Think with Google

# 2021 YEAR IN SEARCH

**Look back to move your marketing forward**

**Indonesia**

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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.

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The pandemic created an inflection point that led people to reassess their priorities and needs, and buy goods and consume information and entertainment in new ways.

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The pandemic not only exposed existing inequalities, but accelerated them. People are turning to the internet for help: consumers are searching for ways to overcome the social challenges they face.


FOREWORD

This year, we accepted that the world as we knew it had been altered. We adapted to the idea of constant flux and recurring disruptions. We began taking slow, steady steps toward moving on and healing. For some Indonesians, this means reevaluating our values, habits, ways of working and living.

And in a sea of ceaseless changes, we kept searching. Every day, people all over the world turn to the search bar to satisfy their curiosities and to deepen their knowledge. Collectively, these searches paint a picture that gives us unique insight into what people really care about.

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 Year in Search report uses search data to identify the top five consumer trends that will help guide your marketing strategy into the next year. We also deep dive into trends across six specific industries where times are changing more rapidly than ever.

In 2021, we saw how Indonesians began to adapt into a "blended" way of life, where there is no straight lines when it comes to making decisions or looking for answers. As the ripple effects of the pandemic continue to compound challenges across Indonesia, everything we once knew about our customers and their behaviors must be reexamined. From newfound priorities to increasing expectations of brand accountability, this new consumer climate is uncharted territory.

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

From us to you.


**Randy Jusuf**
Managing Director
Google Indonesia

# Bridging distances

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

As more COVID-19 variants emerge, it's clear that the pandemic isn't quite over yet. COVID-19 is still a top concern for people and consumers remain wary of being in close physical contact with others. In Indonesia, anxiety levels are at a "cautious but not worried" level.[1]

The concern around resuming in-person activities hasn't, however, overtaken basic human needs for personal connection and belonging. Regardless of physical distance, rising searches show people will continue to find new ways to connect, and they are increasingly open to using digital to do so.

Now that people are increasingly embracing an omnichannel reality, is your channel strategy designed to reach them in personal ways? More importantly, what can you do as a brand to help facilitate better, deeper, and more meaningful relationships for your consumers?

SEARCHES

## Online expressions of affection

Love languages are keeping up with the changing times. People are searching for ways to show affection without in-person interactions.

Search interest in "express courier services" has grown by 115% as Indonesians look for ways to bridge physical distances.

In Indonesia, search interest in "gift box" grew by 65% as sending gifts became the new way of showing care to friends and family.

## Digital for personal connection and entertainment

Technology is enabling people to connect and have fun in innovative ways, sparking interest in virtual versions of activities such as group meals, escape rooms, and concerts.

Indonesians are looking for ways to enjoy their offline hobbies online. There's been

growth in search interest in "escape room online"

Search interest on YouTube for "konser virtual" (virtual concert) grew by 200%.

While in-person events dwindled, search interest in "online conference" grew by 30%.

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 reassured and empowered, and they want the brand that helps them navigate the "messy middle."

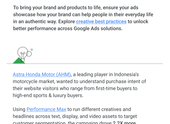
> Indonesia, Electronics, Gen Z[2]
>
> "Having gone through all the info on Google Search first before purchase makes you feel that you have knowledge and you have confirmed that the purchase is right for you. You have confidence that you made the right decision."

Provide timely, accurate, and relevant information across your organic and paid communication channels to stay top of mind for consumers during the decision-making process.

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

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

When it comes to beauty and personal care products, an in-store experience is key to influencing purchase decisions. L'Oréal Indonesia has been one of the industry pioneer in bringing this experience to life digitally, using virtual reality.



L'Oreal first launched a Virtual Try On feature that let customers virtually test out the brand's makeup and hair products in 2019 and 2020 respectively.

It has since continued to innovate and just recently launched two new features — L'Oréal's Skin Genius and Garnier's Skin Coach — that use skin recognition technology to offer customers an analysis of their skin health and conditions. These innovations really show how brands can adapt to the changing nature of consumer behavior by leveling up customer experience in the digital world.

### 3 Invest in ad creatives that can connect and inspire

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

**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.**

Astra Honda Motor (AHM), a leading player in Indonesia's motorcycle market, wanted to understand purchase intent of their website visitors who range from first-time buyers to high-end sports & luxury buyers.

Using Performance Max to run different creatives and headlines across text, display, and video assets to target customer segmentation, the campaign drove 2.2X more conversion at 19% lower cost.




Sources
1 Kantar, COVID-19 Living Index, conducted in Indonesia by Kantar Consumer Pulse, Indonesia, Sep 2021, Aug 2021, Jul 2021, Jun 2021, unless otherwise indicated.
2 Kantar, "COVID-19 Latest Time and Intentions Survey", December 2021.
3 Google/Kantar Quantaxis, "Indonesia Online at Scale", October 2021.

# Truth seekers

4

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

In 2021, the pandemic further exposed the dangerous consequences of misinformation, spurring governments across the region to enact "fake news" laws. At the same time, the public has become more aware of the spread of false information online. Not only are people more careful 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[1], searches related to privacy also continued to rise alongside people's growing concerns about their digital safety.

With truth-seeking behaviors becoming more of a consumer habit, we see shoppers willing to invest more of their time and resources to ensure the choices they make align with their value systems and beliefs. **Our research shows that 56% of Indonesians find it important to research all relevant information about a product or service before making a purchase.[2]**

This means that for brands, getting ahead on transparency, focusing on authenticity, and ensuring consumers have easy communication with their customers has become more important than ever.

SEARCHES

## Fact-checking, fighting fraud, and protecting privacy

Searches show consumers are increasingly concerned about misinformation and privacy, especially compared with pre-COVID times.[3]

Search interest in "berita bohong" (fake news), has increased by 52%, showing a rising concern about misinformation.

With Indonesians less willing to compromise on quality when it comes to their health and bodies, search interest in "vitamin palsu" (fake vitamins) grew by 83%.

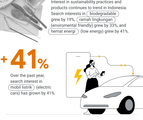
Privacy-related searches have increased, with search interest in "kebocoran data" (data leaks) growing by 33%.

## 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.

Search interest in topics related to "carbon footprint", grew by 114%.

Ethical practices are increasingly important to consumers, with search interest in "Cruelty-free", growing by up to 90%.




Interest in sustainability practices and products continues to trend in Indonesia: Search interests in "biodegradable", grew by 33%, "eco friendly", "sustainable", "environmental friendly" grew by 41%, and "vertical energy", (low energy) grew by 41%.

Over the past year, search interest in "mobil listrik" (electric cars) has grown by 41%.

## Consumer demands for reassurance

Consumers today expect to be reassured along their shopping journeys. Authenticity is a key issue on marketplaces for 31% of shoppers surveyed[4], and we see increasing searches for delivery tracking and official stores of popular brands:

Search interest in "Spoon", Shaban Pengawas, Ulsar dan Makanan, the National Agency of Drug and Food Control, grew by 61%.

Search interest in "online lingerie/pakaian" (located online) grew by 40%.

Indonesians' preference to purchase from brands' official or verified stores to avoid counterfeit products has driven up search interest in "official store", by 31%.

MARKETING IMPLICATIONS

# Trust as brand equity

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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**
>
> "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 more willing to share information with brands. In fact, 61% of APAC marketers have a dedicated strategy to communicate with consumers about data privacy.[5] It's time to consider how you can prioritize your users' privacy concerns to earn their trust.

1.1

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

1.2

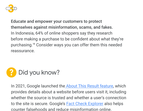
**Prepare your digital ads ecosystem for a future without third-party cookies.**
Explore privacy-preserving strategies that fuel continued business growth by allowing companies to reach people with relevant ads and measure results without needing to track people across the web.

1.3

**Educate and empower your customers to protect themselves against misinformation, scams, and abuse.**
In Indonesia, 64% of online shoppers say they research before making a purchase to be confident about what they're purchasing.[6] Consider ways you can offer them this needed information.

### Did you know?

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 site's connection to the site is secure. Google's Fact Check Explorer also helps counter falsehood 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 overwhelmed by bold 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.**

### Did you know?

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.

Since April 2021, Sweetfrog has been listing the carbon footprint of its meals, making it the first restaurant chain in Asia to do so. The labels, displayed on the brand's menus, take into account farming practices, land usage, and water wastage among other factors.[7]

Gojek launched the Goldenrose Carbon Offset in-app feature in April 2021, making it the first in the ride-hailing industry around the world to prioritize B2C carbon offsetting.[8]


Sources:
1) Cybersecurity Ventures, "Cybercrime Damages $6 Trillion By 2021", Dec 7, 2020
2) TCS, Aug 2021, Aug 2021, Q1 2022, Indexes (Worldwide, APAC)
3) Google Trends, Indonesia, Jan 1, 2020 - Jan 31, 2022 vs. Jan 1, 2018 - Dec 31, 2019
4) Edelman, "Edelman Trust Barometer Special Report: Trust and Technology", Jan 2021
5) Google Marketer's Playbook, "Strategies for Data Privacy", Jan 2021
6) Google Consumer Survey, "Online Shopping Behavior", Jan 2021
7) Sweetfrog Malaysia, "Sweetfrog Launches Carbon Footprint Labels", Jan 2021
8) Gojek, "Gojek Leads Ride-Hailing Industry in Carbon Offsetting", April 2021

# Growing inequalities

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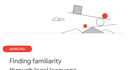
While everyone's way of life has undoubtedly shifted this past year, the pandemic didn't affect everyone the same way. It not only exposed existing inequalities, but accelerated them. People are turning to the internet for help; whether they're existing internet users with fresh financial woes, or newcomers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

Dubbed the "inequality virus", the pandemic has exposed many inequalities, and in some cases, accelerated them even further. While many of these inequalities soared 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[1] from the outset (hidden inequal focus as many days in a school year compared with those from high income families.[2] Women, too, suffered increased violence, with 84% in Indonesia reporting that domestic violence worsened due to COVID-19.[3]



To overcome these inequalities, people are searching online for solutions to help themselves and their communities. Their questions range from "how can I protect myself from the virus" to "how can I" finance options to claim unemployment and womens rights, reflecting their growing interest in social issues.

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 worldwide, and 52% in Southeast Asia, indicate they can access information in their local language.[4] With more new users coming online from non-metropolitan areas, the demand for local translations is continuing to grow.

**+40%**

Search interest in (Dalam bahasa Indonesia) (In Bahasa Indonesia) grew by up to 40% among Indonesians for translations and assistance in comprehending words that are not in their mother tongue.

**+52%**

Vs. global average of 32%[4] Consumers in Southeast Asia are notably tasks (to translate into a different language): Indonesia Thailand, Philippines, Colombia, Brazil, and Mexico are the use of online translation tools.[4]

## Access to stable and affordable internet

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

**+45%**

In 2021, we saw continued momentum in searches testing internet speed and connectivity as more people came online. Search interest in (Lab kecepatan internet) (internet speed check) grew by up to 45% in Indonesia.

## The need for financial support

Consumers are searching for different ways to alleviate economic concerns. Whether it's a business grant or a cash loan, Indonesians are looking for financial support to tide them over in an uncertain year.

**+23%**

Rising economic pressures and unemployment have prompted Indonesians to look for ways to save money or start their own businesses, with search interests in (usaha online) (business licenses) growing by 23% and (lowongan bisnis) (business grant) growing by 150%.

Search interest in (pegadaian) (loan) and (pinjaman online) (online lending) grew by 96%.

**+38%**

More Indonesians are looking for financial support from the government, with search interest in (bantuan sosial) (social support) growing by 38%.

**+96%**

Search interests in (usaha online) (business licenses) grew by more than

**150%**

## Social inequalities

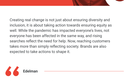
Continuing from 2020, searches reveal growing exploration and awareness around inclusion and equity.

Search interest in (kebermanan sosial adalah) (social discrimination) grew by more than

**150%**

**+130%**

Gender equality was a key concern in 2020 and continued to be in 2021. Searches in (Cari pekerjaan) (women's rights) growing by 130% and (kesetaraan wanita) (women equality) growing by 80%.



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 exposed inequalities that many of us 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.

**Eddman**

"With four converging global crises over the last year – COVID-19, economic meltdown, financial/health inequities and systemic racism – brands that take a stand get a giant boost in trust. Brands that don't risk being seen as not caring about the board mandates 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

Engage your global audience with a full language experience that goes beyond just translation. Provide customer support in their mother tongue, conditions for your web content, or adapting social assistance to make interactions easier for your customers, regardless of literacy levels.

Since 2019, Grab Indonesia's #MendidikanDuniaLengkap has been supporting students in Indonesia with their learning dreams. The brand has been developing features like closed captions for its videosharing video and also offered employees basic training in Indonesian Sign Language.[5]

### 1. Did you know?

Google Meet has launched live translated captions to help video calls be more global and inclusive. This expands 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 everyone has access to the latest devices or high speed internet, some users have data caps, others don't really have internet users still struggle with basic tasks.*

Look at your engagement metrics as indicators 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 unleashing experience for customers, but also the fundamental user experience.

### 2. Did you know?

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

## 2 Take a bigger stand

Consumers are drawn to brands that focus on the "we" over the "me". Brands that have a strong purpose are more appealing to consumers. Brands that focus on making the world a better place! only 37% said they preferred "brands that focus on making me a better person."[6] The same survey found that 84% of respondents expect brands to act beyond their product or business. Consumers are looking for brands that are more than 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 equitable and sustainable economy. Brands need to speak up and act beyond their traditional business boundaries, for both consumers and employees.

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

Consumers are 4.5X more likely to buy from a brand if it demonstrates that it cares about the well-being of its economic inequality.[7] As marketers, we are in a unique position to drive authentic and meaningful change, and it starts with the teams we build and the stories we tell. Get inspired by tips for inclusive marketing best practices.

more likely to buy if a brand demonstrates it cares

**5x**

Resona, a dedicated brand, shows a light on the underrepresented disabled community in Indonesia by advocating for their health and mobility through its #GoingFor3 campaign. The brand invited customers to count their daily steps, with every step contributing towards new wheelchairs for the disabled.[8]

Wardah, an Indonesian beauty brand, launched a series of sunscreen products with a wide range of shades to represent all skin colors.[9]

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Some figures may not add up due to rounding.
Unless noted, all data is worldwide, all time period is 2020 vs. 2019, and all growth is YoY.