

Think with Google

YEAR IN SEARCH 2022



INDONESIA

Look back to move your marketing forward

A journey of a thousand miles begins with a single step. 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 to help marketers uncover meaningful audience insights.

INTRO

Across Indonesia, 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 what life serves up.

We've identified three key insights about Indonesians 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, Indonesians are moving past merely coping or going with the flow. They're reenvisioning who they are and 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 also embracing their individuality and searching with more specificity to satisfy their distinct needs and preferences.

Soul searching

1.1

Cultural Identity


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 Indonesian traditions unique.

This dynamic duality points to the increasing complexity of Indonesians' identity as global citizens and proud denizens.



Living in a connected world is driving Indonesians to learn more about cultures that are different from their own, with search interest in **japanese culture** growing by over 20%.

Asian cuisine crossed borders
as search interest in **indian restaurant**
increased by over 150% in Indonesia.

While search interest in **nasi padang**
in Indonesia was also up by over 20%.



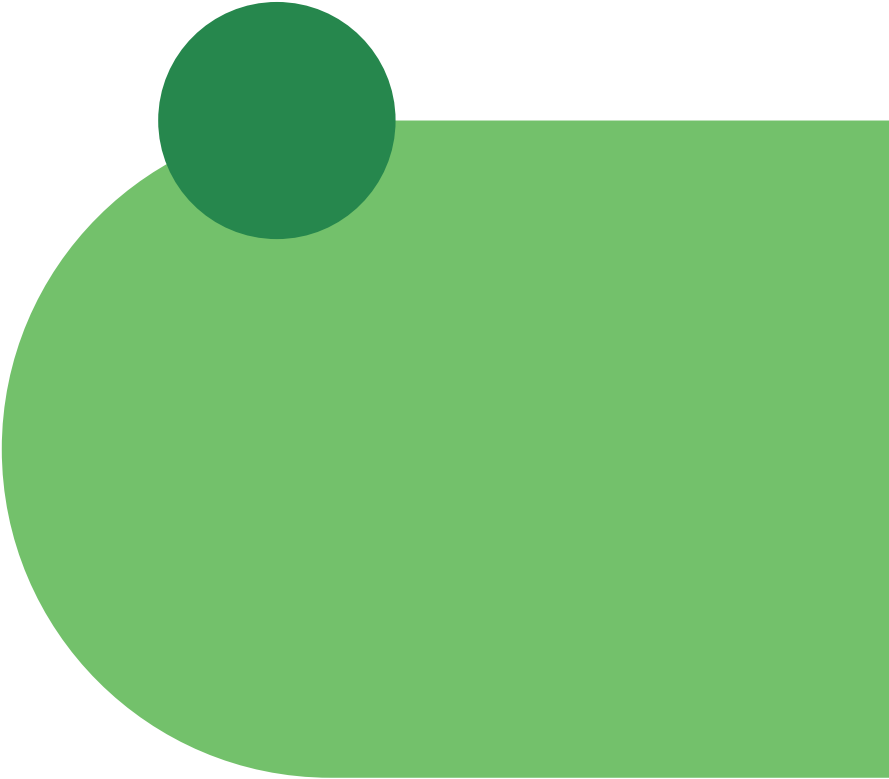
1.2

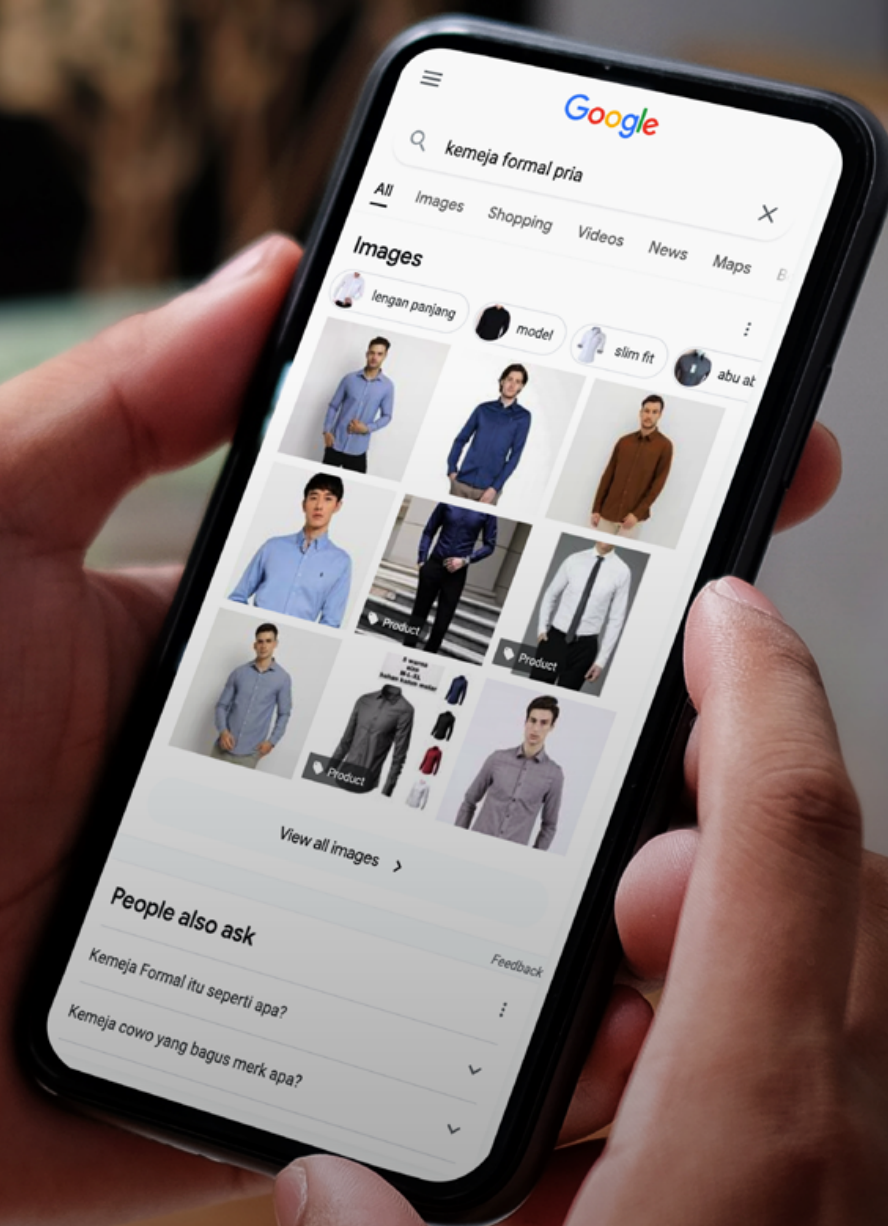
Personal Identity

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.

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





🔍 formal dress for men 🎤 +50%

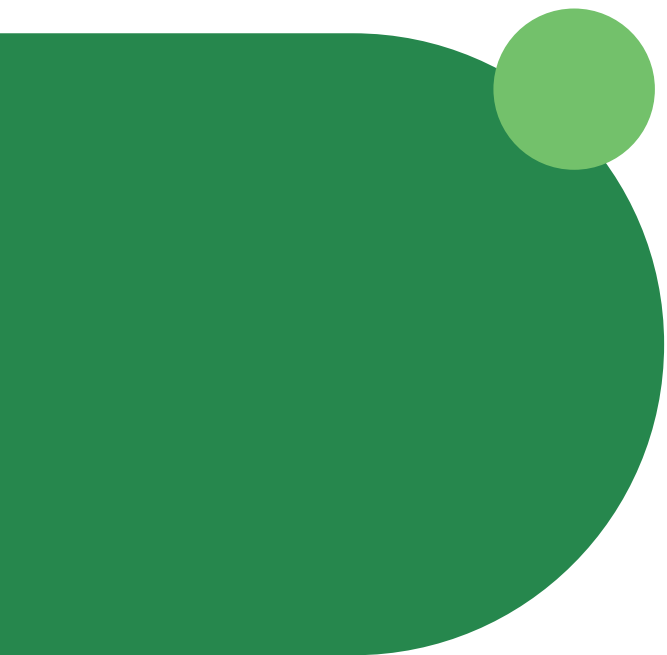
Their evolving sense of self is also being reflected in the way they dress, with search interest in “formal dress for men” rising by 50%.



Look forward
to move
our market
forward

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



In Indonesia,
search interest in
gym membership
grew by over 20%
and can I change
increased by 20%.

There's a touch of introspection
in the air, with search interest
in **healing** jumping by

+230%



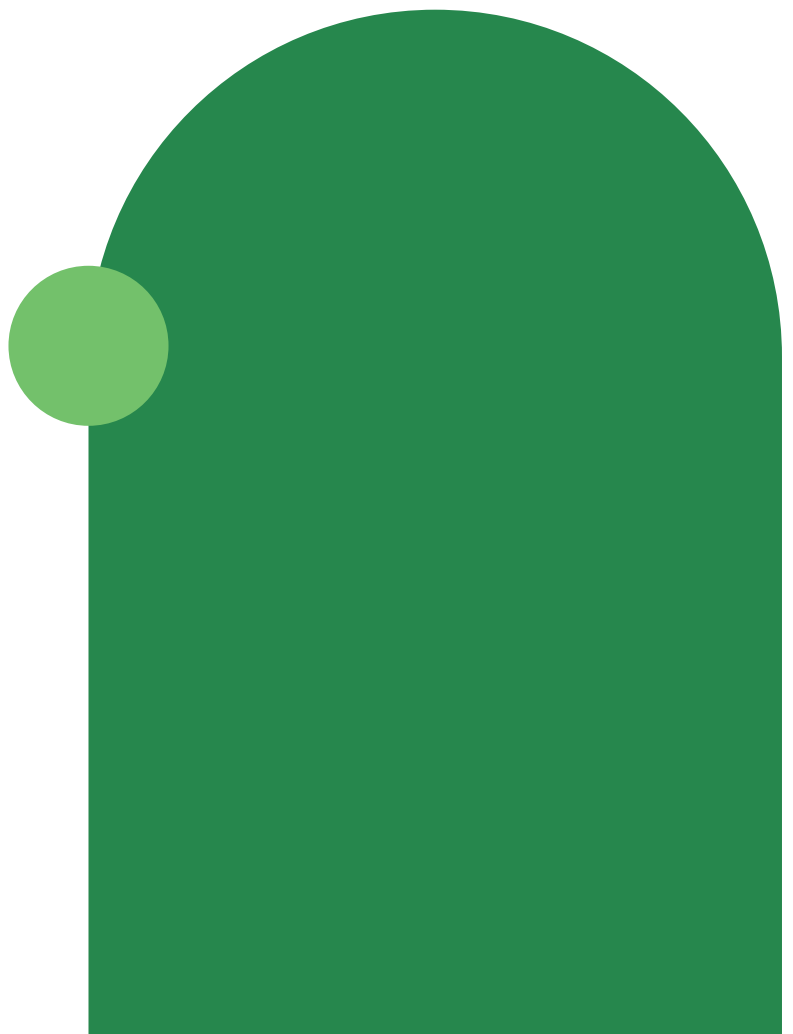


At the same time, search interest in **self reward** grew by over 70%, while **self development** saw a leap of more than 50% in Indonesia.



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.



As Indonesians look to Search to become more aware, search interest in **gender equality** increased by 60%.

While search interest in **self branding** increased by 20% in Indonesia.

+60% —————
————— +20%

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

Indonesians are striving to be financially independent, with search interest in financial freedom growing by 50%.

Search interest in remote working increased by 60% in Indonesia.



A diver in a wetsuit and scuba gear is shown underwater, swimming towards the left. The entire image has a strong green tint. Bubbles are visible rising from the diver's equipment. The diver's right arm is extended upwards and to the right.

+100%

Indonesians are also feeling emboldened to explore other styles of working. 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.

🔍 side hustle



+50%

Indonesians seeking additional income streams also contributed to an over 50% rise in search interest in "side hustle".

Search interest in
hybrid learning grew by

+220%



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 messages. Brands that portray women and underrepresented groups positively have greater influence on customer intent.

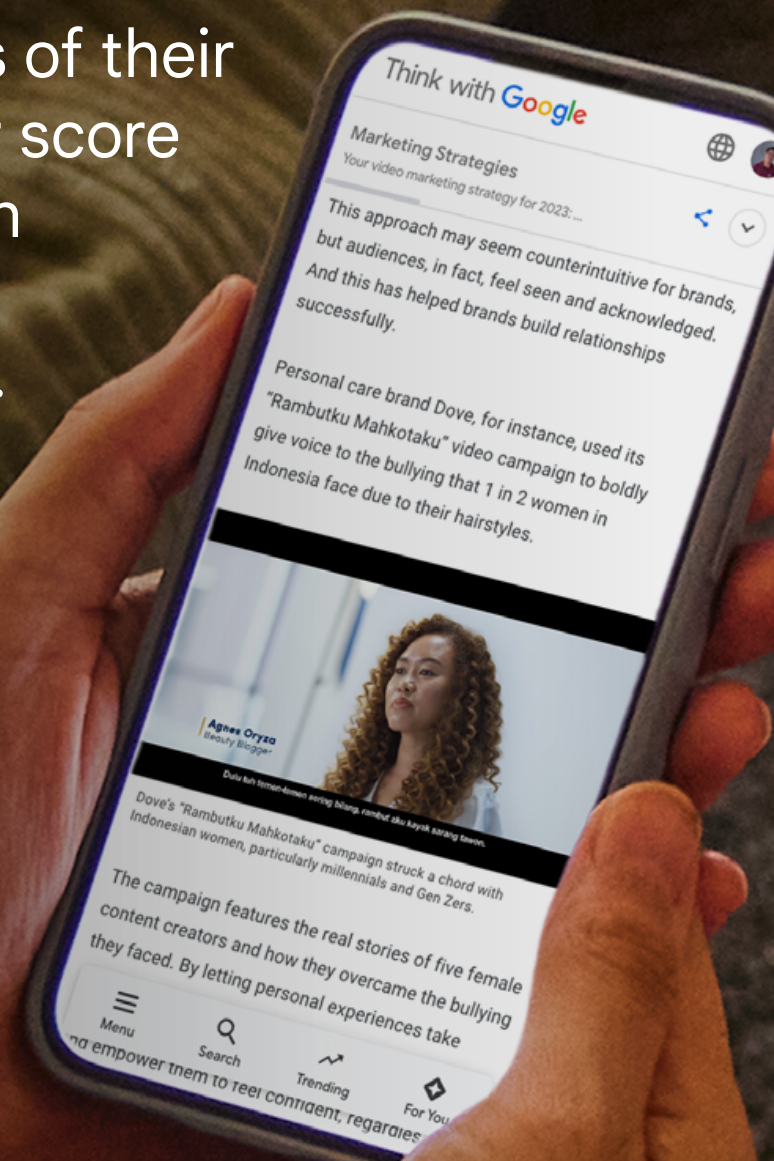
For more tips, check out [Think with Google's inclusive marketing best practices](#).

+80%

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

Brand Example

Dove Indonesia created an inclusive ad to give voice to the bullying that 1 in 2 women in Indonesia face due to their hairstyles. It invited Indonesia's top female content creators to share how they overcame the bullying they faced, and empower millennial and Gen Z audiences to feel confident, regardless of their hairstyle. Its brand power score among this hard-to-reach group of audiences grew significantly by 30 points.



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 act - especially on mobile.

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



Look ba

to move

the market

forward

THEME 2



Value hunting

VALUE HUNTING

As inflation rises, Indonesians 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.

Source: 5. Google commissioned Ipsos Consumer Continuous, US, CA, UK, FR, DE, IT, AU, JP, IN, CN, BR, MX, ES, ZA, KR, AR, CO, BE, CL, PE, SE, NL, DK, FI, NO ~n=500-1,000 online consumers 18+ per market. Sep 8-11, 2022.

VALUE HUNTING

Trust in a brand plays a significant part in people's calculations. They're 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 77% of Indonesian consumers have switched brands due to "better value".

Value hunting

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 for “compared to” remains consistently high,⁶ and 73% of shoppers in Southeast Asia are shifting budgets from wants to needs.⁷



+50%

In Indonesia, search interest in **compare to** leapt by more than 50%.

Source: 6. Google Trends, Worldwide, July 5, 2022–Oct 5, 2022.

7. Google Trends, Worldwide, Shopping category, Oct 5, 2021–Oct 5, 2022.

SEEKING VALUE AND KNOWLEDGE | INSIGHT 1

Value shopping is on the rise in Indonesia, with search interest in **best price**, **best deal** and **best value** climbing by

+10%



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 help make decisions that count.



With the cost of living continuing to rise, search interest in “what is inflation” leapt by more than 50%.

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

While search interest in **how to save**
increased by 10%, as Indonesians
try to budget and plan ahead.



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.⁸

As consumers search for more environmentally friendly vehicles, search interest in **electric vehicle** leapt by

+80%



+60%

Search interest in **sustainability** rose by over 60% in Indonesia.

There's rising awareness about climate change and its impact on Indonesia. Search interest in **carbon footprint** leapt by more than 50%.

At the same time, search interest in **food waste** rose by over 40%.



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.⁹



+84%

want to trust in the brand
before purchasing.¹⁰

Source: 9. Google-Kantar Shopper Pulse SEA, August 2022. Base: Researched 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

10. 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

As shoppers in Indonesia spend more time weighing up their options, search interest in “original product” and “top brand” increased by over 20%.

🔍 original product 🎤

🔍 top brand 🎤



 consumer review  +60%

Brand trust is top of mind, as search interest in “consumer review” increased by over 60%.

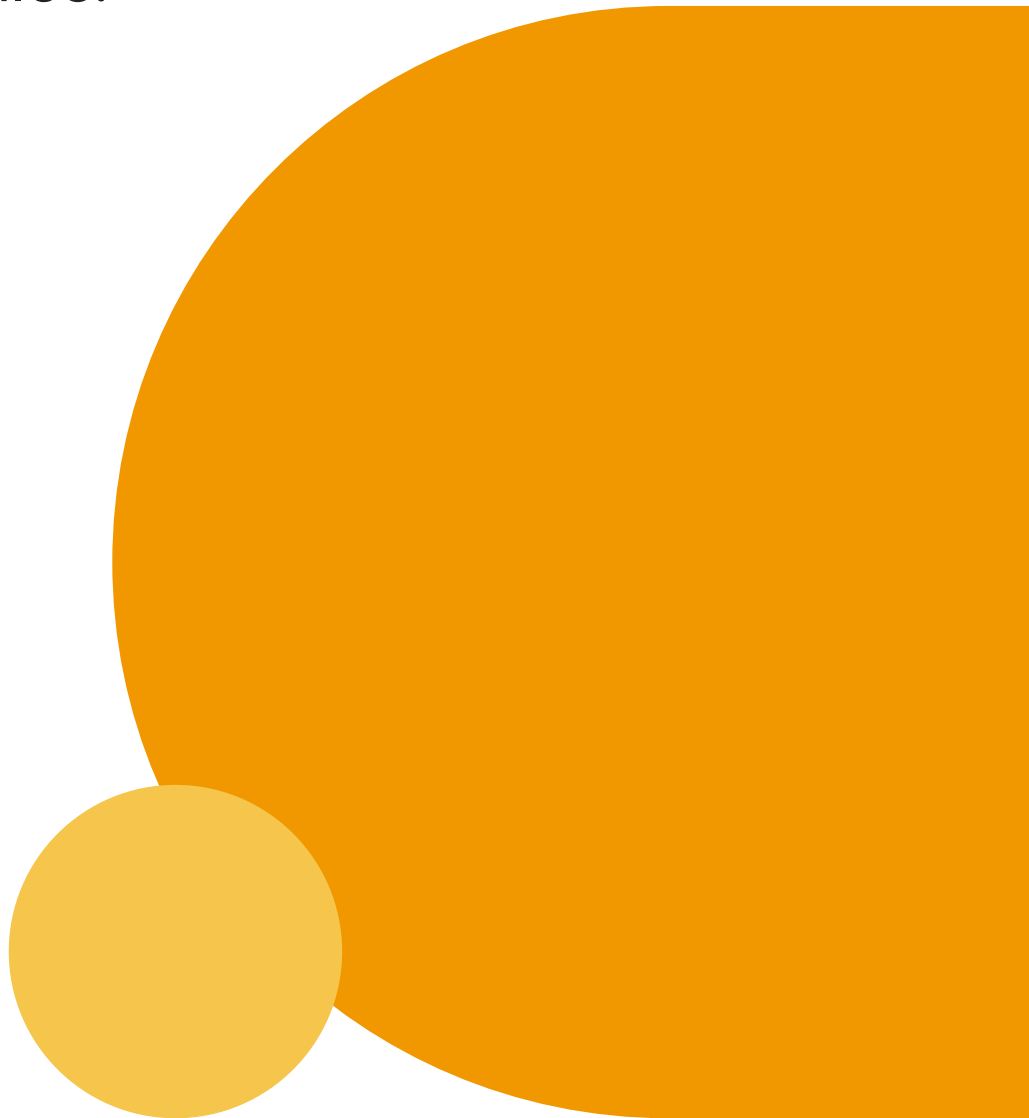
01

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.

Maximize your effort with seasonality adjustments to your campaigns, to inform Smart Bidding of expected changes in conversion rates for future events like promotions or sales.



+80%

80% of Google advertisers around the world now use automated bidding to unlock Search's full potential.¹¹

+82%

82% of marketers recognized a positive ROI from marketing automation and said that it makes them more efficient.



Brand Example

Frisian Flag Indonesia used Smart Bidding to generate more leads for its launch of Omela Foaming Milk Professional, which caters to coffee shops and cafes that require foaming milk in their coffee-based beverages. It achieved **12x higher conversions at 94% lower cost per acquisition.**

02

Ensure coverage over a wider range of relevant queries.

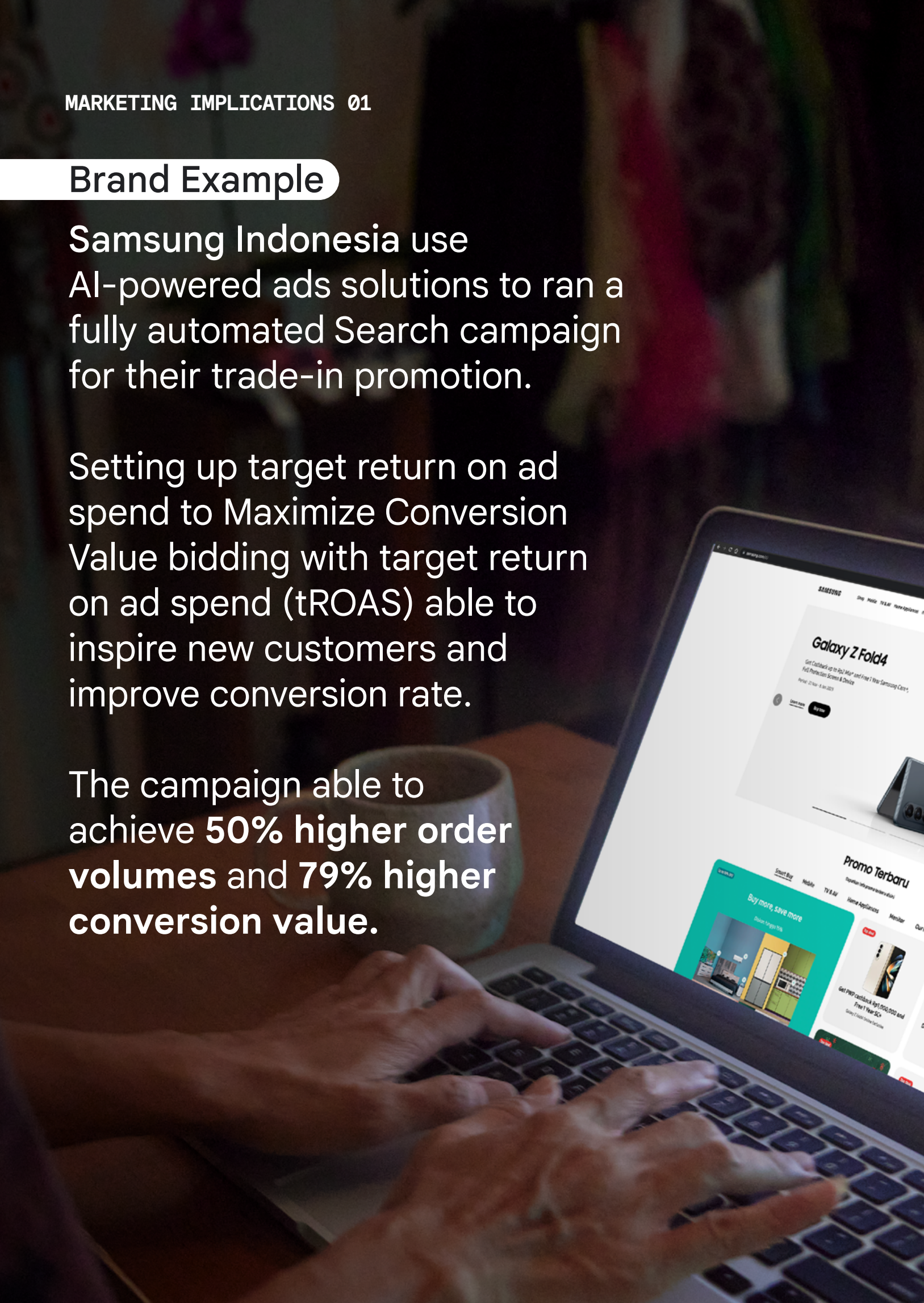
As consumers navigate the messy middle, they spend significant time exploring and evaluating their options. To reach Indonesians at scale, over a wider range of relevant queries, without having to laboriously manage huge volumes of keywords, use Broad Match. And by combining Broad Match with Smart Bidding, your campaign can perform optimally and efficiently.

Brand Example

Samsung Indonesia use AI-powered ads solutions to ran a fully automated Search campaign for their trade-in promotion.

Setting up target return on ad spend to Maximize Conversion Value bidding with target return on ad spend (tROAS) able to inspire new customers and improve conversion rate.

The campaign able to achieve **50% higher order volumes** and **79% higher conversion value**.



03

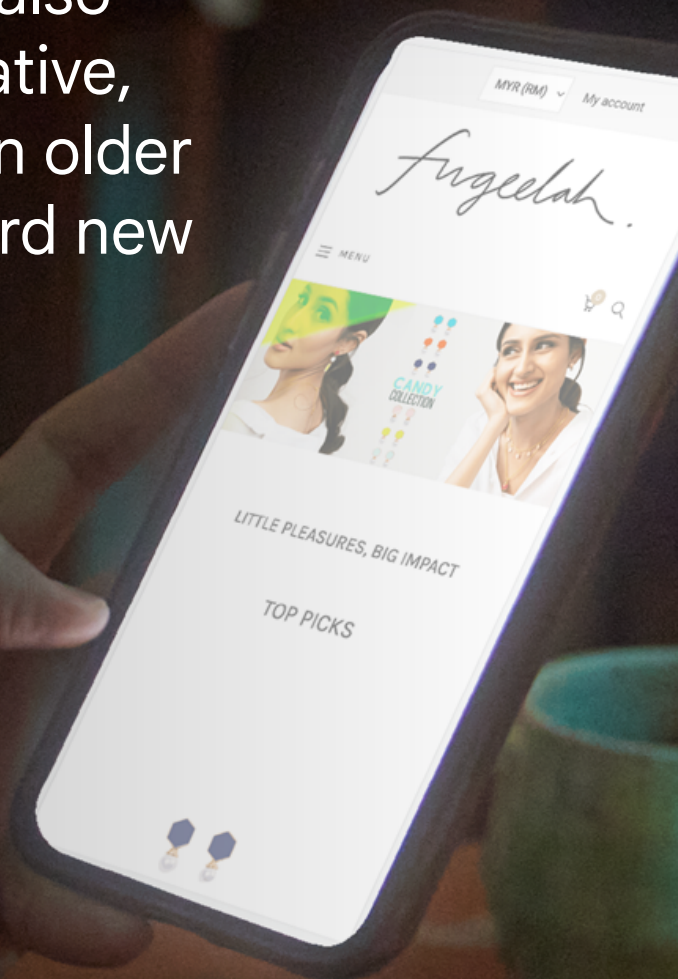
Be transparent in your sustainable efforts.

Today, environmental issues have become the second-most pressing issue among people in Southeast Asia.¹² 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.

Source: 12. Google-commissioned Ipsos e-Conomy SEA Research 2022, ID, MY, PH, SG, TH, VN, N1: Please share your views on some key issues in the world today. Select the top 2 topics that are important to you. Weighted base: Digital users in Southeast Asia n=8,144

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. In the blooming second-hand clothing market, **Lululemon** also implemented a buyback initiative, where customers can trade in older goods and earn credits toward new sustainable purchases.





THEME 3



Finding joy

In the face of constant waves of disruption, people in Indonesia 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 their favorite concert abroad.** 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 telehealth and instant delivery. At the same time, people are going offline in bigger ways as compared with previous years. Live concerts are back on the calendar, and luxury experiences like Michelin-starred dining are back on the menu.

Finding joy

3.1

Little Luxuries and Cheap Thrills

People care about value but they 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, but others are seeking cheap thrills, with 80% of Southeast Asian shoppers looking for more affordable ways to treat themselves.¹³

The hunt for all-you-can-eat culinary adventures in Indonesia has led to an over 60% increase in search interest in **buffet restaurant**.

Sophisticated palates are also on the rise, as search interest in **michelin star restaurants** climbed by over 30%.



People are looking to indulge themselves, as search interest in **massage near me** increased by 70% in Indonesia.

while search interest in **omakase** jumped by over 100%.



3.2


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

TRAVEL RESUMED, EVEN IF IT'S BUDGET | INSIGHT 1



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

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. They're also open to changing their everyday behaviors to save up for big travel purchases.¹⁴



Search interest in **glamping** rose by over 40% in Indonesia.

As people plan their travel,
search interest in “cheap flight”
jumped by over 70%.

While search interest in
“staycation” grew by over 60%.



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 they want flexible options for free cancellation or rebooking.¹⁵

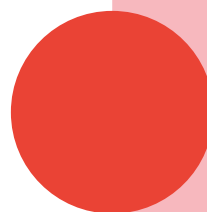


3.3

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.



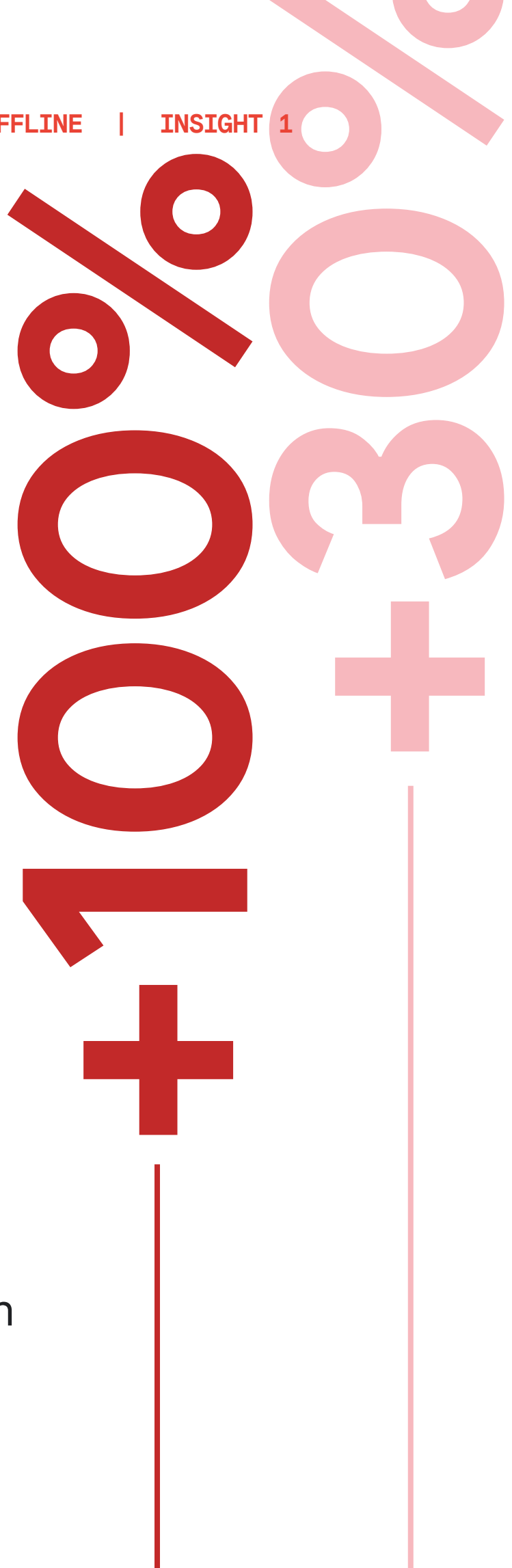
Online search trends:

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



Convenience is top of mind, as search interest in quick commerce grew by over 100% in Indonesia.

While search interest in online games climbed up by over 30%.



Offline activity search trends:

With Indonesia getting back on its feet, search interest in “car free day” jumped by over 100%, and search interest in “konser” (concert) increased by 60%.



car free day



konser



Search interest in **dress up** jumped by over 210% in Indonesia and search interest in **cooking class** increased by 40%.

+210%
+40%



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 2022.¹⁶

At the same time, 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 for research.¹⁷

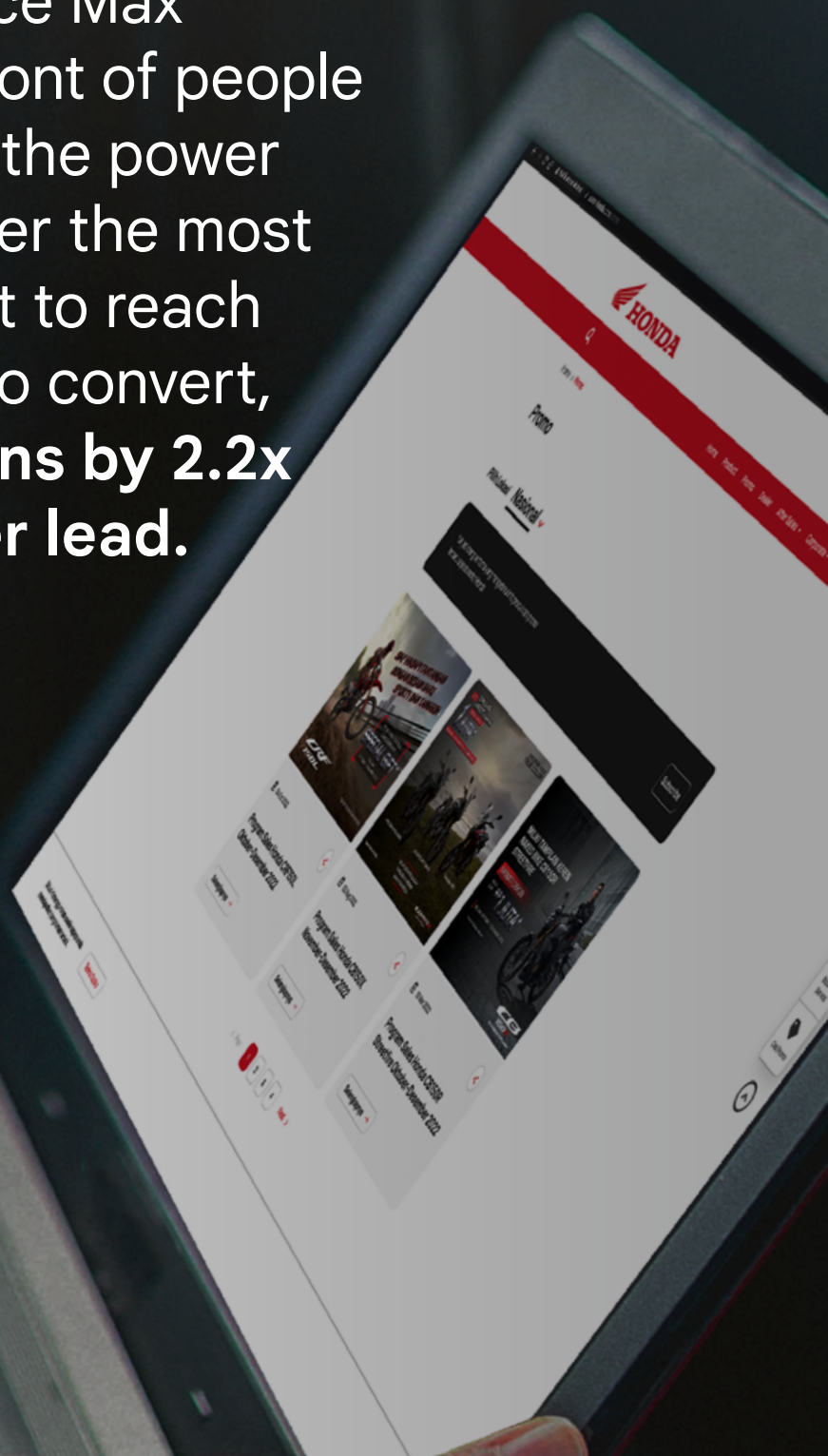
Use Performance Max campaigns to promote your products or services across all of Google's advertising channels and inventory by creating one easy-to-manage campaign.



Source: 17. Google-commissioned Ipsos COVID-19 tracker, AU, BR, CA, CN, FR, DE, IN, IT, JP, MX, RU, ZA, KR, ES, U.K., and U.S., n=500–1,000 online consumers 18+ per market, Dec. 2–5, 2021.

Brand Example

Having been hit hard by COVID-19 lockdowns, **Astra Honda Motors** was keen to expand their digital touchpoints for lead generation. They used Performance Max campaigns to get in front of people searching online, and the power of Google's AI to deliver the most relevant creative asset to reach shoppers most likely to convert, **improving conversions by 2.2x at 19% lower cost per lead.**



The marketing tips shared here will help you unlock consumer trends in Indonesia and find business growth through Search and marketing innovations. Stay subscribed to [Think With Google](#) 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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