Think with Google

2021 YEAR IN SEARCH

Look back to move
your marketing forward

Asia Pacific

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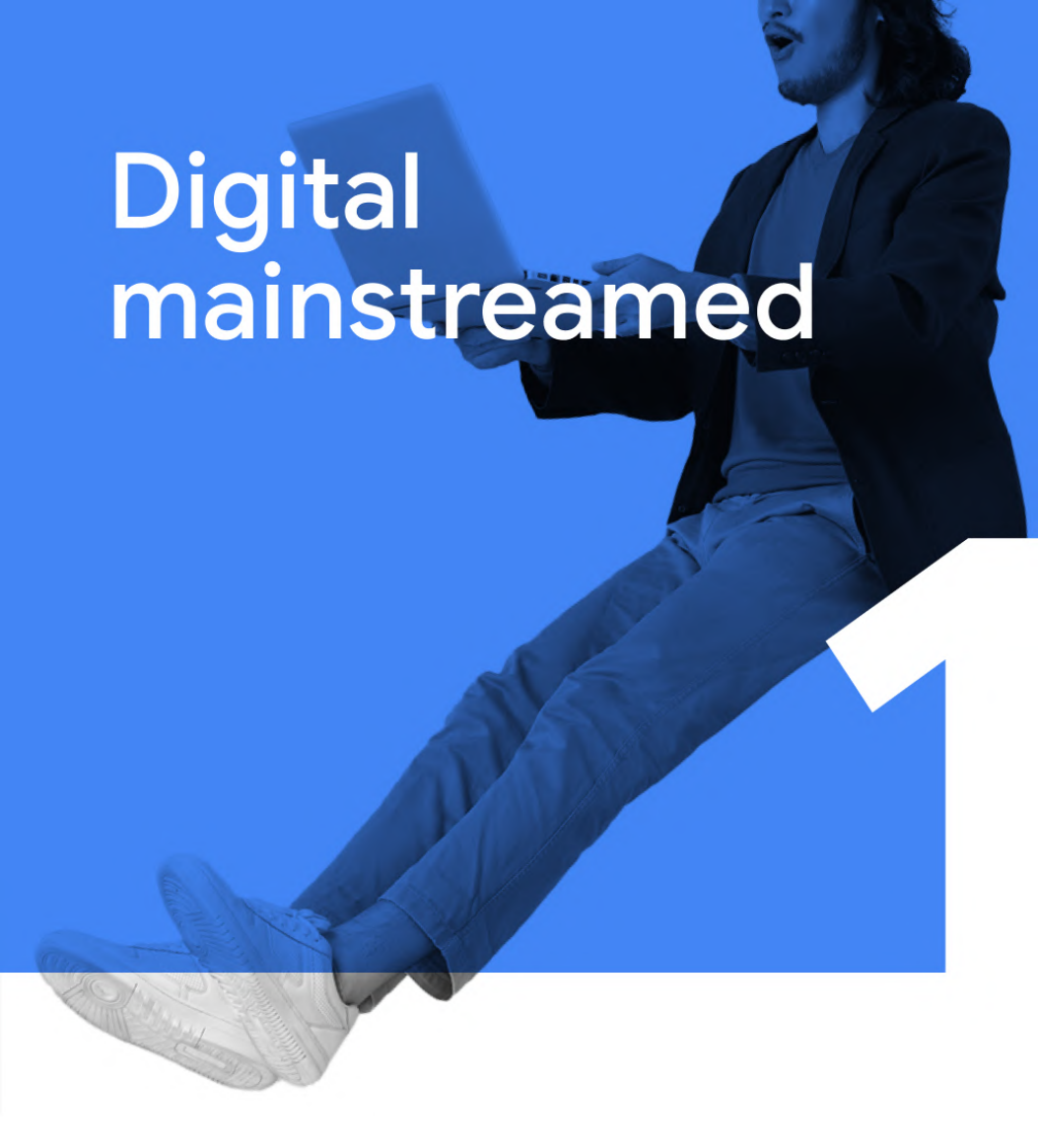


Digital mainstreamed

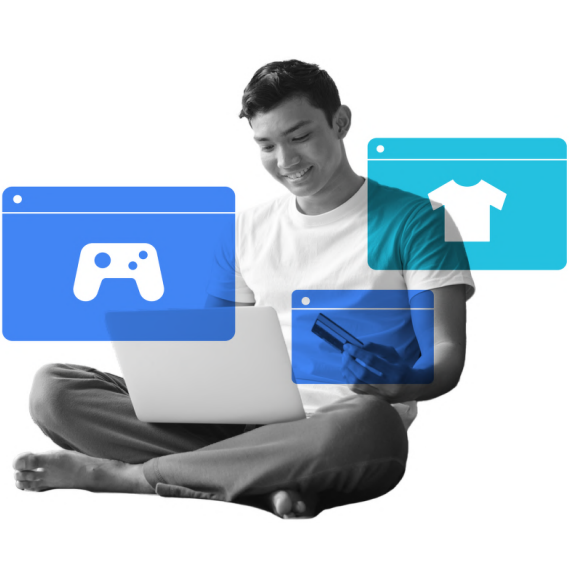
If 2020 saw millions of consumers migrate online, 2021 showed the staying power of digital. From shopping to services, **new users who may have begun their online journeys due to necessity are now proactively deepening their usage.** Speed, convenience, and price are just a few of the reasons more consumers are now choosing digital-first lifestyles.

Online shopping

In 2021, APAC's digital migration continues with people going online to access services that were disrupted by physical shutdowns. In the first half of the year alone, 20 million people in Southeast Asia became new digital consumers. But what we're also seeing this year is the staying power of digital. Rising searches in 2021 paint a picture of how the many newcomers have not only dipped their toes into the online world, but also taken the plunge to integrate digital into their lifestyles.

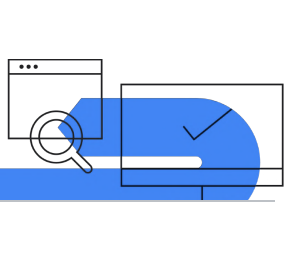
Indeed, even as offline spaces start to open up, consumers who have grown more comfortable with the digital world are now choosing to stay online. In 2021, more than 58% of consumers in India and China are buying the majority of items they need online instead of going in-store, up from 34% last year.[1] Benefits like time and cost savings, flexible payment options, diversity of product offerings, and delivery services are motivating shoppers to choose digital-first experiences.

In some cases, online shopping has even outpaced traditional retail. In 2021, China became the first country in the world to see e-commerce sales overtake store sales. South Korea follows closely behind, with just under a third of all its retail sales occurring online. Today, consumers are not only seeing digital as a useful channel for research and decision-making, but also as the easier option for completing their purchases. A recent study, for example, found that close to half of shoppers in Japan choose to both research and purchase exclusively online.[2]



The rise in users pushed online by the pandemic meant that brands had to adapt and digitalize at a scale and pace they had never planned for or expected. This resulted, often quite successfully, in scrappy solutions and quick-fix pivots, as businesses forced moments of flexibility within traditional marketing and business models.

Now that consumer behaviors are no longer only fueled by the pandemic, but also by the draw of a digital-first lifestyle, brands need to set themselves up to not only be COVID-proof, but future-proof as well. This is a watershed moment to rethink the agility of your business model and ensure it is ready for any changes that may lie ahead, while still keeping the customer at the center of what you do.



SEARCHES

New users and businesses online

As new users come online, businesses are evolving their digital strategies to meet people where they are. Growing searches across APAC show businesses seeking to understand more about digital transformation strategies and online inventory management, while new online shoppers are looking to be rewarded for their brand choices.

Search interest related to (new user) grew by up to 55% in the Philippines, Indonesia and Pakistan, for example **Lazada new user, kode promo tokopedia pengguna baru** (Tokopedia new user promo code), and **daraz new user voucher.**

+55%

In South Korea and Taiwan, we see more than 50% growth in searches by new users looking to bank online, with searches like (계좌 개설) (opening an account) and (線上 開戶) (online banking account open).

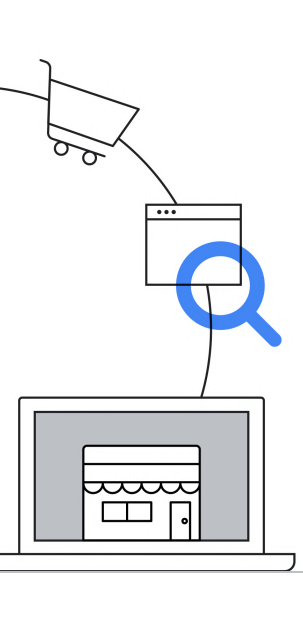
+50%

Across countries like Malaysia, Philippines, Indonesia, Pakistan and South Korea, we see people researching how to get their products online with search interest in (seller center) or (merchant center) growing by up to 95%. In India, search interest in **sell online** was 10% higher than last year.

+95%

+55%

Search interest in (scan harga) (scan price) referring to online versions of price catalogs, has grown by 55% in Indonesia, showing how even the most basic shopping experience has moved online. Most of the search results for this show businesses have scanned their physical catalogs to make digital versions for their customers.



+60%

In Japan, there was +60% growth in search interest in (デジタルトランスフォーメーション) (Digital Transformation), as businesses adjust to an online world.

Online-first shopping experiences

Today, almost half of APAC consumers surveyed see no reason to go in-store if they can buy what they need online.[3] Rising searches show how shoppers are using digital channels as a helpful tool for decision-making, but are reluctant to endure downsides like delivery waiting times and costs.

+30%

We see a rise in searches by people looking to build their consideration sets online. Search interest in (ยี่ห้อ ไหน ดี) (which brand is good) grew by 30% in Thailand and **[XYZ] brands in Pakistan** grew by over 25%, as people try to learn more about brands available to them locally.

+80%

In Japan, we see 80% growth in search interest in (セール いつ) (when is [XYZ] brand's sale), as people do more online research to find out when their favorite brands are holding sales.

Shoppers are looking for free and reliable delivery, with India and Thailand seeing up to 60% growth in search interest in (free delivery) and Malaysia seeing over 4000% growth in (best express tracking)

Search interest in (same day delivery) in Australia, New Zealand, Malaysia, the Philippines, and India has grown by up to 70%, as consumers seek to replicate the instant gratification they get from in-store shopping.

+60%

+70%

Digital in our day-to-day

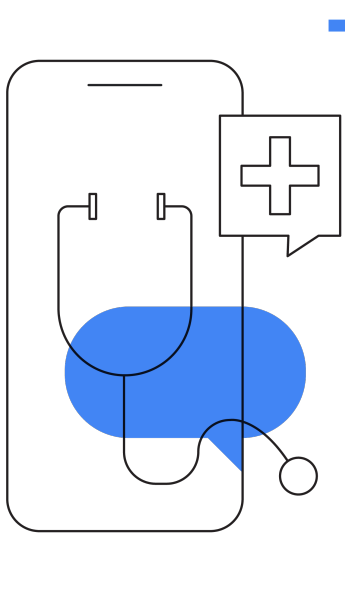
People are expanding the use of apps and technology in their day-to-day lives, as well as experimenting with new digital services like contactless payments. While digital wallets may have started out as a way to pay safely during the pandemic, their ease and convenience are converting consumers for good. In the first quarter of 2021 alone, Mastercard saw one billion more contactless transactions as compared with the same period of 2020.[4]

+700%

Hong Kong saw 700% growth in search interest in (tap and go) as people embrace new ways of paying for shopping and traveling with their Octopus Cards.

+170%

Search interest in (digital wallet) (e-wallet) or (digital payment) has grown by up to 170% in Malaysia, Australia, Indonesia, Pakistan, and Singapore. This search interest has also seen growth in New Zealand and South Korea, albeit at a smaller volume.



+80%

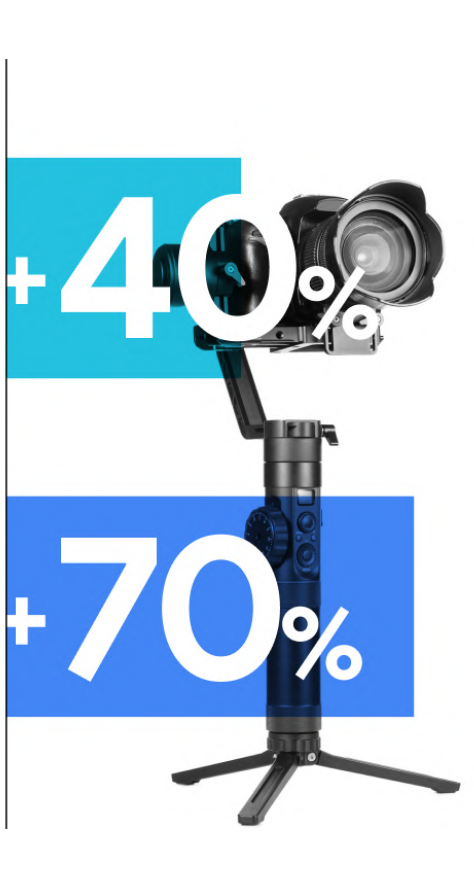
We see more than 80% growth in searches that indicate a shift from an in-person to screen-first reality, with people in the Philippines searching for (online appointment) people in Singapore searching for (virtual consultations) and people in India and Taiwan searching for (virtual) or (online doctor consultations)

Preference for digital formats

Searches for digital formats continue to gain momentum as APAC consumers entertain themselves online. Streaming on connected TV has taken off,[5] live commerce is expanding its reach,[6] and even when people take a break from the screen, they're opting for content like podcasts[7] and audiobooks which they can enjoy on-the-go.

In Hong Kong and Japan, search interest in (livestream) or (live commerce) grew by more than 40%.

YouTube search interest in (streaming) increased by up to 70% in the Philippines, Australia, Malaysia, South Korea, New Zealand, and Sri Lanka.



+40%

+70%

+145%

YouTube search interest in (podcasts) grew by more than 145% on average across India, Indonesia, the Philippines, Malaysia, Singapore, and Taiwan.

MARKETING IMPLICATIONS

From COVID-proof to future-proof

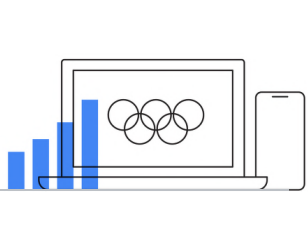
While COVID-19 created an urgency for more people and businesses to meet online, searches reveal a rise in digital-preferred behavior. At first, many brands responded to the initial rush online by finding flexibility in existing marketing strategies to solve for pandemic-related challenges. Now, the fast evolving online landscape calls for a more agile business model that is not only COVID-proof, but future-proof as well.

McKinsey

> "What many leaders feared, and the pandemic confirms, is that their companies were organized for… standardization and predictability that's [now] being overwritten by four big trends: a combination of heightened connectivity, lower transaction costs, unprecedented automation, and shifting demographics."

1 Digital is where the masses are: from a complementary to elementary strategy

With the magnitude of the shift to online as a preferred channel for so many people in APAC, it's clear that digital is where the masses are at. This means that channel strategies that only rely on "above the line" advertising for mass reach are fast becoming outdated.



For example, although TV viewership for the Tokyo Olympics hit a record low, advertising budgets did not reflect this shift, with brands still paying as much as ever for commercials. Is your **audience and media strategy** reflecting the reality of where audiences are today?

1

Before deciding on your digital advertising strategy, check out best practices and tips for audience reach and segmentation strategies.

2

Stay on top of the latest consumer insights and best practices across marketing objectives and shopper moments, and use them to inform your digital strategies.

2 Bring your storefront to wherever shoppers are

Consumers expect to be able to fulfill their shopping needs whenever they need, and wherever they are. We know purchase decision-making is not linear, there is a complicated web of touchpoints that differs from person to person. And with new innovations like Google Lens, more people are browsing online for inspiration in fresh, unique ways.

Be ready to meet people wherever they are on their shopping journeys and create helpful bridges to take them one step closer to your storefront.

Show up for people searching for what you're selling by featuring your products on free listings in the Shopping tab on Search.

Shorten the path from your ad to your virtual storefront by connecting your product feed to either Video action campaigns to drive customers to your site, or App campaigns to take them to your mobile app.

AIS, Thailand's largest mobile operator, more than doubled its click-through rate by adding product feeds to its TrueView for Action campaign compared to a similar campaign that only had sitelink extensions.

Apichart Tangtrakulwongse
Head of Online Channel Management

> "It brings the product shelf one step closer to customers. The results show an impressive increase in clicks and conversions."

Search interest in "open now near me" has grown over 2X globally year over year.[8] To create a seamless online to offline experience for your shoppers, use Local inventory ads to promote your products that are available for in-store or curbside pickup.

3 No more lines: Integrate and innovate across functions, channels, and formats

Digital is leveling the playing field for businesses. Traditional industry norms such as size of stores and retail legacy matter less as 90% of APAC consumers expect retailers to sell their products online, and even those who purchase offline still refer to at least one digital channel for research.[9] This means that every brand has the opportunity to enjoy borderless growth, especially those that focus on seamless online-offline experiences for their customers.

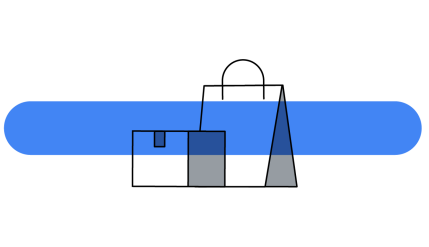
+90%

of APAC consumers expect retailers to sell their products online.

1

Build an agile omnichannel strategy that enables your business to unlock short-term wins and long-term growth.

An omnichannel ecosystem doesn't just entail showing up online. More importantly, it requires an integrated, cross-functional business strategy. Transformation needs to come from within in order for your brand to meet ever-changing consumer needs and drive sustained business growth. This agility, coupled with customer-centricity, is what will open doors to new business opportunities.



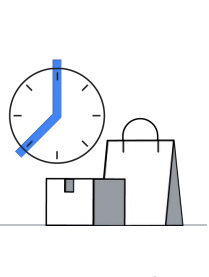
The advent of online shopping means you can now connect with customers beyond physical borders, like how Singapore-based Shopee expanded its reach outside of Asia to become the most downloaded shopping app in Brazil.[10]

2

Connect and innovate the shopping experience, both online and in-store.

Simply moving a part of your business online will not satisfy the growing consumer demand for a seamless experience. Offer the best of online and offline shopping so that consumers can engage with your brand effortlessly, at their fingertips or in stores.

Get the last mile delivery right. Time and cost savings are the two benefits people value most in online shopping, while shipping fees and long delivery times are deal breakers.

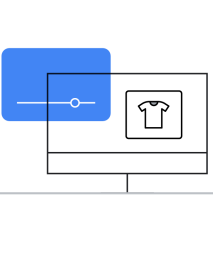


In China, Sephora launched a one-hour delivery service through its online retail platform to mirror the instant fulfillment shoppers would get from an in-store shopping experience.[11] Leverage immersive technologies to replicate offline shopping experiences online and elevate the in-store shopping experience.

Almost half of the consumers surveyed felt that immersive technology like AR, VR, and 3D content helps them feel more connected with products, and 61% said they are more likely to buy from a brand that uses these technologies.[12]

+61%

Live commerce is fast gaining popularity for its immersive, participatory shopping experience, and shoppable video presents opportunities for experimentation. As many creators go live to review products and discuss their shopping hauls, livestreaming is becoming increasingly influential in the consumer's decision-making process.



YouTube's Holiday Stream and Shop hosted livestreams by creators and brands together.

Conversational commerce can personalize shopping journeys and offer shoppers assistance. For example, a live chat function on your e-commerce platform enables a two-way exchange with customers. Shoppers can clarify delivery statuses or ask questions, while your brand can showcase relevant products and learn from customers why they drop off.

Sources:
All Google Search data points included in this report are from Google Trends, Sep 2019 - Aug 2020 vs. Sep 2020 - Aug 2021, unless otherwise indicated.

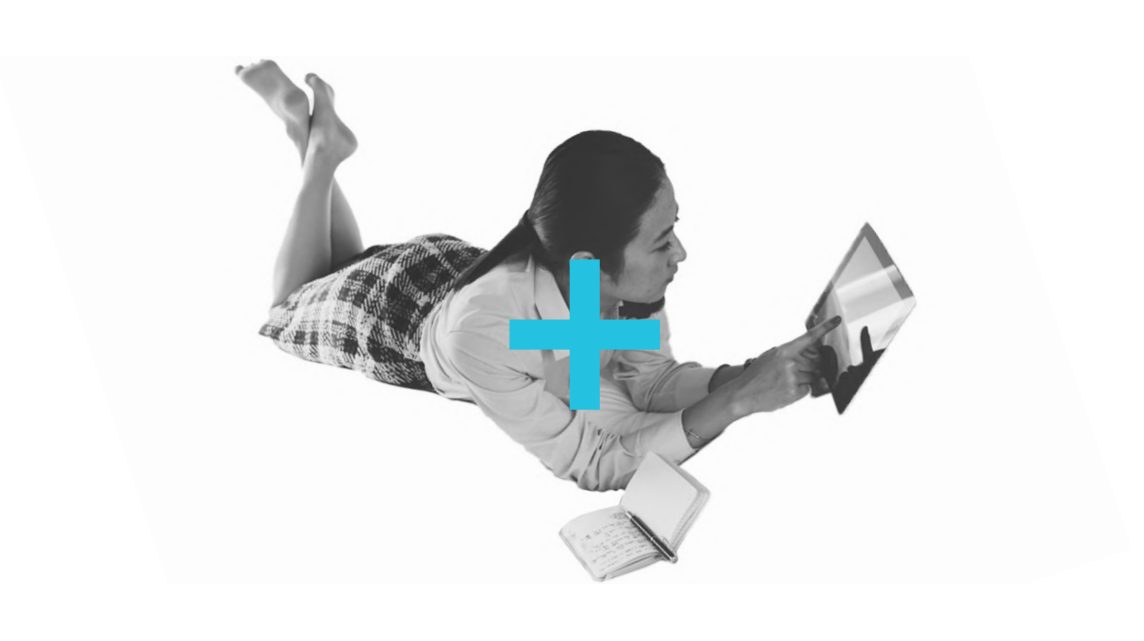
1. Ipsos, COVID Pulse Insights, Oct. 21, 2021–Oct. 24, 2021, March 19, 2020–March 22, 2020.
2. Google/Kantar, Shopper Pulse SEA + JP Core Report: Waves 1+2, Sept. 2021.
3. Google commissioned Ipsos COVID-19 Tracker, AU, BR, CA, CN, FR, DE, IN, IT, JP, MX, RU, ZA, KR, ES, U.K., U.S., n=500-1000 online consumers 18+ per market. Oct. 7, 2021–Oct.10, 2021.
4. Mastercard Data Warehouse, 2021.
5. GWI, Wave Q1, 2020, ID, MY, PH, SG, TH, VN.
6. iKala, The Rise of Social Commerce in Southeast Asia, 2020.
7. GWI via CampaignAsia, June 2021.
8. Google Data, Global English, June 1, 2021–July 30, 2021 vs June 1, 2020–July 30, 2020.
9. Accenture, Global Consumer Pulse Research, 2021.
10. Trendwatching Premium.
11. Trendwatching Premium.
12. Accenture Interactive, Immersive Experiences Survey, 2020.

Lives reexamined

Following the sudden disruptions of the pandemic, people emerged in 2021 with a realization that some changes weren't temporary after all. This prompted a **sense of introspection and a reevaluation of their values and lifestyle choices.** As a result, they looked for more comfort and ease in their lives, and shifted their focus to the things that matter most to them.

People have endured many waves of change on the global and local level over the past few years. As people try to embrace new unknowns in their lives, they're reexamining former lifestyle choices, once-familiar ways of life, and the comfort of established routines.

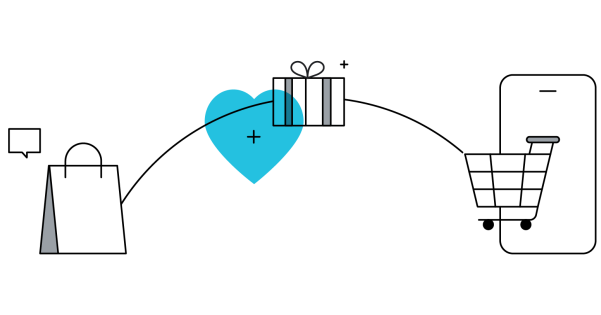
In a recent survey, half of the consumers in APAC said the pandemic inspired them to reevaluate what was important to them in life,[13] with the most significant shifts in priority being their approach to finance and savings, time with loved ones, and a greater sense of self-care and "treat yourself" mentality.[14] Indeed, emotional wellbeing is predicted to be a key focus for people in 2022 as they gravitate towards emotional acceptance and dedicating time to feel.[15]



From small everyday upgrades to more major life decisions, searches are showing how people are taking stock of their lives and assessing how closely their choices are aligning with what truly matters to them. Evidence of this shift is seen in the "Great Resignation," a global trend where a significant number of people are leaving their jobs voluntarily. In fact, the 2021 Work Trend Index report found that compared with other regions, APAC workers are most likely to change professional paths, with 47% considering changing employers and 56% planning a career change.[16]

Such significant, widespread shifts in life priorities among consumers should be studied closely by brands. The changing core values and priorities of people are often a strong indicator of how they will behave as consumers. But it's not just customers that businesses need to care about. Given how many people are reassessing their careers in APAC, employee satisfaction and wellbeing should be top priorities for attracting and retaining top talent.

As people spring-clean their lives, there's a window of opportunity for businesses to reconnect and convince. How can you persuade your customers and employees to continue to make your brand a part of their new lives? How will you show the value your brand can bring to their newfound priorities?



SEARCHES

Acceptance of a blended life

Even as restrictions ease, it seems a blended way of living is likely to remain. Searches reflect this adaptation to a more flexible future as people begin taking charge of their own time and space, particularly at home. Signs point to a semi-remote future of work as well, and according to Accenture, APAC is readier than other regions to adopt a hybrid working model.[17]

People are upgrading their homes as they accept a more permanent way of hybrid living. We see more than 25% growth in search interest in "indoor bicycles" in South Korea and Malaysia, and 45% growth in Singaporeans searching for "ergonomic chairs at home". Indonesia saw a 25% growth in search interest in "solar power" and "electricity saving" as people look for longer-term ways to lessen the toll of stay-at-home life on their electricity bills.

+20%

In Vietnam, there was 20% growth in search interest in how to do tasks at home, like how to make coffee at home and how to fix appliances at home leading to a corresponding increase in search interest for **bảo hành** (warranties).

Reevaluation of finances

We see people changing the way they look at their finances. While some looked for ways to put their savings to work through investments, others searched for deals, discounts, and ways to stretch their dollar. Ahead of 2021's holiday season, most shoppers planned to either buy less or hold off on buying gifts until they were on sale, due to COVID-19's impact on their finances.[18]

Searches for deals, discounts, and coupons have seen growth across APAC, with the highest growth of more than 110% coming from India, Singapore, Malaysia, Indonesia, and Vietnam.

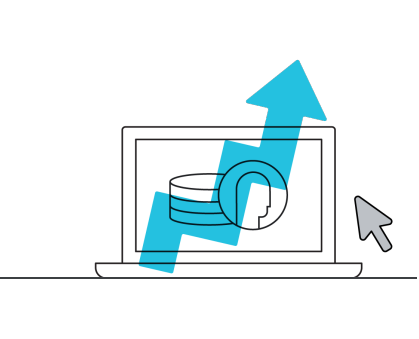
+110%

+400%

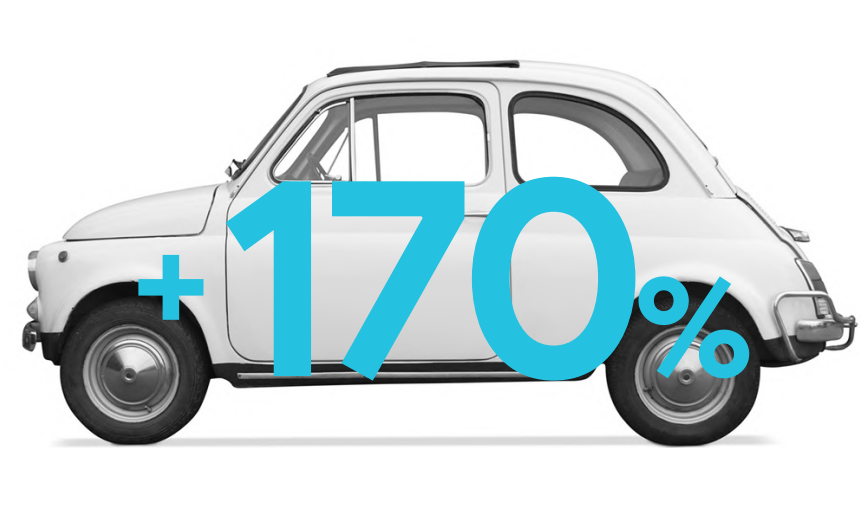
Cryptocurrency has continued to be of high search interest across the region, with the highest growth of more than 400% coming from Australia, India, Indonesia, Singapore, New Zealand, and Pakistan.

+20%

Pakistan, the Philippines, New Zealand, and Singapore saw more than 20% growth in search interest in investments like **how to invest, where to invest,** and **recommendations for small investments.**



In some countries like Vietnam, where more rural users are coming online, we see an increase in more nascent search interest related to investments like chứng khoán là gì (what is stock).



+170%

In Singapore, search interest in car sharing (+170%) is emerging, as people are looking for more economical ways to get around the high costs of owning a car.

Quality time with loved ones

People in APAC have placed more value on spending time with their families, and some even see it as more important than being financially secure or successful.[19] This is echoed in searches, with consumers looking for moments of quality time with their loved ones.

+110%

People are seeking to build stronger familial relationships. The Philippines saw 110% growth search interest in terms that include with family such as **quality time with family, relationship with family,** and **spend time with your family.** In Australia and New Zealand, search interest in **things to do with kids** near me grew by more than 70% and Indonesia saw a rise in search interest in **waktu berkualitas** (quality time).

In India, interest in searches containing with family grew by more than 10%, including searches like **hindi movies to watch with family** and **places to visit in Delhi with family.**

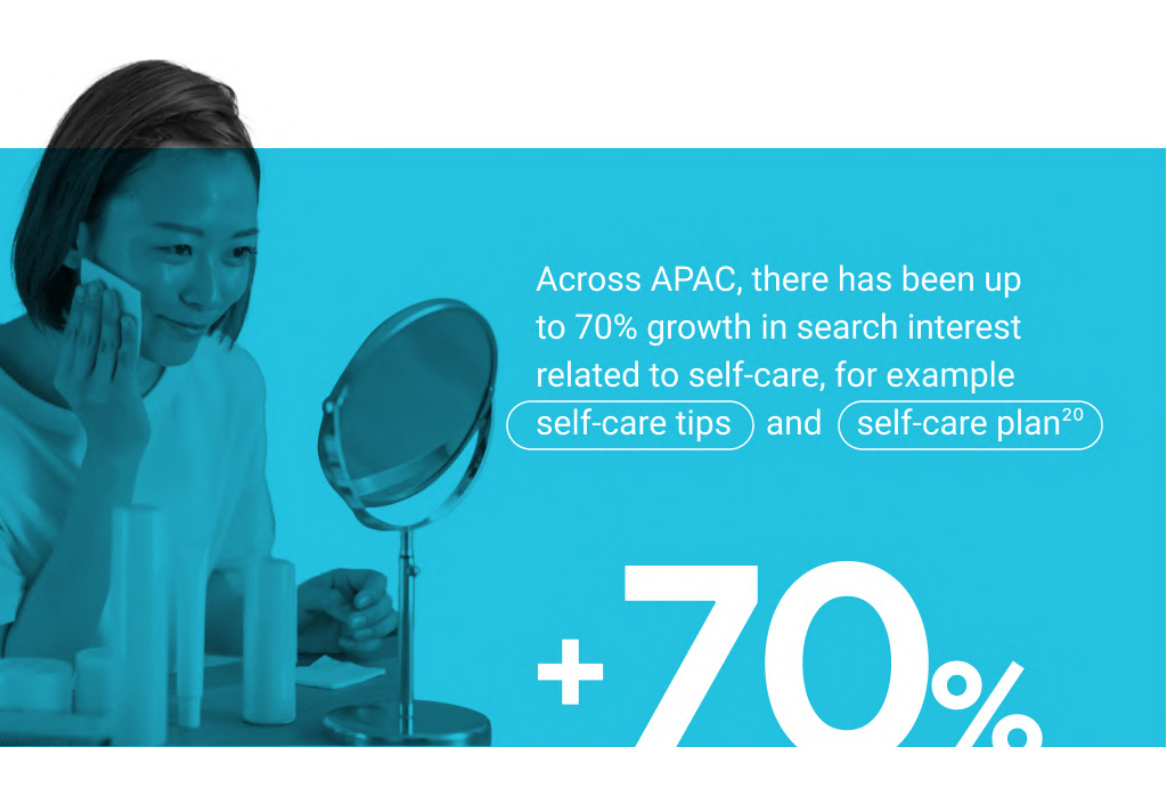
South Korea, India, Australia, Singapore, Hong Kong, New Zealand, and Taiwan have seen more than 35% growth in search interest in pet friendly as people seek to have their furry family members join them on their staycations.

+10%

+35%

Self-care, introspection, and the reevaluation of lifestyle choices

Consumers today view wellness through a broader lens, valuing physical, emotional, and mental health. As people reevaluate their lifestyle choices, we see introspection and consideration for holistic wellness playing a bigger role in their decision-making processes.

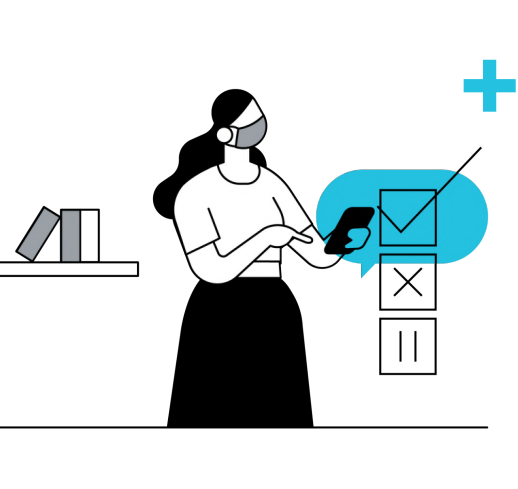


Across APAC, there has been up to 70% growth in search interest related to self-care, for example self-care tips and self-care plan[20]

+70%

+25%

Evidence of the Great Resignation is showing across some countries in APAC as people reconsider their careers. Search interest in **resignation letter** has grown by more than 25% in Australia and New Zealand. India has seen an increase in search interest in **resignation letter due to personal reasons,** and in South Korea and Pakistan, people are looking for tips on **how to write a resignation letter.**



+170%

Across APAC, search interest in personality tests and myers-briggs is growing by up to 170%as people seek to understand themselves better.[21]

Countries like Singapore, India, Pakistan, New Zealand, South Korea, and India saw up to 30% growth in search interest related to wellness **including mental wellness, emotional wellness,** and **physical wellness.**

+30%

+60%

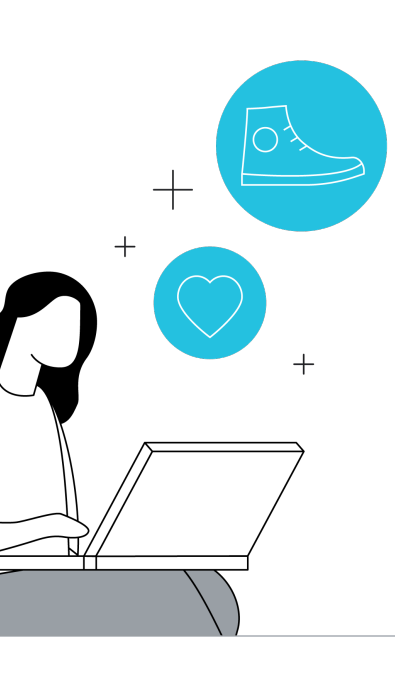
People in the Philippines are prioritizing **quality** over **price** search interest in quality rising by +60%, while search interest in **cheap** shows a decline.

Search interest in vitamins had up to 35% growth across APAC including Indonesia, Malaysia, Thailand, Taiwan, India, Vietnam, Japan, and Indonesia. In the Philippines and Vietnam, we see 15% more searches for the health benefits or functions of certain products.

+35%

+130%

Across countries in APAC, we see up to 130% growth in interest in sports-related searches, including olahraga di rumah (sports at home) in Indonesia, and cycling in Singapore and Australia. Vietnam saw increased search interest in **tập thể dục** (exercising) and 140% growth in YouTube search interest in **bài tập yoga cho người mới bắt đầu** (yoga exercise for beginners).



+100%

Across the Philippines, Indonesia, Singapore and Malaysia, search interest related to mental health grew by up to 100%.

MARKETING IMPLICATIONS

Your brand is back on the table: gain and retain

From reactive behaviors and short-term solutions, to a greater acceptance of our new blended lives, searches show that people are emerging from the pandemic with updated priorities. As people reevaluate their choices, **brands and businesses should also be updating how they show the value they offer,** not just externally to their customers, but also internally to their employees.

Simon Kahn
Vice President, Marketing for Google APAC

> "The next decade will be defined by a state of accelerated disruption. In order to enable people in the region to achieve better, more equitable outcomes in the face of increasing disruptions, businesses need to stay curious and cultivate a desire to understand what works and, more importantly, what doesn't, to uncover and refine an understanding of users' true needs."

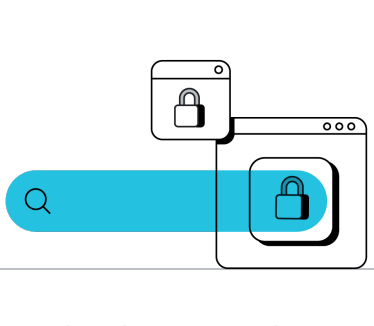
1

Ensure your brand makes the list as consumers reevaluate their options

Today, as shoppers look for the brands that best align with what they need and value, up to 75% are buying from newly discovered brands rather than familiar ones.[22] As consumers look to be empowered and confident about their purchase decisions, Search ranks as a top touchpoint for providing them with relevant and helpful information.

1

Tap into the power of Search and automation to grow your brand's discoverability.
Fifteen percent of queries every day are brand new searches.[23] By broadening your keyword match type to Broad Match with Smart Bidding, you're able to automatically adjust your campaigns to capture the different ways consumers are looking for your products, and act on new opportunities as they arise.



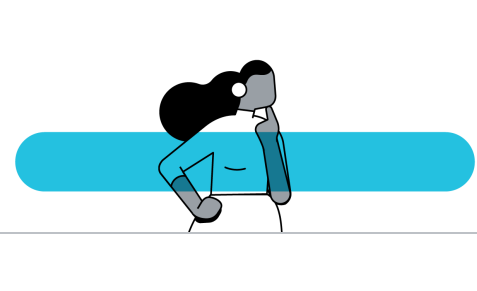
Hyundai Marine & Fire Insurance, a leader in South Korea's nonlife insurance industry, leveraged Broad Match to expand its generic Search keyword strategy. It successfully increased the discoverability of its website and offerings, unlocking +16% conversions at a -3% cost per conversion.

When consumers research, they don't always have a specific product in mind yet. Responsive Search Ads can put your product in the spotlight with personalized ads that are relevant to the shopper.

2

Create data-driven marketing cycles to keep up with evolving needs.
An adaptable advertising strategy allows you to act on what matters most to consumers in the moment, and adopt a test and learn approach for sustainable optimization.

Get inspired by APAC industry leaders, who share how an experimental approach helps their marketing strategies stay data-driven and agile, and turn uncertainty into business growth opportunities.



Rising Retail Categories and Google Trends show you what the world is searching for, both at a local and global level.

With the new Insights Page in Google Ads, you can forecast and capture demand with insights tailored to your ads business and identify product offering growth opportunities.

2

Use direct-to-consumer strategies to own your brand presence and experiences

Consider owned, direct-to-consumer channels (a brand.com and app property) that can enable you to build a bespoke brand presence and experience, and showcase your brand values and consumer offerings without compromise. They also give you the freedom to experiment and evolve your platforms to make your brand stand out even more.

3

Don't overlook your internal stakeholders

During times of reevaluation and change, attracting and retaining top talent becomes ever more critical to ensuring sustainable business growth.

1

Prioritize building a diverse and inclusive workforce that will not only help to attract and retain top talent, but also increase innovation and profitability.

2

Recognize the importance of purpose beyond pay.
Nurture your employees as internal stakeholders and representatives of your brand.

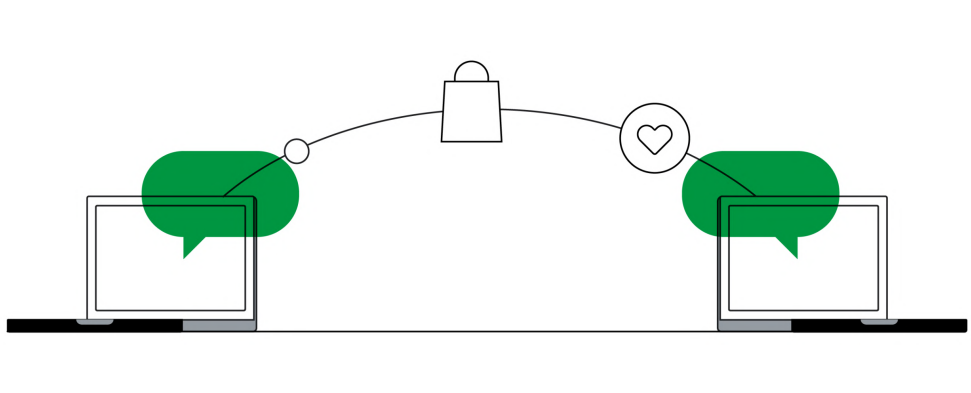
To encourage employees to find their unique purpose and build a workplace where people enjoy their work and are engaged, Unilever Sri Lanka ran a series of Discover Your Purpose workshops. The sessions combine e-learning with personal connections to challenge personal growth.

Sources:
All Google Search data points included in this report are from Google Trends, Sep 2019 - Aug 2020 vs. Sep 2020 - Aug 2021, unless otherwise indicated.

[13] Accenture, Global Consumer Pulse Research, 2021.
[14] GWI, Zeitgeist, 2021.
[15] WGSN, Future Consumer 2022, 2021.
[16] Edelman Data x Intelligence, Work Trend Index, 2021.
[17] Accenture, Future of Work Study, 2021.
[18] Google commissioned Ipsos COVID-19 tracker, AR, AU, BE, BR, CA, CL, CN, CO, DK, FI, FR, DE, IN, IT, JP, MX, NL, NO, PE, RU, ZA, KR, ES, SE, U.K., U.S., ~n=260-520 online consumers 18+ per market who will shop for the holiday season. Sept. 23, 2021–Sept. 26, 2021.
[19] GWI, Wave Q2, 2021.
[20] Google Trends, AU, BD, HK, IN, KR, NZ, PH, TH, TW, VN.
[21] Google Trends, HK, MY, NZ, PH, PK, SG, TH, TW, VN.
[22] Global Web Index Core, Sample Size by Country: All (n=3,919 internet users aged 16-64), ID (n=656), MY (n=651), PH (n=655), SG (n=650), TH (n=656), VN (n=651), April 2021.
[23] Google Data, July 2019.

Bridging distances

The pandemic kept countless people physically apart, and consumers quickly found ways to adapt. But in 2021, we saw the sense of separation deepen. As a result, consumers **moved beyond finding brief moments of connection**, to finding **new ways to express themselves and nurture deeper, more ongoing relationships**, both online and offline.



As more COVID-19 variants emerge, it's clear that the pandemic isn't quite over yet. COVID-19 is still a top concern for people, and consumers in APAC remain wary of being in close physical contact with others. In fact, people in India, Japan, and South Korea feel more anxious about resuming normal activities compared to the global average.[24]

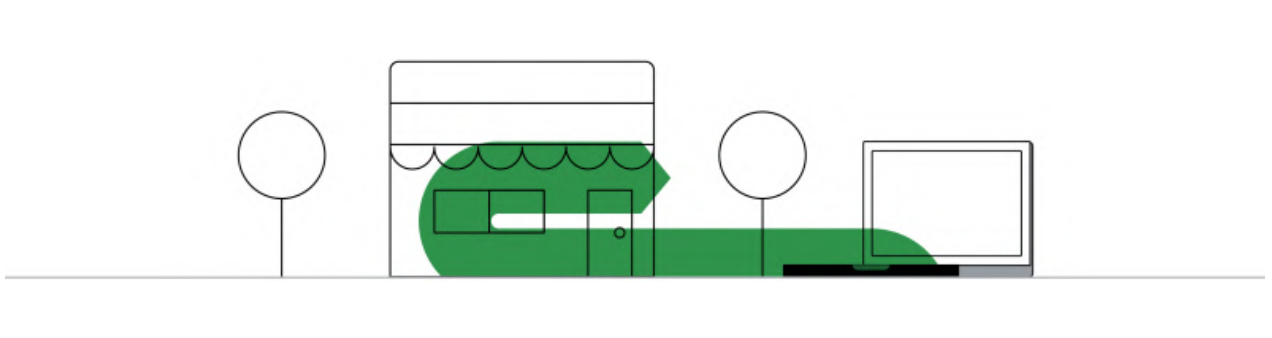
But fears of resuming in-person activities haven't overridden basic human needs for personal connection and belonging. Regardless of physical distance, rising searches show us how people will continue to find new ways to connect, and how they are increasingly open to using digital to do so.

One example is how people have started to adapt the way they express their affection. In lieu of physical touch or time spent together, people are searching for gifts they can send their loved ones, and inspiration for the right words to wish them a happy birthday or anniversary.

An October 2021 survey found that one in two APAC consumers are still choosing to meet their loved ones virtually instead of in person,[25] and searches for online group activities like escape rooms, races and concerts are seeing consistent growth.

As the world grows more dependent on digital technology to form meaningful human connections, brands need to move on from thinking of digital platforms as purely functional channels or just an online front end. Instead, consider how you can get longer-term value out of connecting meaningfully with your customers online.

In marketing, we often say the medium is the message. But that doesn't mean that a channel should do all the hard work for you. How are you ensuring you're reaching the human behind every channel strategy? More importantly, what can you do as a brand to help facilitate better, deeper, more meaningful relationships for your consumers?



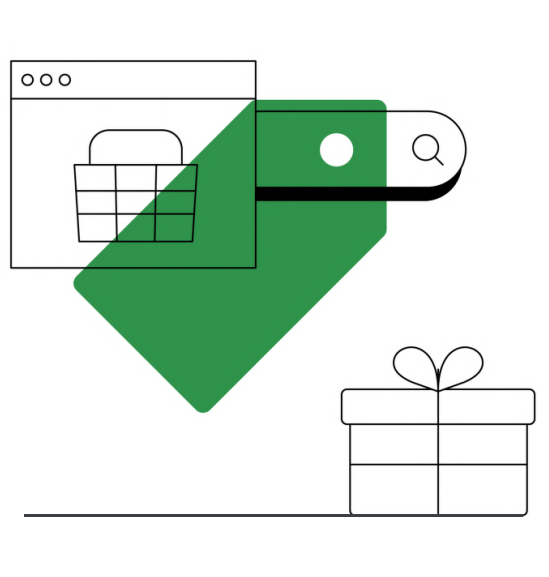
SEARCHES

Online expressions of affection

Love languages are keeping up with the changing times, with people searching for ways to show affection without in-person interactions. Gift-giving has become particularly trendy in APAC, where more than half the online population has bought a gift for someone online, trending higher than any other region in the world.[26]

Many people across APAC are turning to Search for inspiration on birthday or anniversary well wishes for their loved ones. In Australia, Vietnam, Thailand, and the Philippines, search interest in (sinh nhật cho) (birthday wishes for), (คำ อวยพร วัน ครบ รอบ) (anniversary greetings), and **meaningful birthday message for best friend** have grown by up to 100%.

Gifting has become an important expression of connection during lockdown, with related interest rising across APAC by up to 40%.[27] Indonesians are looking for (gift box) and (snack gift box) and as Singapore sees the highest drop in non-residential population since 1950,[28] searches interest in **farewell gifts** have grown by 40%.



In Japan, shoppers are looking for ways to digitize gift giving experiences, with 40% more search interest in (オンラインギフト) (online gift), and Australians are seeing 20% more searches for help to deliver gifts and hampers.

Photoshoots have seen more than 350% growth across APAC countries, as people are taking time to capture moments that others cannot be there in person for.[29]

Digital for personal connection

Technology is enabling people to connect in innovative ways, sparking interest in virtual versions of activities such as group meals, escape rooms, and concerts. Even holiday gatherings are going digital, with 53% in Australia and 61% in New Zealand expecting to celebrate Christmas 2021 with their loved ones via online video calls.[30,31]

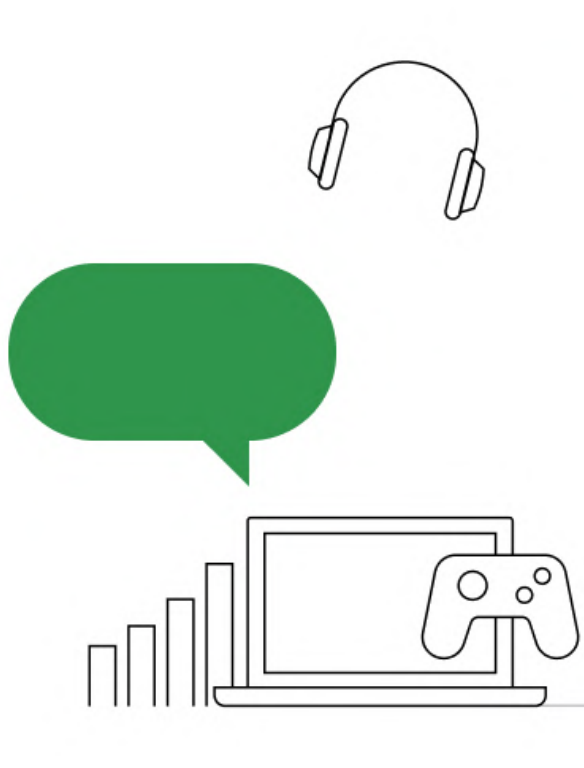
+390%

We see 390% growth in search interest in **group order** in the Philippines as Filipinos look for ways to share meals together, even while apart. Correspondingly, top food service brands are offering send to many and multi-delivery services that allow customers to order online as a group and receive meals in different locations at the same time.

We see up to 520% growth in people searching for the online or virtual equivalent of offline experiences. For example, **virtual concert** in Singapore, **virtual tour** in the Philippines, **virtual race** in Malaysia, virtual escape rooms in Australia, and (オンライン コンサート) (online concert) in Japan.

+80%

People in South Korea are looking online for things to do outside with others: search interest in (등산 동호회) (hiking club) searches grew by more than 80%.



+25%

In the Philippines, we saw over 25% more search interest in the terms (games) plus (friends) like **online games with friends**.

MARKETING IMPLICATIONS

The emotional value of digital

Faced with the physical distancing caused by the pandemic, people have adapted how they express themselves and increased their reliance on digital for building personal connections. As a result, brands that merely use digital as a functional channel are missing out on an **opportunity to build and nurture deeper relationships** with their customers, where both sides stand to gain and grow through emotional connection.

Harvard Business Review
An Emotional Connection Matters More Than Customer Satisfaction

> "Emotionally connected customers buy more of your products and services, visit you more often, exhibit less price sensitivity, pay more attention to your communications, follow your advice, and recommend you more — everything you hope their experience with you will cause them to do."

---

1 Build customer love and loyalty by consistently delivering at each touchpoint

Research shows how the consumer's path to purchase is driven by emotions. At each and every touchpoint, shoppers want to feel reassured and empowered, rewarding brands who help them navigate the messy middle.

Leverage the emotional power of digital to provide timely, accurate and relevant information across your organic **and** paid communication channels.

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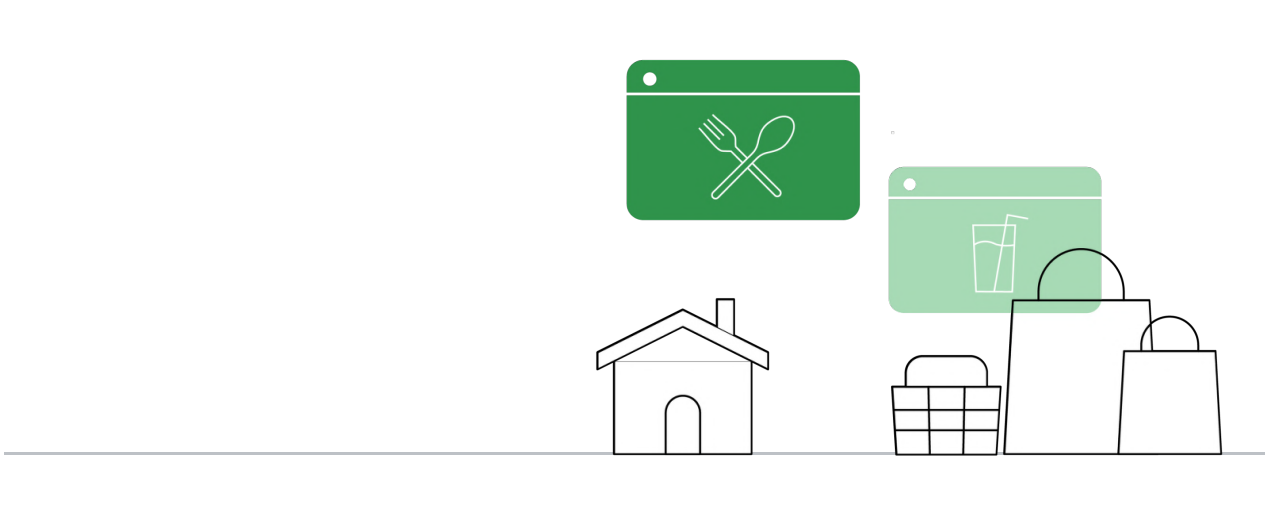
2 Tap into the value of virtual to augment real world experiences

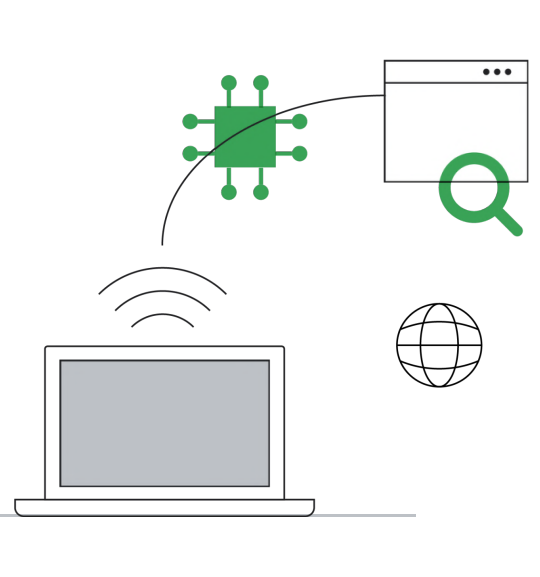
Not everyone prefers in-person experiences, especially during a pandemic. Consider the value of virtual channels as a means of complementing or augmenting physical experiences, allowing the freedom of choice between online or offline events.



October 2020 saw Tiger Beer Malaysia launch The Tiger Street Food Virtual Festival, an online street food experience that could be enjoyed from home.

Heydoor marketplace allows customers in Australia to shop in cafes, restaurants, pharmacies, and more, without having to go indoors. It aims to help people who use wheelchairs and mobility scooters, people with prams or pets, or those who find crowds overwhelming or unsafe.[32]

Google Project Starline is a new 3D technology that combines advances in hardware and software to enable friends, families, and coworkers to feel like they're together even when they're apart.



3 Invest in ad creatives that can connect and inspire

Your advertising efforts can be a key lever to build emotional connection and simultaneously drive campaign performance. In fact, creative is the dominant ROI driver across all media platforms, and especially so on digital.[33]

To bring your brand and products to life, ensure your ads showcase how your brand can help people in their everyday life in an authentic way.
Explore creative best practices to unlock better performance across Google Ads solutions.

Sources:
All Google Search data points included in this report are from Google Trends, Sep 2019 - Aug 2020 vs. Sep 2020 - Aug 2021, unless otherwise indicated.

[24] Ipsos, Essential Report, Oct. 7 , 2021-Oct.10, 2021.
[25] Ipsos, Essential Report, Oct. 7 , 2021-Oct.10, 2021.
[26] GWI, Wave Q2, 2021
[27] Google Trends, AU, BD, HK, IN, ID, JP, MY, NZ, PK, PH, KR.
[28] Singapore Department of Statistics, Population in Brief, 2021.
[29] Google Trends, AU, HK, IN, ID, JP, MY, NZ, PK, SG, KR, TH, VN.
[30] Pureprofile, Christmas Report, Australia, n= 1052, 2021.
[31] Pureprofile, Christmas Report, New Zealand, n= 535, 2021.
[32] Trendwatching Premium
[33] Nielsen Catalina Solutions, 2017.

Truth seekers

With online misinformation and data breaches on the rise, consumers are more skeptical than ever. **Wary of being misled and savvier about their choices**, they're also more proactive about finding trustworthy sources, using Search to fact-check claims, scrutinize brand values, and ensure authenticity from the brands they choose to engage with.

In 2021, the pandemic further exposed the dangerous consequences of misinformation, spurring governments across the region to enact "fake news" laws. At the same time, the public has become more aware of the spread of false information, with 86% in APAC expressing worries about fake news.[34] Consumers, especially Gen Zers, are now more conscious about the mix of both facts and misinformation that can be found online.[35] People are not only savvier about what they see on the internet, but are also willing to proactively seek out accurate information on their own terms.

Searches reflect these growing anxieties, with consumers looking for ways to guard against the increasing pervasiveness of fraud and scams. As data breaches reached an all-time high in 2021,[36] searches related to privacy also continued to rise alongside people's growing concerns about their digital safety.

With truth-seeking behaviors becoming more of a consumer habit, we see shoppers willing to invest more of their time and resources to ensure the choices they make align with their value systems and beliefs. Rising searches for sustainable practices and ethical shopping reflect how consumers have a lower tolerance for being misled, and are setting the bar higher for brands, holding them closely accountable for any claims that they make.

Consumers today don't just check the list of ingredients on a label, they want brands to be accountable and transparent at every step of their value chain, including sourcing, production, and corporate sustainability policies. Regardless of how much they trust a brand, consumers across all age groups will conduct extensive research prior to making their purchases.[37] Instead of simply hoping that brands will be true to their word, consumers now expect brands to take proactive steps towards earning and keeping their trust.

This means that for brands, getting ahead of transparency, focusing on authenticity, and ensuring two-way continuous communication with their customers has become more important than ever.

SEARCHES

Fact-checking, fighting fraud, and protecting privacy

Searches show consumers increasingly concerned about misinformation and privacy, especially compared to pre-COVID times.[38] In 2021, 87% of APAC consumers say it is now more important to find a trusted source of information, compared with before the pandemic started.[39]

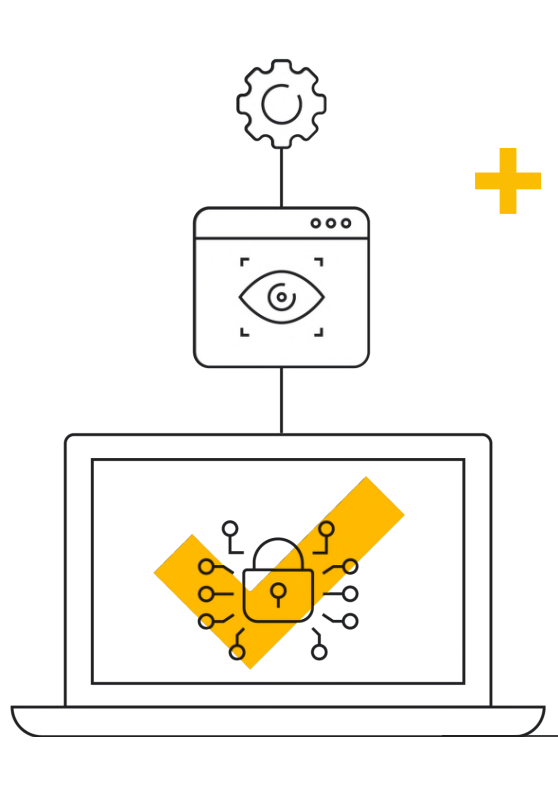
Fact Check Explorer

+140%

Many APAC countries have seen an increase in search interest related to misinformation, fact-checking, and fake news like is it true, menyanggah (debunk) legit and fact check with up to 140% growth coming from the Philippines, India, Japan, Thailand, and Indonesia.

+35%

Searches about frauds and scams have grown by up to 35% in India, Vietnam, Taiwan, Pakistan, Singapore, Malaysia, and Australia. Indonesia saw an 80% rise in search interest in fake vitamins as people become less willing to compromise on quality when it comes to their health and bodies.



+20%

Privacy and data breach-related searches have grown by more than 20% across India, Japan, Indonesia, Singapore, Australia, and Hong Kong.

Savvier value systems

As consumers grow more entrenched in their belief systems, they're making sure that the brands they choose also share the same higher purpose. Searches are continuing to rise for topics like sustainability and ethics, while more than half of the consumers have stopped buying products or services that have a negative impact on the environment and society.[40]

+65%

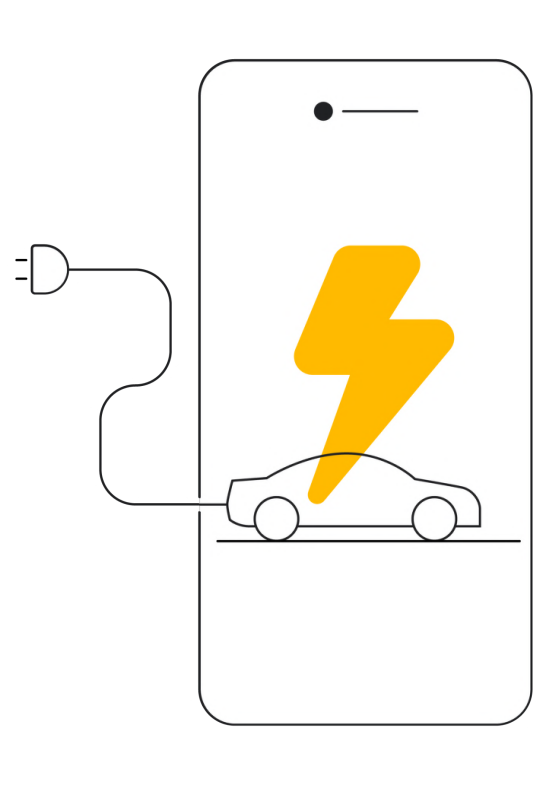
Ethical practices are increasingly important to consumers, with search interest in fairtrade growing by 15% in India, cruelty-free growing by up to 65% in New Zealand and Indonesia, and South Korea showing increasing concern for 멸종 위기 동물 (endangered animals) with 50% growth in searches.

+25%

Interest in sustainability continues to see more than 25% growth across Asia,[41] with **recycling** growing by up to 25% in Hong Kong and South Korea, カーボン ニュートラル (carbon neutral) growing by over 1950% in Japan, **environmentally friendly** and **biodegradable** growing by more than 15% in Indonesia, and the Philippines seeing more than 85% growth in search interest in **renewable resources**.

+70%

Searches for electric cars and bikes have increased across APAC, with India, Singapore, New Zealand, Pakistan, Australia, Japan, Hong Kong, and Taiwan all seeing more than 70% growth.



Consumer demands for reassurance

Consumers today expect to be reassured along their shopping journeys. Authenticity is a key issue on marketplaces for 31% of shoppers surveyed,[42] and we see increasing searches for delivery tracking and official stores of popular brands.

As demand for authenticity increases, there has been up to 80% growth in customers searching for a brand's official store in countries like Pakistan, Vietnam, Malaysia, the Philippines, Indonesia, India, and Singapore.

+80%

Indonesia saw 40% growth in search interest in online terpercaya (trusted online).

+40%

With an increase in deliveries, delivery tracking has become more essential. We see a 75% increase in search interest in delivery tracking in India, and Malaysia has the highest concentration of searches for **delivery tracking** in the world.

+75%

MARKETING IMPLICATIONS

Trust as brand equity

Rising misinformation and record-breaking data breaches have put consumers on high alert, sharpening their values and lowering their tolerance for anything misleading. As a result, **trust is now a brand's most important asset**. **Customers expect proactive transparency and authenticity** at a minimum.

> **Edelman**
> Trust, the new brand equity
>
> "Brands need to be for the people, and guided by the people. Why? Because brand trust ranks higher than brand love."

1 Act intentionally and respectfully to protect people's privacy and earn trust

When users have clear choice and control over their data, they're happy to share it with businesses they trust. However, just 30% of APAC marketers have a dedicated strategy to communicate with consumers about data privacy.[43] It's time to consider how you can prioritize your users' privacy concerns to earn their trust.

1

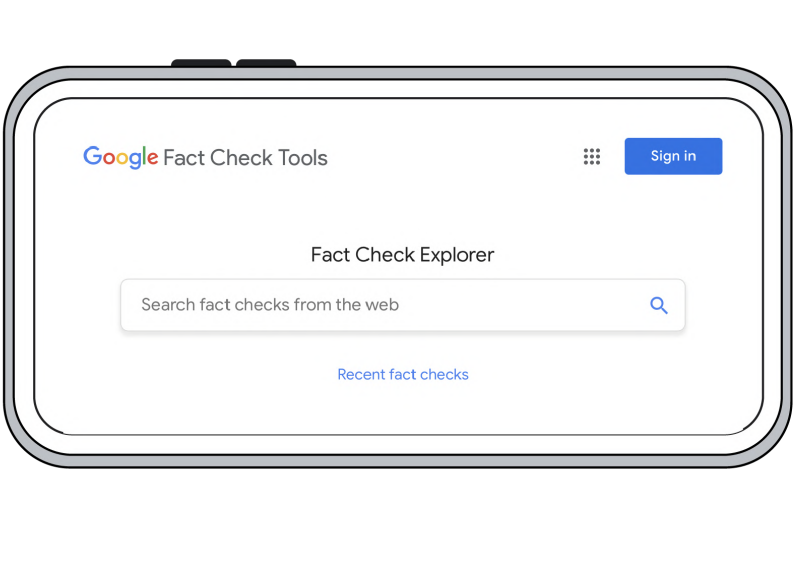
Use first-party data responsibly and effectively to find the right balance between privacy and the personalized interactions that consumers prefer.
Check out our marketer's playbook for privacy to deliver performance in a privacy-safe way and learn what industry leaders across APAC think about the region's key data privacy trends and how to create a privacy-first ecosystem.

2

Prepare your digital ads ecosystem for a future without third-party cookies.
Explore privacy-preserving strategies that fuel continued business growth by allowing companies to reach people with relevant ads and measure results without needing to track people across the web.

3

Educate and empower your customers to protect themselves against misinformation, scams, and fakes.
With 68% of online shoppers in Southeast Asia rating "guarantee of product authenticity" as very important,[44] consider ways you can offer them this needed reassurance.



Google Fact Check Tools

Sign in

Fact Check Explorer

Search fact checks from the web

Recent fact checks

In 2021, Google launched the About This Result feature, which provides details about a website before users visit it, including whether the source is trusted and whether a user's connection to the site is secure. Google's Fact Check Explorer also helps counter falsehoods and reduce misinformation online.

2 Hold your whole business accountable and get ahead of the conversion

When it comes to building trust, brands cannot afford to cut corners. As consumers feel increasingly empowered to hold brands accountable to their claims, earning and keeping trust requires consistent, authentic, and proactive communication.

Consider the full implications of your company values on every part of your value chain.

Since April 2021, Singapore-based SaladStop has been listing the carbon footprint of its meals, making it the first restaurant chain in Asia to do so. The labels, which are displayed on the brand's menus, take into account farming practices, land usage and water wastage, among other factors.[45]

Expand the definition of what it means to be sustainable by considering the carbon footprint of your digital actions. Through Google Cloud Carbon Footprint, you can take action to evaluate and reduce the footprint of your carbon workloads.

Sources:
All Google Search data points included in this report are from Google Trends, Sep 2019 - Aug 2020 vs. Sep 2020 - Aug 2021, unless otherwise indicated.

[34] APEC Secretariat, Multilateralism in the Era of COVID-19: Perception Survey – Post-2020 APEC, 2021.
[35] A Brand Studio study of youth in APAC found that Gen Z users are heavily reliant but discerning users of the internet. To them, the internet is "a fantasy close to the truth" and "a mandala with all the good and bad things mixed together."
[36] Identity Theft Resource Center, Q3 Data Breach Analysis, 2021.
[37] IBM Institute for Business Value, Meet the 2020 consumers driving change, 2020.
[38] Google commissioned Kantar/Quantum Report: Emotional Value of Search 2021, IN, ID, MY, PK, PH, TH, VN, n=5006, consumers who have purchased vertical in the past 18 months, 2021.
[39] Google commissioned Kantar/Quantum Report: Emotional Value of Search 2021, IN, ID, MY, PK, PH, TH, VN, n=5006, consumers who have purchased vertical in the past 18 months, 2021.
[40] Kantar, Asia Sustainability Foundational Study, 2021.
[41] Google Trends, IN, JP, PH, SG, KR.
[42] Google, Ipsos, and SixthFactor, Brand.com and Marketplace in the evolving online path to purchase, IN, SG, TH, n=3600, July 29, 2020–Nov. 14, 2020.
[43] Forrester, "The State Of Privacy In Asia Pacific," 2021.
[44] Google/Kantar, Shopper Pulse SEA + JP Core Report: Waves 1+2, Sept. 2021.
[45] Trendwatching Premium.

Growing inequalities

While everyone's way of life has undoubtedly shifted this past year, the pandemic didn't affect everyone the same way. It not only exposed existing inequalities, but accelerated them. People are turning to the internet for help: whether they're existing internet users with fresh financial woes, or newcomers with more basic needs, consumers are **searching for ways to overcome the challenges they face.**

Dubbed the "inequality virus," the pandemic has exposed many societal fractures along the lines of wealth, race, and gender. While many of these inequalities existed before COVID-19, the pandemic has played a role in exacerbating them, and the most vulnerable in society have been disproportionately hit.

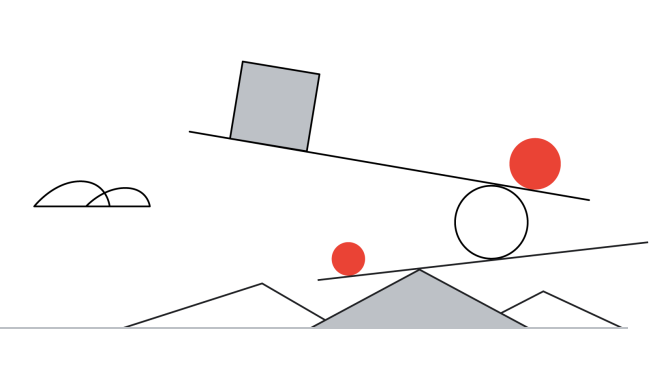
Lower income households experienced a higher concentration of job losses[46] while their children missed twice as many days in a school year compared with those from high income families.[47] Women too, suffered increased violence, with 83% in Indonesia reporting that domestic violence worsened due to COVID-19.[48]

To overcome these inequalities, people are searching online for solutions to help themselves and their communities. Their searches range from unemployment benefits and "buy now pay later" financing options to topics on discrimination and women's rights, reflecting their growing interest in social issues.

Unfortunately, not everyone has equal access to the support systems they need. The world's growing reliance on technology means it's crucial to equip the less privileged with access to digital solutions. Factors like unstable internet access, technical illiteracy, and language barriers can prevent people from joining the rest of the world online, and exacerbate the inequity they already experience.

Indeed, rising searches for local translations, line speed tests, and even free internet services reflect a growing section of society struggling to keep up. When cities shut down during the pandemic, millions of migrants across APAC had to return to their homes, many in rural areas. Without access to the high-speed internet of urban centers, these workers and their families lost jobs and learning opportunities.[49] Widespread digital migration on the other hand, has brought more users online from non-metropolitan areas in APAC, hastening the need for the digital ecosystem to evolve to address their specific needs through the acceleration of vernacular, voice, and video solutions.[50]

People recognize that these societal inequalities cannot be solved by governments and nonprofits alone. The expectation is now also on brands to help drive meaningful change.[51] Perceived to be more ethical and competent,[52] businesses are uniquely positioned to boost customer loyalty and trust by driving social change. This means that consumers will embrace brands who not only reflect diversity in their campaigns, but take action to create equity in societies as well.



SEARCHES

Finding familiarity through local language

Searches show the anxiety that consumers face when transacting in a foreign language. In fact, up to 40% of consumers won't consider making a purchase unless they can access information in their local language.[53] With more new users coming online from non-metropolitan areas, the demand for local translations is continuing to grow.

Across multiple countries in APAC, we see up to 155% growth in searches for translations and assistance in comprehending words that are not in users' mother tongue. The highest growth this year came from India, the Philippines, Vietnam, and Malaysia, with searches like english to malayalam in tagalog in malay and dịch tiếng anh thành tiếng việt (translate English to Vietnamese).

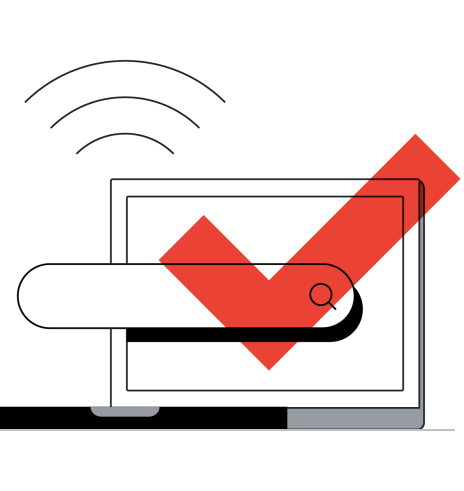
Access to stable and affordable internet

As more needs are being fulfilled online, people are increasingly focused on ensuring that they have reliable and affordable internet access.

This year, we have seen continued momentum in searches testing internet speed and connectivity as more people come online. Search interest in internet speed check or line speed test grew by up to 60% in countries like Malaysia, India, Philippines, Taiwan, Vietnam, South Korea, Indonesia, Singapore, and Japan.

+35%

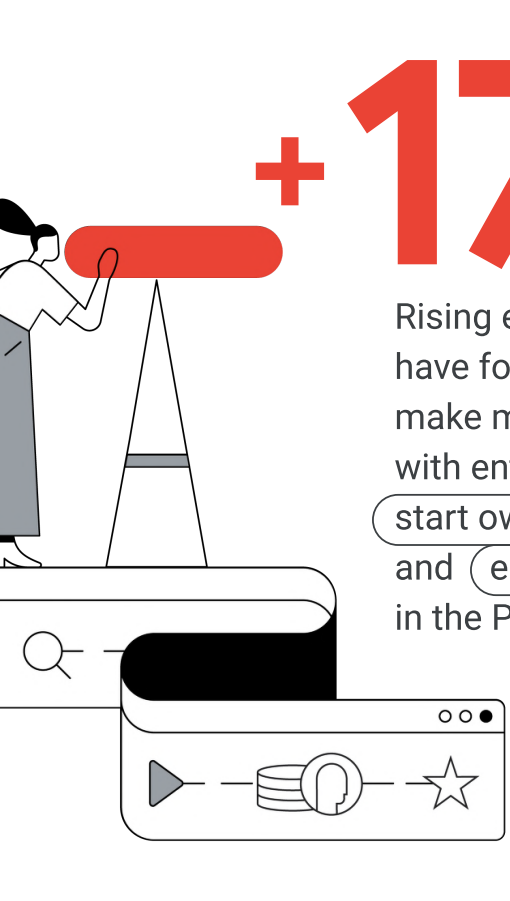
In Thailand, YouTube search interest in เน็ต ฟรี (free internet) grew by 35%.



The need for financial support

As APAC experiences high unemployment rates,[54] consumers are searching for different ways to alleviate economic concerns. Whether it's a business grant or a cash loan, people in APAC are looking for financial support to tide them over in an uncertain year.

Australia, Singapore, and India have the highest concentration of searches in the world for bnpl (buy now, pay later). In Singapore and Malaysia, search interest in pay later increased by up to 270%.



+175%

Rising economic pressures and unemployment have forced many people to look for ways to make money or start their own businesses, with entrepreneurship-related searches like start own business micro business grant and earn money seeing up to 175% growth in the Philippines, Indonesia, and Hong Kong.

+170%

Three of the top five countries with the highest concentration of searches related to unemployment benefits are in APAC: South Korea, the Philippines, and India. **YouTube searches related to unemployment in Australia grew by 170%**, and in Vietnam, they grew by over 2000%.

Across countries in APAC, we see up to 85% rise in searches for loans, for example same day loans in New Zealand, **vay tiền online** (borrow money online) in Vietnam, **สินเชื่อ เงินด่วน** (quick cash loans) in Thailand, and **education loan** in India.

Social inequalities

The general APAC region is still lagging behind the global average when it comes to the importance of equal rights,[55] but people are starting to become more curious about inclusion and equity. Continuing from 2020, searches reveal this nascent stage of exploration and awareness growing in APAC.

In India, Japan, the Philippines, and Indonesia, searches related to discrimination grew by up to

+60%

with searches like what is discrimination in India コロナ 差別 (Corona discrimination) in Japan, gender discrimination in the Philippines, and **diskriminasi sosial adalah** (social discrimination meaning) in Indonesia. The latter also saw a 40% rise in searches for women's rights and 90% growth in search interest in **bantuan sosial** (social support).

MARKETING IMPLICATIONS

From reflecting society to changing it

Creating real change is not just about ensuring diversity and inclusion, it is about taking action towards ensuring equity as well. While the pandemic has impacted everyone's lives, not everyone has been affected in the same way, and rising searches reflect the need for help. Now, reaching customers **takes more than simply reflecting society.** Brands are also **expected to take actions to shape it.**

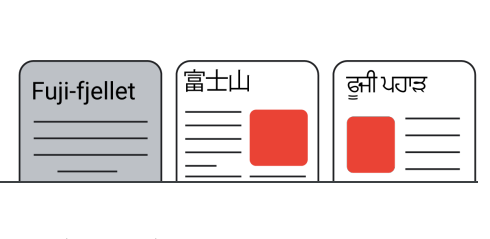
> **Edelman**
>
> "With four converging global crises over the last year - COVID-19, economic insecurity, financial/health inequities and systemic racism - brands that take a stand get a giant boost in trust. This evolved role for brands offers a new opportunity for brand marketers and real risk if they fail to recognize consumers' call for brand action."

1 Cater to consumers' basic needs to enable them to participate and engage

1

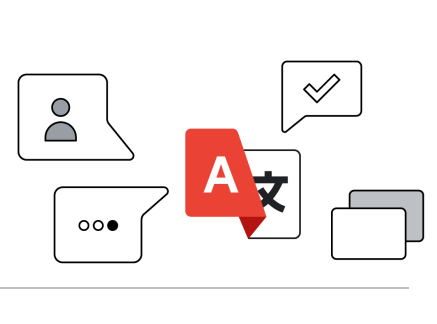
Don't let language be a barrier.
Engage your global audience with a full language experience that conveys your brand, reputation and trustworthiness. This might entail having translation options for your web content, or adopting voice assistance to make interactions easier for your customers, regardless of literacy levels.

In 2020, Starbucks opened a store in South Korea that focused on inclusive design, such as contactless speech-to-text voice recognition at the till, a braille menu, and digital signage to help consumers keep track of their orders. Staff members also received customized training and a basic course in Korean Sign Language.



Google's Multitask Unified Model (MUM) has the potential to break down language barriers by transferring knowledge across languages. MUM can learn from sources in a foreign language and use those insights to find the most relevant results in your preferred language.

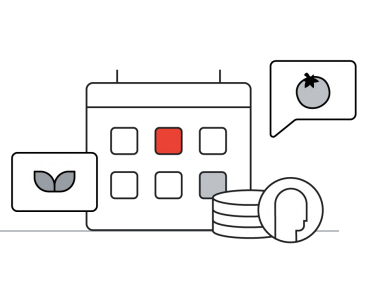
Google Meet has launched live translated captions to help video calls be more global and inclusive. This equalizes information sharing, learning, and collaboration.



2

Help close technical, financial, and accessibility gaps.
Keep in mind that your quest for operational efficiency and digital transformation isn't leaving some of your customers behind. Not all users will have the same level of digital savvy, especially as more new users come online. In fact, many new internet users still struggle with basic tasks. For example, in South Korea, elderly people gave up ordering food because they did not know how to do so through an unmanned kiosk. In India, 73% of users ask for help in getting their phones set up,[56] and 40% in Pakistan have installed finance apps but never used them due to factors like requiring help or complicated processes.[57]

Look at your engagement metrics as indications of how your online platforms or services are used. By paying attention to potential drop-off points, you can get insights on how to improve not least the onboarding experience for customers, but also create ongoing learning moments.



Wagely is a financial wellness app that aims to reduce financial stress for low- and middle-income employees in Indonesia by providing access to earned wages before payday.

In 2021, Grab started a grassroots strategy to realize financial inclusion in Indonesia by empowering sellers and the unbanked with access to financial products and services.

2 Take a bigger stand

Consumers are drawn to brands that focus on the "we" over the "me." While 63% of consumers surveyed were more attracted to "brands that focus on making the world a better place," only 37% said they preferred "brands that focus on making me a better person."[58] The same survey found that 86% of respondents expect brands to act beyond their product or business,[59] suggesting that people are increasingly looking for brands that focus on contributing to society and the rest of the world.

1

Stand for something bigger than profits.
It's time to redefine success in business and build for a more inclusive and sustainable economy. Brands need to speak up and act beyond their traditional business boundaries, for both consumers and employees.

Honda, the Japan-based automaker, is creating an in-shoe navigation system designed to help people with blindness or low vision. This is an extension of their usual products, but in line with their vision to bring joy by expanding life's potential, advancing mobility, and improving people's daily lives.

2

Build inclusive marketing strategies that benefit people and your bottom line.
Consumers are 4.5X more likely to buy from a brand if it addresses human rights, and 3.5X more likely to do so if it takes on economic inequality.[60] As marketers, we are in a unique position to drive authentic and meaningful change, and it starts with the teams we build and the stories we tell. Get inspired by tips for inclusive marketing best practices.

more likely to buy if a brand addresses human rights
4.5x

Singapore-based digital telco Circles.Life has unveiled a data plan which enables customers to choose their family, acknowledging non-traditional families such as LGBTQ+, single-parent, and divorced families.

In April 2021, Kao announced it would stop using the words "whitening," "lightening," and "bihaku" (beautiful white) in its product marketing.

Sources:
All Google Search data points included in this report are from Google Trends, Sep 2019 - Aug 2020 vs. Sep 2020 - Aug 2021, unless otherwise indicated.

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