

Think with Google



YEAR IN SEARCH 2020

THAILAND

Looking back to move your marketing forward

As 2020 drew to a close and we welcome a new year 2021, we still find ourselves amidst uncertainties and unlimited questions. In a year where the pandemic has challenged everyone around the world to accept change and adapt to a new normal, we turned to Search to find answers to our questions, many of which we'd never had to ask before.

And while we may not have found all the answers, observing how people turned to Search, both on Google and YouTube, offers a unique view into their changing habits and needs. We hope that the development of our second edition of Year in Search 2020 Thailand report can help to portray some of the shared desire Thais have in trying to understand our collectively unique experiences, and how businesses can connect - and reconnect - with consumers in a more personal and meaningful way.

With this report, we also dive into six industries and uncover the changes - and opportunities - that are unfolding: Auto, Beauty & Personal Care, Finance, Food & Beverages, Media & Telecommunications and Shopping. We have added the industry takeaways to help you translate these insights into actions for your businesses, along with some examples of brands that have reinvented themselves, and reconnected emotionally and functionally with their consumers.

As the world continues to evolve, the marketing landscape, too, must adapt alongside it. Uncertain times represent new opportunities that call for new learnings, deeper reflections, and greater inspirations. And, we hope that our report can serve as an opportunity for us to together look back and help move your marketing forward.



Jackie Wang,
Country Director, Google Thailand

Country Themes

1 Individual Matters ▶ 05

COVID-19 reaffirmed a simple truth: no two human experiences are the same. Search trends reveal that people are placing increasing importance on individual perspectives, even if they aren't accepted by society.

2 Higher Purpose ▶ 10

As a global crisis tests their values, people are looking for ways to do more for their communities and the environment – and they expect the same of brand.

3 Whole Selves ▶ 15

Lines are blurring in the roles people play, and consumers are looking to have more specific needs met at any one time. They are searching for brands that fit into their lives, and not the other way around.

4 Sweet Relief ▶ 21

Happiness never goes out of style, but amid the historic challenges of the pandemic, consumers are welcoming brands that spark joy in their lives and create a safe space for them.







5 Future Proofing ▶ 26

In a year that nobody could have planned for, there's been a new wave of interest in managing the things you can control, wherever possible, and seeking more assurance from brands to ensure peace of mind.

Industry Trends

COVID-19 has changed the way people make purchase decisions. Some decisions have sped up because people wanted what they wanted, right away. Other decisions have become harder and slower, as people sought new ways to purchase or needed to reassess when would be the right time to buy.

In this section, we explore the changing habits and needs of consumers in 6 key industries along with industry takeaways to help you translate these insights into actions for your businesses.

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Trend 1

Individual Matters

COVID-19 is far more than a health crisis. It affected societies and economies at their core across nations, and with it, a simple truth was reaffirmed: no two human experiences are the same.

The pandemic has made people's diverging needs, habits, and beliefs more apparent than ever. It's this unique set of experiences that remind us that individual behavior shouldn't be influenced by what society considers to be appropriate and inappropriate. Instead, the focus should be on understanding and embracing what makes us all different, and prioritizing mental and physical well-being so we can emerge stronger as individuals and as a society.

Across Thailand, people are confronting various social stigmas and have discreetly been educating themselves on how to handle them, even on issues that have been traditionally considered taboo.

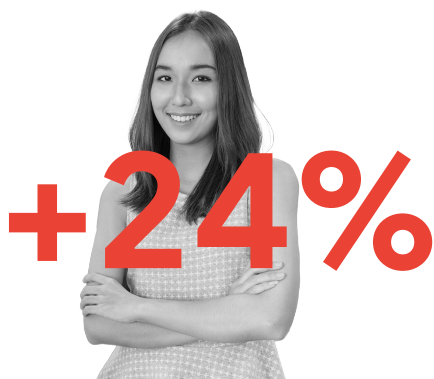


year-over-year (YoY) growth in searches for **bullying**, with the highest search per capita in Amnat Charoen, Phrae and Sing Buri



YoY growth in searches for **LGBT**

...and are taking responsibility to learn more about social justice.



YoY growth in searches for **feminism**



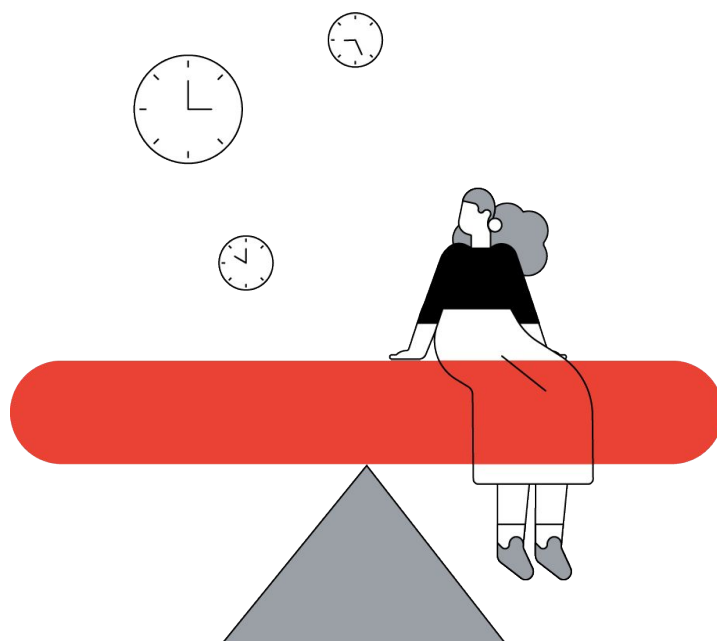
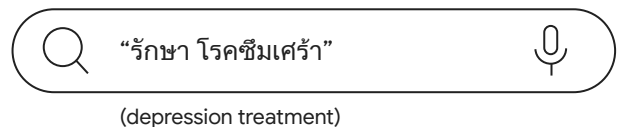
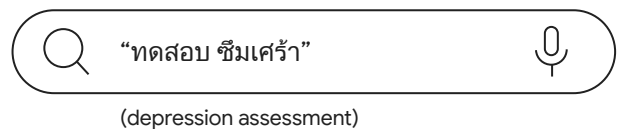
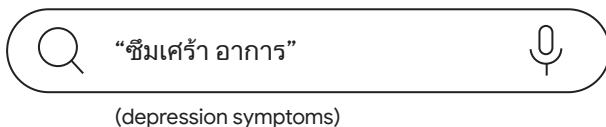
YoY growth in searches for “**ความเท่าเทียม**” (equality), with breakout growth in searches for “**สมรส เท่าเทียม**” (equal marriage)

And regardless of whether mental health is widely acknowledged in our country, there's been a rise in searches for mental health-related information, including early exploration of the concept.



YoY increase in searches for “โรคซึมเศร้า” (depression), as the focus on mental health grew during the pandemic

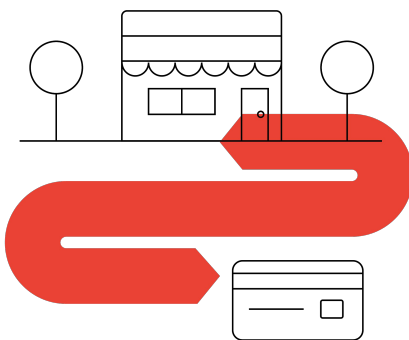
Rise in depression-related search queries include



What it means for brands

Nods to diversity, equity, and inclusion aren't enough. It takes empathy to understand the sheer variety of situations consumers face and acknowledge an individual consumer's journey to create both meaningful and profitable connections.

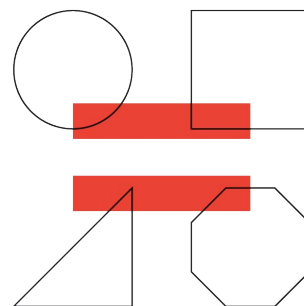
1. Consider the individual journey of each consumer (sometimes literally)



IKEA understands that because of the unique distance each customer has to travel to get to their store, the net impact on wallets — and time — will differ. Recognizing this inequality, they introduced distance-based pricing, allowing customers to pay for their items using the time spent getting to the store.

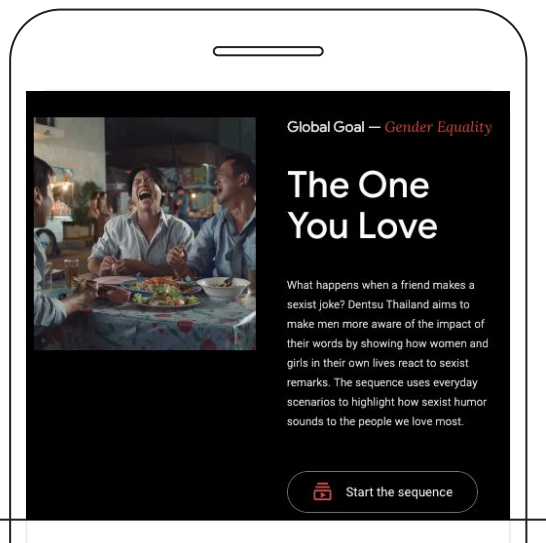
2. Build for inclusivity into your brand and act on your words

Siam Piwat incorporated inclusivity from the get go by instilling it into its core values. The developer empowers underprivileged and disabled people and special needs children by accounting for the necessary facilities when building their properties, and driving education programs for relevant patrons. Most recently, they launched the first long-term rent-free retail space to showcase products made by these groups.



What it means for brands

3. Tone and timing matter. Don't push taboos too soon (which could come off as a stunt), but show your support by connecting with audiences when they are ready

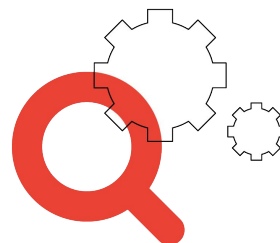


In partnership with YouTube and Tribeca Enterprises, the United Nations launched a campaign to drive awareness of 8 of the Sustainable Development Goals, including gender equality issues in Thailand. The campaign used video ad sequencing tool on YouTube which allowed them to tell a sequential story based on how the viewers choose to interact with the content, and hopefully inspire them to take action against inequality.

4. Make use of tools and technology to engage large audiences who have specific and ever-evolving needs

Tools like Google Trends keep us up-to-date on changing behaviors, so brands can find the right fit with their brand values and speak to them genuinely.

15% of daily searches on Google are new, making it difficult to consistently show up as helpful and understanding of customers' needs. Responsive Search Ads help adapt an ad to more closely match potential customers' search terms, making it much easier to serve relevant ad messaging.





Trend 2

Higher Purpose

The pandemic forced a global reset that is testing our humanity and values. It has encouraged us to think beyond ourselves to focus on the greater good of the community. Many sought ways to give back to society while others explored how to be more environmentally responsible through charity work or adopting green habits.

Environmental concerns are not new. But 2020 was a turning point that featured some key attitude shifts towards protecting our planet. Confronted with their own personal consumption habits during lockdown, Thais have been reassessing their impact on the environment.



YoY growth in searches for “หน้ากากผ้า” (fabric mask), in comparison to 65% growth in searches for “หน้ากาก” (mask)



YoY growth in searches for “กระถางรีไซเคิล” (recycle Krathong) as people sought ways to repurpose items at home for the festival

Top search terms for “ขวดพลาสติก” (plastic bottle)



“สิ่งประดิษฐ์จากขวดพลาสติก”

(plastic bottle craft)

“ปลูกผักในขวดพลาสติก”

(grow plant in plastic bottle)

“ดอกไม้จากขวดพลาสติก”

(plastic bottle flower)

Social distancing – and isolation, in many cases – brought a desire to connect to our wider community by giving back.



Rising search terms related to “บริจาค” (donate):

(COVID donation)

(clothes donation 2020)

(hair donation 2020)

Top search terms for “ตู้ปันสุข” (Blessing Box):

(where is Blessing Box located)

(Blessing Box Chiang Mai)

(Blessing Box near me)



“volunteer”



Rising searches for volunteering-related queries:

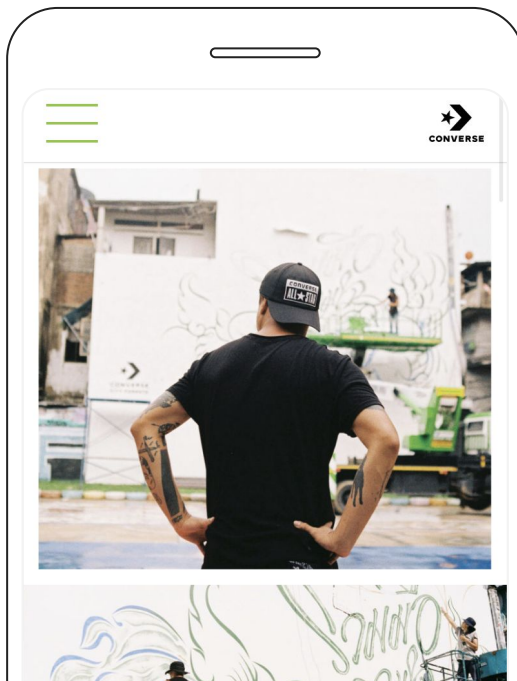
(disaster relief volunteer)

(what is local volunteer caretaker)

(public health volunteer)

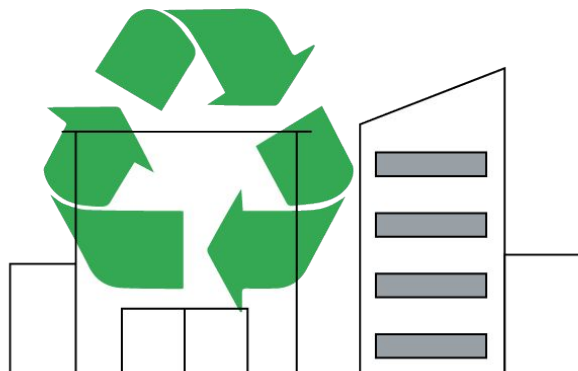
What it means for brands

Going beyond corporate social responsibility and environmentalism, this trend is about expanding where you can make meaningful connections with (and for) consumers. Meeting their personal functional and emotional needs should be a given. Now, it's just as important to actively support their communities and take actions to integrate sustainability into your business.



1. Create new ways for consumers to connect with the environment, and each other

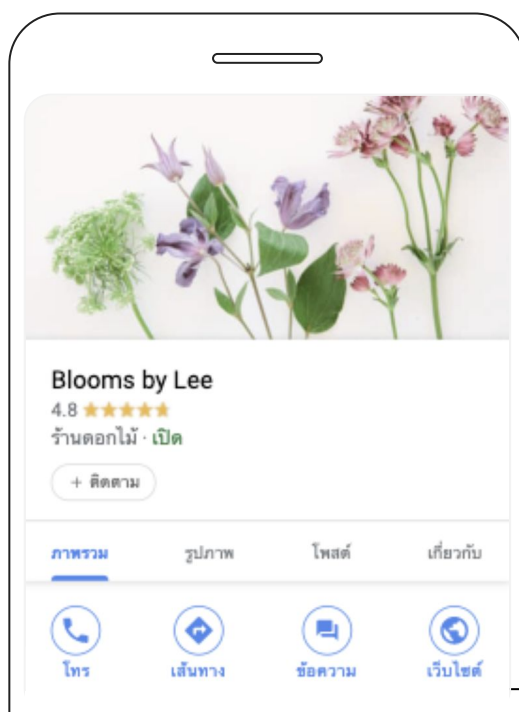
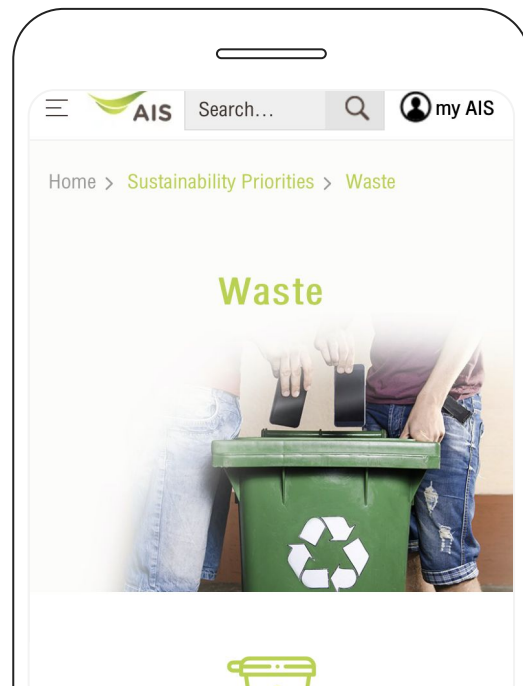
Go beyond your operational footprint and actively invest in sustainability-centered activations like Converse did with their City Forests. This community project engages local artists to create murals using photocatalytic paint that helps clean the air. These air purifying murals have been spotted in Jakarta, Sydney, Bangkok, and Ho Chi Minh City.



What it means for brands

2. Make your values and internal practices externally visible

Although local district offices in Bangkok take in e-waste, it's typically simply integrated into a broader category of toxic waste. Recognizing this, AIS unveiled collection boxes where consumers can donate old mobile phones, batteries, power banks, earphones, charging cables and accessories, which are then dismantled, sorted and transferred to process centers.



3. Connect with potential customers in the nearby community

Ensure you have a prominent online presence so that your customers can easily find you. Google My Business is an easy-to-use tool that helps businesses connect & interact with the customers who are looking for their products and services.



Trend 3

Whole Selves

Due to the pandemic, new circumstances such as work from home and disrupted routines have emerged. Suddenly, the lines that used to distinguish the manager at the office from the parent at home have blurred. They are left juggling the various roles they play, while at the same, are faced with uncertainty on many fronts.

Many are struggling to manage their work and home duties under one roof, all the time. As a result, people are actively looking for ways to optimize their time, making efficiency more important than ever.



+25%

YoY growth in searches for **internet speed test** (peaking during lockdown)



+34%

YoY growth in searches for **“เก้าอี้ทำงาน”** (working chair), as more people worked from home



YoY growth in searches on YouTube for **video conferencing solution**

Consumers are also maintaining their well-being - physically, mentally and spiritually - and putting an emphasis on self-care.



YoY growth in searches for **serum**
(compared to 13% growth for overall skincare)



YoY growth in searches on
YouTube for **yoga**

Breakout growth in prayer-related searches



“บทสวดมนต์ รัตนสูตร”



(Ratana Sutra prayer)



“บทสวด มหาจักรพรรดิ”



(Maha Chakrapat prayer)



“วิธีสวด อิติปิโส 108”



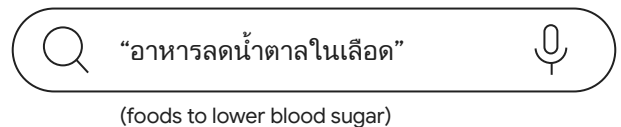
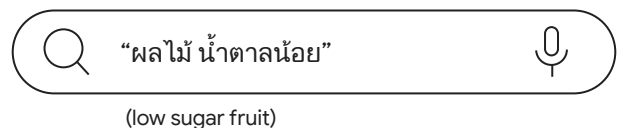
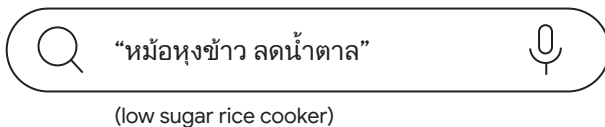
(how to chant Itipiso 108 prayer)

More than ever, brands are now expected to keep in consideration their customers' personal beliefs and specific preferences across a broad range of products and services.

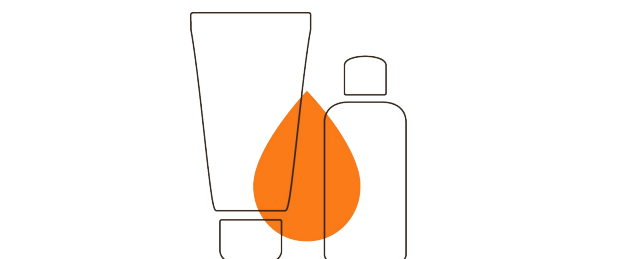
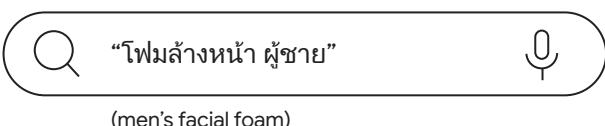
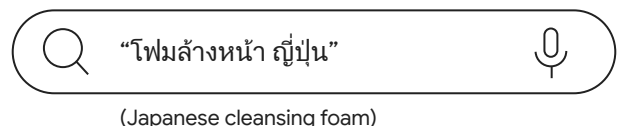
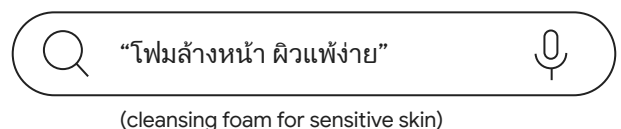
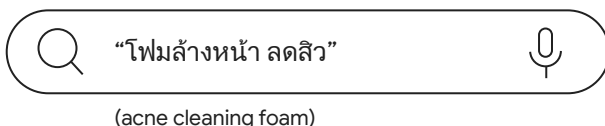


YoY increase in searches for **plant-based diet**, as people sought alternatives to animal-based products

Top trending low sugar-related searches range from food to cooking appliance:



Top face wash-related searches, reflecting consumers specific needs:



What it means for brands

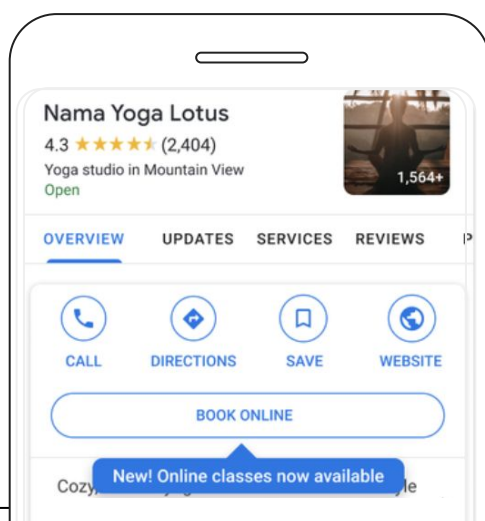
People bring their whole selves to your brand, not just their consumer identities. How can you challenge your business to reexamine and redefine industry norms? A wider understanding of your audience ultimately means a wider business opportunity.

1. Speak to your customers like a local

Within Google marketing, even when users are on English language browsers, click-through rates are consistently higher when local language ad copy is used.



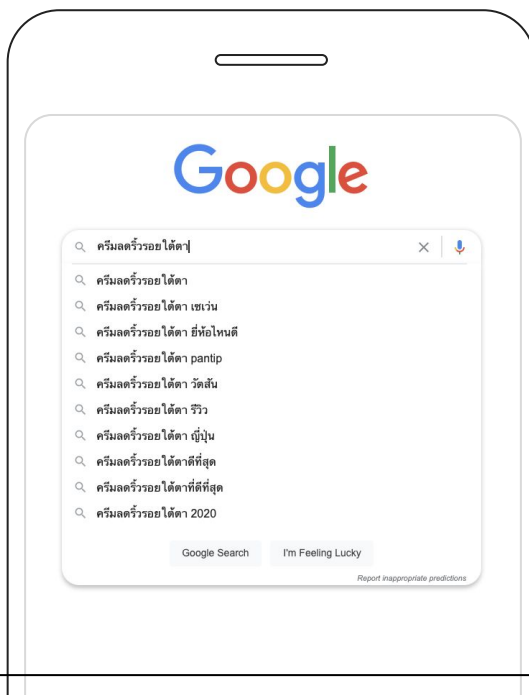
2. Rethink your business boundaries. Challenging traditional industry models will help you uncover new business opportunities



Google made it easier for merchants who normally provide in-person services to pivot online by letting those who are verified on Google My Business to add attributes like "online classes," "online appointments" or "online estimates" to their Business Profile. This information will be visible on merchants' Business Profiles in Search and Maps.

What it means for brands

3. Fit into their world. Adjust your business and marketing solutions to fit into your consumers' lives and needs either through your communication strategy or actual product solutions



A beauty brand in Thailand realized that there are thousands of variations on searches for eye creams, because consumers tend to tailor their queries to their individual needs. Their team selected one keyword, “anti-wrinkle eye cream” and used broad match keywords which helped them to show up whenever someone searched for variations and/or related searches to this one keyword. They also used Responsive Search Ads to customize the messages so as to closely match consumers’ search terms, which resulted in higher clicks and conversions.





Trend 4

Sweet Relief

At the height of the pandemic, March through May, festivals, concerts and other events were canceled. Many vacations and large celebrations, including Songkran, were curbed or put on hold. But that doesn't change the fact that as people developed new habits and behaviors while confined to their home. Happiness and joy were always welcome. Even as lockdown lifted, people retained the activities, hobbies, and habits that they enjoyed the most, taking them into their new ways of life. Amidst a year of historic challenges, consumers are embracing the brands that spark joy and create a safe space for them to take a break.

The need to de-stress and for comfort were the main driving forces behind the surge in media consumption. Home entertainment has been the main source of entertainment for most Thais.

Thais spent on average
(for personal use)

3.7hrs

per day
pre-COVID-19

4.6hrs

per day online at the
height of lockdown

4.3hrs

per day online
post-lockdown

+90%

YoY growth in watch time on
YouTube for **comedy movies**

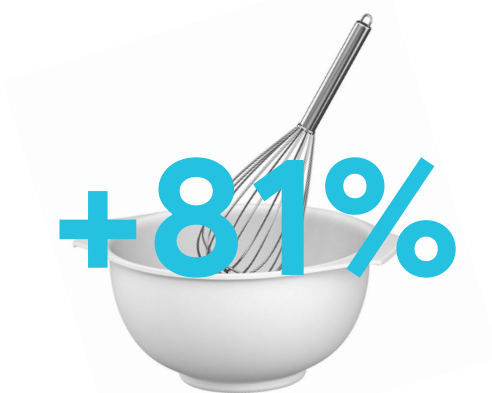
+125%

YoY growth in searches for
“เก้าอี้ เกมมิ่ง” (gaming chair)

Given the travel constraints and the challenges many face in their everyday lives, many have been seeking alternative forms of downtime.



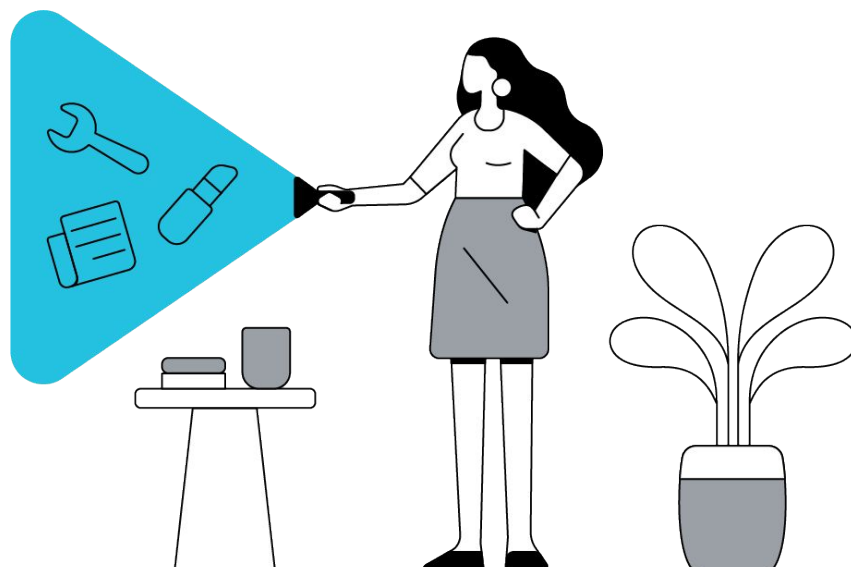
increase in searches for **sewing machine** during lockdown



YoY growth in YouTube searches for **cooking**



YoY growth in searches for **“ปลูก”** (planting), as people spent more time gardening at home due to the pandemic



With social distancing emerging as the new way of life, Thais have been finding creative ways to spend more quality time with their loved ones.



YoY increase in searches for “เล่นเกมกับเพื่อน” (gaming with friends) as people sought different ways to connect with others and cope with isolation

Top “ให้เพื่อน” (for friends) searches this year include:

(gift for friends)

(transfer money to friends)

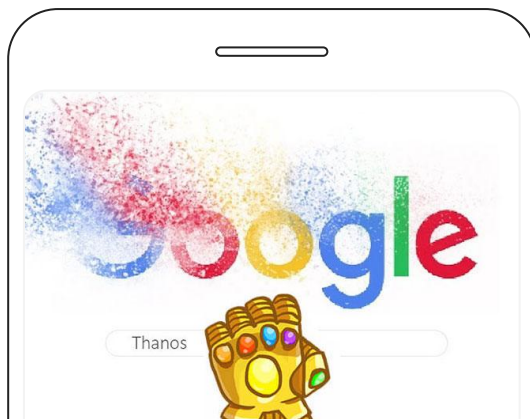
(give support to friends)



YoY growth in YouTube searches for “สำหรับเด็ก” (for kids)

What it means for brands

Brands that surprise and delight can reap the rewards of consumer love – especially when they do it with empathy for people's unique experiences and challenges.

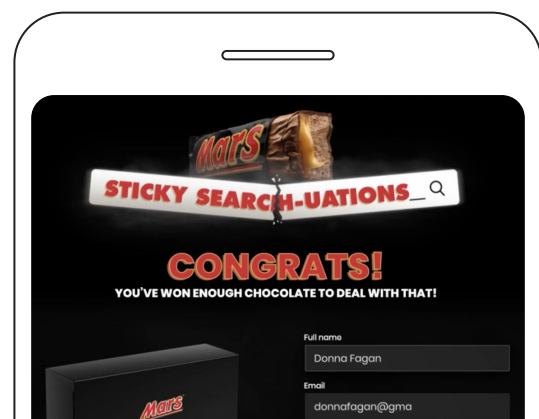


1. Make things fun in a personal way

Google delights Avengers fans with surprise results when they search for one of the movie's villains.

2. Be funny, too

Using Search analytics, Mars identified some of the most awkward queries on Google, and delivered chocolate bars to the people in those “sticky” situations. The campaign helped alleviate some difficult or uncomfortable situations with humorous solutions.



3. Make it easier to share joy

With in-flight meals suspended during the height of the pandemic, Thai AirAsia made their most popular in-flight meals and beverage options available for home delivery, right to their customers' doorstep.

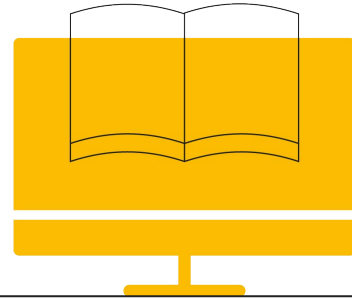


Trend 5

Future Proofing

In a year that nobody could have planned for, people are looking to find a greater sense of control. To ensure peace of mind, many have started looking for ways to future-proof and de-risk their lives, while seeking reassurance from brands along the way.

People are safeguarding and strengthening their economic prospects by boosting their skills.



YoY growth in searches for “เรียน ออนไลน์” (online learning)



YoY growth in searches for **digital marketing**, with the highest search per capita coming from Phichit, Uthai Thani and Phetchabun



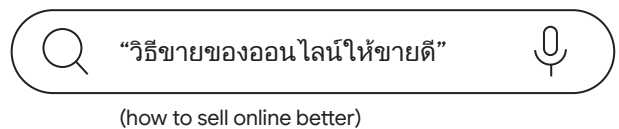
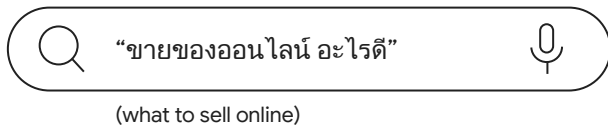
YoY growth in searches for **digital transformation**, as businesses sought ways to capture the new online demand

...and building up their side hustles.

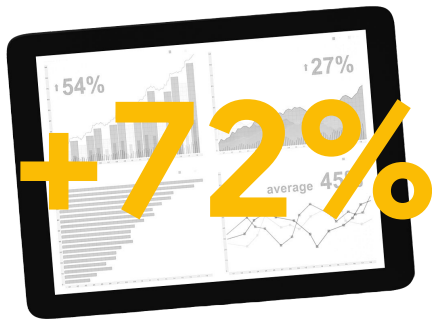
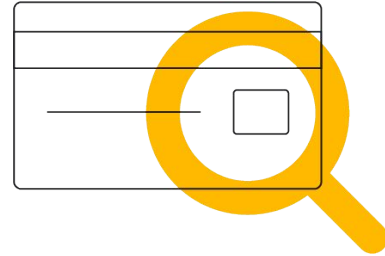


YoY growth in searches for
“ขายของออนไลน์” (sell online)

Top search queries related
to selling online:



They are also looking to improve their financial knowledge and make their money work harder for them during these challenging times.



YoY growth in searches for “เปิดพอร์ต” (sign up for investment portfolio)



YoY growth in watch time for **finance-related videos**



YoY growth in searches on YouTube for “หุ้น” (stocks)

Health-related interest increased as a direct impact of the pandemic, but particularly interesting is the uptick in proactive and preemptive health management.



YoY growth in watch time on YouTube for **fitness-related videos**, as people at home turned to technology to maintain an active lifestyle



YoY growth in searches for **vitamins** in the months of March and April, as consumers sought to boost their immunity



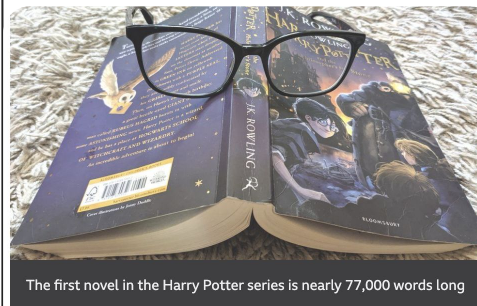
YoY growth in searches for “**ฟ้าทะลายโจร**” (green chiretta), as word spread that the plant prevented and relieved symptoms of the novel coronavirus

What it means for brands

Account for your consumers' desire for peace of mind, lower appetite for risk, and forward-planning mindset when crafting your business strategy and communications.

1. Communicate to empower your customers, not overwhelm them

Agreeing to terms and conditions is often a mandatory step before accessing an app. A recent study explored the length of the T&Cs of popular apps and discovered that the top 13 apps had more words in their T&Cs than any Harry Potter novel – leaving much room for improvement when it comes to user experience.



The first novel in the Harry Potter series is nearly 77,000 words long

The combined terms and conditions of 13 top apps including TikTok, WhatsApp and Zoom would take 17 hours and five minutes to read, a firm has estimated.

The documents contain a joint total of 128,415 words - longer than any one of the first three Harry Potter novels.

The longest was Microsoft Teams at 18,282 words - or two-and-a-half hours of reading time for many people.

In 2018, a BBC study found that several website policies



Bangkok 10 April 2020 – In every crisis lies an opportunity. Central Food Retail, which operates

2. Reduce risk for consumers

Family Mart Thailand introduced two first-of-its kind retail concepts during lockdown: a container-style store and an automatic vending machine that sell snacks, drinks and ready-to-eat meals on the go. These retail concepts could be recreated quickly in areas under quarantine while providing social distancing.

What it means for brands



3. Enable them to act on information easily

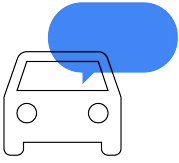
Aid consumer decision making by including crucial information with Search Ad Extensions. By including things like callouts, price extensions, and affiliate locations, you not only make things easier for your customers, but you become easier to find with greater visibility on the Search results page.

4. Think about ways to provide longer term support for your partners from a B2B point of view

To boost sales in China, motor lubricant maker Castrol offered free advertising space to independent repair workshops that increased the sale of Castrol products. Around 6,000 workshops benefitted from the campaign, and Castrol reported a 44% increase in sales.

5. Recognize the role brands can play in empowering people to grow their skill sets

Grow with Google is a hub consolidating resources for job-seekers and businesses to upskill themselves and their employees. For example, an initiative was launched by Saphan Digital, where Google partnered with the Ministry of Commerce and various organizations in Thailand, to help small businesses, NGOs and individuals make the most of online opportunities.



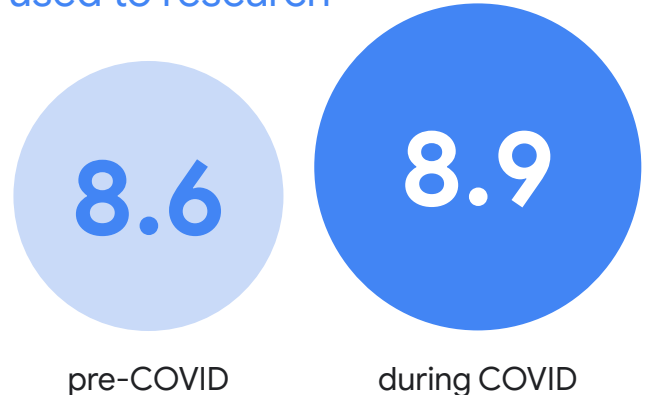
Automotive

As lockdown restrictions eased in mid-2020, Search signals indicate early signs of rebound in demand for cars. However, challenges in retaining brand loyalty means brands need to reach and engage with consumers in a meaningful way, if they want to be considered.



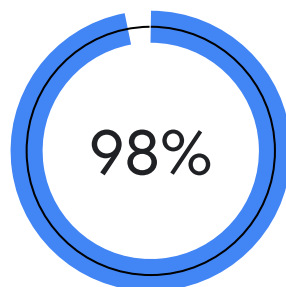
COVID-19 introduced a new dynamic that surfaced the importance - and opportunities - of online touchpoints when it comes to buying a new car.

Number of online touchpoints used to research

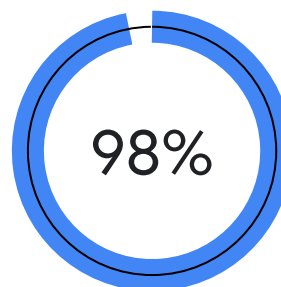


Video, Search and brand websites are the leading research sources, likely because they are seen as trustworthy.

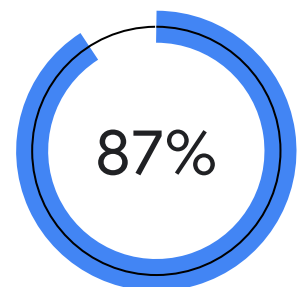
To inform their recent vehicle purchase,



used online video

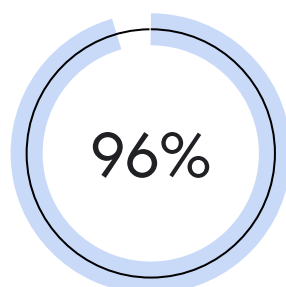


used search engine

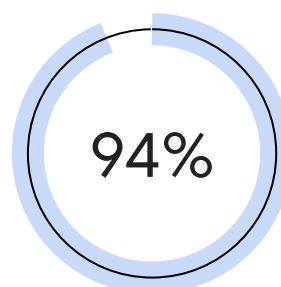


used manufacturer or brand websites

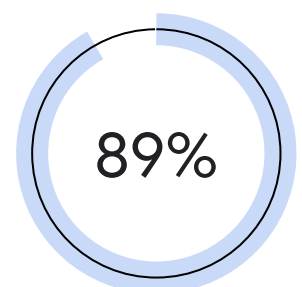
Top 3 most trusted online channels



say YouTube videos

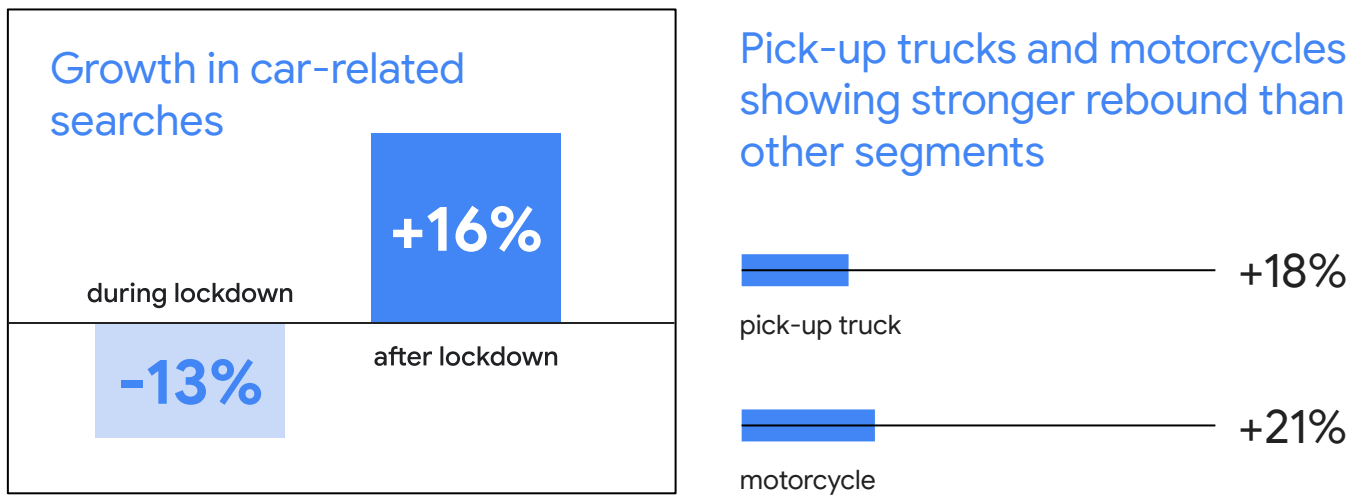


say the manufacturer or brand websites

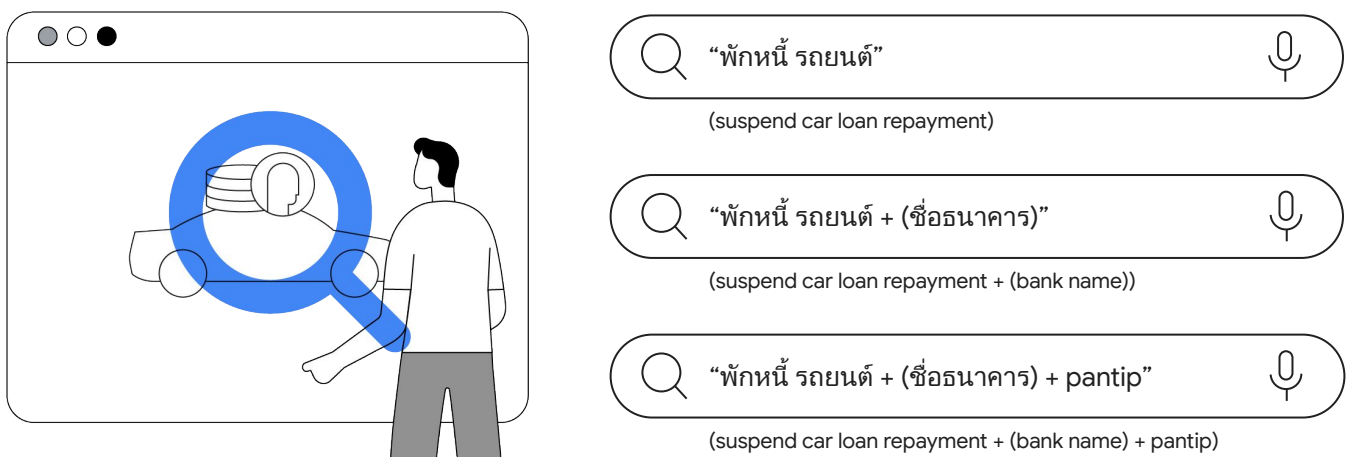


say review websites

Search signals reflect the consumer's underlying state of mind; despite a decline in car purchase-related searches during lockdown, they resumed when it was lifted.



Rising car-related search queries during lockdown (March-May 2020)





Rising search queries post-lockdown (Jun-Aug 2020)



“ฤกษ์ออกรถ + (เดือน) 2563”



(auspicious time for new car + (month) 2563)



“เช่ารถ + (เมือง)”



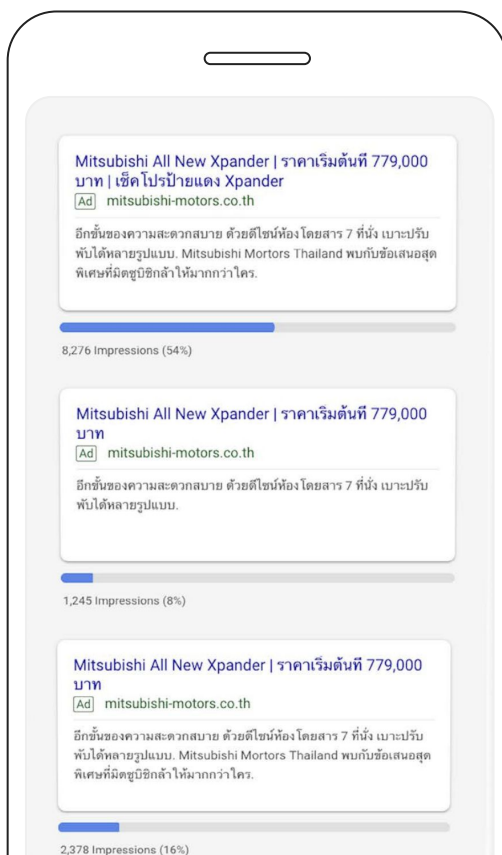
(car rent + (city))



“Motor show 2020”



Case Study: Mitsubishi Motors Thailand

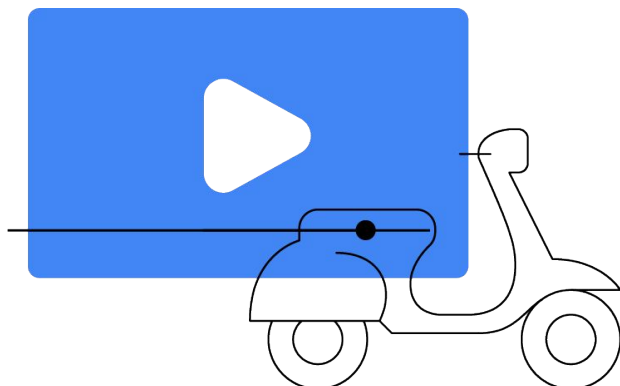


Because Search has been effective at generating leads, **Mitsubishi Motors Thailand** used Responsive Search Ads to deliver a wide range of unique selling points. Based on machine learning technology, Responsive Ads automatically piece together multiple variations of an ad by combining copy elements such as headlines and descriptions. Over time, the ads will serve the most suitable message to searchers depending on the keywords they searched for, their device and various other signals. Mitsubishi Motors was thus able to deliver relevant and customized experiences for their customers, and eventually unlock more conversions.

Given the uncertainty around the world, car shoppers are more likely to shop around and were open to exploring brands that offer the best value for them.

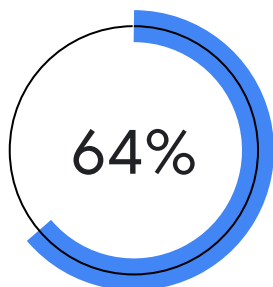


growth in searches for **generic (non-branded) terms**, mostly driven by promotion keywords e.g. “ราคาถูก” (cheap price), “โปร” (promotion), “ไหนดี” (which one)

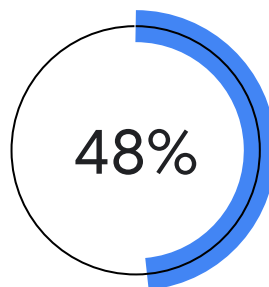


of Thais **click the first ad they see**, regardless of the brand they searched for

YouTube is also a pivotal decision-making tool and a gateway to further action.

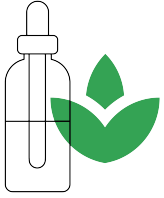


turned to YouTube for **help on the type of vehicle to purchase**



turned to YouTube **to change or reinforce a perception of** a vehicle model

96% of those who watched an online video completed at least one of these follow-up actions: visiting a dealer website, requesting a quote or locating a dealer



Beauty & Personal Care

Daily routines have drastically changed in the “new normal”. It’s no surprise our skin is feeling it, too. Thais have quickly learnt that skin concerns aren’t the same for everyone.



Social distancing, face masks, and work-from-home measures have changed how Thais use and buy personal care and beauty products, with a big drop in makeup. Interestingly, beauty videos are still being watched daily on YouTube.



decline in searches for
cosmetics



Top searches on YouTube for makeup-related terms

“แต่งหน้าใสๆ”

(natural makeup)

“วิธีแต่งหน้า”

(how to do makeup)

“สอนแต่งหน้า”

(makeup tutorial)

Interest in skincare and personal care has been climbing, as people across the nation sought help on personal hygiene, self-care and self-pampering at home. During lockdown, the trends were especially apparent when DIY and how-to tutorials gained viewership. While some of the behaviors were temporary, others have sustained as consumers began to see the longer-term benefits of turning the 'one-off' experiments into habits.

Temporary

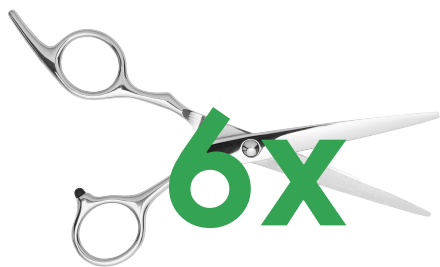


growth in “เจลล้างมือ” (hand sanitizer gel), although this returned to pre-outbreak when lockdown was lifted

Sustained



YoY increase in searches for **serum**, with the highest search per capita coming from Satun, Nakhon Nayok and Surin



growth in searches for “กรรไกร ตัดผม” (hair scissors) during lockdown, which transferred to ร้านตัดผม (hairdresser) when lockdown was lifted

60% growth in searches for “ร้านตัดผม” (hairdresser) in the first week after lockdown was lifted



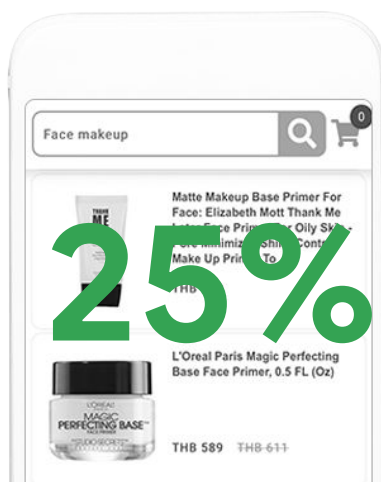
YoY growth in search for **skincare**

Typically, searches for sunscreen peak in the summer (in April) though that was not the case this year, indicating that the pandemic may have altered the seasonality of certain beauty product categories. It's worth noting that domestic travel revived in the second half of the year, and a summer-like phenomenon emerged, with consumers developing a different set of needs.



YoY decline in searches for “ครีมกันแดด” (sunscreen) in April despite it being peak summer

This year, beauty products appealed to a whole new set of online customers, making e-Commerce the purchase channel of choice. Before the actual purchase, however, shoppers first navigated through a plethora of touchpoints for advice, ideas and inspiration, including to Search and YouTube - the main sources to discover new products.



of new digital users in Thailand **bought beauty products online for the first time** as a result of COVID-19

When it comes to discovering new products:



For **facial care shoppers**,
Search is the top touchpoint at 36%,
followed by YouTube at 33%





For **makeup shoppers**,
Search sits at the top at 43%, followed
by YouTube at 40%


Across the country, people's journeys have become **increasingly personal**, with the expectation that products should be fulfilling their particular set of needs, as evidenced by search queries that are **needs-specific and non-branded**.





Top searches for serum include:

- 

(serum to get clear skin)
- 

(korean serum)
- 

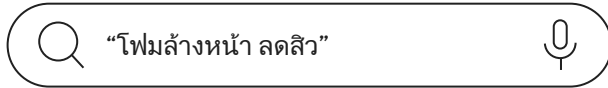
(serum to reduce acne marks)
- 

(aloe vera serum)
- 

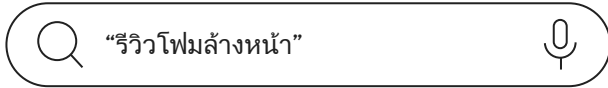
(vitamin C serum)



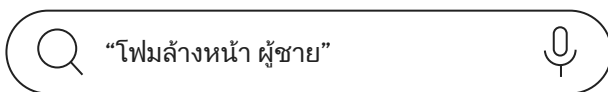
2020 top searches for face wash include



(face wash to reduce acne)



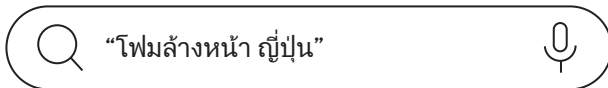
(face wash review)



(face wash for men)



(face wash for sensitive skin)



(japanese brand face wash)



2020 top searches in beauty product reviews:



(lipstick review)



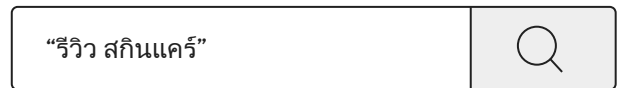
(foundation review)



(sunscreen review)

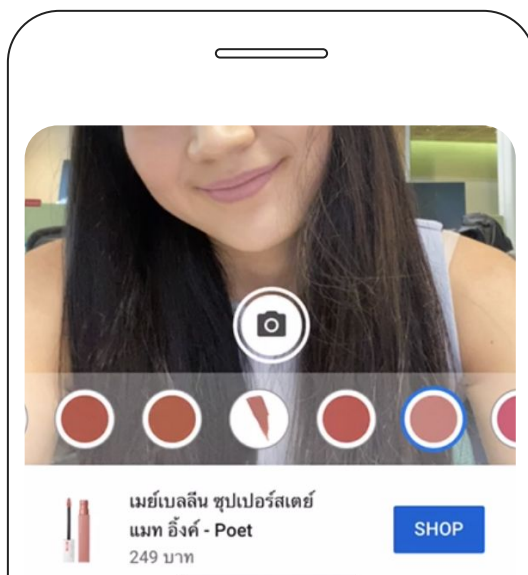


(perfume review)

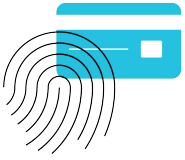


(skincare review)

Case Study: Maybelline New York Thailand



To help consumers find the right lipstick, **Maybelline New York Thailand** leveraged the **'Virtual Try-on'** on YouTube. Since trying products on in-person has become challenging, the solution lets viewers try on different lipstick shades, virtually, and makes it easy for them to buy online directly at an e-Commerce channel. The platform has helped them connect with consumers in an engaging way, expedite the path to purchase, and, ultimately, deliver helpful customer experiences.



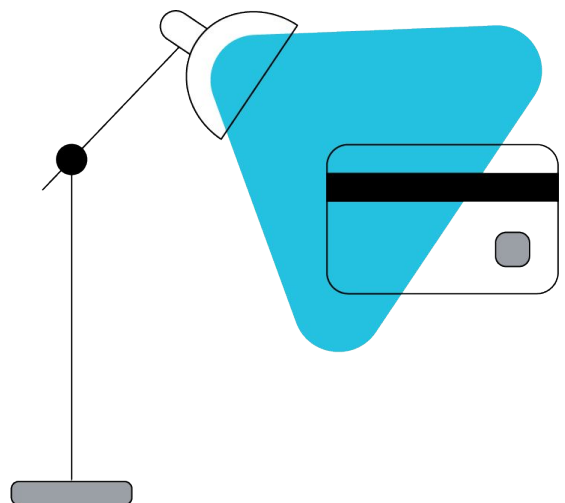
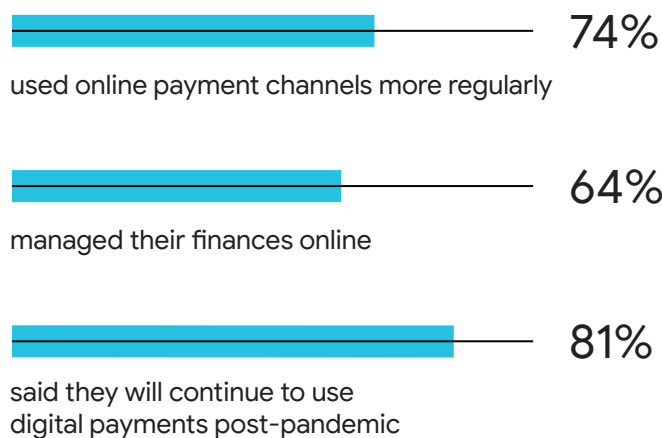
Finance

Thai consumers across Thailand are being more proactive when it comes to managing finances. They are turning to online channels to actively educate themselves on financial services and secure investment options.

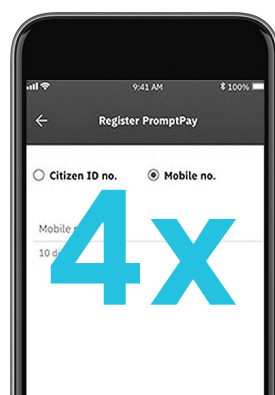


Thailand edged closer towards greater financial inclusion and becoming a cashless society. This trend is likely to sustain post-COVID, forever altering how Thais relate to spending, saving and connecting with their money.

As a result of COVID-19,

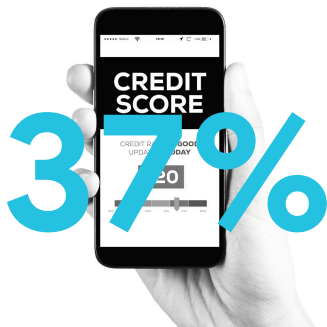


PromptPay drew renewed interest, thanks to the government's financial relief payment



higher search interest vs when it launched in 2016

The pandemic also brought a wave of new digital users online.



of them **signed up to online lending for the first time** as a result of COVID-19*



Lockdowns and social distancing measures urged customers to find new ways to interact with banks.



YoY growth in searches for **bank contact details** (peaking during lockdown)



YoY growth in searches for **banking apps**

There were rising search trends for terms related to “via app”:

🔍 “สมัคร พร้อมเพย์กสิกรไทย ผ่านแอป” 🎤
(register for PromptPay via app)

🔍 “พักชำระหนี้ ไทยพาณิชย์ ผ่านแอป” 🎤
(loan payment deferral via SCB App)

🔍 “จ่ายเงินยกยศ ผ่านแอป กรุงไทย” 🎤
(student loan payment via KTB app)

People across the board also sought financial assistance to help ride through the uncertain period.



YoY spike in searches for “พักชำระหนี้” (loan payment deferral), with the highest search per capita coming from the non-urban provinces of Rayong, Prachinburi and Mukdahan

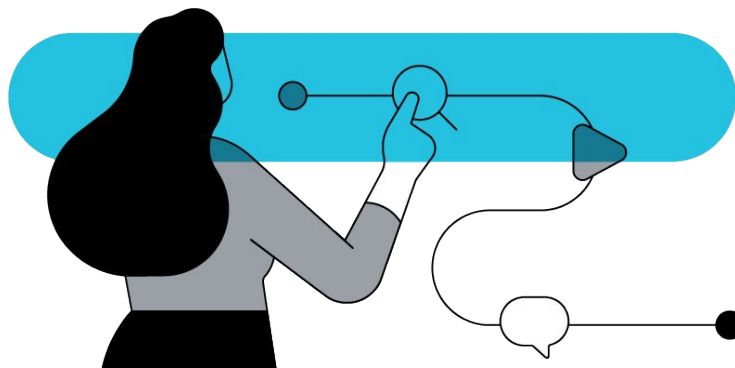


YoY increase in searches for “เงินสด ” (quick cash)

The sudden focus on health concerns prompted people to buy health and life insurance for themselves and for their loved ones, a product traditionally bought offline.



YoY increase in searches for “ประกัน ออนไลน์ ” (online insurance)

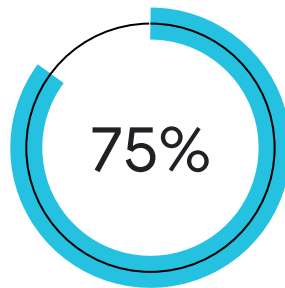


To stay on top of their finances or to learn more about new financial products, people turned to YouTube, Search and to banks' websites.

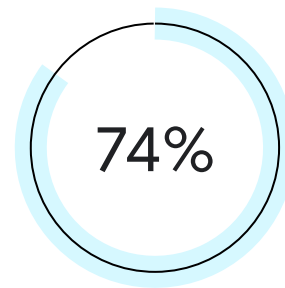


YoY growth in watch time on YouTube for **finance-related videos**

To find out about **Fixed Accounts**

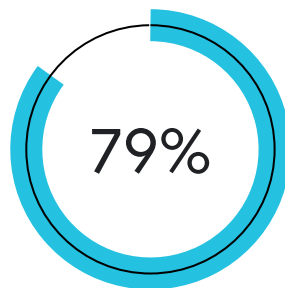


search engine

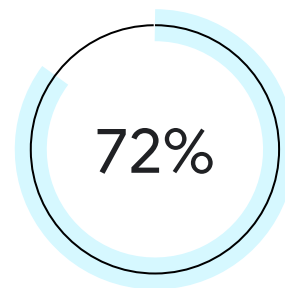


official bank websites

To find out about **Mutual Funds**

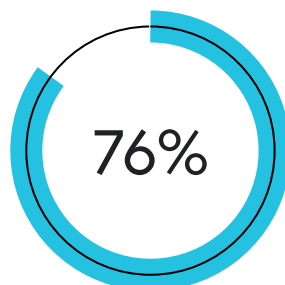


search engine

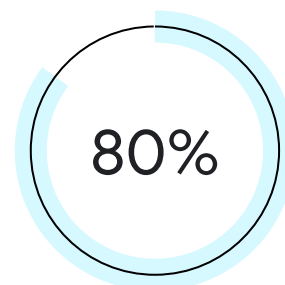


official bank websites

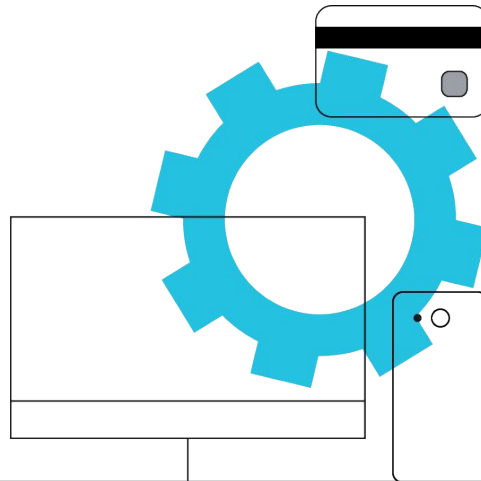
To find out about **Home Loans**



search engine



official bank websites



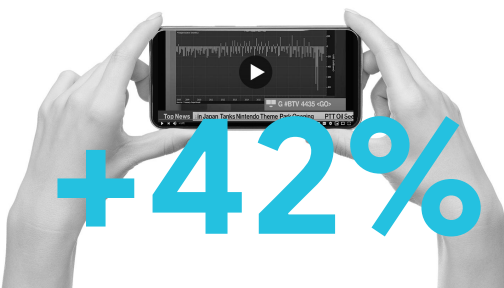
Thais also sought ways to make their money work harder for them, with many new investors wanting to take advantage of a weaker stock market.



YoY growth in searches for “เปิดพอร์ต” (sign up for investment portfolio)

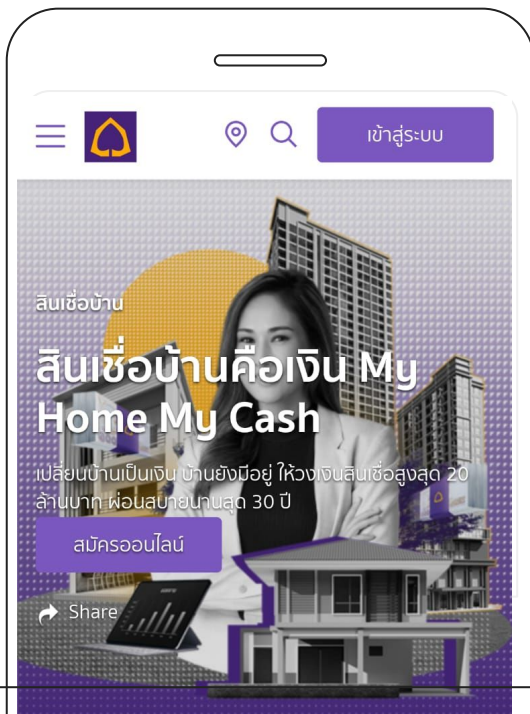
with the top rising searches on “เปิดพอร์ตหุ้นที่ไหนดี 2563” (where to sign up for investment portfolio 2020)

While Search has been a destination to discover brands, product features and find the best deals, YouTube has become a go-to for financial product education.

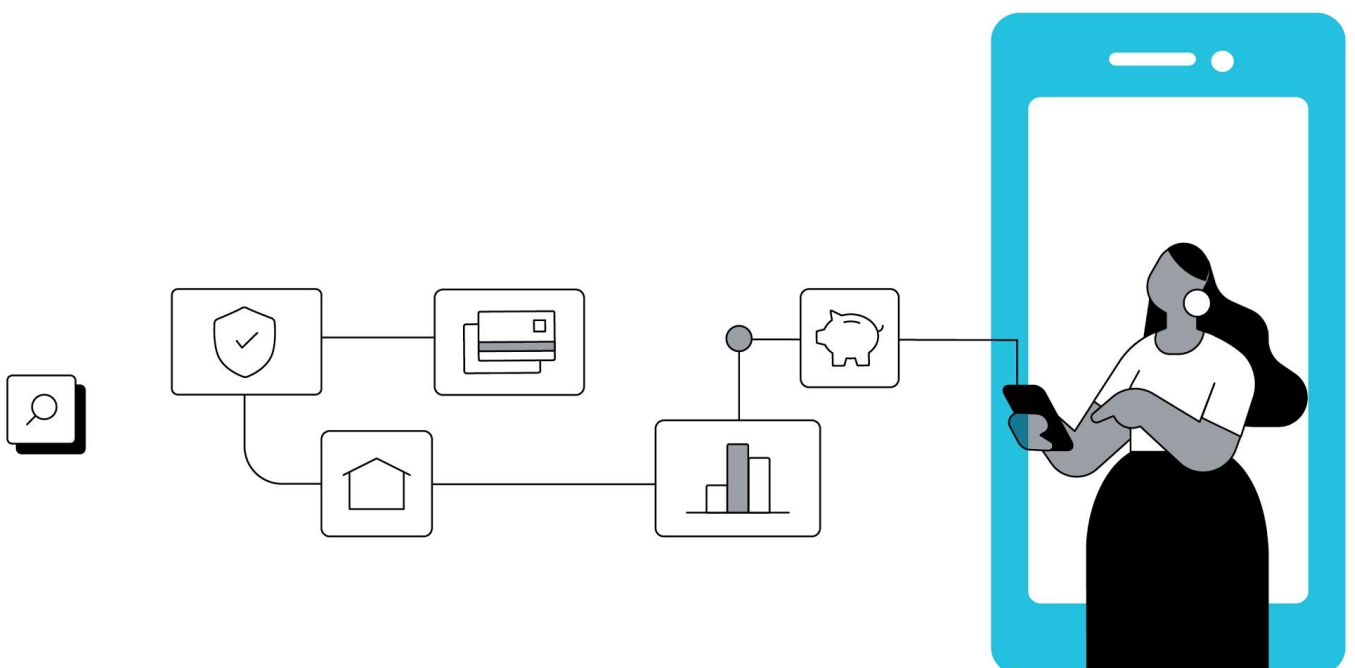


YoY increase in searches on YouTube for “หุ้น” (stock)

Case study: SCB



Siam Commercial Bank (SCB)'s key priority is to efficiently drive high quality leads for their financial products. They realized that consumers regularly switch between search, video and conversations with friends to learn about financial products. By adopting the Google Max solution, SCB leveraged machine-learning-based insights to reach high potential customers across Google Search, Display and YouTube, and consolidated their performance solution across the platforms. They invariably drove more quality leads at lower cost, and broadened the opportunity to speak to the potential consumers who are looking for the right products at the right point in their purchase journey.





Food & Beverages

COVID-19 has driven Thais to prioritize healthier eating habits - to protect themselves from illness and for their general well-being. Many of them are also open to online food delivery services and experimenting in the kitchen.

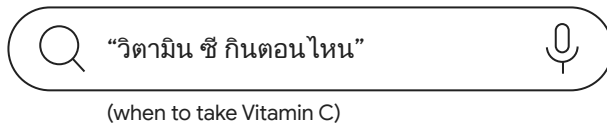
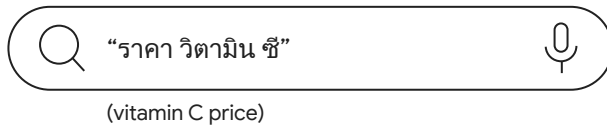




+80%

YoY growth in searches for **vitamins** (March to April), with the biggest surge for vitamin C

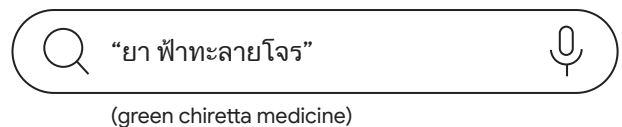
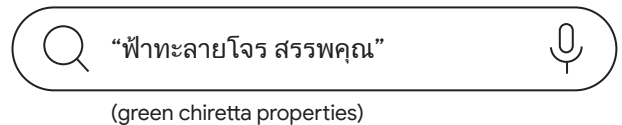
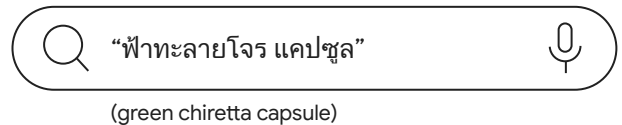
Top searches included:



+233%

YoY growth in searches for **“ฟ้าทะลายโจร”** (green chiretta)

Top searches included:



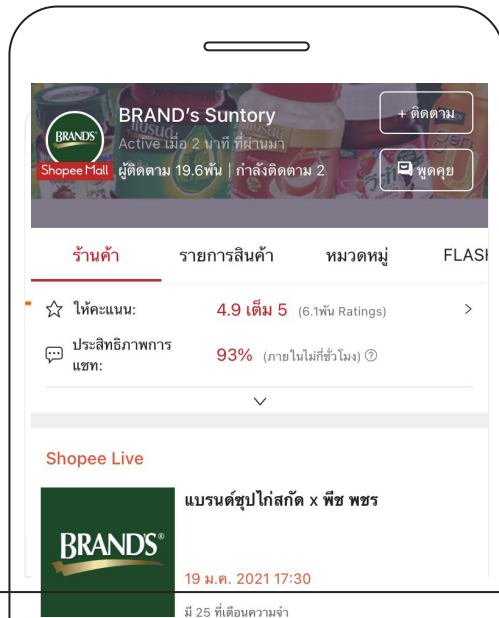
“keto diet”



+121%

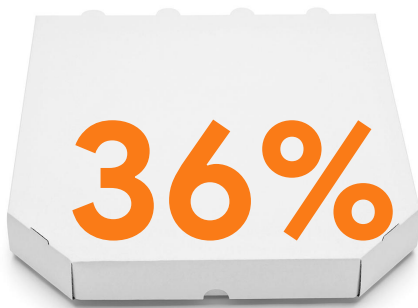
YoY growth in searches for **Keto diet**

Case study: Brand's Suntory



Brand's Suntory, a major drinks and health supplements brand, quickly realized that lockdown was prompting Thai people to 1) research products online more than before; and 2) increasingly turn to e-commerce platforms to meet their everyday needs. To cater to these trends, the brand piloted the Google Shopping Ads with Shopee solution as a way to reach consumers at the moments when they are researching health supplement products on Google Search. They were able to tap into this set of potential customers and help them complete the purchase via their e-commerce platform, thus driving incremental traffic and orders on their Shopee shop.

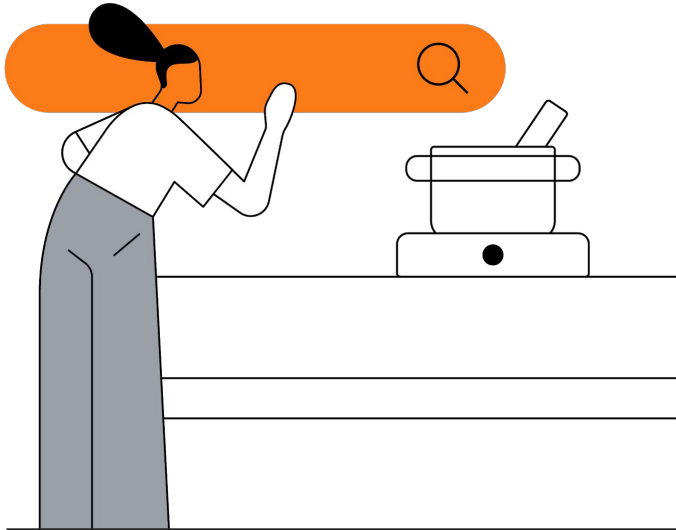
Even pre-pandemic, online food deliveries were a fast-growing trend. But being suddenly homebound exponentially accelerated the behavior, a phenomenon mainly driven by new users and increased adoption in major cities.



of **new digital users in Thailand** used an **online food delivery service** for the first time because of COVID-19

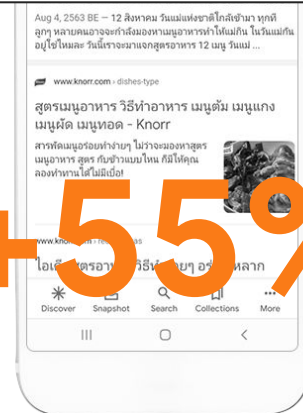


growth in searches for **online food delivery apps**, concentrated in Bangkok and major cities



Across the country, people are cooking and dining more at home than ever and we're seeing a growing interest for different menus and cooking appliances.

+55%



growth in **Google searches for recipes** (during lockdown)

+81%



YoY increase in **YouTube searches for cooking**



Highest growth in “how to cook” searches on YouTube:

“วิธีทำ น้ำพริกกะปิ”



(how to cook chilli Shrimp Paste)

“วิธีทำ ขนมปังหน้าหมู”



(how to cook Minced Pork Toast)

“วิธีทำ ขนมตาล”



(how to cook toddy palm cake)

“วิธีทำ หอยทอด”



(how to cook oyster omelette)

“วิธีทำ ขนมครก”



(how to cook Thai Coconut Milk Pancake)

“Grill chicken marinate recipe”



Top menus searched on Google:



“สูตร หมูแดดเดียว”



(sun-dried pork recipe)



“สูตร บราวนี่”



(brownie recipe)



“สูตร ขนมครก”



(thai Coconut Milk Pancake recipe)



“สูตร หมักหมูย่าง”



(grill pork marinate recipe)



“สูตร หมักไก่ย่าง”

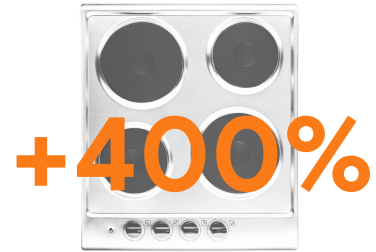


(grill chicken marinate recipe)

Biggest surge for cooking appliances



growth in searches for
“หม้อทอดไร้น้ำมัน” (air fryer)



growth in searches for
“เตาไฟฟ้า” (electric stove)

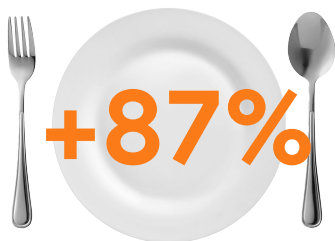


growth in searches for
“ไมโครเวฟ” (microwave)

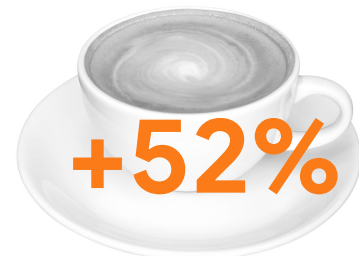


growth in searches for
“เครื่องชงกาแฟ” (coffee machine)

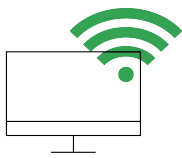
As lockdown restrictions eased, dining out and cafe culture bounced back and even surpassed pre-COVID rates, thanks to the government's efforts to boost domestic travel and consumption.



YoY growth in searches for “ร้านอาหาร ใกล้ฉัน”
(restaurant near me) post-lockdown



YoY growth in searches for
“ร้านกาแฟ ใกล้ฉัน” (cafe near me)
post-lockdown



Media & Telecommunications

As people increasingly rely on digital services to meet their daily needs, there is a heightened demand for high-quality internet connectivity and curiosity about the future of technology.



People across the country are heading online for information and entertainment across content types and screen sizes.

Thais spent on average
(for personal use)

3.7hrs

per day
online pre-COVID-19

4.6hrs

per day
online at the height of lockdown

4.3hrs

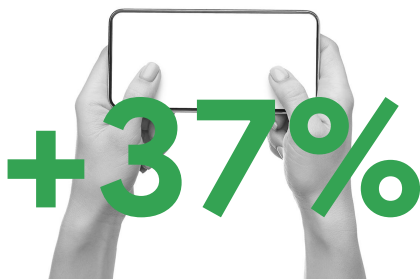
per day
online post-lockdown



YoY growth in watch time on YouTube
for **comedy movies**



YoY growth in searches for
online music streaming platforms



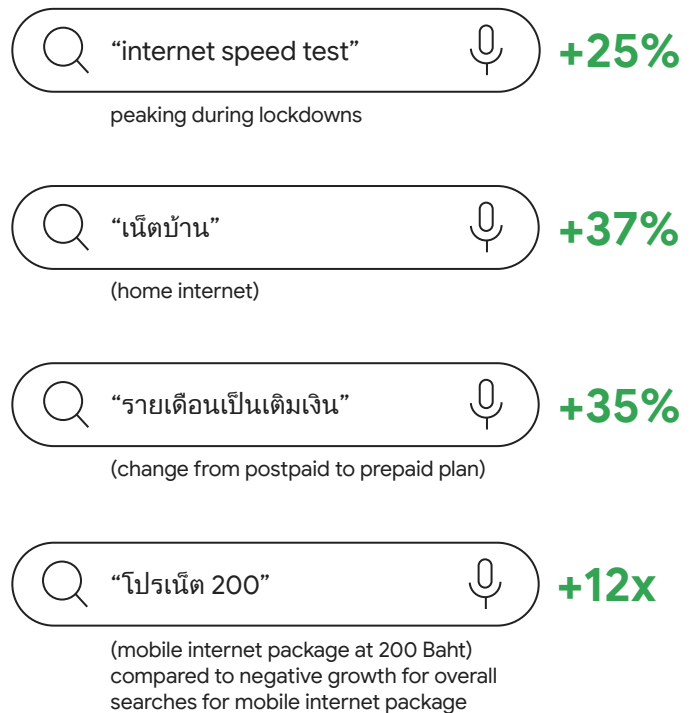
YoY growth in searches for
online games, with the highest search
per capita coming from Sa Kaeo, Nong
Bua Lam Phu and Uthai Thani



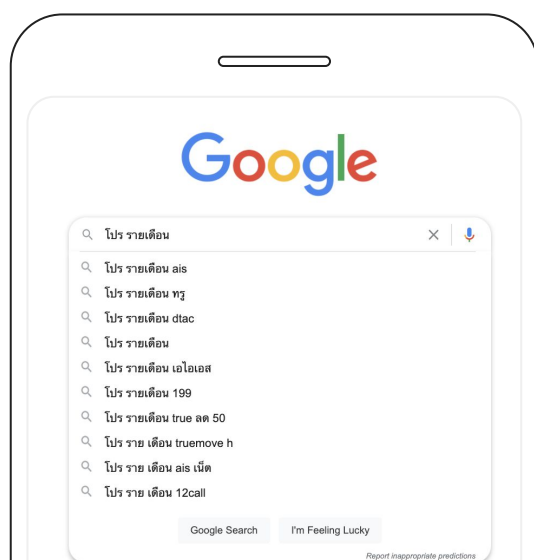
YoY in searches for
online learning

The spike in online content consumption has led to heightened demand for high-quality internet connectivity, at the best value. Noteworthy is Thai consumers' creativity and specificity in how they searched.

YoY growth



Case Study: dtac



dtac, a mobile service provider in Thailand, knew that consumers tend to go through multiple rounds of searches before they find the right mobile package they want to buy. It's crucial for dtac to understand which clicks are the most impactful because many clicks before the last click may have contributed to the conversion. They adopted a data-driven attribution model on their search campaigns, which uses machine learning algorithms to give the proper credit to each click in the user journey. This helped them to better optimize their bidding strategy and strengthen their approach to win potential customers in the consideration phase.

The pandemic prompted consumers to use online self-services when it came to their telecom needs.



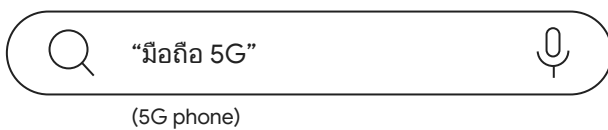
growth in searches for **telecom operators'** **contactless channels** with the highest search per capita coming from Narathiwat, Phatthalung and Chumphon

The accelerated role of digital technologies have also propelled people's curiosity about the future of technology and the implications on their lives and businesses.



YoY growth in searches for **5G**

The top 5G-related searches included:



Similarly, growth were seen across these searches.



YoY growth in searches for **cloud computing**



YoY growth in searches for **virtual reality (VR)** with top searches in VR games and movies



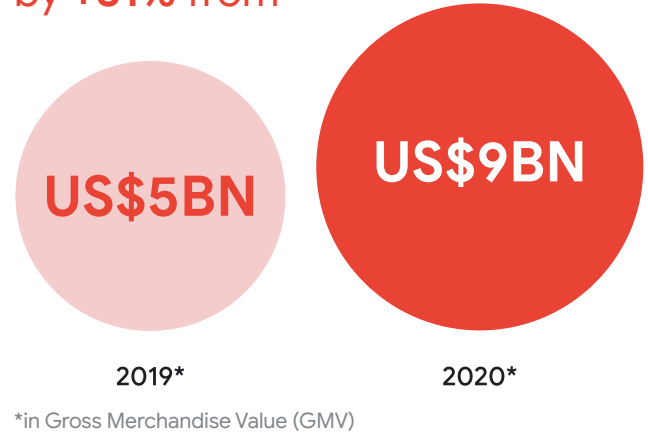
Shopping

In 2019, e-commerce was Thailand's fastest-growing segment in the digital economy (at 54% CAGR), but in 2020, the pandemic has even further turbo-accelerated its growth.



To fulfill their day-to-day needs, Thais turned to online shopping — a shift that's fast becoming more than a short-term response.

In 2020, e-commerce grew by **+81%** from



1 in 3 of 2020's Thai online shoppers were new to digital services

9 in 10 of online shoppers intend to continue buying online going forward

The pandemic not only pushed consumers online, many sellers joined the digital economy too.

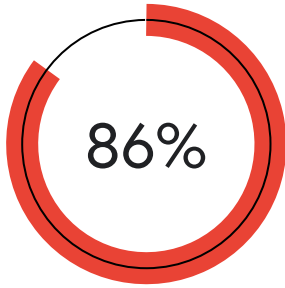


YoY growth in searches for “ขายของออนไลน์” (Sell online)

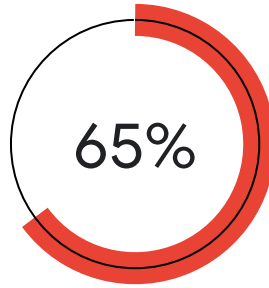
They looked for general information on selling online as well as specific how-to's.



Shopping behavior has also evolved this year, with Thai consumers doing more research across a variety of online touchpoints before deciding what to buy.



of Thai consumers spent more time researching a product before making a purchase



of them turned to a search engine for more information about a product before making a purchase



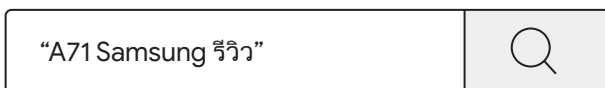
YoY growth in watch time on YouTube for **consumer electronic videos**



2020's top IT product reviews on YouTube:



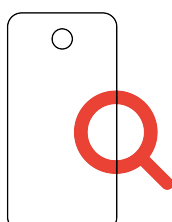
(iPhone review)



(a71 samsung review)



(bluetooth earphones review)



2020's top rising product reviews on Google Search



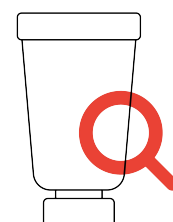
(cream review)



(serum review)



(perfume review)



Thai consumers weren't just searching for a product, they were looking for one-stop-shop retailers who could service multiple needs across a category, such as:

Groceries

6X growth in searches for **online grocery stores** between March to May 2020, mainly in Greater Bangkok

An all-time high search interest for **convenience stores and hypermarkets** in March 2020 for the rest of Thailand

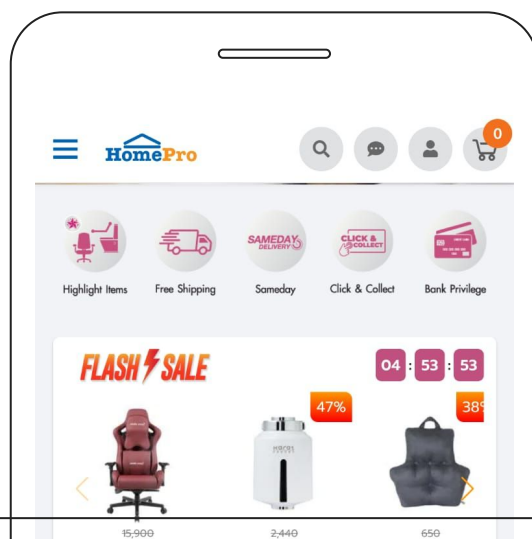
Home enhancements

3X growth in searches for **electronics & home decor retailers**

"home decor"



Case study: HomePro

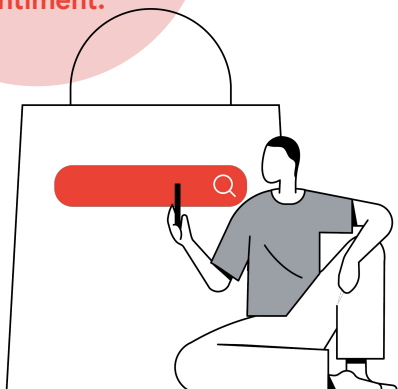


With its stores closed during lockdown and consumers turning to the web to find what they need, **HomePro**, a home improvement store in Thailand, knew their website would become their digital storefront. They used Google Trends and Google Analytics tools to analyze changing consumer needs and adjust product offerings on their home page. They also improved the way they show up when consumers are searching for them, by optimizing their campaign through optimization score.

Industry Takeaways

While every industry will have its unique set of opportunities and challenges, we've collated here key takeaways and next steps for brands to help you translate these insights into actions for your businesses.

Use tools such as Google Trends to help keep a pulse on consumer sentiment.



Understand and capture the dynamic demand

■ Shifted seasonalities

Seasonality might not look the same during these periods of uncertainty. The challenge is to understand how consumer preferences and needs have changed. This may mean you need to add new product features or communicate relevant messages in your messaging in order to capture the changing demand.

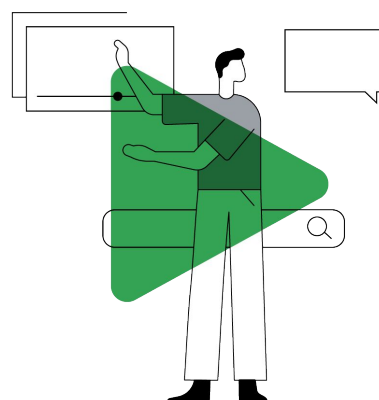
■ Beyond the traditional

New demand is also emerging from “new to digital” users brought about by COVID-19, including those in non-metro areas. Brands need to look beyond traditional channels to connect with these consumers.

Tap into consumers' passions

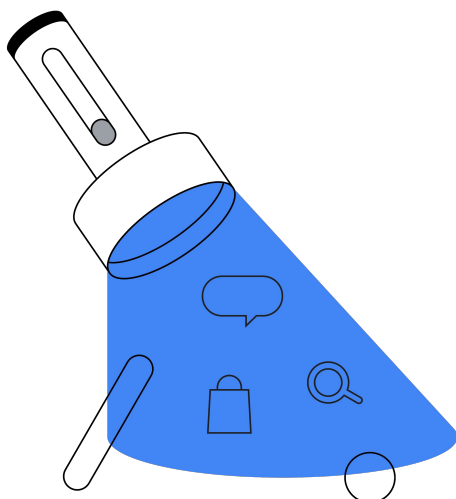
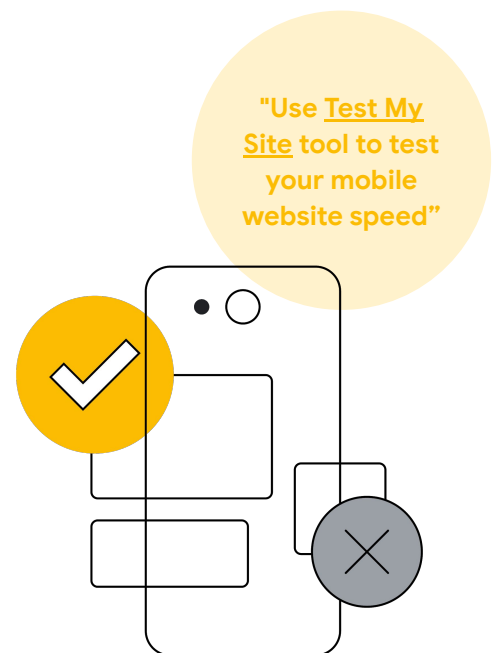
■ Feed their passion

As people turn to YouTube for information about specific products or topics, be there to provide them with helpful information that feeds their passions. Using the right creative, targeting and format, brands have a valuable opportunity to tell their brand story and drive purchase intent.



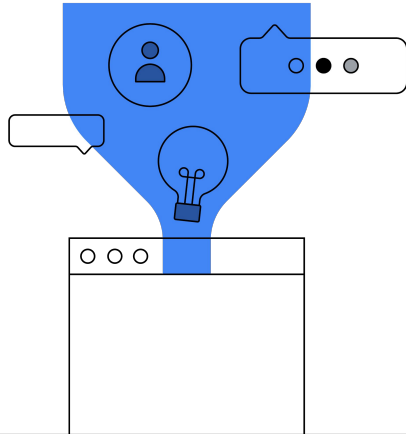
Be discoverable and frictionless across all touchpoints

- **Be there when consumers are looking for you**
Ensure your products are discoverable across touchpoints, and provide helpful and relevant information along the way. For example, you can showcase products on the Google Shopping tab (it's free!) or across Google's properties with Google Shopping Ads.
- **Leverage e-Commerce partnership**
With the launch of Google Ads with Shopee, brands can also now promote their official stores and products on Shopee, on Google Shopping Ads.
- **Get listed online**
For businesses with a physical storefront, this means signing up to Google My Business for free so customers can find your business across Google Search and Maps.
- **Make it frictionless**
With your website becoming your storefront, ensure
 1. The messaging across your marketing channels is aligned.
 2. The Site performance and speed are optimized for a frictionless and helpful shopping experience.



Create meaningful and relevant experience

- **Be helpful and relevant**
More important than showing up in consumers' searches is delivering meaningful answers when they're searching for you. This means you need to understand how consumer preferences and needs are shifting in a time of change and may require additional product features or clearer communications on existing specifications.

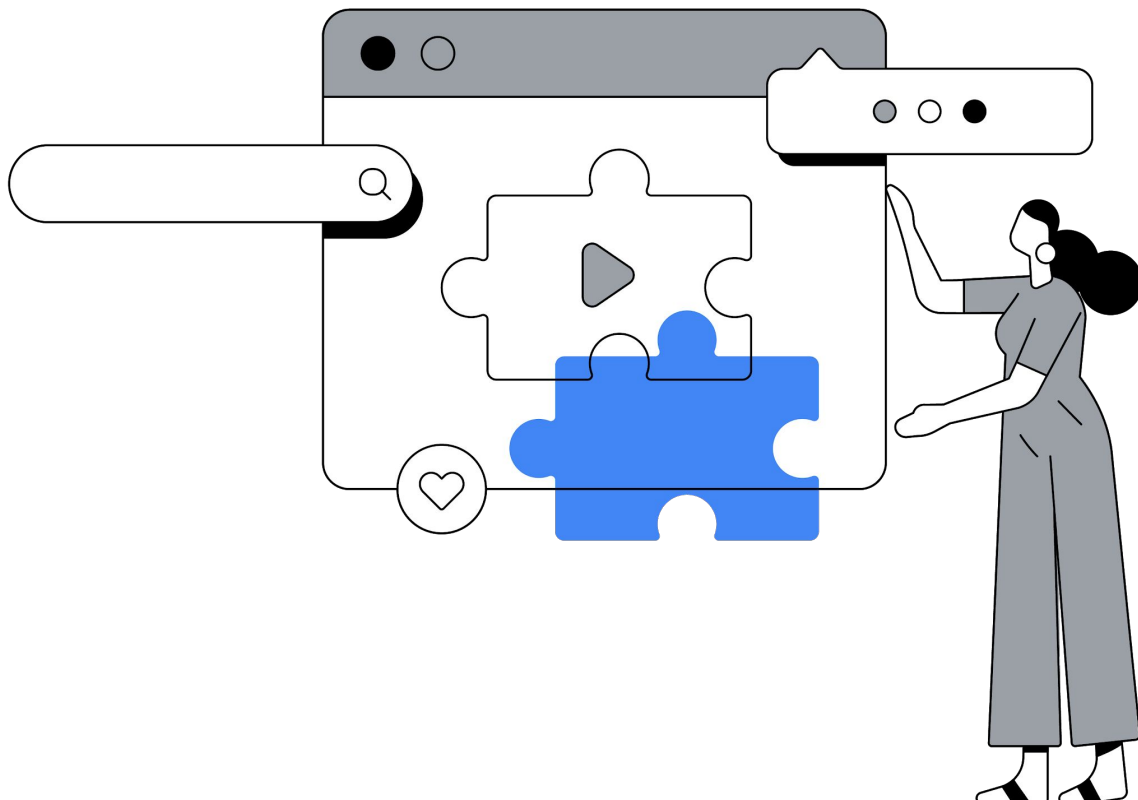


■ Be in the consideration mindset

For example, tap onto non-branded keywords, such as "review", "what to buy" or a functional benefit of the product, to reach undecided consumers with helpful and relevant content. By offering the right information at the right time, the customer will feel that your brand understands their needs and will be more likely to choose you.

■ Leverage automation & Machine Learning technology

As consumers navigate numerous touchpoints across platforms, brands can leverage automation technology, such as Google Max campaign or Smart Shopping campaigns, to reach high potential customers across Google platforms. Solutions such as Responsive Search Ads and Dynamic Search Ads can also help deliver a more personalized experience at scale whilst driving better conversion.



Sources

All data points used in this report are from Google Trends, 1 Jan 2020-31 Oct 2020 vs. 1 Jan 2019-31 Oct 2019, unless indicated otherwise.

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