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
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.

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.

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.

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.

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.
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

+70%

YoY growth in searches for LGBT

+39%

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

YoY growth in searches for feminism

+24%

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

+42%

Source: Google Trends, TH
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.

Rise in depression-related search queries include:

- “ทดสอบซึมเศร้า” (depression assessment)
- “รักษาโรคซึมเศร้า” (depression treatment)
- “ซึมเศร้าอาการ” (depression symptoms)

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

Source: Google Trends, TH
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) 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)

Source: Google Trends, TH
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):

- “บริจาค โควิด” (COVID donation)
- “บริจาคเสื้อผ้า 2563” (clothes donation 2020)
- “บริจาคผม 2563” (hair donation 2020)

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

- “ตูปินสุขมีที่ไหนบ้าง” (where is Blessing Box located)
- “ตูปินสุขเชียงใหม่” (Blessing Box Chiang Mai)
- “ตูปินสุขใกลฉัน” (Blessing Box near me)

Rising searches for volunteering-related queries:

- “จิตอาสาภัยพิบัติ” (disaster relief volunteer)
- “อาสาสมัครสาธารณสุขประจำหมู่บ้าน” (Public Health Volunteer)

Source: Google Trends, TH
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.

Source: Trendwatching.com
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.

Source: Trendwatching.com
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.

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

+25%

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

+34%

YoY growth in searches on YouTube for video conferencing solution

1.5x

Sources: Google Trends, TH
Google Trends, TH, YouTube search
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)

+37%

YoY growth in searches on YouTube for yoga

+60%

Breakout growth in prayer-related searches

- “บทสวดมนต์ รัตนสูตร”
  (Ratana Sutra prayer)

- “บทสวด มหาจักรพรรดิ์”
  (Maha Chakrapat prayer)

- “วิธีสวด อิติปิโธ 108”
  (how to chant Itipiso 108 prayer)

Sources: Google Trends, TH; Google Trends, TH, YouTube search
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.

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

- อาหารลดน้ำตาลในเลือด (foods to lower blood sugar)
- หม้อหุงข้าวลดน้ำตาล (low sugar rice cooker)
- ผลไม้น้ำตาลน้อย (low sugar fruit)
- โฟมล้างหน้าลดสิว (acne cleaning foam)
- โฟมล้างหน้าผิวแพ้ง่าย (cleansing foam for sensitive skin)
- โฟมล้างหน้าญี่ปุ่น (Japanese cleansing foam)
- โฟมล้างหน้าผู้ชาย (men’s facial foam)
- รีวิวโฟมล้างหน้า (face cleansing foam review)

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

Source: Google Trends, TH
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

YoY growth in watch time on YouTube for comedy movies: +90%

YoY growth in searches for “เก้าอี้ เกมมิ่ง” (gaming chair): +125%

Sources: Google/Kantar, e-Conomy SEA Report as referenced in Google, Temasek and Bain & Company, e-Conomy report, Nov 2020; Google data, TH, Jan-Jun 20 vs Jan-Jun 19; Google Trends, TH
Given the travel constraints and the challenges many face in their everyday lives, many have been seeking alternative forms of downtime.

YoY growth in YouTube searches for **cooking**

+81%

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

+335%

YoY growth in searches for **เย็บ** (sewing machine) during lockdown

+20%

Sources: Google Trends, TH, Mar-Apr 2020 vs Jan-Feb 2020; Google Trends, TH, YouTube search; Google Trends, TH
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 "เล่นเกมส์กับเพื่อน" (gaming with friends) as people sought different ways to connect with others and cope with isolation.

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

- ของขวัญ ให้เพื่อน (gift for friends)
- โอนเงิน ให้เพื่อน (transfer money to friends)
- ให้กำลังใจ เพื่อน (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.

Source: Trendwatching.com
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.

**6X**

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

**+50%**

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

**+35%**

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

Source: Google Trends, TH
...and building up their side hustles.

+32% YoY growth in searches for “ขายของออนไลน์” (sell online)

Top search queries related to selling online:

- "ขายของออนไลน์ อะไรดี?" (what to sell online)
- "วิธีขายของออนไลน์ให้ขายดี" (how to sell online better)
- "แอพแต่งรูปขายของออนไลน์" (app to take product photos to sell online)

Source: Google Trends, TH
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 on YouTube for "หุ้น" (stocks): +42%
- YoY growth in watch time for finance-related videos: +70%
- YoY growth in searches for “เปิดพอร์ต” (sign up for investment portfolio): +72%

Sources: Google Trends, TH
Google data, TH, Jan-Jun 20 vs. Jan-Jun 2019
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.

Sources: Google Trends, TH
Google data, Thailand, Jan-Jun 2020 vs Jan-Jun 2019
Google Trends, TH, Mar-Apr 2020 vs Mar-Apr 2019
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.

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.
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.

Source: Trendwatching.com
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.

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

Sources: Google/Kantar, Gearshift report, Thailand, n=500 (new car buyers), May-Jul 2020; Google/Nielsen, Automotive market study, Thailand, n=500, June 2020
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.

Growth in car-related searches during lockdown:
- +16% (motorcycle)
- -13% (pick-up truck)

After lockdown:
- +18% (motorcycle)
- +21% (pick-up truck)

Pick-up trucks and motorcycles showing stronger rebound than other segments.

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

- "พักหนี้รถยนต์" (suspend car loan repayment)
- "พักหนี้รถยนต์ + (ชื่อธนาคาร)" (suspend car loan repayment + (bank name))
- "พักหนี้รถยนต์ + (ชื่อธนาคาร) + pantip" (suspend car loan repayment + (bank name) + pantip)

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.

**Sources:** Google Trends, TH, Jun-Aug 2020
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.

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

64% turned to YouTube for help on the type of vehicle to purchase

48% 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.

Sources: Google/Nielsen, Automotive market study, Thailand, n=500, June 2020; Google/Kantar, Gearshift report, Thailand, n=500 (new car buyers), May-Jul 2020
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.

Top searches on YouTube for makeup-related terms:
- “แต่งหน้าใสๆ” (natural makeup)
- “วิธีแต่งหน้า” (how to do makeup)
- “สอนแต่งหน้า” (makeup tutorial)

Source: Google Trends, TH, YouTube Search
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.

<table>
<thead>
<tr>
<th>Temporary</th>
<th>Sustained</th>
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<tbody>
<tr>
<td><strong>+1100%</strong> growth in “เจลล้างมือ” (hand sanitizer gel), although this returned to pre-outbreak when lockdown was lifted</td>
<td><strong>+37%</strong> YoY increase in searches for serum, with the highest search per capita coming from Satun, Nakhon Nayok and Surin</td>
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<td><strong>6x</strong> growth in searches for “กรรไกรตัดผม” (hair scissors) during lockdown, which transferred to ร้านตัดผม (hairdresser) when lockdown was lifted</td>
<td><strong>+13%</strong> YoY growth in search for skincare</td>
</tr>
<tr>
<td>60% growth in searches for “ร้านตัดผม” (hairdresser) in the first week after lockdown was lifted</td>
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Sources: Google Trends, TH; Google Trends, TH, Apr 2020 vs. Feb 2020
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.

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.

25% 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:

- “เซรั่ม หน้าใส” (serum to get clear skin)
- “เซรั่ม เกาหลี” (korean serum)
- “เซรั่ม ลดรอยสิว” (serum to reduce acne marks)
- “เซรั่ม วานทนะจระเข้” (aloe vera serum)
- “เซรั่ม วิตามินซี” (vitamin C serum)

Sources: Google/Nielsen, Thai FMCG shopper journey, Thailand, n=1278, Dec 2020; Google Trends, TH
2020 top searches for face wash include:

- โฟมล้างหน้า ลดสิว (face wash to reduce acne)
- รีวิวโฟมล้างหน้า (face wash review)
- โฟมล้างหน้า ผู้ชาย (face wash for men)
- โฟมล้างหน้า ผิวแพ้ง่าย (face wash for sensitive skin)
- โฟมล้างหน้า ญี่ปุ่น (japanese brand face wash)

2020 top searches in beauty product reviews:

- รีวิว ลิป (lipstick review)
- รีวิว รองพื้น (foundation review)
- รีวิว กันแดด (sunscreen review)
- รีวิว น้ำหอม (perfume review)
- รีวิว สกินแคร์ (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.

Sources: Google Trends, TH
Google Trends, YouTube Search, TH
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,

- 74% used online payment channels more regularly
- 64% managed their finances online
- 81% said they will continue to use digital payments post-pandemic

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

Sources: Google/Nielsen, Finance Market Study, Thailand, n=600, Aug 2020; Google Trends, TH
The pandemic also brought a wave of new digital users online. 37% 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.

+28% YoY growth in searches for bank contact details (peaking during lockdown)

+81% 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)
- “สัญญาเงินกู้ ผ่านแอป กรุงไทย” (student loan payment via KTB app)

Sources: Google/Kantar, e-Conomy SEA Report as referenced in Google, Temasek and Bain & Company, e-Conomy report, Nov 2020; Google Trends, TH
*signed up for a personal loan, installment plan or ‘pay later’ option via an online channel
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

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 “เงินด่วน” (quick cash)

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

Source: Google Trends, TH
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

<table>
<thead>
<tr>
<th>Topic</th>
<th>Search Engine</th>
<th>Official Bank Websites</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Accounts</td>
<td>75%</td>
<td>74%</td>
</tr>
<tr>
<td>Mutual Funds</td>
<td>79%</td>
<td>72%</td>
</tr>
<tr>
<td>Home Loans</td>
<td>76%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Source: Google/Nielsen, Finance Market Study, Thailand, n=600, Aug 2020
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.
YoY growth in searches for **vitamins** (March to April), with the biggest surge for vitamin C

Top searches included:
- “ราคา วิตามิน ซี” (vitamin C price)
- “วิตามิน ซี กินตอนไหน” (when to take Vitamin C)
- “วิตามิน ซี ยี่ห้อไหนดี” (vitamin C which brands)

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

Top searches included:
- “ฟ้าทะลายโจร แคปซูล” (green chiretta capsule)
- “ฟ้าทะลายโจร สรรพคุณ” (green chiretta properties)
- “ยา ฟ้าทะลายโจร” (green chiretta medicine)

YoY growth in searches for **Keto diet**

Sources: Google Trends, TH, Mar-Apr 2020 vs Mar-Apr 2019; Google Trends, TH
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.

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.

36% of new digital users in Thailand used an online food delivery service for the first time because of COVID-19

4x 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

Sources: Google Trends, TH, Mar-Apr 2020 vs Mar-Apr 2019; Google Trends, TH, Jan-Jun 20 vs Jan-Jun 19
Highest growth in “how to cook” searches on YouTube:

- “สูตร น้ำพริกกะปิ” (how to cook chilli Shrimp Paste)
- “สูตร หมักหมูย่าง” (grill pork marinate recipe)
- “สูตร ขนมครก” (how to cook Thai Coconut Milk Pancake)

Top menus searched on Google:

- “สูตร ขนมตาล” (how to cook toddy palm cake)
- “สูตร บราวนี่” (brownie recipe)
- “สูตร หอยทอด” (how to cook oyster omelette)
- “สูตร น้ำพริกกะปิ” (how to cook sun-dried pork recipe)
- “สูตร ขนมครก” (how to cook Minced Pork Toast)

Sources: Google Trends, YouTube Search, TH; Google Trends, TH
Biggest surge for cooking appliances

+2400% growth in searches for “หม้อทอดไร้น้ำมัน” (air fryer)

+400% growth in searches for “เตาไฟฟ้า” (electric stove)

+156% growth in searches for “ไมโครเวฟ” (microwave)

+61% 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.

+87% YoY growth in searches for “ร้านอาหารใกล้ฉัน” (restaurant near me) post-lockdown

+52% YoY growth in searches for “ร้านกาแฟใกล้ฉัน” (cafe near me) post-lockdown

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

**+90%**
YoY growth in watch time on YouTube for comedy movies

**+50%**
YoY growth in searches for online music streaming platforms

**+37%**
YoY growth in searches for online games, with the highest search per capita coming from Sa Kaeo, Nong Bua Lam Phu and Uthai Thani

**6x**
YoY in searches for online learning

Sources: Google/Kantar, e-Conomy SEA Report as referenced in Google, Temasek and Bain & Company, e-Conomy report, Nov 2020; Google data, Thailand, Jan-Jun 20 vs Jan-Jun 19; Google Trends, TH
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.

**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.

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.

The top 5G-related searches included:

- “มือถือ 5G” (5G phone)
- “AIS 5G”
- “Samsung 5G”

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

Source: Google Trends, TH
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

US$5BN

2019*

US$9BN

2020*

*in Gross Merchandise Value (GMV)

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.

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

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

+32%

“ขายของออนไลน์อะไรดี”

(what to sell online)

“วิธีขายของออนไลน์ให้ขายดี”

(how to sell online better)

“แอพแต่งรูปขายของออนไลน์”

(app to take product photos for online sales)

Source: Google/Kantar, e-Conomy SEA Report as referenced in Google, Temasek and Bain & Company, e-Conomy report, Nov 2020; Google Trends, TH
Shopping behavior has also evolved this year, with Thai consumers doing more research across a variety of online touchpoints before deciding what to buy.

86% of Thai consumers spent more time researching a product before making a purchase.

65% 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:
- “รีวิว ไอโฟน” (iPhone review)
- “A71 Samsung รีวิว” (a71 samsung review)
- “รีวิว หูฟังบลูทูธ” (bluetooth earphones review)

2020’s top rising product reviews on Google Search:
- “รีวิว ครีม” (cream review)
- “รีวิว เซรั่ม” (serum review)
- “รีวิว น้ำหอม” (perfume review)

Sources: Ipsos global advisory platform survey, eCommerce Unleashed, Thailand, n=1,500 (age 20-74), May 14 - 21st 2020, average of groceries, home care, beauty care, health care, personal care, electronic devices, tobacco and alcohol products; Google Trends, TH; Google Trends, YouTube Search, TH
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**

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**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 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.

**Understand and capture the dynamic demand**

- **Shifted seasonalties**
  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.

Ipsos global advisory platform survey, eCommerce Unleashed, Thailand, n=1,500 (age 20-74), May 14 - 21st 2020, average of groceries, home care, beauty care, health care, personal care, electronic devices, tobacco and alcohol products;

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