



Year in Search Singapore

Insights for Brands Report 2020

Think with Google



Anticipate what matters



Today, complex digital journeys and heightened consumer expectations make it more challenging than ever to keep up with consumers. What matters to consumers as they are trying to make a decision about where to go, what to do, or what to buy?

The best opportunity for brands to shape consumer journeys and drive business impact is when consumers are actively searching for help with making choices. Marketers, advertisers, and brands need to evolve from understanding consumers to anticipating what matters to them.

At Google, we've partnered with TrendWatching*, a leading independent consumer trends firm, to make sense of our 2019 search data. The resulting Year in Search report reveals topics that have mattered more to consumers in recent times, and provides some possible directions for brands looking to get ahead of consumer journeys.



*Established in 2002, [TrendWatching](#)'s trends, insights and tools enable 250,000+ future-focused professionals in 180+ countries to build brands, products and services that matter. TrendWatching is fueled by an international network of 2,000+ spotters, scanning the globe for innovations that will reshape business and consumerism.



The Expectation Economy

...04

Seeking Balance ...10



Value Redefined ...16

Information Empowerment ...22



Odd Couples

...28

The Expectation Economy



As startups and established brands alike race to deliver better, faster, cheaper products, services, and experiences, the result is an ever-spiraling cycle of upward expectations, reflected in 2019's search patterns.

More choices, more needs met on-demand have fueled an on-demand mindset in Singapore.

In the past decade, access to on-demand services—from streaming entertainment to ride-sharing to delivery—has ballooned, setting a benchmark expectation of affordable convenience that has spread across multiple categories, contexts, and needs.

Convenience minus the premium

Q delivery promo



+ 56%

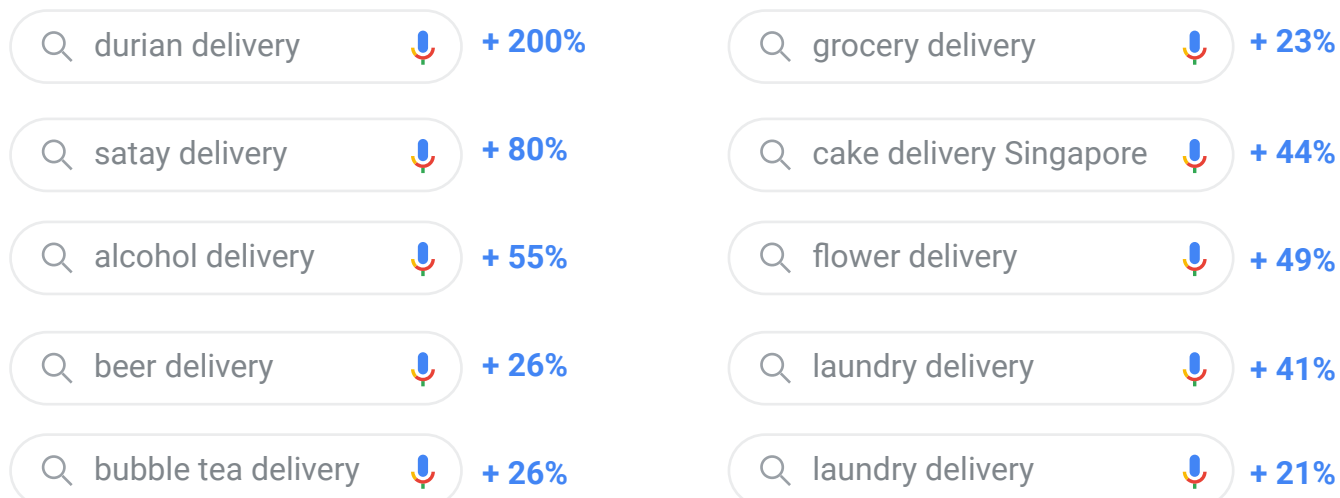
Q free delivery



+ 60%



Delivery going beyond fast food



An interest in new delivery offerings



The democratization of assistance.

With on-demand personalized services going mainstream, Singaporeans are outsourcing more facets of their lives to outside help, enabled by technology.



Technology becomes a helper

🔍 home assistant + 77%

🔍 virtual assistant + 50%

🔍 best virtual assistant + 74%

🔍 itinerary planner + 42%

🔍 travel itinerary planner + 23%

An on-demand mindset means that speed and convenience outrank brand loyalty.

We see how expectations are rising through an increase in “**near me**” searches, even in a dense city like Singapore with most modern conveniences just minutes away from any given location. As speed and convenience become a basic expectation, searches for “**same day delivery**” are likely to start diversifying beyond cakes and flowers.

Now, now, now

44%

increase in “**near me open now**” searches

Regaining mobility when it's lost

Q cobbler near me  + 300%

Q car workshop near me  + 250%

Q petrol station near me  + 250%



Satisfying a craving

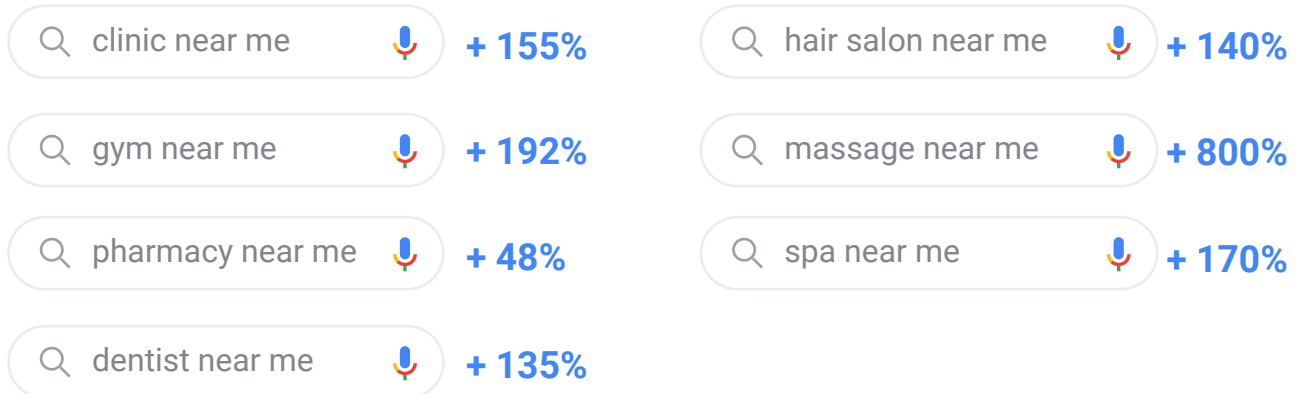
Q dessert place near me  + 200%

Q cafes near me  + 143%

Q bubble tea near me  + 360%



Addressing health and wellness needs



When proximity takes precedence over brand preference.

Brands that have a physical presence can capitalize on their proximity advantage to potential customers with **local inventory ads**, or **by using “near me” searches to drive store traffic as in the example of HipVan**. Increasingly, brands will face a choice when it comes to differentiating themselves: provide the speed and convenience that consumers seek, or else offer a compelling, exciting human experience that makes it worth the trade-off for consumers to travel further, or wait longer.

UOB found a way to do both through **Mighty Insights**, a new feature in their mobile banking app. It smartly anticipates customer needs and concerns by analyzing user habits and serving timely information: alerts of potential duplicate charges, proactive confirmation of refunds and regular payment reminders—providing convenience while assuaging day-to-day human worries.

Seeking Balance



Singapore has always been a competitive society, even before the popularization of the “5Cs” concept in the late 20th century. Decades on, the competitive spirit continues to thrive, with terms like “996” and #hustle surfacing in the local vernacular.






And while Blackberries were an accessory for high-flying corporate elites in the early 2000’s, today the expectation of connectivity follows all of us—regardless of our position in the organization—wherever we happen to go when we leave the office.

And Singaporeans have had enough. In 2019, we started to see a mounting reaction in the form of measures mitigating the invasion by the rat race into our personal lives.

Take a deep breath. Relax.

Singaporeans are taking advice from Taylor Swift this year—in addition to searching for her song *You Need to Calm Down*, they're also actively seeking out practical tips and online resources to neutralize everyday stressors, from meditation apps to ASMR videos.

Ok Taylor, but how?

Q calming music for stress (on YouTube)		+ 39%
Q how to calm down		+ 17%
Q how to calm down from anxiety		+ 110%
Q being calm		+ 60%
Q how to stay calm		+ 20%



Getting away from it all.

What better way to leave work stress behind than a change of scenery? Here are a few types of travel inspiration that Singaporeans needed more in 2019 compared to past years.



Quick escapes

Q Sentosa for staycation  + 20%

Q Batam day trip  + 26%

Q best staycation in Singapore  + 40%

Q luxury escapes  + 100%



There's a growing awareness of and interest in mental health.

In 2019, the World Health Organization formally recognised 'burnout' as a workplace health phenomenon. With this increase in awareness, Singaporeans are seeking to better understand and protect their mental wellbeing. Intriguingly, there has been a parallel decline in searches around "stress", indicating that Singaporeans are dealing with this as a medical, rather than an emotional, challenge.



Researching mental health topics

Q how to overcome anxiety  + 300%

Q chest pain due to stress  + 180%

Q anxiety attack symptoms  + 60%

Q mental breakdown  + 170%

Q do I have anxiety  + 40%

Q burnout symptoms  + 80%

Finding alternatives to the rat race.

Some Singaporeans are looking for more sustainable models of work. At the same time, as a practical nation, financial considerations are also top-of-mind for those contemplating these alternatives.



Researching more sustainable models of work





Singapore has the highest concentration of searches for **“work life balance”** in the world

It also has the second highest concentration of searches for **“flexible working hours”** in the world

60%

growth in **“work from home jobs”** searches

Achieving financial freedom

- Q retirement age in Singapore  + 20%
- Q forever financial freedom  + 20%
- Q fire movement  + 180%
(Financial Independence, Retire Early)
- Q fire retirement  + 110%



Take the workload off your consumers.

Consumers appreciate when brands make daily life and mundane tasks easier, faster, and as hassle-free as possible—from entirely new solutions to bundled products, integrated add-ons and innovative business or service models. Singapore Airlines' chatbot is an example of this: by offering personalized assistance, they make customer interactions feel more like help and less like work.

Value Redefined



From the Great Singapore Sale to 11/11, Singaporean consumers are known for their readiness to get in line for a great deal. However, the idea of value is starting to take on more depth and dimension—it's no longer simply about the cheapest deal, but being able to stretch a given budget.

As access to disposable income increases, more Singaporeans are buying into material indicators of status. At the same time, they're smart spenders, ensuring they don't pay more than necessary, while looking to maximize the value of each dollar spent—value in the form of quality, as well as a growing appreciation for environmental responsibility.

Affordability and quality go hand-in-hand.

Consumers are increasingly searching for “**cheap and good**”—from vets to eyebrow embroidery, steak to hotels.

More than just ‘cheap’



Singapore has the highest concentration of searches in the world for “best food”

Getting rewarded for spending.

Consumers are looking for additional sources of value on top of the product or service that they're paying for. For example, being rewarded for trying new brands, or earning credit card benefits.

Milking the benefits of competition in online services

Q new user promo



+ 29%

Q delivery promo



+ 56%



According to the [e-Economy SEA 2019 report by Google, Temasek, and Bain](#), searches for e-commerce promotions in Singapore grew 7X between 2015 to 2019. Gross merchandise value of e-commerce transactions grew 2X in the same period. Promotions were a key driving factor in getting consumers to adopt new purchase behaviors.

Earning while spending

Singapore has the highest concentration of searches in the world for **“credit card benefits”**

Q best credit card + 45%

Q best miles card Singapore + 27%



Crazy rich Asians?

In Singapore, apparel searches are dominated by designer brands as consumers are willing to pay a premium for high quality products. However, designer purchases are characterized by sanity checks as consumers go online to find economical paths to these goods.

Designer searches

Singapore is among the top countries in the world for proportion of apparel searches mentioning designer brand names

Q Dior bag + 200%

Q LV handbags + 160%


Q YSL bag + 90%

Q Gucci camera bag + 400%

Saving on labels

Q Gucci bag price Singapore  + 25%

Q Style Theory  + 42%

Q Changi duty-free shop  + 80%

Q Reebonz outlet  + 200%

Q duty-free shop Singapore  + 60%

A new form of luxury is emerging.

Environmental protection and sustainability are becoming increasingly hard for Singaporeans to ignore, as we experience first-hand the increasingly extreme shifts in weather patterns. At the same time, Marie Kondo's influence reached our shores in 2019, and there is a growing awareness of the zero-waste movement. In 2020, the greatest luxury for some may be the luxury to consume without guilt.

Clearing the air

Q Singapore pollution index  + 650%

Q haze Singapore  + 150%

Q climate change news  + 70%





Environment entering our consciousness

Q guilt-free



+ 43%

Q zero waste



+ 94%

Q sustainable fashion



+ 10%

What's your brand's plastic straw equivalent?

Living in Singapore in 2019, one of the most obvious signs of brands taking the first step towards environmental responsibility has been the increasing scarcity of plastic straws when eating out. From airlines offering carbon offsets to **NTUC Fairprice now charging for plastic bags**, it has become a necessity for brands to ensure that their business practices are contributing to environmental conservation and sustainability—to win favorability, if not simply because it's the right thing to do.

Information Empowerment



"Does this product work? Is this the best there is? Can I get a better price on it?"

With access to a world of information at our fingertips, we no longer need to second-guess ourselves before pulling the trigger on a purchase.









Consumers know this. According to Ipsos, search is the top source of information among Singaporeans, with more than 95% turning to search when they have questions. A research study conducted across Southeast Asia in partnership with Ipsos and Quantum Consumer Solutions this year found that even when purchases were made offline, more than half of those purchases were influenced by digital touchpoints. Across geographies and product categories, shoppers are spending more time online before visiting a store, while they're shopping, and even after they've made a purchase.

Sources: Google/Ipsos, "SEA Search User Insights 2018"; Google/Ipsos/Quantum Consumer Solutions, "SEA Path to Purchase Research 2019"

An industry of information synthesizers.

Business models trading in the currency of information are becoming more essential to Singaporeans who rely on the information compiled on these sites to make decisions on everything from financial products to travel services.

Comparing comparisons

Q MileLion		+ 41%
Q SingSaver		+ 46%
Q GoBear		+ 11%
Q Trip.com		+ 160%
Q Expedia		+ 60%
Q Traveloka SG		+ 50%
Q Agoda.com		+ 50%
Q eye cream review		+ 30%
(on YouTube)		

The skincare alchemist.

Consumers are looking to make more educated decisions about the products they use, looking past superficial branding to understand what's in them and how they work. This is best exemplified by skincare and healthcare purchases.



It's elementary

Search for oil benefits such as **“tea tree oil”**, **“fish oil”**, and **“cod liver oil”** more than doubled in 2019

Q hyaluronic acid



+ 22%

Q azelaic acid



+ 20%

This has been a boon for minimalist brands such as **“The Ordinary”**, which saw a 40% increase in searches

Best of everything.

Across all domains, consumers are leveraging access to information to ensure that they don't lose out on the best that life has to offer.

130%

increase in “**best laptop for students**” queries

Searches for best wireless headphones not only saw monumental growth from last year, but Singapore also sees the highest concentration of this search in the world



Financial products

Q best health insurance  + 40%

Q best insurance  + 22%

Q best savings account  + 45%

Q best fixed deposit rates  + 29%

(Highest popularity in the world)



Beauty and skincare

Q best vitamin c serum  + 17%

Q best hair salon  + 7%

Q best exfoliator  + 16%

Q best hair mask  + 9%

Education

Q best primary school in Singapore  + 60%

Q best university in the world  + 70%

Healthcare

Q best hospital in the world  + 110%



Air it all out on the internet.

Empower potential customers with information to help with their questions, starting when they first start searching for ideas and inspiration. Decathlon boosted return on ad spend by 51% through serving video ads personalized based on users' search behavior. When they're in a store on the brink of buying, ensure that product features, price points, and benefits are easily accessible through mobile sites optimized for experience and speed—in Singapore, Income, iHerb, and Expedia lead the way. And keep past shoppers coming back for more with new and meaningful ways to stay connected.

Odd Couples



Singapore is a largely conservative society that holds on to its traditional values, yet home to an increasingly worldly population. We've started traveling to far-flung destinations, welcoming all varieties of cuisines to our foodie haven, and immersing ourselves in entertainment culture beyond English- and Mandarin-language sources.

How do we stay grounded to the familiar while embracing novelty? Many fads in Singapore seem to be characterized by unexpected pairings of otherwise known elements.

Fashion can now be comfortable and practical.

Singaporeans have embraced new fashion ideals that don't require a sacrifice of comfort. Or where practicality once took precedence over fashion, consumers are using the internet to seek out stylish iterations of essential accessories.

Sneaker fashion

Q white sneakers for women	+ 50%
Q Gucci sneakers	+ 100%
Q Dior sneakers	+ 400%
Q Yeezy	+ 34%
Q Nike Air	+ 23%



It's in the bag!





Singapore has the third highest concentration of searches in the world for **"bag for men"**

Q bum bag	+ 82%
Q bucket hat	+ 57%




From cheese tea to vegan meat to salted egg-everything.

It's not just our sartorial tastes, but our literal taste buds that are looking to interesting combinations to pique our senses. An industry that relies on extensive menus of novel combinations, bubble tea experienced a renaissance in Singapore in 2019 with new entrants delighting us with everything conceivable from pink cactus-flavored tapioca pearls to crème brûlée on tea.

The bubble tea bubble

Q bubble tea		+ 192%
Q Tiger Sugar		+ 2434%
Q The Alley milk tea		+ 478%
Q HEYTEA		+ 1982%

All possible combinations

Q Impossible Burger		+ 1376%
Q ghost pepper flavored food		+ 336%
Q truffle chips		+ 176%





Repackaging familiarity.

Brands looking for directions in which to innovate can take a cue from Singaporeans' willingness to try new things that reference established concepts. In 2019, we saw two seasoned brands, **Singtel and AIA**, partnering to launch an app that rewards users for leading active lifestyles; **Grab and HEINEKEN** offering more ways for consumers to enjoy beverages at their convenience; and the opening of a **BMW storefront on Lazada**, a site better-known as a source of affordable household knick-knacks.

In the competition between brands offering a wide range of product options and combinations, **Dynamic Search Ads** can help ensure discoverability. **Maggi, a brand with hundreds of recipes on its website, took advantage of them to increase visibility of the recipes by over 6X compared to manual keyword campaigns.**



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