



Year in Search Thailand

Insights for Brands Report 2020

Think with 





Anticipate what matters

With the exponential growth of internet connectivity in Thailand, going online is becoming second nature for many. From paying bills online to consuming content, people across the country are rapidly becoming a part of the digital landscape. The result? Consumers' online journeys are becoming much more complex and their expectations are rising rapidly. It may seem difficult for businesses to keep up, but this challenge also presents them with a host of opportunities.

For businesses, every search and every YouTube view is a deeper connection that offers them a window into the motivations and needs of people. It gives them a golden opportunity to understand and anticipate what matters to Thai consumers as they try to make a decision about where to go, what to do, or what to buy. Organizations that adopt this approach will be able to interact with consumers in a meaningful way.

The Year in Search Thailand report offers important insights into what consumers are looking for, along with how and when they're looking for it. By understanding what truly matters to consumers, businesses can shape their journeys and deliver what matters to them.

Don't wait for consumers to express intent. [Anticipate it.](#)
Don't chase the consumer journey. [Shape it.](#)

Top 5 Country Themes



Beyond the Metros

Non-metros are starting to play a bigger role in the growth of new online users

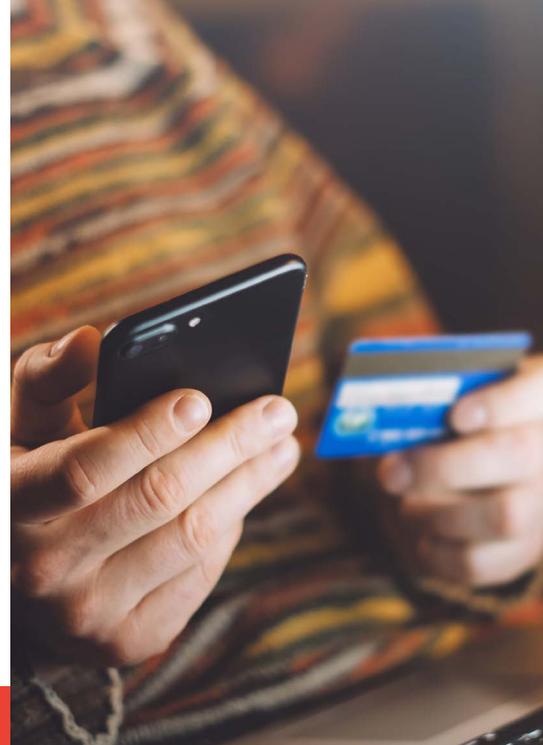
On-demand Economy

Consumers want a high level of convenience from all the businesses they engage with across categories



The Omnichannel Experience

Thai consumers are looking for a seamless purchasing experience across online and offline



Going Cashless

Digital transactions are becoming an integral part of the purchasing journey of Thai consumers

Conscious Consumption

Concern for the environment is driving Thais towards more eco-friendly habits



Table of contents

Country trends

Beyond the Metros	10
On-demand Economy	14
The Omnichannel Experience	20
Going Cashless	26
Conscious Consumption	30

Industry trends

Auto	36
Beauty and Personal Care	44
Food and Beverages	52
Online Shopping	60
Travel	66

Beyond the Metros

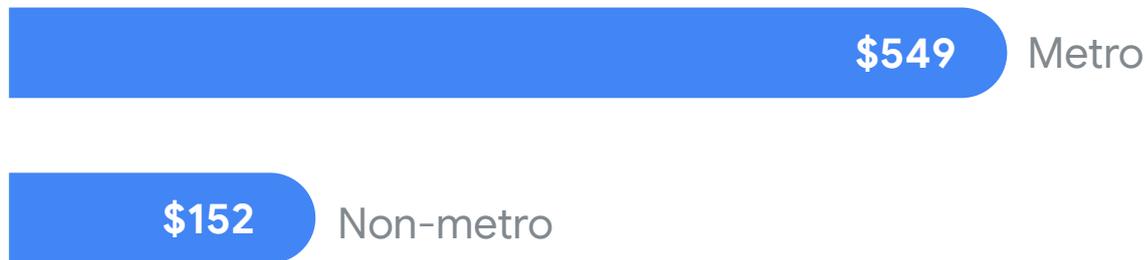


When it comes to spending on the internet economy, metros continue to dominate Thailand's online landscape. In comparison to non-metros, their per capita spend is over 3 and a half times higher. But non-metros are fast catching up.

They are expected to play a bigger role in the growth of the country's online user base and are poised to grow twice as fast as the metros, in terms of spending on the internet economy

Metros refers to Bangkok and surrounding areas, including Nonthaburi, Samut Prakan, Pathum Thani, Samut Sakhon and Nakhon Pathom

Thailand's Internet economy (Gross Merchandise Value per capita, 2019, USD)



What are Thai consumers looking for:

Metros

Seek greater convenience and higher value for their digital and offline experiences

Non-metros

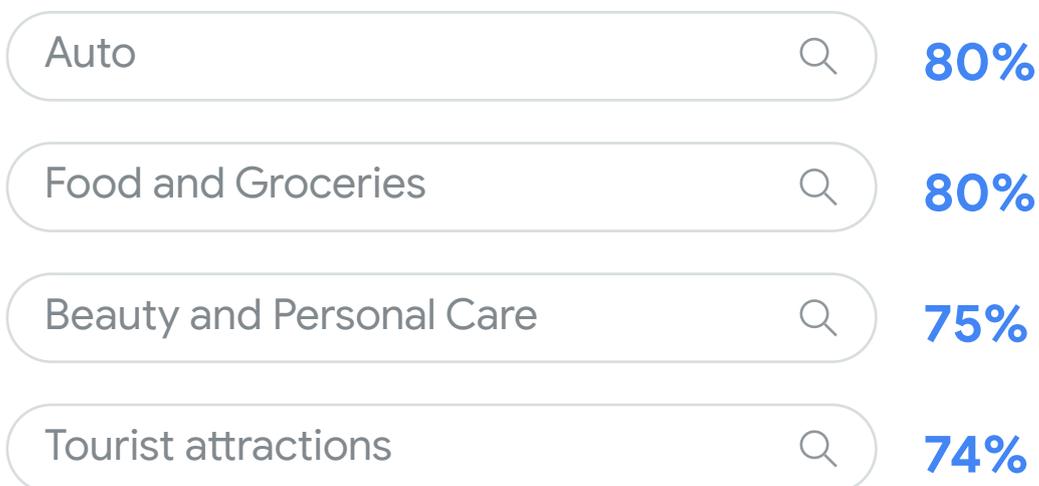
Seek products and services that were previously unavailable to them



The Internet has become the bridge to the non-metro consumer's aspirations

Consumers in non-metros are no longer restricted by the lack of access to technology.

The volume of searches coming from outside Bangkok:





On-demand Economy



The race to deliver better, faster, cheaper products and services by brands, is fuelling an on-demand mindset among Thai consumers and raising their expectations. They now expect a high level of convenience from all the businesses that they interact and transact with.

This convenience isn't just about the speed and immediacy of fulfilling a demand but also its affordability.

More needs are being met on-demand

Ride hailing service 🔍 **+127%**

Delivery service 🔍 **+85%**



Convenience without paying a premium

Free delivery 🔍 **+223%**

delivery promo 🔍 **+117%**

Searches by Thai consumers are becoming more personalized and complex

They are using specific, more personalized queries to look for exactly what they want. This is also a reflection of the fact that as Search becomes more helpful to users, providing relevant answers to them, they in turn come to it for more specific needs.



Shoes-related searches

รองเท้าวิ่งผู้ชาย



+127%

Running shoes for men

รองเท้าแตะผู้หญิง



+37%

Flip flops for women

vs 1% growth in searches for “shoes”

Real estate-related searches

คอนโด ตลาดพลู



+245%

condo "Talat Phlu" - an area in Bangkok

เช่า คอนโด 5000



+213%

rent condo less than 5,000 baht

คอนโด ใกล้ BTS



+133%

condo close to BTS

vs 15% growth in searches for "condo"

Auto-related searches

[รุ่นรถ*] + ตาราง



+69%

Car model name installment table

[รุ่นรถ*] + ราคา



+39%

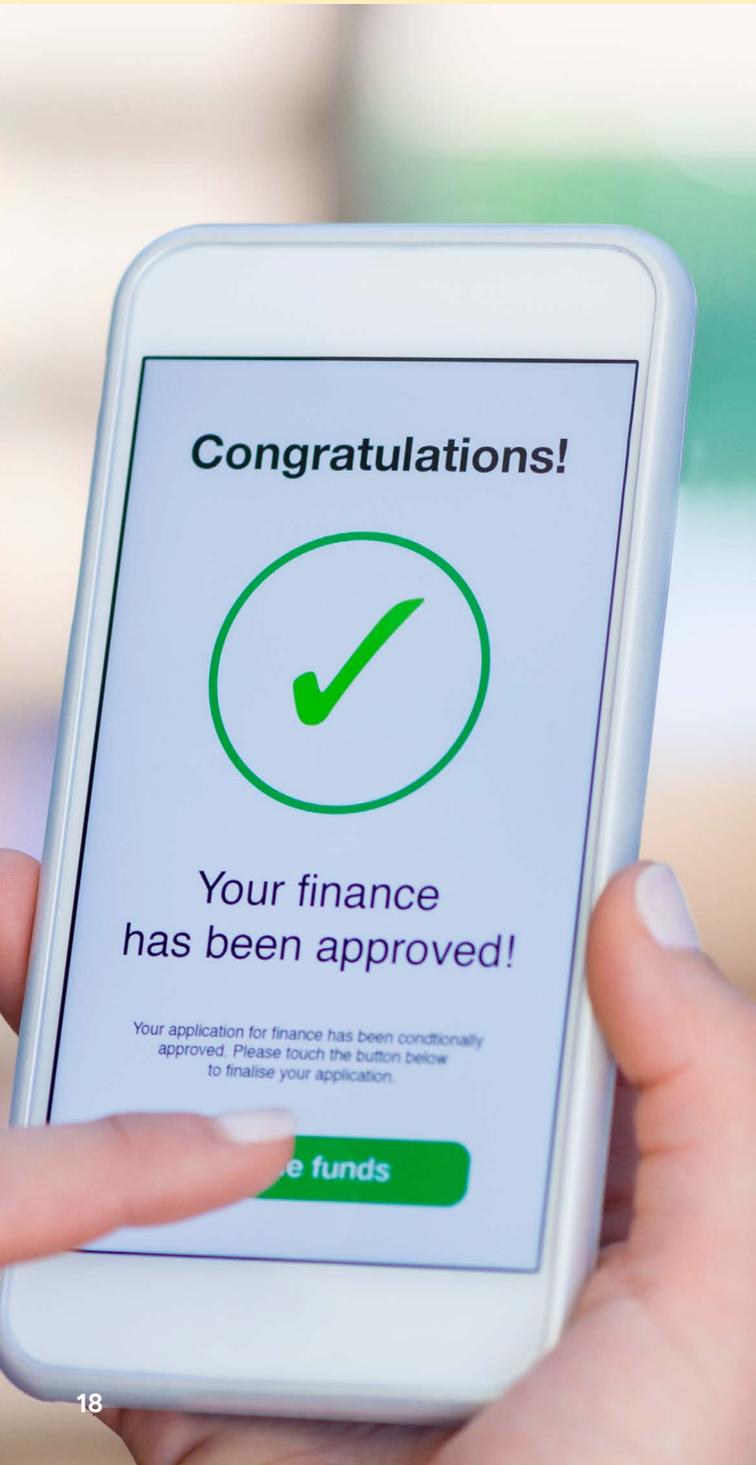
Car model price

vs 23% growth in searches for "autos & vehicles"

*Name of car model
Source: Google Trends data, TH,
Jan-Dec 2019 vs Jan-Dec 2018

They are also looking for immediate access to funds

The demand for quick access to goods and services has also led to consumers seeking financial products that can offer them access to instant funds.



67%

rise in searches for “เงินด่วน”
(on-demand cash)

Top related searches
in this category include:

กู้เงินด่วน



instant cash loan

เงินด่วน นอกกระบบ



quick cash black market

ยืมเงินด่วน



borrow quick cash

Consumers
are turning to
online channels
to look for
quick cash

254%

jump in “online lending
& app” searches



Did you know?

Watch time for finance-
related videos on YouTube
in Thailand grew more than
4 times in 2019

Searches for installments are on the rise

People are looking out
for **product-specific
installments**. Some of
the top products in this
category include:

รถ



car

บ้าน



house

โทรศัพท์



mobile phone

บัตรเครดิต



credit card

ทอง



gold

Sources: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018; Google data, Thailand, Jun 2017 - May 2018 vs Jun 2018 - May 2019. Classification as “Finance” videos was based on public data such as headlines, tags, etc. and may not account for every such video available on YouTube

The Omnichannel Experience



The rise of omnichannel is enabling consumers to fulfill their needs across online and offline channels seamlessly. This approach to sales and marketing is also helping businesses maximize their potential.

On average, consumers across Thailand engage in 8 online and offline activities before they make purchase decisions. Out of these, 6 are online.

Sources: Google / Ipsos, Path to Purchase 2.0., TH, March 2019, n=2,400 smartphone owners who are past 3 month purchasers of category (face care, hair care, women's wear)



Top 5 most searched product reviews on YouTube

Car



House



Camera



Mobile phone



Lipstick



1 in 5

Thai consumers use Google Search while in-store, before making a purchase

Sources: Google Trends data, TH, 2019
Google / Ipsos, Path to Purchase 2.0., TH, March 2019, n=2,400 smartphone owners who are past 3 month purchasers of category (face care, hair care, women's wear)

The rise of smartphone users is driving the growth of searches on-the-go

With easy access to mobile internet, more and more consumers across Thailand are looking for places that cater to their needs, right when they need them.

+104%

growth in “ใกล้ฉัน” (near me) searches



Increase in “near me” searches across categories:

Satisfy cravings

หมูกระทะ ใกล้ฉัน 🔍

+203%

pork BBQ near me

บุฟเฟต์ ใกล้ฉัน 🔍

+170%

buffet near me

เบเกอรี่ ใกล้ฉัน 🔍

+163%

bakery near me



Access to finance

ธนาคาร ใกล้ฉัน 🔍 **+203%**

bank near me

atm ใกล้ฉัน 🔍 **+170%**

atm near me

Regaining mobility when it's lost

ปั้มน้ำมัน ใกล้ฉัน 🔍 **+156%**

petrol station near me

ปะยาง ใกล้ฉัน 🔍 **+138%**

tire repair shop near me

อู่รถ ใกล้ฉัน 🔍 **+133%**

auto repair service near me





Addressing health and wellness needs

ร้านทำผม ใกล้ฉัน 🔍

+376%

hairdresser near me

หมอฟัน ใกล้ฉัน 🔍

+355%

dentist near me

ร้านสปา ใกล้ฉัน 🔍

+163%

spa near me

Exploring new places

ที่เที่ยวนear ใกล้ฉัน 🔍

+733%

tourist attraction near me

วัด ใกล้ฉัน 🔍

+400%

temple near me



Source: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018

Consumers are no longer just searching for stores near them but also seeking specific products from such outlets

There has been massive growth in “specific product + convenience store brand” searches across Thailand.

Some of them include:

ช็อคโกแลต + [ร้านสะดวกซื้อ*]	🔍	+300%
chocolate + [convenience store*]		
ไอติม + [ร้านสะดวกซื้อ*]	🔍	+270%
ice cream + [convenience store*]		
อาหารคลีน + [ร้านสะดวกซื้อ*]	🔍	+270%
clean food + [convenience store*]		
เครื่องสำอาง + [ร้านสะดวกซื้อ*]	🔍	+138%
make up + [convenience store*]		
ครีมกันแดด + [ร้านสะดวกซื้อ*]	🔍	+104%
sunscreen + [convenience store*]		

*A brand of convenience store

Source: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018

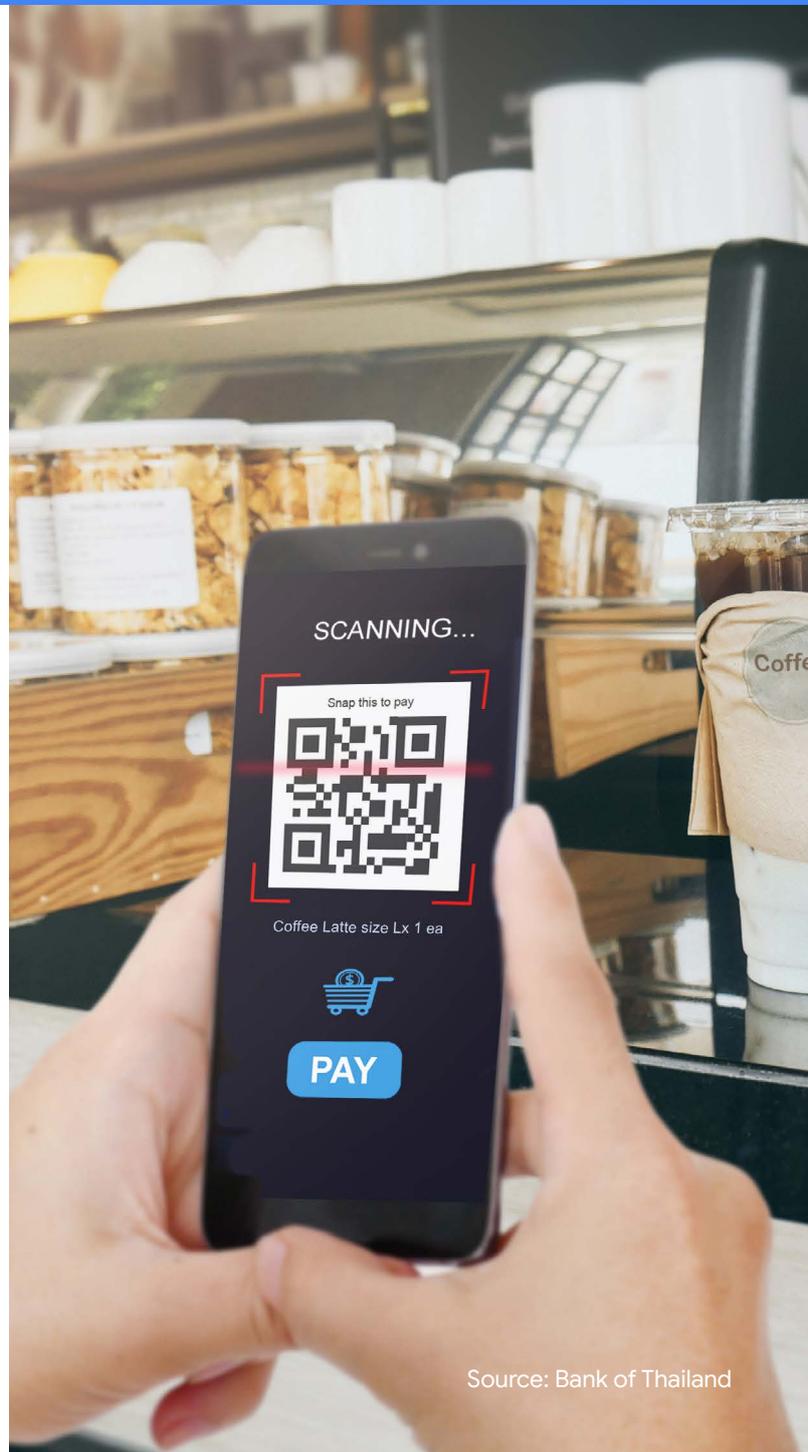
Going Cashless

With a rise in smartphone penetration, greater reliability of digital transactions, consumer trust, and government support, Thailand is rapidly moving towards becoming a cashless society.

**In the past 12 months
(ending September 2019):**

Number of online banking transactions: **4.8 billion**

Growth of online banking transactions: **94%**

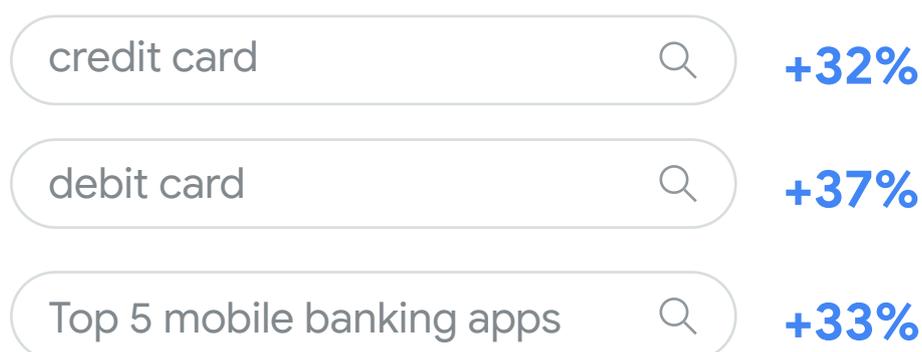


Source: Bank of Thailand

Across Thailand, we continue to see growing interest in digital payment products

Thai consumers are highly aware of digital payment products and are actively seeking out more information to become a part of the country's cashless society.

Growth in searches:



Apart from credit cards, debit cards and mobile banking, Thai consumers are also showing a growing interest in digital wallets

67%

jump in “**digital wallets**” searches, which was driven by the roll-out of g-wallet by the government in its effort to boost domestic spending and tourism.

Consumers also turn to Search when facing issues with cashless products

The most common issues consumers have with mobile banking apps are:



วิธีสมัคร



How to sign up

เปลี่ยนเบอร์



Change mobile number

ใช้ไม่ได้



Can't sign in

โอนเงิน



Transfer money

ลืมรหัส



Forgot PIN



Conscious Consumption



As Thai consumers experience the extreme shifts in weather first-hand, many of them are turning their attention to the implications of climate change, environmental preservation, and sustainability.

Air pollution



4.5x

PM 2.5



100x



They are also searching for solutions to protect themselves

หน้ากาก N95



100x

mask N95

เครื่องกรองอากาศ



50x

air purifier

Both public and private sectors are working towards sustainability

The Thai government has passed a legislation to ban single use plastic by 2022 and the country's largest retailers have stopped handing out single use plastic bags in 2020.

Such initiatives have encouraged Thai consumers to become aware of the impact of their consumption habits and to look for eco-friendly products and services.



Sources: Google Trends
The Thaiger: Thailand to ban three kinds of plastic by end of this year
Reuters: Major Thai stores to stop giving out plastic bags by 2020



Conserving energy

ประหยัดไฟ 🔍

+163%

save electricity

Eco-friendly product interests

ถุงผ้า 🔍

+355%

fabric bag

ลดถุงพลาสติก 🔍

+376%

reduce plastic bag



The push towards sustainability is also driving consumers to search for more eco-friendly habits



70%

growth in watch time of **gardening-related*** videos on YouTube



104%

increase in **vegan-related** searches



Source: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018
*Google data, TH, Aug 2018-Jul 2019 vs Aug 2017-Jul 2018



They are also looking to reduce their carbon footprint

Significant growth in the interest for:

electric car



+257%

electric scooter/motorcycle



+376%

Auto



Auto consumers are rapidly turning to digital, with Search and online videos becoming the top research destinations for Thai car buyers



99%

of all Thai car buyers use **Search**



98%

of them use **online video** to inform their car purchasing decisions

While auto searches continue to grow across Thailand, there has been a decline in searches for second-hand cars

auto & vehicles



+23%

second-hand car



-29%

Consumers across Thailand are now relying more on online research and immersive experiences.



80%

of all auto-related searches come from outside Bangkok

Did you know?

Thai consumers start researching about upcoming car models well in advance of their launch. Across the country, users started searching for “2019 car launches” from the second half of 2018.



Car buyers love promotions

2 out of every 3

car buyers see **0% rate** and **free insurance** as the most attractive promotion

335%

increase in “**car insurance**” searches

426%

jump in “**auto financing**” searches



For Thai consumers, Search is also the “go-to” tool to locate the closest dealer or showroom

138%

growth in “**car showroom**” searches

Search helps move Thai auto buyers down the purchasing funnel

They are using Search to discover relevant vehicles, compare prices, learn about new features, and locate showrooms of their choice

Some popular queries include:

[รุ่นรถ*] + ปี



year

[รุ่นรถ*] + ราคา



price

[รุ่นรถ*] + ตารางผ่อน



installment table

โปรโมชั่น + [รุ่นรถ*]



Promotion

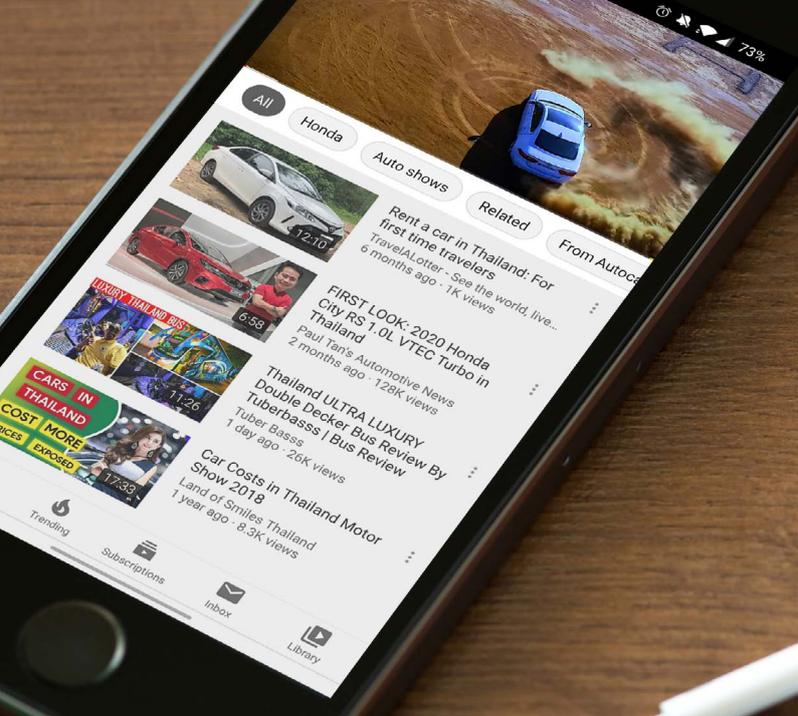
โชว์รูม + [รุ่นรถ*]



Showroom



*Name of car model
Source: Google Trends data, TH, 2019



YouTube viewing trends among car buyers:

44%

watch third party reviews / test drives / comparisons

42%

watch vehicle walk-arounds (interior and exterior)

76%

watch professionally produced videos by vehicle manufacturer

51%

watch professionally produced videos by independent third parties

27%

watch amateur videos



YouTube has become one of the most important sources of information for buyers. It lets consumers experience cars from different and unique angles



Auto brand subscriptions on YouTube are rising rapidly

The number of auto brands' YouTube channels in Thailand with over 100K subscriptions have grown from 1 in 2018 to 6 in 2019.

Watching YouTube video triggers further action

97%

of those who watched an online video undertook a follow-up action like visiting dealer website, requesting for price quotation, or visiting dealer



Electric driving consumer searches for both 4 wheels and 2 wheels



Searches for electric vehicles saw new peaks in 2019

electric car



+257%

electric scooter/motorcycle



+376%

Searches for electric vehicles were **not just restricted to Bangkok**, they were also coming from **northeastern and eastern provinces**.

Beauty and Personal Care





Thai consumers today use Search and YouTube to discover new beauty and personal care products

Thai shoppers who have purchased face care products in the past 3 months



88%

use YouTube daily



80%

use Search daily



Top search queries for beauty and personal care include

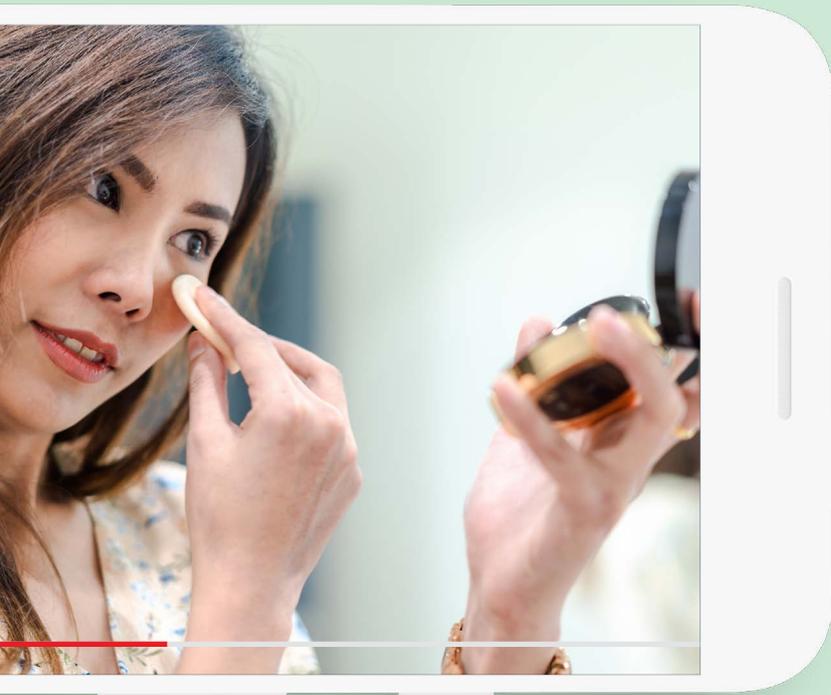
skincare review



skincare how-to/routine



skincare acne



Top YouTube search queries for Beauty & personal care include

Review



Make up

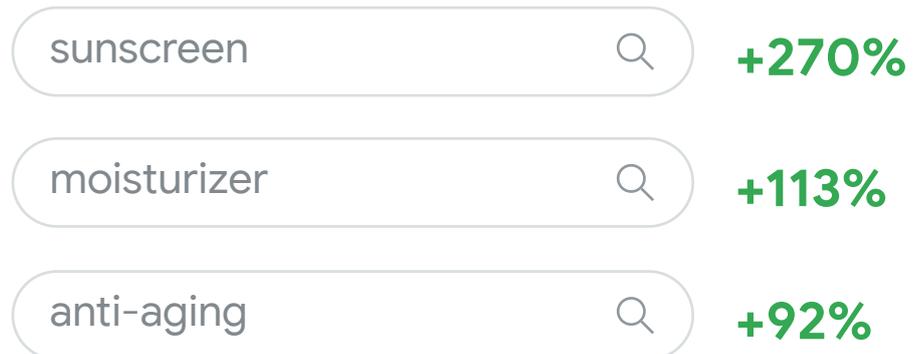


Acne



Growth in skincare is being driven by sunscreen, anti-aging, and moisturizer

Increase in searches over the last two years:



vs 52% growth in searches for “skincare”

There is a decline in “whitening” searches. This, however, now know what it takes to whiten. Their search behavior has shifted from specific products to solutions for a concern.

44%

decline in “หน้าขาว” (whitening) searches

Beauty and personal care is no longer restricted to women only, men are also now seeking products to take care of themselves

27%

growth in **men-related** beauty queries

Top 3 men-related beauty search queries are:

ทรงผม



hair style

น้ำหอม



perfume

ครีม



cream



Thai consumers are searching online for specific products at offline locations near them

39%

growth in “beauty products + convenience store” queries

Top skin care products + convenience store brand searches:

ครีม + [ร้านสะดวกซื้อ*]



cream + [convenience store*]

เซรั่ม + [ร้านสะดวกซื้อ*]



serum + [convenience store*]

ครีมลดสิว + [ร้านสะดวกซื้อ*]



acne cream + [convenience store*]

ลิป + [ร้านสะดวกซื้อ*]



lip + [convenience store*]

ครีมกันแดด + [ร้านสะดวกซื้อ*]



sunscreen + [convenience store*]

They do even more research once they are at the store

46%

of all offline skincare purchasers engaged digital touchpoints at the point of purchase



*A brand of convenience store

Sources: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018

Google/Ipsos,P2P 2.0 Insights Face Care, TH, Jun 2019, n=800 Face Care users

**Haircare
searches
are also
growing
consistently
across
Thailand**



Did you know?

Haircare searches have a strong seasonality based on consumer concerns.

Search terms by season:

Cool season (November-January)

Anti-dandruff



Wet season (July-October)

Hair fall



Hot season (March-June)

Coloring and Damage



Every year, searches for hair coloring and hair style peak during the **week before Songkran**



74%

increase in watch time on YouTube for **hair coloring-related content**

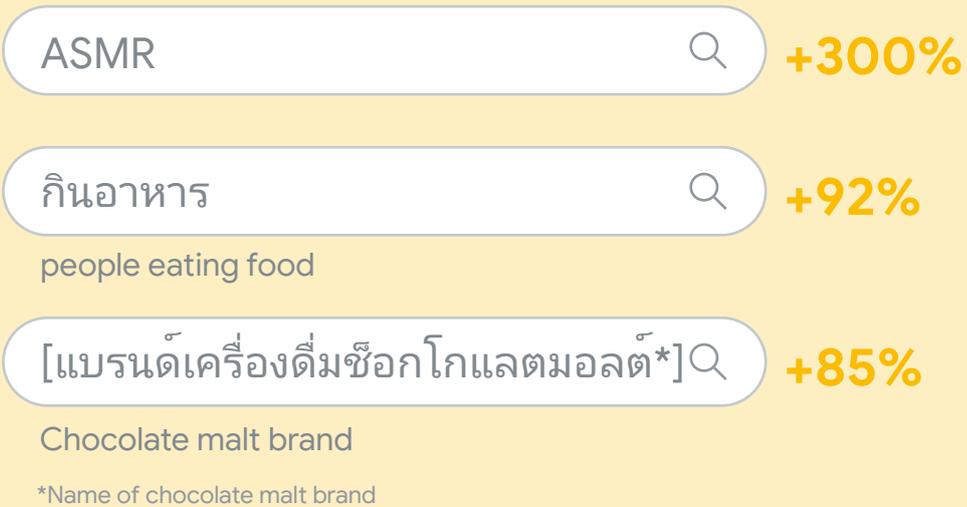
Food and Beverages





Thai consumers are using YouTube to experience food and beverages through others

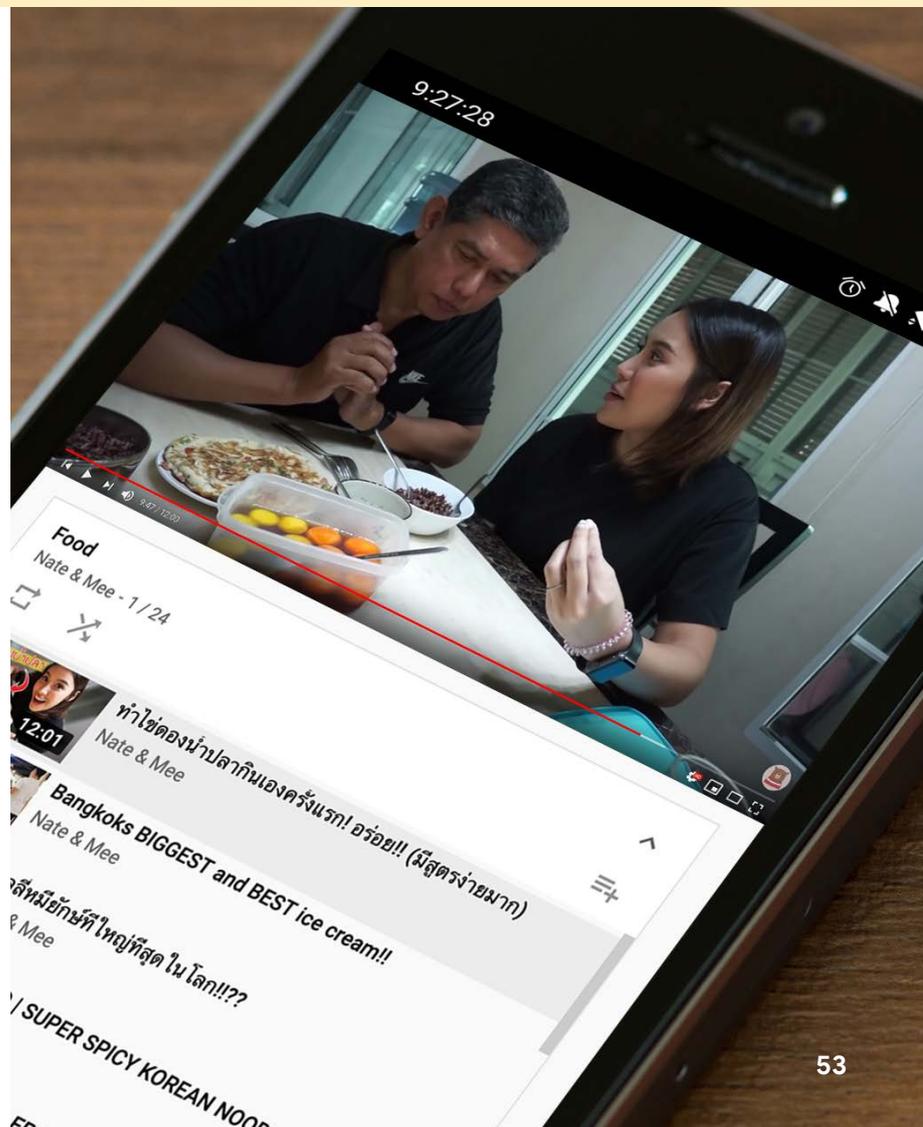
This includes finding inspiration in creating innovative menus using branded products



Interest in food and beverages continues to grow with every passing year

64%

increase in food and beverages-related searches



Source: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018



Food trends in Thailand continue to change every year



Fastest **growing** food trends on Search

เห็ดเผาะ



+809%

Barometer earthstars

ปูไข่ดอง



+456%

Pickled crab egg

ชานมไข่มุก



+317%

Bubble tea

Fast **declining** food trends on Search

빙ซู



-62%

Iced korean dessert

ปูอลาสกา



-58%

Alaskan crab

เค้กวันเกิด



-32%

birthday cake

Coffee
remains a big
part of Thai
consumers'
lifestyle

92%

increase in “Americano”
searches

Thais love
going to cafes

46%

rise in “cafe” searches,
with Chiang Mai having
the highest search per
capita in the country

There is also
a growing interest in
making coffee at home
among consumers

30%

growth in “coffee
machine” searches

Top searches related
to making coffee at
home include

ยี่ห้อไหนดี



which brand to buy

แคปซูล



capsule

กาแฟดริป



drip coffee

Thai consumers are adopting the latest trends in health consciousness

171%

rise in Keto-related searches, making it the most popular diet concept. Whereas, intermittent fasting-related searches have declined by 70%

Trending Keto-related searches:

กินแบบ คีโต



how to eat keto

เมนูอาหาร คีโต



keto menu

สูตรขนม คีโต



keto recipe



Source: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018



When it comes to food and beverages, there has also been a significant growth in queries for:

organic



+82%

vegan



+104%

gluten



+150%

protein bar



+194%

Thai consumers are searching for convenient ways to eat food

There has been immense growth in on-demand food delivery service-related searches.



809%

growth in searches for top 3 online food delivery brands in Thailand

Thai consumers are no longer searching just “ร้านอาหารใกล้ฉัน” (restaurants near me) but are also becoming more specific about their needs.

Examples of such trending searches include:

ร้านซิมซ้อปใช้ ใกล้ฉัน



government partnered shops near me

ร้านอาหารติตแอร์ ใกล้ฉัน



aircon restaurant near me

ร้านอาหารมุสลิม ใกล้ฉัน



muslim restaurant near me

ร้านอาหารอินเดีย ใกล้ฉัน



indian restaurant near me

ร้านอาหารมังสวิรัต ใกล้ฉัน



vegetarian restaurant near me



Online Shopping



E-commerce is the fastest growing segment in Thailand's digital economy

Total value of e-commerce in Thailand (USD, billion)



Compound Annual Growth Rate (CAGR) **54%**



Growth isn't just restricted to the “buy” side, but is also seen on the “sell” side

Top search terms related to selling:

ขายของออนไลน์อะไรดี 🔍

What products to sell online

วิธีขายของออนไลน์ 🔍

How to sell products online

ภาษี ขายของออนไลน์ 🔍

Tax on e-commerce

Online shopping festivals are typically the key growth drivers

11.11 remains the biggest festival.
In 2019, searches for 11.11 were

2.7x

higher than those for 9.9

9x

higher than those for 10.10

But there is substantial growth
in newer double-digit promotion days

3.2x

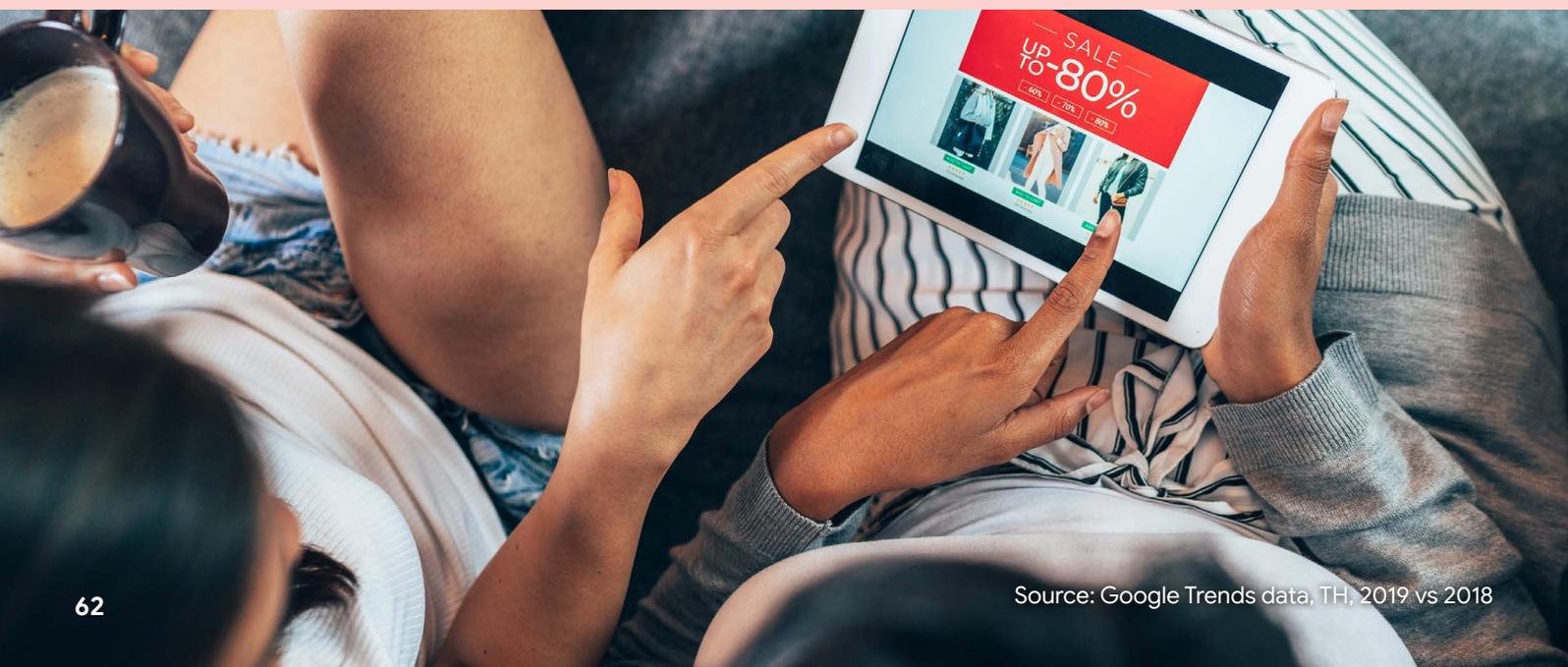
increase in
searches for 9.9

4.3x

jump in queries
for 10.10

1.6x

rise in searches
for 12.12



Did you know?

Searches around double digit promotion days start 2 to 3 weeks before the events. In 2019, there was a spike in searches for:

รองเท้าออกกำลัง 🔍

sneakers

กระเป๋าสตางค์ 🔍

wallets

ผ้าอ้อมเด็ก 🔍

diapers

เสื้อกันหนาว 🔍

sweaters

กางเกงยีนส์ 🔍

jeans





While online shopping festivals have multiplied, discounts and promotion are “always on”

39%

growth in queries related to vouchers, coupons, and promotions

The rise of online shopping has also fueled the growth in searches for delivery options

85%

growth in
“delivery services”
searches

56%

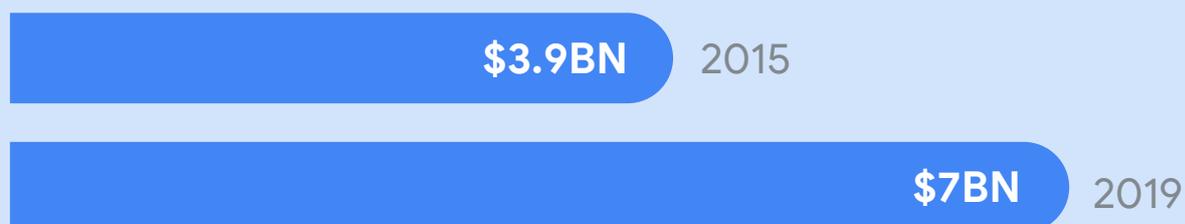
increase in “parcel
tracking + delivery
provider” queries



Travel

Online travel is the largest, most mature segment in Thailand's digital economy

Total value of online travel in Thailand (USD, billion)



Compound Annual Growth Rate **17%**



Government campaigns to promote domestic travel and spending are topping travel-related searches

ชิมช้อปใช้

Chim Shop Chai
(Eat, Shop, Spend)

100 บาทเที่ยวทั่วประเทศ
100 Baht nationwide travel

The highest search per capita for these terms came from Southern provinces:

Interest by subregion ?

1. Phatthalung
2. Narathiwat
3. Pattani
4. Satun
5. Trang



Thai consumers are using Search to seek inspiration for travel ideas, to plan and to book their trips

tourist attractions

+22%

book ticket

+26%

...and are also increasingly using YouTube for visual inspiration on where to go

223%

jump in “รีวิว ที่เที่ยว” (review travel places) searches on YouTube



Top destination searches on YouTube

Korea

Japan

Koh Lan (Thailand)

Did you know?

There has been a massive growth in “**tourist attractions near me**” searches. Consumers across the country are looking to indulge in local activities and visit places in their vicinity like temples, markets, waterfalls, and coffee shops.

156%

growth in “ที่เที่ยว ใกล้ฉัน” (tourist attraction near me) searches

2019 was the year of small towns

From tax incentives to Thai consumers’ desire to explore the unseen and the road less travelled, travel in the country was all about visiting secondary cities. This trend was very visible in the list of top domestic destinations on Search



Source: Google Trends, TH, Jan-Dec 2019 vs Jan-Dec 2018.

เที่ยวเมืองรอง  **+25x**
secondary cities



Top 10 rising domestic travel destinations

สถานที่ท่องเที่ยวในประเทศ

กาญจนบุรี



Kanchanaburi

นครนายก



Nakorn Nayok

เชียงใหม่



Chiang Mai

จันทบุรี



Chanthaburi

สุราษฎร์ธานี



Surathani

ชุมพร



Chumporn

สุพรรณบุรี



Suphanburi

ระยอง



Rayong

สมุทรปราการ



Samut Prakarn

สกลนคร



Sakon Nakorn

While some travelers were looking for last-minute deals in 2019

2x

rise in “ทัวร์ไฟไหม้” (fire sale) searches over the past 2 years

Most searched for destinations when it comes to last minute travel deals:

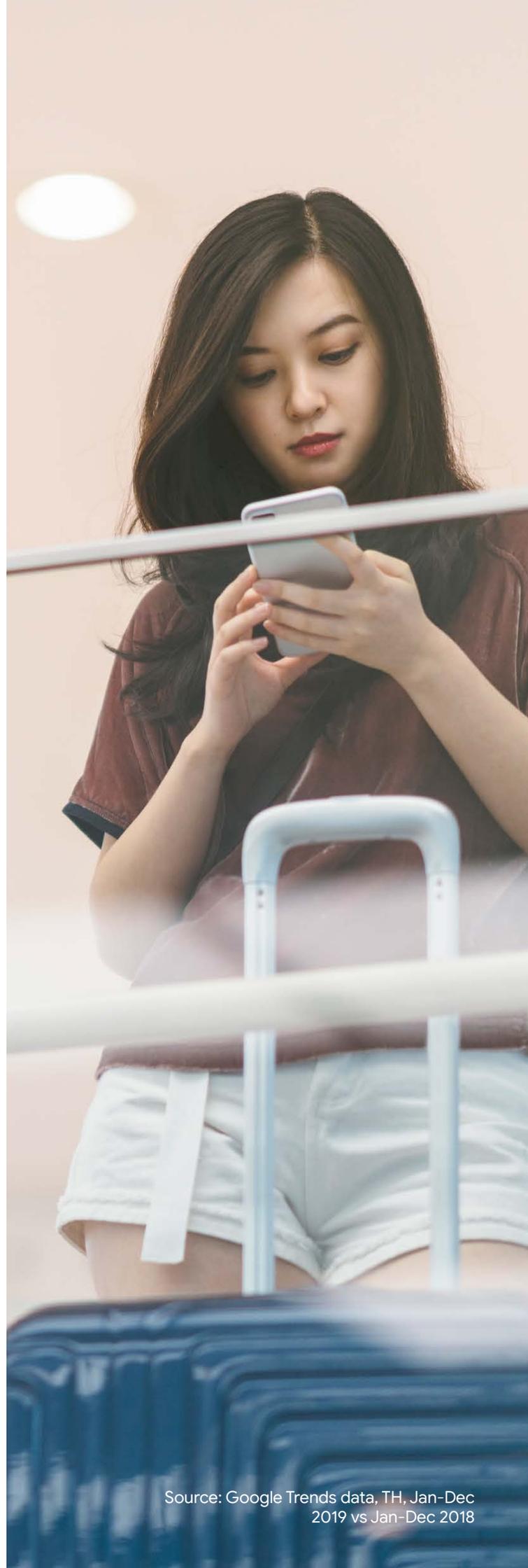
Japan



Korea



Taiwan



...others were already planning ahead for 2020 trips in 2019

Many consumers searched for destinations by adding the year 2020 to their search queries

Top travel queries in the category were:

ทัวร์ญี่ปุ่น 2563 🔍

Tour Japan 2020

เขาคิชฌกูฏ 2563 🔍

Khao Khitchakut 2020

ซากุระ 2020 🔍

Sakura 2020

ทัวร์ยุโรป 2563 🔍

Tour Europe 2020

ทัวร์เกาหลี 2563 🔍

Tour Korea 2020



Thai consumers are now looking for more comfort, convenience, security and personalization in their journeys

Comfort

airport lounge  **+30%**

Related searches include
“credit card with lounge privilege”

Convenience

travel card  **+150%**

This increase has been spurred by the launch of travel cards by major Thai banks, which provide benefits like special exchange rates and access to airport lounges



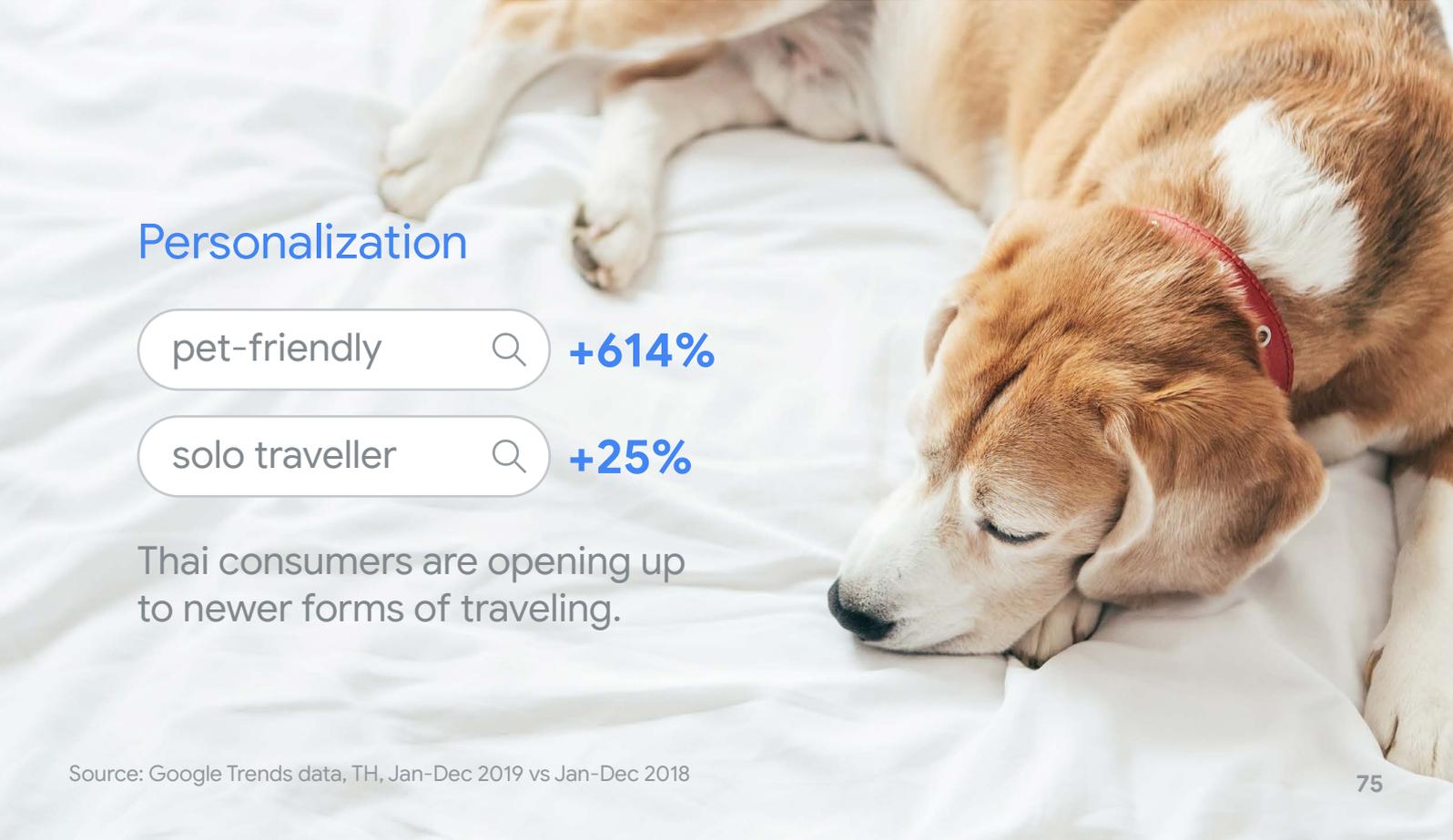
Source: Google Trends data, TH, Jan-Dec 2019 vs Jan-Dec 2018



Security

travel insurance 🔍 **+355%**

Travellers are looking to make sure that they plan for all eventualities on their trips



Personalization

pet-friendly 🔍 **+614%**

solo traveller 🔍 **+25%**

Thai consumers are opening up to newer forms of traveling.

Glossary

ASMR (Autonomous Sensory Meridian Response)

A tingling sensation that can come over someone when they watch certain videos or hear certain sounds

Carbon footprint

Greenhouse gas emissions that come from the production, use and end-of-life of a product or service

Internet Economy

Total gross merchandise value (GMV) across e-commerce, online media, ride hailing, online travel, and digital financial services

Metros

Bangkok and surrounding areas, including Nonthaburi, Samut Prakan, Pathum Thani, Samut Sakhon and Nakhon Pathom

Non-metros

All areas in Thailand, excluding the metros

Online media

Includes advertising, gaming, subscription music, and video on demand

Online travel

Includes flights, hotels, and vacation rentals

Online shopping

Purchase of products and services over the internet

Omnichannel

A multi-channel approach in creating seamless consumer experience across touchpoints

Ride hailing

Includes transportation and food delivery



Year in Search Thailand

Insights for Brands
Report 2020

Think with **Google**

