites in this category are “car marketplace” websites.

The growing demand for used cars is driving the online growth of car parts and tyre websites with Australian’s turning to DIY car projects.

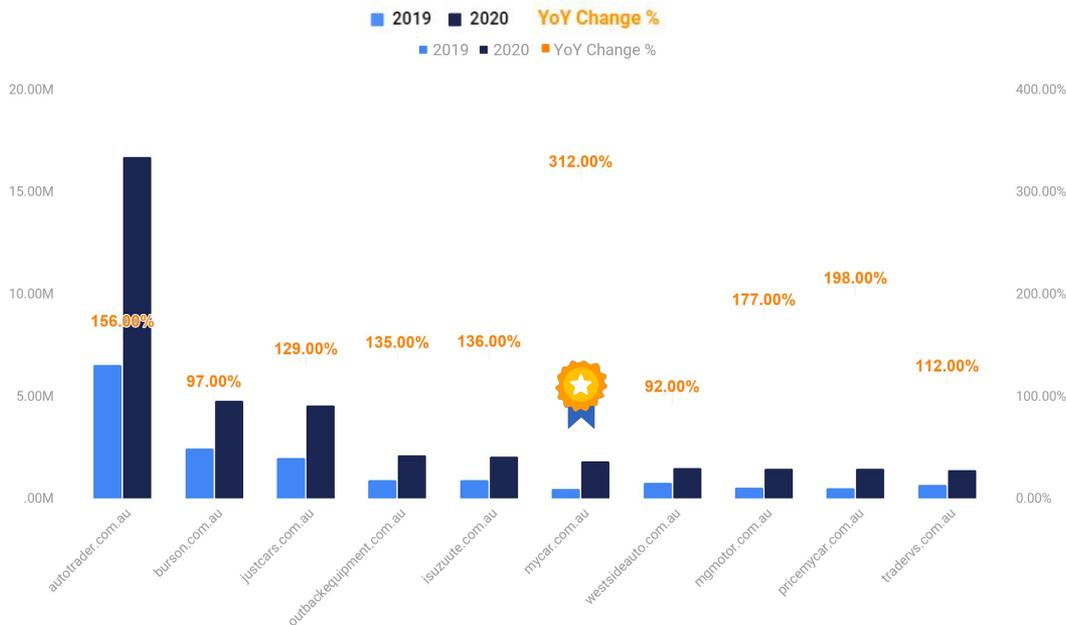


## INSIGHT

- Autotrader recorded the largest YoY growth (+156%) amongst Automotive websites. Only two OEMs made it in the top ten list; MG motors recorded 177% YoY growth, while isuzuute recorded 136% YoY growth in online traffic.
- mycar (Tyre website) saw 312% YoY growth and Burson (Car parts) recorded 97% growth in visits during 2020.
- Pricemycar (content & review aggregator website), saw 198% YoY growth and is transforming the car buyer journey. It is an emerging affiliate in the automotive category website that connects car buyers with car dealers.
- Industry keyword analysis shows “sell cars” searches increased by 7% YoY. Also, traffic to the sell section on car marketplace websites increased by 2% YoY.

**Fast-growing websites like "Autotrader" are taking on category leader carsales.com.au on search engines. Autotrader had the highest (21.37%) paid share of voice from "Used Car" searches during 2020. Focusing on search engines would be critical for customer acquisition in this category.**

### Top Automotive Websites - AU : YoY Traffic Growth





## About SimilarWeb

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SimilarWeb insights, from every market, in every category, enable companies to find untapped opportunities to grow their business.

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