

Think with 

YEAR IN SEARCH 2022

INTRO

Look back to move your marketing forward

When life hands out lemons, people in Singapore, and across APAC no longer just search for ways to make lemonade. Having weathered three years of disruptive changes, they're seeking to live life on their own terms and looking to be in control of their identities, lifestyles, and what they value.

We've noticed this shift as we analyze billions of searches every year across APAC to help marketers uncover meaningful audience insights in the region.

INTRO

Across APAC, searches in 2022 point to how people are standing their ground amid sustained waves of uncertainty. With open minds, quick thinking, and digital savvy, they're seeking out authentic, fulfilling ways of living, working, and being that suit them, and not simply going with what life serves up.

We've identified three key insights about people in Singapore, and across APAC, based on what's top of mind for them as they search. In this report, we dive into the insights, what they mean for your brand, and how you can strengthen your marketing strategy for the year ahead.

Year in
Search 2022

THEME 1



Soul searching

SOUL SEARCHING

After three years of uncertainty, people in Singapore and across APAC are moving past merely coping or going with the flow. They're envisioning who they can be, on their own terms. When border restrictions limit people to their backyards, **they're taking the opportunity to dig deep into local traditions while also connecting with global cultures from home.**

SOUL SEARCHING

People are also looking to be their most full and authentic selves. Following on the heels of the Great Resignation, the Great Exhaustion is sweeping across the world, prompting people to focus more on their well-being and upskilling themselves to land better opportunities. They're embracing their individuality and searching with more specificity to satisfy their distinct needs and preferences.

Soul searching

1.1

Cultural Identity

Globally connected, locally focused.

We're seeing a paradoxical dissonance in people's searches: They desire to be plugged into global culture, but they're also celebrating what makes local traditions unique.

This dynamic duality points to the increasing complexity of their identities as global citizens and proud denizens.



Asian cuisine crossed borders as search interest in **malaysian restaurant** grew by over 40% in New Zealand and **indian restaurant** increased by over 150% in Indonesia.

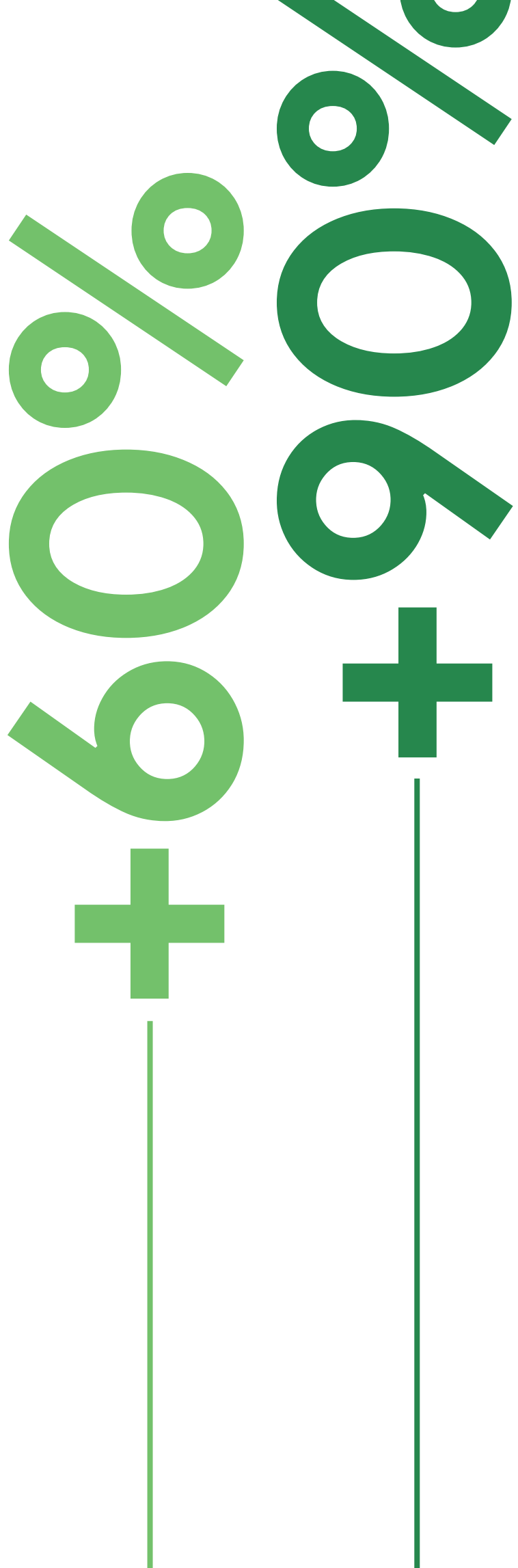




The global power of “kpop” continues to spread beyond South Korea, with a 20% increase in search interest in India and Australia.

In Malaysia,
search interest in
traditional clothes
grew by over 60%.

In Vietnam,
search interest in
vietnamese culture
was up by over 90%.

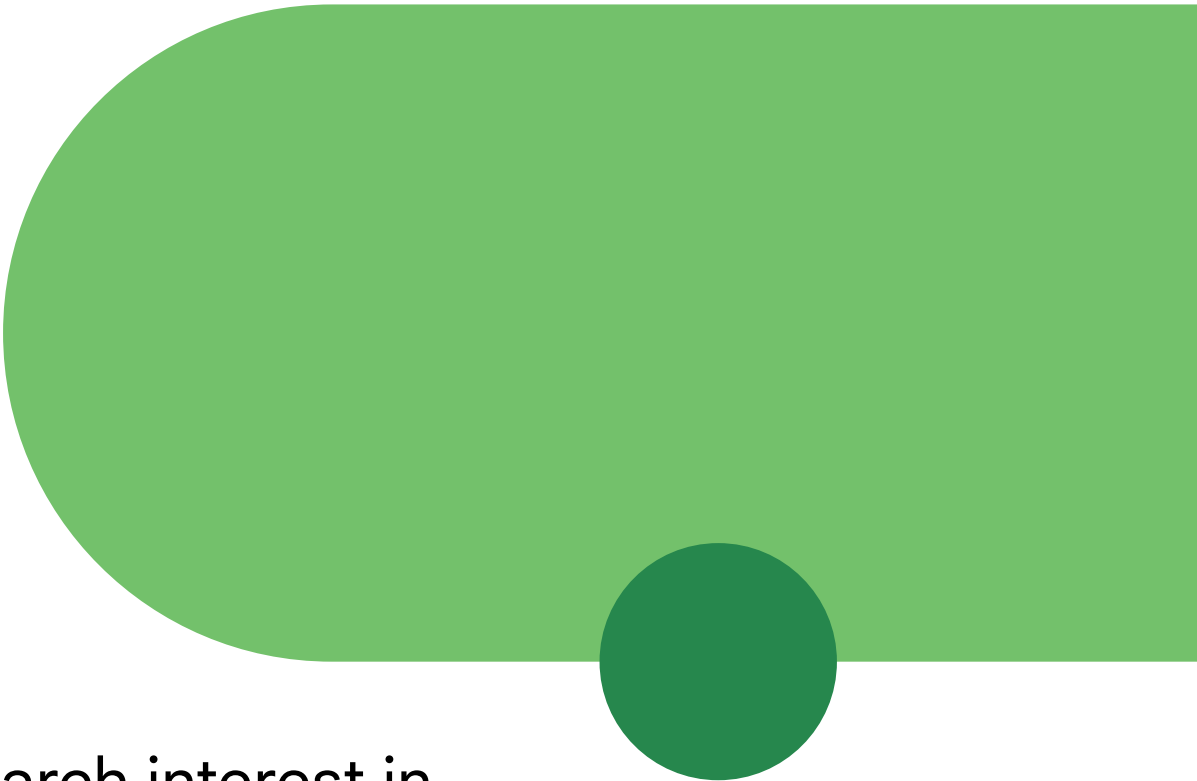


1.2

Personal Identity

Refined searches.

People are searching with greater specificity as they become more aware of their distinctive identities. Whether it's looking for "unisex perfume" (as compared with just "perfume") or "heart shape face hairstyle male" (as compared with "male hairstyle" simply), people's searches reflect their evolving sense of self.




In India, search interest in heart shape face hairstyle male grew by over 330%.

Search interest in **unisex perfume** in Indonesia was up by over 10%.

In Australia, search interest in **plus size dress for** grew by over 20%.

Taking better care of themselves.

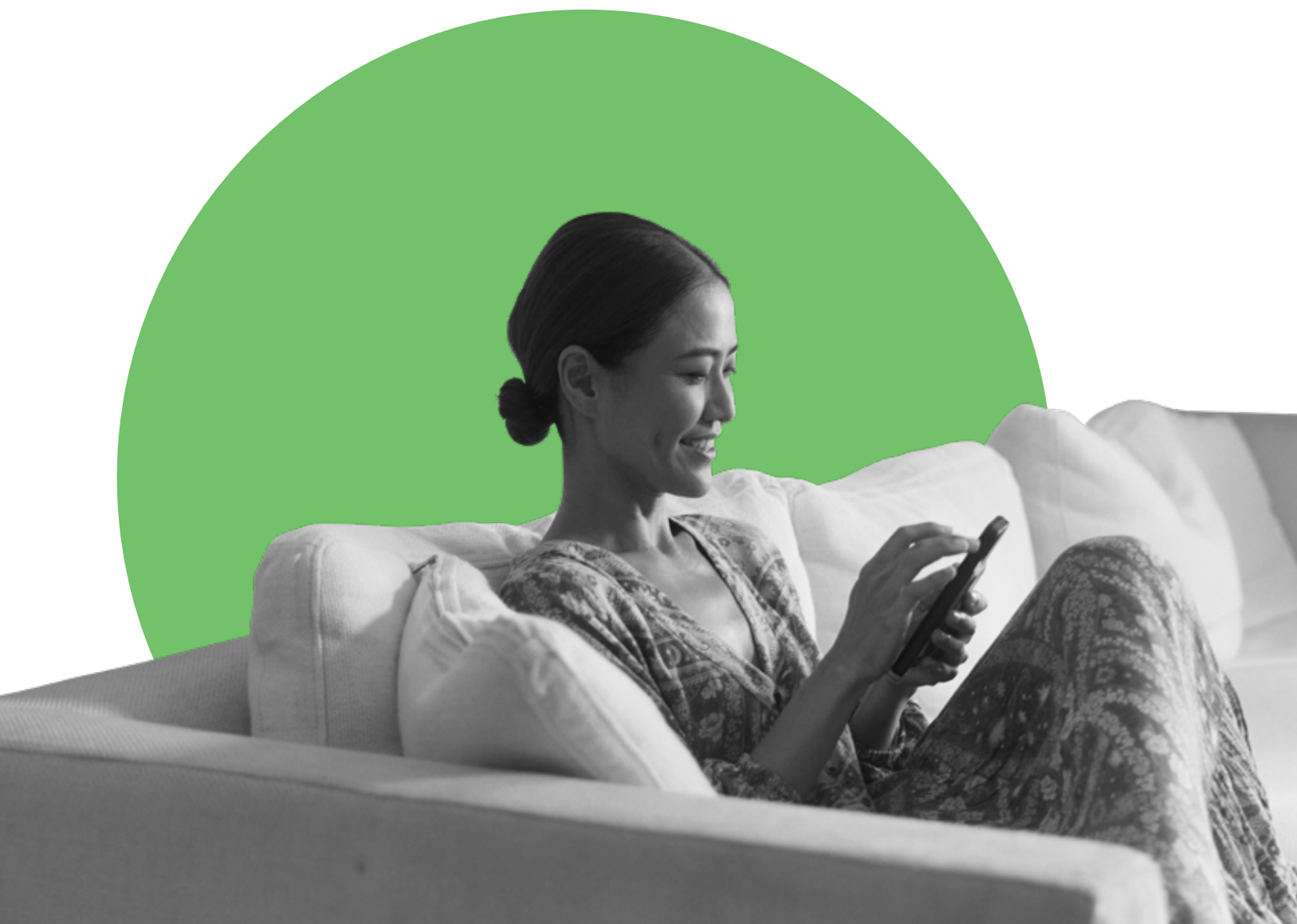
Searches for various forms of self-care are also on the rise, including ways to avoid burnout. Indeed, some 23% of people in Southeast Asia say they plan to spend more on self-improvement, including wellness, health and fitness, and education.¹



occupational burnout saw rising search interest across APAC, increasing by over 20% in Singapore, Indonesia, Malaysia, and Australia.

Embracing diverse identities.

More than ever, people are embracing diverse lifestyles, with Gen Z leading the way in standing up for their personal brand and crafting their own identities.



+ 200% + 40%

Search interest
in **lgbtq** increased
by over 200%
in Thailand.

In the Philippines,
search interest in
genderqueer
grew by over 40%.

1.3

Professional Identity

Harmony between work and home life.

Work and home life continue to be parts of a whole but people are now seeking to find a harmony between the two, even if it means resigning from their jobs.

Others are seeking more flexible work arrangements, with 77% of workers saying they value remote work, and 42% saying they would refuse a job if they couldn't work from home.²

110%
10x

Search interest in
great resignation
increased by over
110% in Singapore
and 10x in India.

+100%

In Thailand and Indonesia, search interest in **work life balance** doubled, with over 100% growth.

Upskilling and entrepreneurship.

Just as people are rethinking their work life, they're also expanding their skills with training, looking for more flexible work, and considering striking out on their own.



In Japan, search interest in reskilling saw a 7x increase.

Search interest in **hybrid learning** grew by over 210% in the Philippines.

+210%



Marketing implications

01

Adopt inclusive marketing strategies as a mindset, not a checkbox.

Commit to diversity, equity, and inclusion as a constant responsibility and embed them into every aspect of your brand campaigns, from conception to execution and beyond. For marketing to feel truly inclusive and accessible, brands must understand and regard people holistically, across the full spectrum of what makes up their identity, including gender, race, ethnicity, sexual orientation, and more.

One way to do this is through nuanced narratives that reflect intersectionality in your campaign messages. Brands that portray women and underrepresented groups positively have greater influence on customer intent.

For more tips, check out [Think with Google's inclusive marketing best practices](#).

+80%

of Gen Zers in APAC would pay more for a product if the brand supports an issue they care about.³

Brand Example

02

Think visually beyond text search

Recent innovations in Search are helping consumers find what they're looking for in more natural and intuitive ways. As people increasingly search with images and text together, think about investing in compelling image assets to bring your ads to life with diverse representation of people and products. This makes it easy for people to see relevant visuals of your products and services, and take action, especially on mobile.

In fact, advertisers see a 10% increase in click-through rate when image extensions show with their mobile Search ads.⁴

Responsive search ads (RSA) also gives advertisers the opportunity to provide multiple headlines and descriptions to create one ad that adapts to show tailored messages to diverse audiences.

Brand Example

Knorr Philippines maximized the potential of Search image extensions by using it to create Search and Display Ads designed to resemble tarot cards. The cards, linked to Knorr's wholesome recipes, show parents how they can set their children up for success and good health by eating nutritiously with Knorr. The campaign generated a 70% growth in click-through rate, as compared with the benchmark, and contributed to a 41% sales growth post-campaign.

THEME 2



Value hunting

VALUE HUNTING

As inflation rises, people are reassessing the cost of things. They're looking at not only the sticker price but also what they consider to be of value. For instance, **people are being more pragmatic and focusing on the essentials, with 40% of consumers making fewer impulse purchases and prioritizing needs over wants.**⁵ Along the way, people are discovering that wallet-friendly options like second-hand clothing don't just save money; they can also help to save the environment.

VALUE HUNTING

Trust in a brand plays a significant part in our calculations. They are searching for clear indications of whether a brand provides quality service and reliable products. And they're looking for the one that offers the best deal overall rather than the cheapest price. It's why their searches for **most popular** are higher than those for **most affordable**.⁶

Value hunting

Source: 6. Google Trends, Worldwide, Shopping category, Oct 5, 2021-Oct 5, 2022.

2.1

Seeking Value and Knowledge

People are more carefully weighing their buying options.

As costs rise, people are carefully considering how and when they spend, seizing the right moment for the best deals. Globally, search interest in **compared to** remains consistently high,⁷ and 73% of shoppers in Southeast Asia are shifting budgets from wants to needs.⁸



Value shopping is on the rise in Vietnam, with search interest in “best price” climbing by over 10%.

Source: 7. Google Trends, Worldwide, July 5, 2022-Oct 5, 2022.

8. Google Trends, Worldwide, Shopping category, Oct 5, 2021-Oct 5, 2022.

160%
+
20%
+

Comparison shopping is up in the Philippines, where search interest in **which one** jumped by more than 160%, and **which is better** rose by over 20%.



Seeking greater economic literacy.

As the global economy remains uncertain, people are looking for information to increase their financial and economic literacy, from learning about the causes of rising prices to emerging investment trends, to make decisions that count.

 what is inflation  **+150%**

In Japan, Malaysia, and Australia, search interest in “what is inflation” leapt by more than 150%.

+120%

Search interest in
why prices are increasing was up
by over 120% in Indonesia.

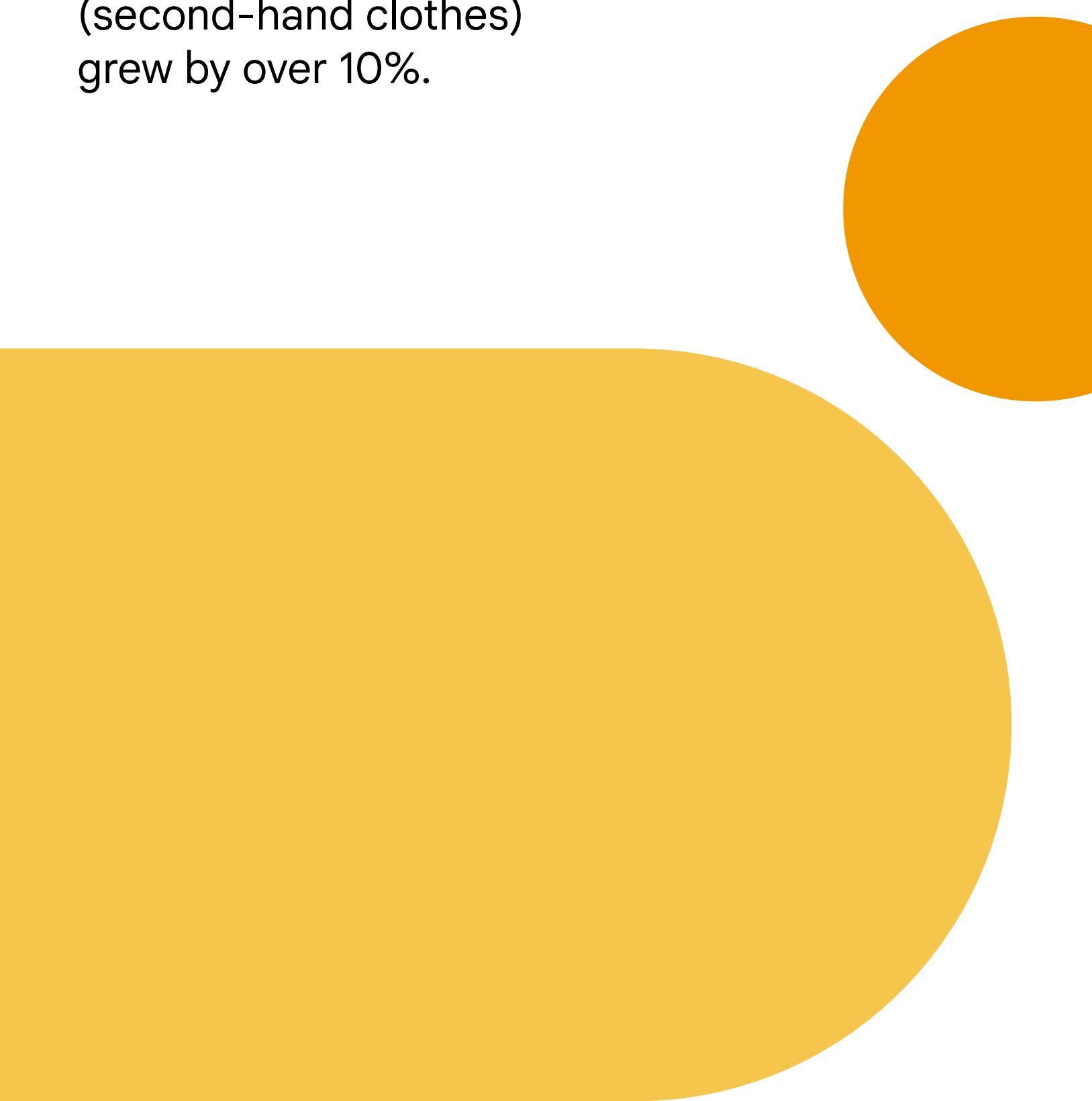
2.2

Saving Money and the Planet

Inflation and sustainability are going hand-in-hand in forming an unexpected alliance.

People are discovering that purchases which support sustainability, such as electric cars, can help them be savvier about their spending, especially when petrol prices rise. In fact, 73% of Southeast Asian consumers say they are willing to choose a more sustainable product or service if given the option.⁹

In Vietnam, search
interest in quần áo cũ
(second-hand clothes)
grew by over 10%.

The page features two large, solid orange decorative elements. On the right side, there is a large circle. At the bottom, there is a large, rounded rectangular shape that spans most of the width of the page.

+110%

Search interest in **sustainable packaging** rose by over 110% in Australia.

2.3

**Trusted
Brands
Above
All Else**

As economic concerns mount, consumer trust remains ever more imperative for brands.

Shoppers enter the messy middle with doubt and skepticism, and they're scrutinizing brands and products for lasting quality as they search for daily necessities. Among Southeast Asian consumers, three of the top five factors influencing purchase decisions — positive reviews, established brands, and return/money back guarantees — are all strong signals of consumer trust.¹⁰

84%

want to trust in the brand before purchasing.¹¹

Source: 10. Google-Kantar Shopper Pulse SEA, August 2022. Base: Re-searched and purchased product in P2M, Home appliances/White Goods Total n=420, ID n=84, SG n=84, TH n=84, VN n=84. PH n=84.

11. Google commissioned Kantar/Quantum Report: "Emotional Value of Search 2022". E4. To what extent do you agree with each of the following statements? Base: Those who have purchased or intend to purchase from the vertical within 12 months IN, ID, VN, TH, AU, All verticals n=6002.

Search interest for terms such as **top rated** jumped by more than 50% in Singapore.

+50%



 money back guarantee 

In Malaysia, search interest
in “money back guarantee”
increased by over 70%.

01

Use AI-powered ad solutions to stay nimble as trends shift.

To keep pace with how people are navigating shifts in prices, your brand can use AI-driven ads to immediately deliver the best deals to people as they search for affordable – and trusted – options.

Adopt a “tried-and-new” approach that blends traditional Search best practices with Google’s AI-powered products.

For example, combining value-based bidding with broad match keywords will help your brand show up in new, high-performing queries.

+80%

of Google advertisers around the world now use automated bidding to unlock Search's full potential.¹²

Brand Example

02

Be transparent in your sustainable efforts.

Today, environmental issues have become the second-most pressing issue among people in Southeast Asia.¹³ Consumers are taking note of this more than ever before, prioritizing their search for green brands. Brands poised to thrive are those that innovate to minimize their environmental impact while strengthening credibility by offering full transparency about their sustainability efforts.

Brand Example

Malaysian social enterprise **Fugeelah** created limited-edition bags made from upcycled fabrics, while Filipino e-wallet provider **GCash** offered to plant trees in exchange for points earned when its users made cashless transactions or took other green-forward actions.



3

Finding
joy

In the face of constant waves of disruption, people in APAC are realizing that they don't want to put their lives on hold any longer. **While uncertainty persists, people are no longer letting it stop them from living their best lives,** whether it's indulging in a massage or attending 2022's Formula 1 Grand Prix. Instead, they're finding ways to enjoy life's little luxuries, even if it means making concessions or spending extra time searching for better deals.

FINDING JOY

People have also merged their online and offline lives into a continuum, with people wholeheartedly embracing the convenience of digital services and the unique magic of offline experiences. As Southeast Asia's digital economy approaches \$200 billion, we see rising searches in digital services like instant delivery. At the same time, people are going offline in bigger ways as compared with previous years, with live concerts and Michelin-starred dining back on the menu.

Finding joy

3.1

Little Luxuries and Cheap Thrills

LITTLE LUXURIES AND CHEAP THRILLS

People care about value but aren't ready to give up the little luxuries in life.

They're searching for ways to fit expensive purchases into their budget. Some may wait to invest in big ticket items, while others are seeking cheap thrills, with 80% of Southeast Asian shoppers looking for more affordable ways to treat themselves.¹⁴



+130%

Search interest in **massage near me** jumped by over 130% in Malaysia.

Glamping




3.2

**Travel
Resumed,
Even if it's
Budget**

In 2022, demand for travel surpassed 2019's pre-pandemic levels across most of APAC.¹⁵

75% of people say they want to travel as much as possible in the near future, and 29% of Southeast Asian shoppers say they're reluctant to put off a long-awaited trip.¹⁶ They're also open to changing their everyday behaviors to save up for big travel purchases.



Search interest in
all inclusive resorts
leapt by over 120%
in Australia.

Source: 15. Internal Google Search data for air and accommodation-related queries; Excludes queries with no specified destination 16. Google-Kantar Shopper Pulse SEA, Aug 2022. SEA n=5000, ID n=1000, SG n=1000, TH n=1000, VN n=1000, PH n=1000.

16. Google-Kantar Shopper Pulse SEA, Aug 2022. SEA n=5000, ID n=1000, SG n=1000, TH n=1000, VN n=1000, PH n=1000



In Australia, Singapore,
and the Philippines, search
interest in “cheap flights”
rose by over 110%.

Travel preferences are generational.

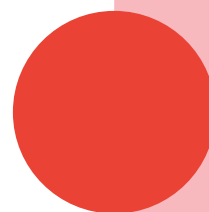
Millennials are more likely to splurge and treat themselves, with 1 in 5 searching for top-of-range vacation options, and 3 in 10 opting for premium-level travel products and experiences. Among Baby Boomers, 57% say value is important when planning travel, and 50% say that they want flexible options for free cancellation or rebooking.¹⁷

3.3

Using Online
to Simplify
the Offline

People are increasingly savvy about which channels they use to optimize their experiences.

They're using digital services in bigger ways than ever before to make their lives easier, and investing the time they save to enjoy the offline experiences that matter to them.

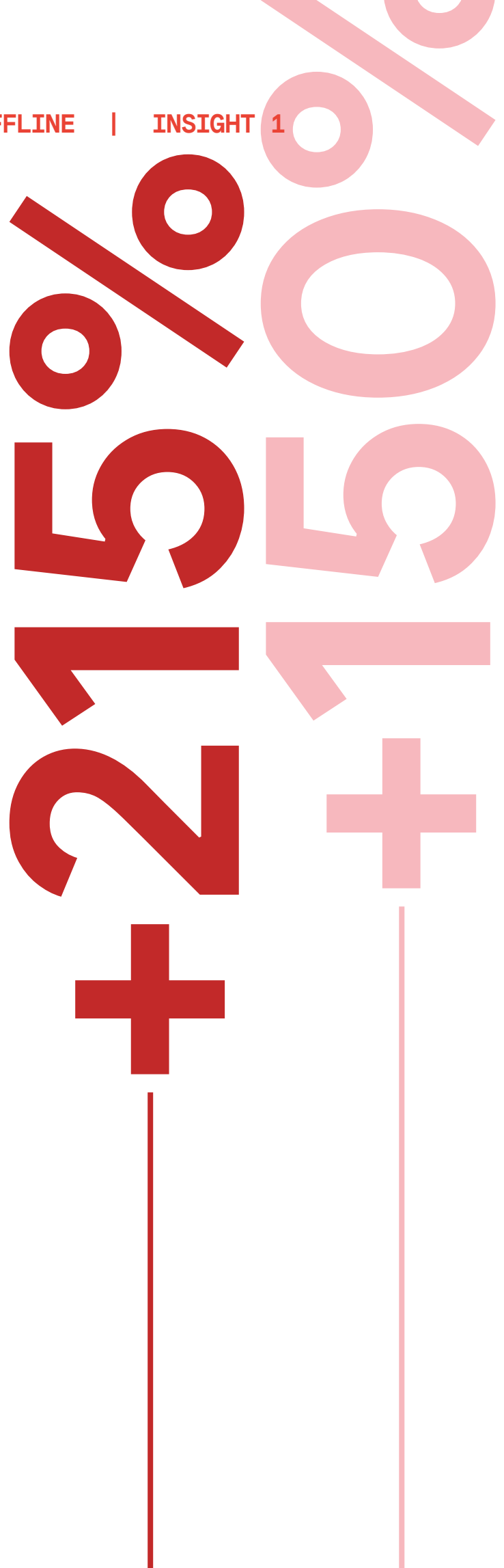


Online search trends:

Search interest in **doctor anywhere** jumped by over 260% in Singapore.

Search interest in
instant delivery
rose by over 215%
in India.

Search interest
in top up e wallet
grew by over 150%
in Indonesia.



Offline activity search trends:

In Malaysia, New Zealand, and Singapore, search interest in **michelin star restaurants** climbed by over 20%.

In South Korea, search interest in **concert schedule** more than doubled.



Search interest for terms including “dress up” rose by over 210% in the Philippines and 130% in Malaysia.

+210%
+130%

Marketing implications

01

Respond to consumer demand in real time.

These Search trends give us a sense of what matters to people in the moment; how they're feeling and what they're looking for. Use the Google Ads [Insights page](#) to identify new and changing consumer demand — and respond quickly, including in real-time. The data shows how search behavior is shifting in the moment and can be tailored to individual business preferences, such as location and language.

02

Rethink online and offline boundaries to meet your shoppers wherever they are.

Today's customers are living — and shopping — in a channel-less world, making a frictionless omnichannel strategy more important than ever. Globally, search interest for **in-store** nearly tripled since the beginning of 2022.¹⁸ At the same time, 90% of APAC consumers expect retailers to sell their products online.¹⁹

Use **Performance Max campaigns** to promote your products or services across all of Google's advertising channels and inventory by creating one easy-to-manage campaign.

Source: 18. Google Trends, Worldwide, Shopping Category, Jan 1, 2022–Nov 3, 2022.

19. Accenture, Global Consumer Pulse Research, 2021.

Brand Example

Nespresso wanted to increase online sales and used Performance Max campaigns to get in front of people searching online for ways to enjoy a cafe experience at home. By leveraging Google's AI-powered solution, Nespresso used the most relevant creative assets to reach shoppers most likely to convert, improving conversions by 55% and reducing cost per action by 3%.

The marketing tips that we've shared here will help you unlock consumer trends in Singapore and APAC, and find business growth through Search and marketing innovations. We'll continue to share more of such important consumer trends and marketing strategies throughout the year on Think with Google, so stay subscribed for the latest insights.

All Google Search data points included in this report are from Google Trends, Sept 2021 - Sept 2022 versus year over year, unless otherwise indicated.

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