Think with Google

2021 YEAR IN SEARCH

VIETNAM'S SEARCH FOR TOMORROW

Welcome to the second edition of Year in Search: Vietnam's Search for Tomorrow.

Over the past year, Vietnam welcomed 8 million new digital consumers, with more than half coming from non-metro areas. In our 2020 "Vietnam's Search for Tomorrow" report, we explored how more people across the country were adopting digital than ever before. 2021's edition shows that these behavioral changes are here to stay.

Understanding consumers is the foundation of every marketer's role. But how do you begin making sense of the billions of searches that happen every year? Our 2021 Year in Search: Vietnam's Search for Tomorrow report uses Vietnam's anonymized search data to identify the top five consumer trends that will help guide your marketing strategy into the next year.

Explore these trends and insights that stood out:

1 Digital mainstreamed

From shopping to services, Vietnamese people are choosing digital-first lifestyles to benefit from the online world's speed, convenience, and price.

2 Lives reexamined

Given the extended pandemic, Vietnamese people are reevaluating their values and lifestyle choices to seek greater comfort and ease in their lives.

3 Bridging distances

While strict social distancing kept us apart, especially last summer, Vietnamese people sought new ways to express themselves and cultivate deeper, ongoing relationships, both online and offline.

4 Truth seekers

With the rise of information and fake news, Vietnamese people are becoming more proactive about seeking out the truth, checking the facts, and evaluating brands for trustworthiness.

5 Growing inequalities

The pandemic has affected us differently. Whether it's access to finance, information, or basic goods and services, Vietnamese people are turning to the internet to overcome their varying challenges.

On top of these key consumer themes, we also provide a closer look into specific industries in these reports:
Health & Beauty
Finance
Food & Groceries, and
Shopping

Let's learn from 2021 — because we need to look back in order to move forward.

From marketers to marketers.

From us to you.

Tammy Thi Phan
Country Head of Marketing
Vietnam, Google APAC

Digital mainstreamed

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

Chao

In 2021, APAC's digital migration continues with people going online to access services that were disrupted by physical shutdowns. Vietnam has seen eight million new digital consumers since the start of the pandemic, with more than half coming from non-metro areas. But what we're also seeing this year is the staying power of digital. Rising searches in 2021 paint a picture of how the many newcomers have not only dipped their toes into the online world but also taken the plunge to integrate digital into their lifestyles.

After five months of physical shutdowns in 2021, Vietnamese consumers who have grown more comfortable with the digital world are now choosing to stay online. Of the country's new digital users, 97% are still using online services and 95% intend to keep doing so. Benefits like time and cost savings, diversity of product offerings, and delivery services are motivating shoppers to choose digital-first experiences. Vietnam's 2021 Gross Merchandise Value is expected to hit $21 billion, a 11% year-on-year surge, underpinned by a 53% growth in e-commerce.

The rise in users pushed online by the pandemic meant that brands had to adapt and digitalize at a scale and pace they had never planned for or expected. In the next five years, eight in 10 merchants anticipate more than half of their sales to come from online sources. This is compelling digital merchants in Vietnam to get tech-savvy, with 81% of them likely to increase their usage of digital payments in the next one to two years.

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

SEARCHES

New users and businesses online

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

Spurred by the recent wave of COVID-19 in Vietnam, search interest in (mua online) (online purchase) grew by over 42%, alongside rising searches related to online shopping at major grocery stores.

42%

Search interest in (seller center) or (merchant center) grew by up to 45% in Vietnam as people seek to understand how to list their products on digital platforms.

45%

+58%

Search interest in **ngân hàng online** (online banking) and **mở thẻ online** (open card online) rose by over 58% and 76% respectively.

+57%

In Vietnam, search interest in (digital transformation) grew by over 57% as businesses adjust to an online world.

Online-first shopping experiences

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

+400%

Search interest in omnichannel grocery retailers such as (Bách hóa XANH) and (Co.opmart online grew by 160% and 400% respectively.

+266%

Shoppers are on the lookout for deals offered by mainstream platforms, especially perks like delivery vouchers or free delivery. As search interest in (Shopee) grew by over 40%, (Shopee voucher) grew by over 266%.

+16%

We see a rise in search interest for (tác dụng) (benefits of) as people compare the benefits of different products.

Even offline shoppers are reliant on online research, with search interest in (siêu thị gần đây) (supermarket near me) increasing by over 58%.

+58%

Digital in our day-to-day

People are expanding the use cases for apps and technology in their day-to-day lives, as well as experimenting with new digital services like contactless payments. While digital wallets may have started out as a way to pay safely during the pandemic, the ease and convenience they offer are winning over consumers for good. Since the pandemic, cash transactions have declined in Vietnam while e-wallet transactions rose by 1.3x, indicating a massive shift toward digital payments.

+100%

Searches related to (digital wallets) and (e-wallets) have increased by 100% in Vietnam, reflecting a growing e-wallet user base.

Preference for digital formats

Searches for digital formats continue to gain momentum as APAC consumers entertain themselves online. Streaming on connected TV has taken off, and live commerce is expanding its reach, with platforms like Shopee reporting more users using livestreams to connect with sellers in the comfort of their homes.

+1250%

YouTube search interest in (review) saw an increase of 1,250% in Vietnam as people conduct online research before committing to a product or service.

+9%

Vietnamese consumers are enjoying online modes of entertainment, with YouTube search interest in (phim hay) (good movies) growing by over 9%.

MARKETING IMPLICATIONS

From COVID-proof to future-proof

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

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

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

With the magnitude of the shift to online as a preferred channel for so many people in APAC, it's clear that digital is where the masses are at. This means that channel strategies that only rely on "above the fear" approaches are not enough. Brands that are fast becoming outdated.

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

1. Before deciding on your digital advertising strategy, check out best practices and tips for audience reach and segmentation strategies.
2. Stay on top of the latest consumer insights and best practices across marketing objectives and shopper movements, and use them to inform your digital strategies.
3. Make your YouTube ad creatives more effective by scrapping these five assumptions and adopting a YouTube-first strategy.

2 Bring your storefront to wherever shoppers are

Consumers expect to be able to fulfill their shopping needs wherever they need, whenever they are. We know purchase decision-making is not linear, there is a complicated web of touchpoints that differs from person to person.

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

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

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

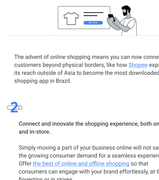
Search interest in "open now near me" has grown over 2x globally year over year.[1] To create a seamless online to offline experience for your shoppers, use Local inventory ads to promote your products that are available for in-store or curbside pickup.

L'Oreal Vietnam embraced Search, YouTube, and Display to drive leads and online sales. What started as an action-driven Shopping campaign quickly transformed into a multi-platform approach that made full use of YouTube inventory and the automation behind Smart Bidding.

> **Pierre-Olivier Guy**
> *Chief Digital and Marketing Officer at L'Oréal Vietnam.*
>
> "By driving results across our entire funnel, our campaign and sales became more sustainable. Our Smart Shopping campaign on Ad Spend was consistently above 200%, which outperformed last year's Standard Shopping Campaign by 2.2 times."

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

Digital is leveling the playing field for businesses. Traditional industry norms such as size of stores and retail legacy matter less in the next normal where 90% of APAC consumers expect retailers to sell their products online, and even those who purchase offline still refer to at least one digital channel during their research journey.[1] This means that every brand has the opportunity to enjoy borderless growth, especially those that focus on seamless online-offline experiences for their customers.



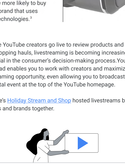
1. Build an agile omnichannel strategy that enables your business to unlock short-term wins and long-term growth.

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

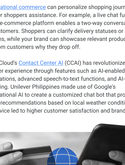
The advent of online shopping means you can now connect with customers beyond physical borders, like how Shopee expanded its reach outside of Asia to become the most downloaded shopping app in Brazil.

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

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



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



TikTok recently launched TikPRO, a service that lets customers schedule instant delivery and installation until as late as 10p.m. every day. The brand also runs TikNOW, a two-hour delivery service subscription, to mirror the instant fulfillment shoppers get from an in-store shopping experience and make online shopping even more convenient.

Leverage immersive technologies to replicate offline shopping experiences online and elevate the in-store shopping experience.

Almost half of consumers surveyed felt that immersive technology like augmented reality (AR), virtual reality (VR), and three dimensional (3D) content helps them feel more connected with products, and 61% say they are more likely to buy from a brand that uses these technologies.[1]

As more YouTube creators go live to review products and discuss their shopping hauls, livestreaming is becoming increasingly influential in the consumer's decision-making process.YouTube Masthead enables you to work with creators and maximize the livestreaming opportunity, even allowing you to broadcast your live digital event at the top of the YouTube homepage.

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

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

Google Cloud's Contact Center AI (CCAI) has revolutionized the customer experience through features such as AI-enabled conversations, advanced speech-to-text functions, and AI-based call routing. Unilever Philippines made use of Google's conversational AI to create a customized chat bot that provides product recommendations based on local weather conditions. This service led to higher customer satisfaction and brand loyalty.

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

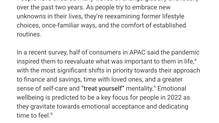
1. Google Data, Global Insights, June 1, 2021–July 30, 2021 vs. June 1, 2019–July 30, 2020
2. Nielsen Consumer Insights, Q2 2020
3. Accenture Interactive, Personalized Experiences Guide, 2018

Lives reexamined 2

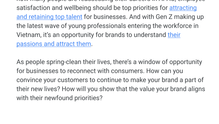
Following the abrupt disruptions of the pandemic, people emerged in 2021 with a realization that some changes weren't temporary after all. This prompted **a sense of introspection and a reevaluation of their values and lifestyle choices**. As a result, they looked for more comfort and ease in their lives,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

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

In a recent survey, half of consumers in APAC said the pandemic inspired them to reevaluate what was important to them in life,[4] with the most significant shifts in priority towards their approach to finance and savings, time with loved ones, and a greater sense of self-care and **"treat yourself"** mentality.[5] Emotional wellbeing is predicted to be a key focus for people in 2022 as they gravitate towards emotional acceptance and dedicating time to feel.[6]



From small, everyday upgrades to more major life decisions, searches are showing how people are taking stock of their lives and assessing how closely their choices are aligning with what truly matters to them. Such significant, widespread shifts in life priorities among consumers should be studied closely by brands. The changing core values and priorities of people are often powerful indicators of how they will behave as consumers.



It's not just customers that businesses need to care about. Given how many people are reassessing their careers in APAC, employee satisfaction and wellbeing should be top priorities for attracting and retaining top talent for businesses. And with Gen Z making up the latest wave of young professionals entering the workforce in Vietnam, it's an opportunity for brands to understand their passions and attract them.

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

SEARCHES

Acceptance of a blended life

Even as restrictions ease, it seems a blended way of living is likely to remain. Signs point to a semi-remote future of work. According to Accenture, APAC is readier than other regions to adopt a hybrid working model.[7] Searches reflect this adaptation to a more flexible future as people begin taking charge of their own time and space, particularly at home.

Now that homes often double up as schools or offices, consumers are taking this opportunity to reimagine their domestic spaces. Search interest in (decor phòng) (room decoration) has risen by 150%, with (nến thơm) (scented candles) seeing 100% growth.

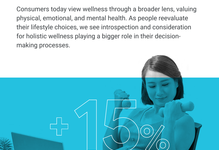
+20%

As people in Vietnam increasingly accept a permanent blended way of living, we see a growth of over 20% in search interest for how to do tasks (tại nhà) (at home), such as **how to make coffee at home** and **how to fix appliances at home**, with a corresponding increase in search interest in (bảo hành) (warranties).

Reevaluation of finances

We see people changing the way they view their finances. While some looked for ways to put their savings to work through investments, others searched for deals, discounts, and ways to stretch their dollar. Ahead of 2021's holiday season, most shoppers planned to either buy less or hold off on buying gifts until they were on sale, due to COVID-19's impact on their finances.[8]

Searches for online discounts and coupons have grown, particularly during COVID-19. There was a 91% growth in search interest in (mã giảm giá Shopee) (Shopee discount code) as consumers opt to shop for the best deals online.



People are learning how to invest. Search interest in (chứng khoán) (stocks) grew by over 106%, with the rural population demonstrating an especially keen interest in investing.

Search interest in (cryptocurrency) remained high, seeing 115% growth in Vietnam.

Self-care, introspection and the reevaluation of lifestyle choices

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

Vietnamese are indulging in self-care at home, with search interest in (tập thể dục tại nhà) (exercises at home) growing by over 15%. YouTube search interest in (bài tập yoga cho người mới bắt đầu) (yoga exercise for beginners) also grew by 140%.

Search interest in (vitamins) saw over 15% growth in Vietnam as people become more concerned about their health.

People in Vietnam are looking to develop new hobbies, especially those related to cooking. For example, search interest in (máy làm sữa hạt) (plant milk machine) increased by 40%.

Searches containing (vật gia đình) (with family) grew by 60%, as people placed more value on spending quality time with their families.

MARKETING IMPLICATIONS

Your brand is back on the table: Gain and retain

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

> **Simon Kahn**
> Vice President, Marketing for Google APAC
>
> "The next decade will be defined by a state of accelerated disruption. In order to enable people to achieve better, more equitable outcomes in the face of increasing disruptions, businesses need to stay curious and cultivate a desire to understand what works - and, more importantly, what doesn't - to uncover and refine their understanding of users' true needs."

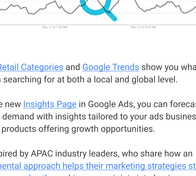
1 Ensure your brand makes the list as consumers reevaluate their options

Today, as shoppers in APAC look for the brands that best align with what they need and value, up to 75% are buying from newly discovered brands rather than familiar ones.[4] As consumers look to be empowered and confident about their purchase decisions, Search ranks as a top touchpoint for providing them with relevant and helpful information.

Tap into the power of Search and automation to grow your brand's discoverability.

15% of queries every day are brand new searches.[10] By broadening your keyword match type to Broad Match with Smart Bidding, you're able to automatically adjust your campaigns to capture the different ways consumers are looking for your products, and act on new opportunities that arise.

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

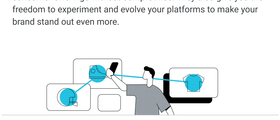


Vietnam International Bank (VIB), a leading joint stock bank, launched its Online Plus 2in1 credit card in 2021. The bank leaned on automation to target more potential customers, successfully going beyond its lead generation target without the hassle of manually setting up and optimizing campaigns.

Create data-driven marketing cycles to keep up with evolving needs.

An adaptable advertising strategy allows you to act on what matters most to consumers in the moment, and adopt a test and learn approach for sustainable optimization.

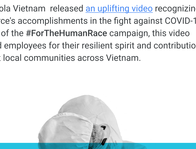
Rising Retail Categories and Google Trends show you what the world is searching for at both a local and global level.



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

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

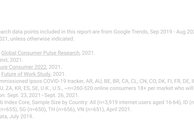
Get inspired by APAC industry leaders, who share how an experimental approach helps their marketing strategies stay data-driven and agile, and turn uncertainty into business growth opportunities.



Nestle Milo Vietnam, for example, embraced experimentation to enhance its customers' digital experience through a full-funnel approach driven by first-party data. The brand experimented with a wide variety of marketing assets and extensions and tested them for optimal exposure across Search, Display, Video, Gmail and, the Discover feed. The test campaign drove 40% incremental conversions at a 63% lower cost per conversion compared with campaigns on other channels.

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

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



3 Don't overlook your internal stakeholders

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

Coca-Cola Vietnam released an uplifting video recognizing its workforce's accomplishments in the fight against COVID-19. As part of the **#ForTheHumanRace** campaign, this video thanked employees for their resilient spirit and contribution to support local communities across Vietnam.

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

4. Accenture, Global Consumer Pulse Research, 2021
5. GWI, Zeitgeist, 2021
6. WGSN, Future Consumer 2022, 2021
7. Accenture, Future of Work Study, 2021
8. Google commissioned Ipsos COVID-19 tracker, AR, AU, BE, BR, CA, CL, CN, CO, DK, FI, FR, DE, IN, IT, JP, MX, NL, NO, PE, RU, ZA, KR, ES, SE, UK, US, ~>260-520 online consumers 18+ per market who will shop for the holiday season. Sept. 23, 2021 - Sept. 26, 2021.
9. Global Web Index Core, Sample Size by Country: AR (n=3,519 internet users aged 16-64), ID (n=656), MY (n=651), PH (n=653), SG (n=650), TH (n=656), VN (n=651), April 2021.
10. Google Data, July 2019.

Bridging distances

In 2020, the pandemic kept countless people physically apart, and consumers quickly found ways to adapt. But in 2021, we saw the sense of separation deepen. As a result, consumers **moved beyond finding brief moments of connection**, to finding **new ways to express themselves and cultivate deeper, ongoing relationships**, both online and offline.

As new COVID-19 variants emerge, it's clear that the pandemic isn't quite over yet. COVID-19 is still a top concern for people and consumers in APAC remain wary of being in close physical contact with others. In fact, people in India, Japan, South Korea, and Vietnam feel more cautious about resuming normal activities compared with the global average.[11]

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

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

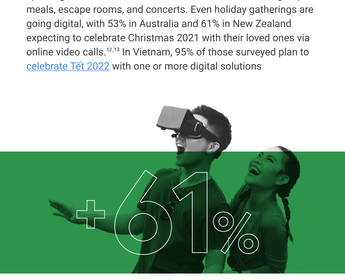
As the world grows more dependent on digital technology to form meaningful human connections, brands need to move on from thinking of digital platforms as purely functional channels or just an online front-end. Instead, consider how you can get longer-term value out of connecting meaningfully with your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

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

SEARCHES

Digital for personal connection

Technology is enabling people to connect in innovative ways, sparking interest in virtual versions of activities such as group meals, escape rooms, and concerts. Even holiday gatherings are going digital, with 53% in Australia and 61% in New Zealand expecting to celebrate Christmas 2021 with their loved ones via online video calls.[12,13] In Vietnam, 95% of those surveyed plan to celebrate Tết 2022 with one or more digital solutions



People are searching for the online equivalent of offline experiences, with searches for virtual games such as Kahoot! seeing over 61% growth.

+11%

Search interest in với bạn (with friends) has grown by over 11% as Vietnamese look for activities to enjoy with friends online.

+14%

Vietnamese are turning to Search for inspiration on birthdays or anniversaries wishes for loved ones. Search interest in sinh nhật cho (birthday for) has grown by over 14%.

MARKETING IMPLICATIONS

The emotional value of digital

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

> **Harvard Business Review**
> An Emotional Connection Matters More Than Customer Satisfaction
>
> "Emotionally connected customers buy more of your products and services, visit you more often, exhibit less price sensitivity, pay more attention to your communications, follow your advice, and recommend you more — everything you hope their experience with you will cause them to do."

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

Research shows how the consumer's path to purchase is driven by emotions. At each and every touchpoint, shoppers want to feel empowered, and will reward brands that help them navigate all the information available and provide them the reassurance they need to make a decision.

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

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

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

To celebrate the Mid-Autumn Trung Thu festival in Vietnam and keep traditions alive despite COVID-19 restrictions, snack company Mondelez Kinh Do released an AI-based genealogy platform that aimed to deepen family bonds by bringing people's old photos to life. The augmented reality experience enabled users to see their ancestors smile, blink, and turn their heads in the photos.

In December 2020, PONDS started to integrate its Skin Advisor Live chatbot into its Shopee storefront. The AI chatbot offers on-demand skincare analysis and recommends effective products which customers can purchase directly on Shopee. This feature has launched across Indonesia, the Philippines, Thailand, and Vietnam.

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

3 Invest in ad creatives that can connect and inspire

Your advertising efforts can be a key lever to build emotional connection and simultaneously drive campaign performance. In fact, creative is the dominant return on investment (ROI) driver across all media platforms, and especially so on digital.[14]

To bring your brand and products to life, ensure your ads showcase how your brand can help people in their everyday life in an authentic way.

Explore creative best practices to unlock better performance across Google Ads solutions.

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

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12. Pureprofile, Christmas Report, Australia, n= 1052, 2021.
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14 . Nielsen Catalina Solutions, 2017.

Truth seekers

4

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

In 2021, the pandemic further exposed the dangerous consequences of misinformation. Governments across the region to enact "fake news" laws. At the same time, the public has become more aware of the spread of false information, with 86% in APAC expressing concerns about fake news.[1] Consumers, especially Gen Zers, are now more conscious about the risks of both facts and misinformation that can be found online.[2] People are not only savvier about what they see on the internet, but also willing to proactively seek out accurate information on their own terms.

Searches reflect these growing anxieties, with consumers looking for ways to guard against the increasing pervasiveness of fraud and scams. As data breaches reached an all-time high in 2021,[3] searches related to privacy and security rose in tandem, alongside people's growing concerns about their digital safety.

With truth-seeking behaviors becoming more of a consumer trait, we see shoppers willing to invest more effort and more resources to ensure the choices they make align with their value systems. Brands that can prove their authentic commitments and ethical shopping reflect how consumers have a lower tolerance for being misled, and are setting the bar higher for brands, holding them closely accountable for any claims that they make.

Consumers today don't just check the list of ingredients on a label, they want brands to be accountable and transparent at every step of their value chain, including sourcing, production, and corporate sustainability policies. Regardless of how much they trust a brand, consumers across all age groups will conduct extensive research before making their purchases.[4] Instead of simply hoping that brands will be true to their word, consumers now expect brands to take proactive steps towards earning and keeping their trust.

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

SEARCHES

Fact-checking, fighting fraud, and protecting privacy

Searches show consumers increasingly concerned about misinformation and privacy, especially compared to pre-COVID times.[5] In 2021, 87% of APAC consumers say it is more important to find a trusted source of information, compared with before the pandemic.[6]

+54%

Search interest in topics related to "scam" has grown by over 54% in Vietnam.

+14%

There's been more than a 14% growth in search interest in "Kem trắng" (fake mixed cream), referring to counterfeit beauty creams. That, and other dangerous fake cream's harmful effects, show that people have become less willing to compromise on quality when it comes to their health and bodies.

Savvier value systems

As consumers grow more entrenched in their belief systems, they're making sure that the brands they choose also share their higher purpose. Sustainable fashion is gaining traction in Vietnam, and interest in vegan and cruelty free brands like Gaia Cosmetics, Lemon Bee, and Thuần Chay Beauty, as well as themselves again, are we brands like Innisfree, Starbucks, and Coca-Cola Vietnam across promoting sustainable practices by using recycled materials for packaging.

+21%

Search interest in "electric cars" has increased across APAC, with Vietnam seeing more than 21% growth. This trend is expected to grow, largely as the country is manufacturing local electric cars by VinFast.

Consumer demands for reassurance

Consumers today expect to be reassured along their shopping journeys. Authenticity is a key issue on everyone's mind for 21% of shoppers surveyed,[7] and we are increasing searches for delivery tracking and official stores of popular brands.

+75%

Demand for authenticity is increasing, with search interest in "Shopee Mall" (which highlights authentic goods) growing by over 75%. Search interest in "Shopee Mall" also grew by 75%, as customers seek official, trusted stores on e-commerce platforms.

MARKETING IMPLICATIONS

Trust as brand equity

4

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

> **Edelman**
> Trust, the new brand equity

"Brands need to be for the people, and guided by the people. Why? Because brand trust ranks higher than brand love."

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

When users have clear choice and control over their data, they're ready to share it with businesses they trust. However, just 30% of APAC marketers have a dedicated strategy to communicate with consumers about data privacy.[8] It's time to consider how you can prioritize your users' privacy concerns to earn their trust.

Use first-party data responsibly and effectively to find the right balance between privacy and the personalized interactions that consumers prefer.

Check out our marketer's playbook for privacy to deliver performance in a privacy-safe way and learn what industry leaders across APAC think about the impact of new data privacy trends and how to create a privacy-first ecosystem.

Prepare your digital ads ecosystem for a future without third-party cookies.

Explore privacy-preserving strategies that fuel continued business growth by allowing companies to reach people with relevant ads and measure results without needing to track people across the web.

Educate and empower your customers to protect themselves against misinformation, scams, and fakes. With 68% of online shoppers in Southeast Asia rating "guarantee of product authenticity" as very important,[9] consider ways you can offer them this needed reassurance.

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

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

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

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

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

In September 2021, Coca-Cola Vietnam started including a Recycle Me! message on package labels across all its brands and products, encouraging consumers to recycle its drinks bottles after they've enjoyed the beverage.

Sources:
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Growing Inequalities

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

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

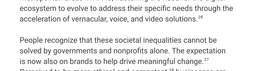
Lower income households experienced a higher concentration of job losses[24] while their children missed twice as many days in a school year compared with those from high income families.[25]

To overcome these inequalities, people are searching online for solutions to help themselves and their communities. Their searches range from unemployment benefits to topics on discrimination, reflecting their growing interest in social issues.

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

Indeed, rising searches for local translations, line speed tests, and even free internet services reflect a growing section of society struggling to keep up. When cities shut down during the pandemic, millions of migrants across APAC had to return to their homes, many in rural areas. Widespread digital migration on the other hand, has brought more users online from non-metropolitan areas in APAC, hastening the need for the digital ecosystem to evolve to address their specific needs through the acceleration of vernacular, voice, and video solutions.[26]

People recognize that these societal inequalities cannot be solved by governments and nonprofits alone. The expectation is now also on brands to help drive meaningful change.[27] Perceived to be more ethical and competent,[28] businesses are uniquely positioned to boost customer loyalty and trust by driving social change. This means that consumers will embrace brands who not only reflect diversity in their campaigns, but take action to create equity in societies as well.



SEARCHES

Finding familiarity through local language

Searches show the anxiety that consumers face when transacting in a foreign language. In fact, up to 40% of consumers won't consider making a purchase unless they can access information in their local language.[29] With more new users coming online from non-metropolitan areas, the demand for local translations is continuing to grow.

Across multiple countries in APAC, we see up to 155% growth in searches for translations and assistance in comprehending words that are not in users' mother tongues. In Vietnam, search interest in (dịch sang tiếng việt) (translate to Vietnamese) has grown by over 73%.

The need for financial support

As APAC experiences high unemployment rates,[30] consumers are searching for different ways to alleviate economic concerns. Whether it's a business grant or a cash loan, people in APAC are looking for financial support to tide them over in an uncertain year.

Search interest in (Vay tiền online) (online loan) grew by over 45% as people look for greater access to funding amidst the pandemic.

+19%

Search interest in (unemployment) grew by over 19% in Vietnam.

Social inequalities

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

Searches related to (gender equality) grew by over 27%, suggesting Vietnamese are becoming more aware of the gender divide in society and exploring ways to balance it.

+27%

Search interests related to (LGBT) grew by over 15% in Vietnam.

MARKETING IMPLICATIONS

From reflecting society to changing it

5

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

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

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

1

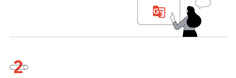
Don't let language be a barrier.

Engage your global audience with a full language experience that conveys your brand, reputation and trustworthiness. This might entail having translation options for your web content, or adopting voice assistance to make interactions easier for your customers, regardless of literacy levels.

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

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

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



2

Help close technical, financial, and accessibility gaps.

Keep in mind that your quest for operational efficiency and digital transformation isn't leaving some of your customers behind. Not all users will have the same level of digitally savvy, especially as more new users come online. In fact, many new internet users still struggle with basic tasks. For example, in South Korea, elderly people gave up ordering food because they did not know how to do so through an unmanned kiosk. In India, 73% of users ask for help in getting their phones set up,[31] and 40% in Pakistan have installed finance apps but never used them due to factors like requiring help or complicated processes.[32]

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

Momo, a well-known mobile payment app in Vietnam, rolled out Pay Later and Saving services to help reduce financial stress for low- and middle-income users. The service connects these users with financial institutions and asset management companies for small loans and investments.

In 2021, Grab Vietnam launched the Digitalize The Least Digital campaign to help wet market merchants affected by COVID-19 shutdowns. Grab enabled these merchants to open online shopfronts on GrabMart and connect with grocery shoppers digitally.

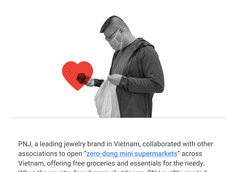
2 Take a bigger stand

Consumers are drawn to brands that focus on the "we" over the "me." While 63% of consumers surveyed were more attracted to "brands that focus on making the world a better place," only 37% said they preferred "brands that focus on making me a better person."[34] The same survey found that 86% of respondents expect brands to act beyond their product or business,[35] suggesting that people are increasingly looking for brands that focus on contributing to society and the rest of the world.

1

Stand for something bigger than profits.

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



PNJ, a leading jewelry brand in Vietnam, collaborated with other associations to open "zero-dong mini supermarkets" across Vietnam, offering free groceries and essentials for the needy. When the country faced more shutdowns, PNJ swiftly pivoted online, launching a web version of the supermarket.

2

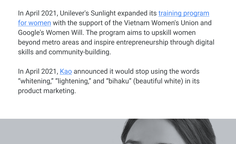
Build inclusive marketing strategies that benefit people and your bottom line.

4.5x

Consumers are 4.5x more likely to buy from a brand if it addresses human rights, and 3.5x more likely if it takes on economic inequality.[36] As marketers, we are in a unique position to drive authentic and meaningful change, and it starts with the teams we build and the stories we tell. Get inspired by tips for inclusive marketing best practices.

In April 2021, Unilever's Sunlight expanded its training program for women with the support of the Vietnam Women's Union and Google's Women Will. The program aims to upskill women beyond metro areas and inspire entrepreneurship through digital skills and community-building.

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



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