



# 2020 Year in Search Malaysia

Insights for Brands

Think with Google







# Anticipate what matters

In an increasingly digital world where information is abundant and highly accessible, the internet is expected to perform the role of a primary entertainer, food guide, personal shopper, travel agent, and an all-round source of truth.

For brands, it is critical to be top-of-mind by serving helpful information to consumers as they make decisions about where to go, what to do, or what to buy—whether it's to hunt for the best musang king nearby, shop for new wireless headphones, binge on episodes of 'Curi-curi cinta', or just making plans to spend the weekend in Taiping.

The key challenge for marketers is to clearly understand what matters to consumers in their moments of need, so they can be present at the right place, at the right time, with the right information. To accomplish this, marketers need to follow consumer intent, which is expressed through Search.

Malaysians view Search as a trusted advisor, as well as a vital source of answers, and turn to it when looking for information on:

...critical life decisions such as how to get married, where to seek medical assistance, and how to get a loan

**3.4x**

growth in “clinic near me” searches

**1.8x**

growth in **loan-related** searches

Rising searches:

Q ASB loan



Q car loan interest rate



**1.5x**

growth in **wedding-related** searches

Top searches:

Q kursus kahwin



Q rukun nikah





...how to navigate the end  
of a relationship or discover  
the meaning of a global pop hit

2.5x

growth in “**tips move on**”  
searches for romance  
and relationships

4.5x

growth in searches  
for “**lirik senorita**”





...finding  
spiritual  
guidance

1.8x

growth in searches  
for “**masjid terdekat**”

1.5x

growth in searches  
for “**temple near me**”

...and even the minutiae  
details of daily life

2x

growth in searches  
for “**best face wash**”

1.6x

growth in searches  
for “**best toothpaste**”





The best opportunities to shape consumer journeys and drive real business impact are when people are actively looking for help while making choices.

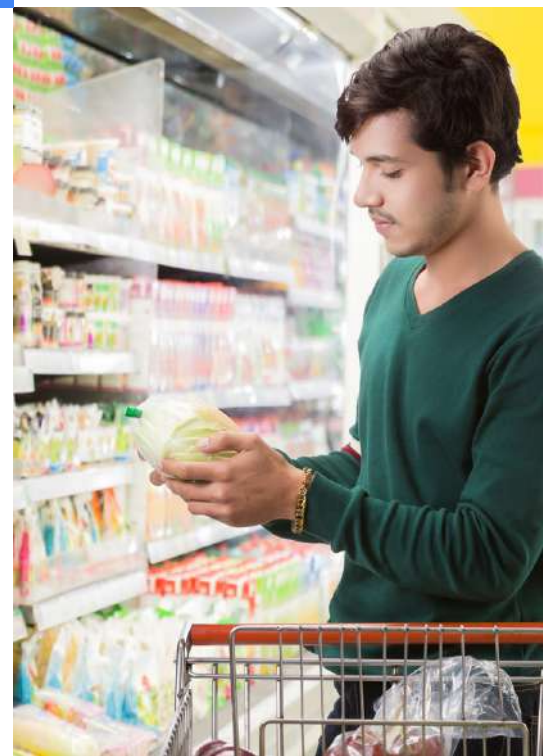
Year in Search Malaysia reveals significant trends shaping the Malaysian digital landscape, which will help brands gain a better understanding of what really drives customers. This knowledge will enable marketers, advertisers, and brands to evolve from understanding consumers to **anticipating what matters to them.**

# Top 5 country themes



**Best for me,  
right here, right now**

**Online  
meets offline**





**Beyond  
the metros**



**Local content  
is exploding online**



**Conscious  
consumers**



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# Best for me, right here, right now



Searches like “best biryani near me” and “best place to dive in Semporna” highlight how today’s users are on a quest for the best. However, the definition of “best” varies for almost everyone. To some, “best” can refer to the cheapest price, while for others it can imply convenience, efficiency, or even beauty or comfort.

And yet, consumers expect Search to not only understand the intent behind what they need, but to also deliver the best, most helpful answers that validate their choices:



...from minor purchases, such as personal care goods

**2x**

growth in searches  
for “**best face wash**”

**1.5x**

increase in searches  
for “**best lip balm**”

...to big ticket items  
like tech gadgets or  
travel

**2x**

growth in searches for  
“**best gaming phone**”

**1.6x**

increase in searches  
for “**best earphones**”

**1.3x**

growth in searches  
for “**best place in...**”

**1.2x**

rise in searches for  
“**best time to...**”

## Tailored to me

Consumers are no longer searching using generic terms, but instead rely on specific queries to look for products that cater to their individual needs.

# 65%

growth in searches for “**best serum for...**”

- Acne
- Combination Skin

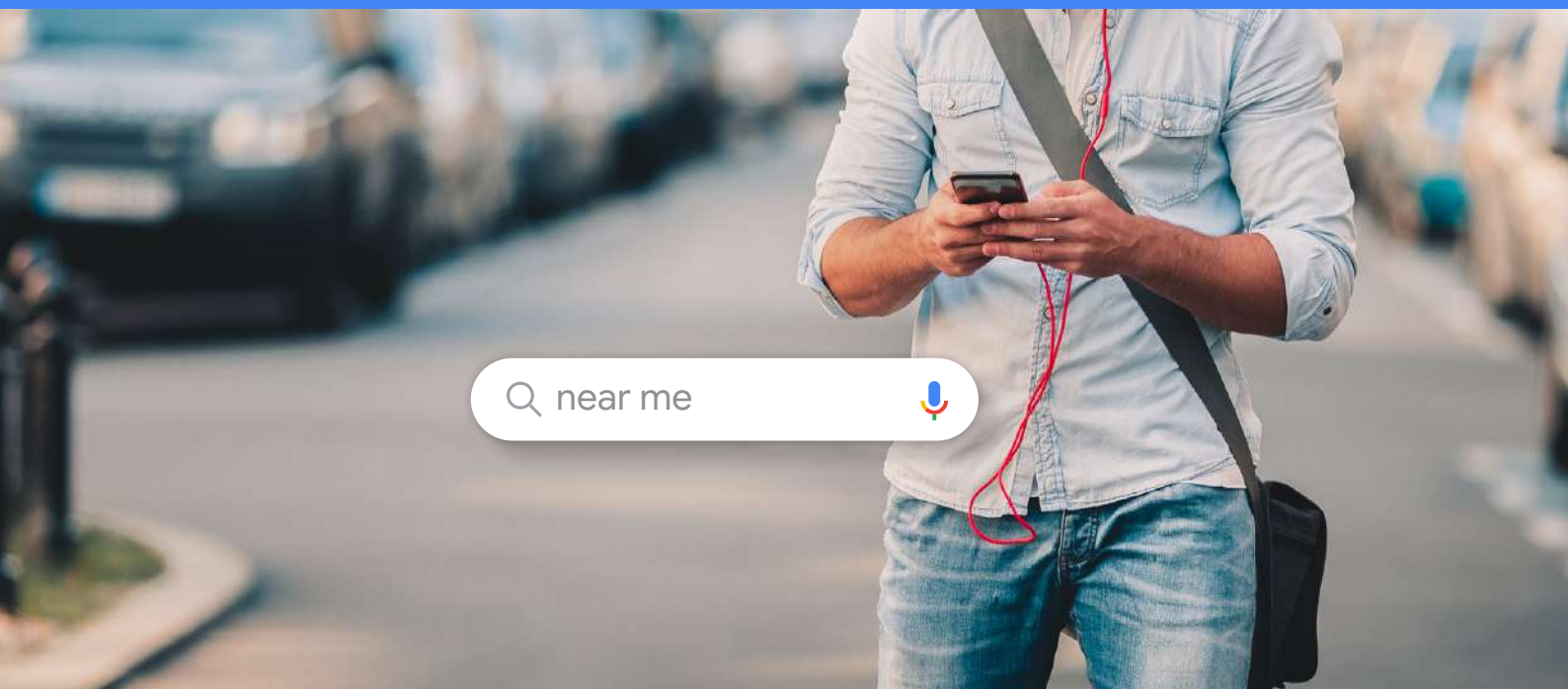
# 70%

growth in searches for “**best laptop for...**”

- Students
- Gaming
- Video Editing



# Proximity, speed, and convenience outrank brand preference online and offline



Growth in searches across categories highlighting these expectations:

near me



2.3x

best + near me



2.2x

open now



1.8x

delivery



1.2x

## However, speed and convenience take precedence online

With a plethora of options to choose from, customers will start looking elsewhere if a brand fails to provide the speed and convenience they seek.



**76%**

of Southeast Asians are more likely to purchase from mobile sites that make it easy to purchase or find answers

**53%**

of consumers will leave a mobile site that takes longer than 3 seconds to load

**20%**

drop in conversions for every second of delay in mobile page load time



Insights for Marketers

## Need for speed: the difference between retaining and losing customers

In today's hyper-connected and highly competitive market, there is a high threshold for speed and convenience when it comes to holding the attention of consumers. But, to truly win them over, you must either provide a seamless journey or offer a compelling human experience enticing enough for consumers to travel further or wait longer.

“For McDonald's McDelivery, getting food to your doorstep should be fast, simple, and easy. A few seconds of inconvenience while a hungry customer is searching for options can make the difference between a McDelivery order going through and a customer losing interest.

That's why it is critical that we are present and capture a customer's intent with highly contextual Search ads, so that McDonald's becomes the preferred choice when they're looking for the best, most convenient option for food online.”

- **Zaid Hasman**, Director of Digital, McDelivery

# Online meets offline



As people become more smartphone savvy and further integrate the internet into their daily lives, their digital and real-world experiences are no longer mutually exclusive. In fact, for most Malaysians, online and offline touchpoints are increasingly intersecting at various junctions of the consumer journey.

Today, it is common for shoppers to research on their smartphones while in-store or to first browse a product at a store before buying it online.



## Putting the search in research

### 4 out of 6

activities that Malaysians  
engage in before a purchase  
take place online

### 7 in 10

smartphone buyers say that  
they actively use Search in  
their purchasing journey



Top 5 most-searched  
product reviews on  
YouTube in 2019:

Q movie



Q car



Q phone



Q food



Q games

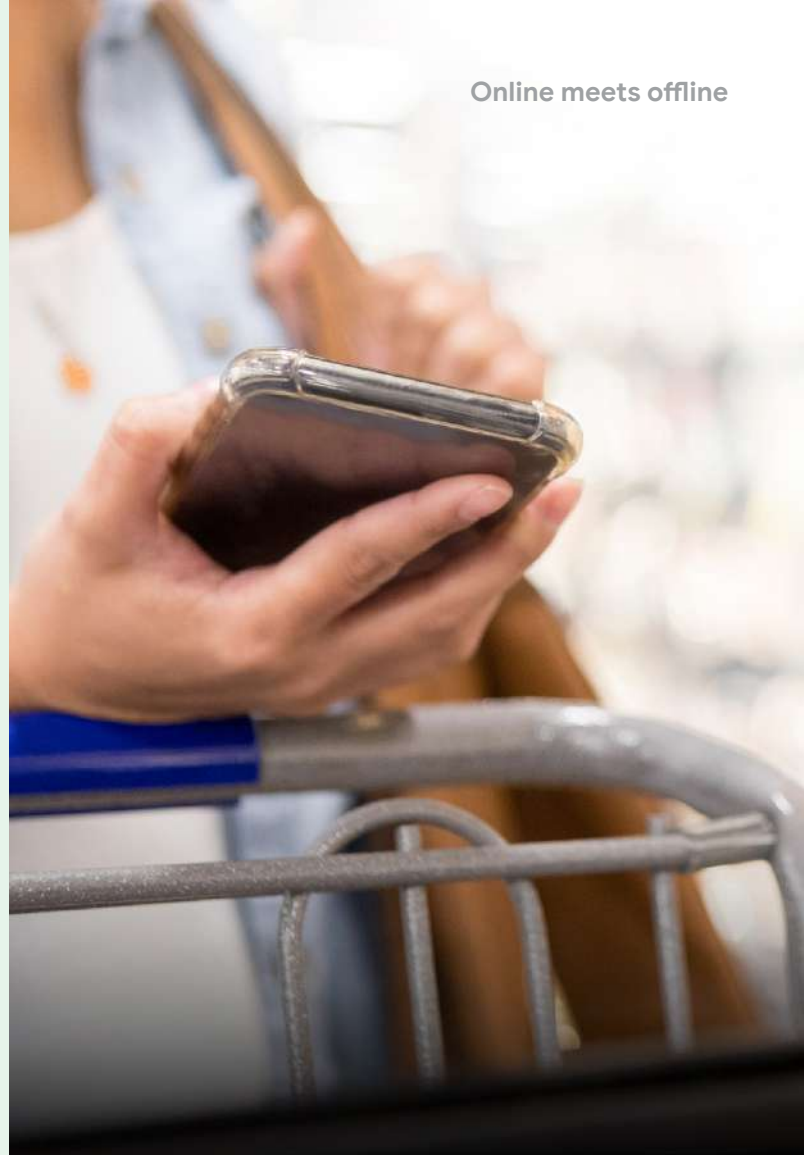




**While they are  
in-store, consumers  
continue to search  
before making their  
purchase**

**6 in 10**

in-store buyers use  
Search before making  
their final purchase



## Offline starts online

Malaysians turn to  
Search to discover  
and navigate to new,  
offline places that:

**...satisfy their food cravings**

Q best restaurant near me  **4.2x**

Q tempat makan best di...  **1.4x**

Q durian near me  **2.7x**

Q bubble tea near me  **18x**

Q best biryani near me  **2x**

## ...solve their auto issues

Q bengkel kereta terdekat 🎤 1.6x

Q petrol station near me 🎤 1.2x

Q kedai tayar terdekat 🎤 3.3x

## ...provide financial solutions

Q bank near me 🎤 1.6x

Q atm near me 🎤 1.5x

## ...offer health, beauty, and wellness solutions

Q klinik gigi terdekat 🎤 3.2x

Q hair salon near me 🎤 1.3x

Q massage near me 🎤 1.4x



Insights for Marketers

## Bridging the gap between online and offline

With more and more walk-ins being driven by digital, consumers have never been as well-informed as they are today. To truly engage with customers, businesses must empower them with the right and relevant information, help them find solutions to their problems, and keep them coming back for more with new and meaningful ways to stay connected, both online and offline.

“When a customer walks into our store, they’re no longer coming in with a cutout of our newspaper ad. They have already done their research on Search and YouTube, and know a lot about the product.

Thus, we have to make sure we are present at every touchpoint of a customer’s journey. YouTube and Search is at the very center of that.”

- **June Tai**, Head of Digital Marketing,  
Senheng Electric



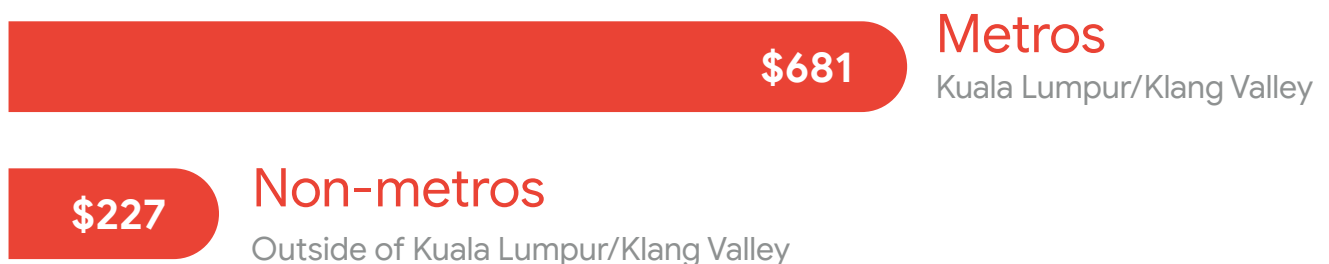


# Beyond the metros

Non-metro users are rapidly breaking the perception that those living outside Kuala Lumpur and the Klang Valley are not digitally savvy. In fact, over the last few years, the non-metro user base has been growing steadily and has become an active part of Malaysia's thriving digital landscape.

## Metros currently spend 3x more than non-metros

Gross Market Value (GMV) per capita in 2019:





## However, the GMV per capita of non-metro users is expected to grow 3x by 2025

### Metros

Expected growth: 1.8x

Expected value: \$1245

Driven by: User engagement

### Non-metros

Expected growth: 3x

Expected value: \$671

Driven by: User acquisition





# When it comes to digital, users from the two areas expect very different benefits:

## Metros

Improved convenience and better value for users, which helps increase the overall productivity of society

## Non-metros

Access to products and services for users, which leads to greater social inclusivity

## Non-metro users have different priorities from their metro counterparts

Consumers from the metros care deeply about functionality, performance, and lifestyle options, and are happy to spend when these conditions are met. On the other hand, non-metro consumers prioritise affordability and content such as news and entertainment.







## Metros vs Non-metros:

Consumer  
products

**73%**

of metro users use  
Search to find hair care  
products that **address**  
hair problems

**65%**

of non-metro  
users search for  
**affordability**

Smartphones

**66%**

of metro users search  
for **smartphone**  
performance

**69%**

of non-metro  
users search for  
**battery life**



... except when it comes to food

Top 3 most searched categories:

### Metros

Q Shopping



Q Technology



Q Dining and Restaurants



### Non-metros

Q News



Q Entertainment and Arts



Q Dining and Restaurants



# Non-metro users love the access e-commerce gives them

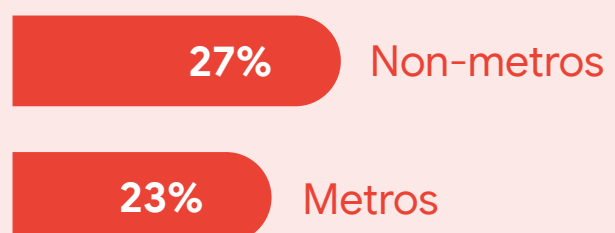
Malaysians living in the metro areas have always had the option of driving to their nearest electronics store and buying the latest smartphone models. In contrast, those living in non-metro areas have not always had this luxury.

With the proliferation of e-commerce platforms, consumers from non-metro areas have access to the same options as their metro peers and are buying more smartphones online than their big-city counterparts.



Source: IPSOS, Path to Purchase Study, Smartphones, Malaysia, 2019

Percentage of Malaysians buying smartphones online:







Insights for Marketers

## Welcome to the age of intent

Purchasing behaviour may differ between metro and non-metro users, but targeting audiences based on demographics alone can be unreliable and inaccurate. For brands, it is **important to connect with consumers' intent** and affinity as it provides a more complete picture of their audience and allows for more relevant and personalised content that addresses their distinct needs.

“At Maxis, we work passionately to deliver innovative services and connectivity to every Malaysian, from individuals to homes, businesses and the community, rural and urban.

As smartphones become an integral part of every user's life, we see our customer segments consuming services that are contextual to their needs - be it for communication, entertainment, shopping, or finance. By recognizing these differences, it enables us to ensure we provide the right experiences to the right customers at the right time.”

- **Koay Chee Keong**, Head of Digital, Maxis

# Local content is exploding online



Malaysians have a voracious appetite for online content, which is illustrated by the significant increase in video on demand, subscriptions, and television content-related searches on both Search and YouTube.

This sharp growth in video, especially on mobile, is accompanied by a booming interest in local content among Malaysians, as well as a desire to watch news and entertainment online.

# 5x

increase in **video on demand (VOD)** and **subscription-related searches**

# Over 90%

of Malaysian internet users above the age of 18 **watch YouTube every month**



Top 5 most-watched YouTube categories:

Q Music



Q Movies



Q TV Shows



Q Hobbies



Q Food





Growth in  
content-related  
YouTube searches:

Q Vlogs 1.6x

Q Gaming 1.4x

Q Drama 1.4x



## Buatan Malaysia

Malaysians are hungry for homegrown video content

**50%**

growth in the total hours  
of content uploaded from  
Malaysia on YouTube

**7 of the top 10**

most viewed YouTube  
channels in the country  
are from Malaysia

**90%**

growth in watch time of local variety show content

Insights for Marketers

## Drive effective campaigns with a multichannel approach

As consumers begin to branch out in their use of media, marketers can reach them on more than one channel. By telling a cohesive story with integrated, customised campaigns across Search, YouTube, and TV, **brands can have up to 67% higher return on investment than non-integrated campaigns.**

“Malaysians are increasingly watching a lot of local content online – often on their smartphones. In view of this shift in viewing habit, it is our Group’s long-term strategy to democratise our content, in close partnership with YouTube, to make our content available everywhere online and offline for our viewers.

In fact, just in the last 12 months, we have seen our overall Group’s YouTube channels (e.g. TV3 Malaysia, one of Malaysia’s top channels for mass Malays) grow by almost 2.2x in the number of subscribers.”

– **Nicholas Sagau**, Group General Manager, Media Prima Digital

# Conscious consumers



Sustainability isn't just a buzzword for Malaysians. They're actively educating themselves on environmental issues and searching for products and services that can help them live an eco-friendly life.

People across the country are changing the way they live and purchase and are also encouraging businesses to change the way they operate.



## Growth in sustainability-related searches:

Q metal straw



3.8x

Q eco shop



1.8x

Q biodegradable plastic



2x

Q hybrid car



1.7x



**From learning how to limit the use of water to seeking products that have a sustainable supply chain, Malaysians are actively researching about their impact on the environment**

Q sustainable fashion



2.1x

Q haze index



12x

Q carbon footprint



1.4x

Q climate change



1.5x

Q zero waste



1.8x

# Views on ownership are changing as consumers warm up to the idea of second-hand goods and rentals

Due to the proliferation of services from the sharing economy, Malaysians are showing a greater interest in the idea of “re-commerce”—the growing practice of using digital platforms to purchase, sell, or rent used goods.

Q second-hand furniture  1.7x

Q rental car  2.1x

Q used car  1.3x

Q dress rental  1.9x

Insights for Marketers

## A win-win by going green

Sustainability is here to stay. Consumers are looking to brands for leadership when it comes to mindful production and consumption. **By promoting an eco-friendly outlook and creating sustainable products and services**, brands can help consumers go green, while also doing the ethical and responsible thing.

# Beauty, health and personal care





**Across the world, consumers are becoming more beauty and health-conscious. The quest for personal care has never been more apparent and is driving many Malaysians to search and buy more**

**Fastest-growing categories:**

Q hair care  **+25%**

Q face care  **+20%**

Q sun protection  **+95%**



## Rise in searches:

Q serum terbaik  **+190%**

Q oil cleanser  **+135%**

Q hydrating toner  **+100%**

Q mask muka  **+80%**

Q double cleansing  **+70%**

# 1.4x

growth in YouTube  
watch time for  
**beauty tips-**  
**related** videos

## Halal beauty: Products that cater to Muslim women's concerns are on the rise

# 1.7x

growth in **halal-related**  
beauty searches

## Top searches:

Q pewarna rambut halal 

Q halal nail polish 

Q produk kosmetik halal 

## Did you know?

Interest in beauty products is not just restricted to women. Men are also looking to find solutions for their grooming needs.

## 1.5x

growth in “...for men” searches in the face and body care category

### Top searches include:

Q perfume



Q hair colour



Q skin care



Q shaver



Q face wash





# Many consumers are looking for ingredients that address their individual skin concerns

Increase in searches:

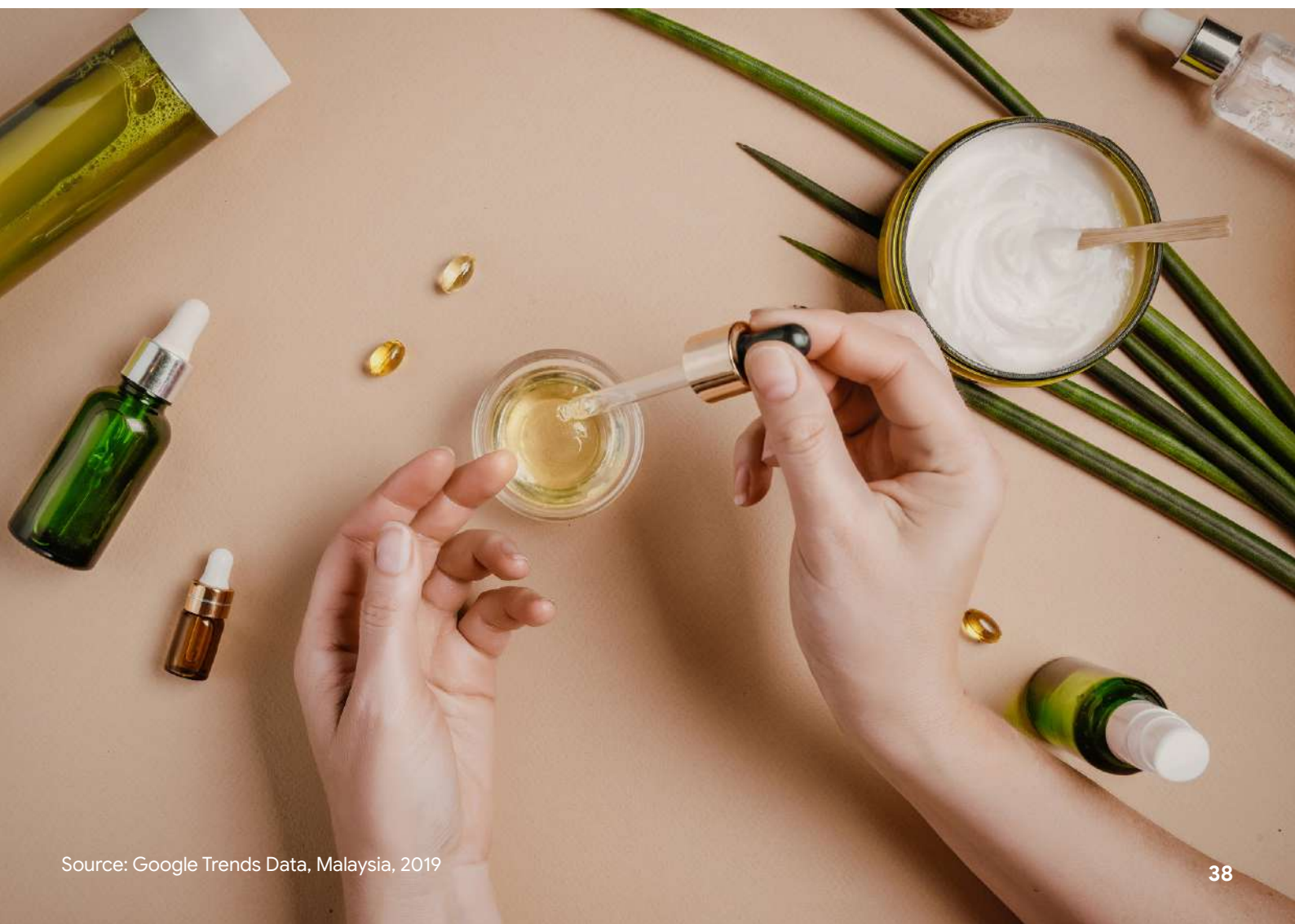
Q niacinamide 8.8x

Q tamanu oil 1.9x

Q retinol 1.7x

Q micellar water 1.7x

Q alpha arbutin 1.6x





**Malaysians are also looking for ways to consume guilt-free and choose brands that are environmentally conscious**

**1.6x**

growth in “eco friendly” searches

**1.4x**

increase in “cruelty free” queries

A growing number of Malaysians are curious about good personal care, health, and hygiene

**1.2x**

increase in **health-related** searches

**2.7x**

growth in “**kebersihan diri**” queries

**1.5x**

rise in searches for **body wash, face wash, and mouthwash**





# Malaysians are concerned about the haze and the spread of infectious diseases

This is driving them to search for products and services that offer protection

Q mask n95 19.1x

Q air purifier 1.6x

Q hand wash 1.4x

Q vitamin c 1.4x

Q hand sanitizer 2.0x



# Food and cooking



Malaysians are hardcore foodies. From eating to cooking and even watching experiential content such as “mukbang”, people across the country have an abiding love affair with food

Search is a great facilitator of this love affair as the platform helps Malaysians decide what and where to eat, and perhaps most importantly: what’s best to eat

### Top 5 food-related searches in Malaysia:

Q recipes



Q restaurants



Q chicken



Q cooking



Q cake







## And while local foodies are curious about global cuisine

Top international cuisines on Search:

Q Thai



Q Japanese



Q Korean



Q French



Q Italian







## ...Malaysian food still reigns supreme

Top 5 Malaysian food searches:

Q ayam masak...



Q nasi ayam



Q durian



Q nasi lemak



Q nasi goreng



# Malaysians' love for culinary trends is the biggest contributor to food-related searches in the country, spanning across:

## Health food

Q chia seed 1.4x



Q plant-based food 1.6x



Q vegan food 1.8x



Q kombucha 1.7x



## Food trends

Q ghost pepper 15.7x



Q bubble tea 8.8x



Q black thorn durian 2.7x



Q bomboloni 79x





# Balancing the love for food and the need to be healthy

Malaysians are growing more curious about healthy ingredients like “**chia seeds**” and “**plant-based food**”, and often search for healthy diets and eating practices.

Q diet keto



13.3x

Q oatmeal diet



6.2x

Q intermittent fasting



5x

## Delivery is going beyond fast food

Q bubble tea delivery



13.3x

Q cake delivery

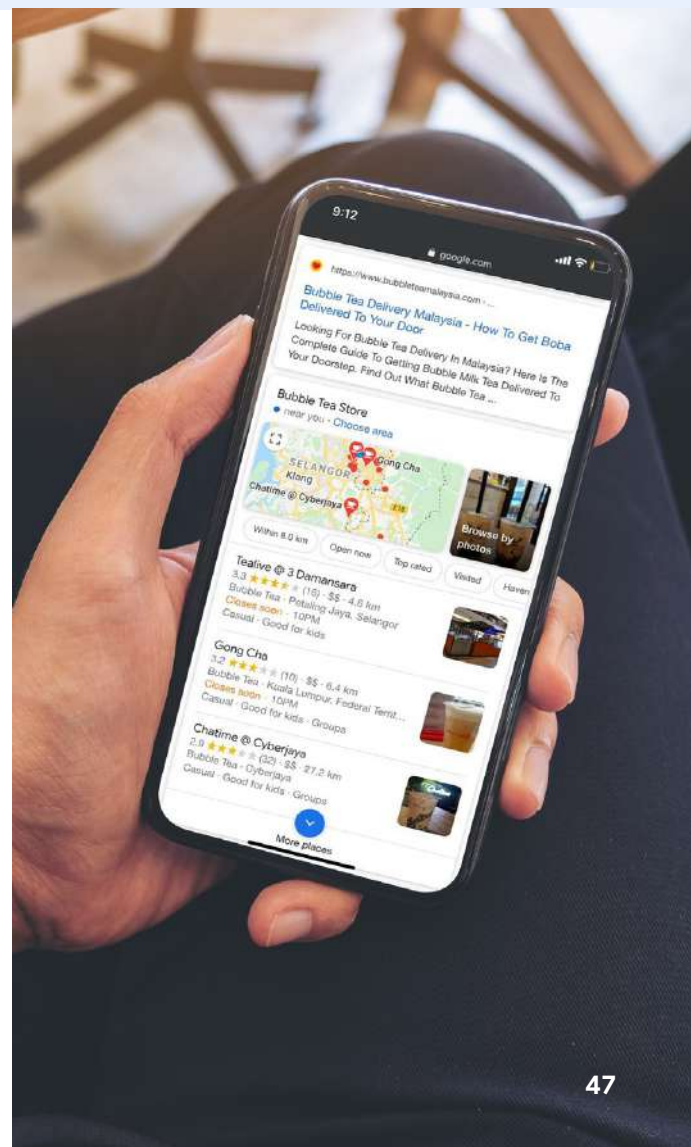


5x

Q grocery delivery



6.2x



# Food is also becoming a source of communal entertainment

There is growing interest in mukbang videos (live streams of creators eating large meals, made popular in Korea) and ASMR eating (a video genre that creates a pleasurable tingling sensation for the viewer through sound).

These videos have a participatory and interactive relationship with viewers who connect with creators through live comment or enjoy the shared experience of eating something as they're watching someone else eat.

## 250%

jump in “**asmr eating**” searches

## 150%

rise in watch time for **mukbang content** on YouTube

“Malaysians love their food, especially when it’s spicy! When we noticed that “spicy noodles” was trending, we took the opportunity to create our very own extra spicy, extra tasty instant noodle—MAGGI® Pedas Giler.

As part of our marketing strategy to be top of mind among consumers, we leveraged the craze of food eating challenge like mukbang and ASMR and launched #CabaranKontrolMacho—an ASMR inspired challenge with a comedy twist—that encouraged Malaysians to upload their very own #CabaranKontrolMacho videos under the #maggipedasgiler campaign.”

— **Beh Hooi Ling**, Senior Brand Manager, Nestle Products Sdn Bhd





# Finance



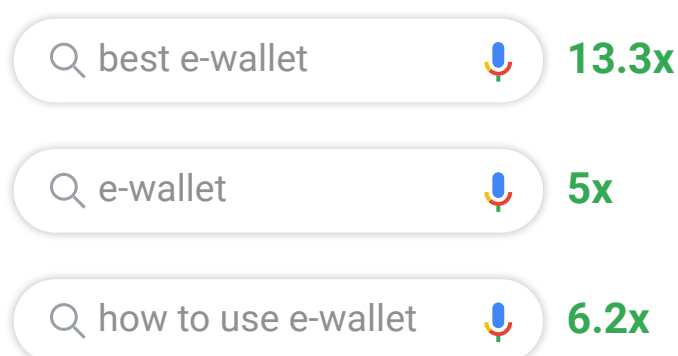
With the rise in smartphone penetration, greater consumer trust, and launch of the e-Tunai Rakyat initiative by the government, Malaysia is rapidly moving towards becoming a cashless society



## From wallets to e-wallets

Malaysians are rapidly adapting to digital wallets and see them as a convenient and practical option for cashless transactions.

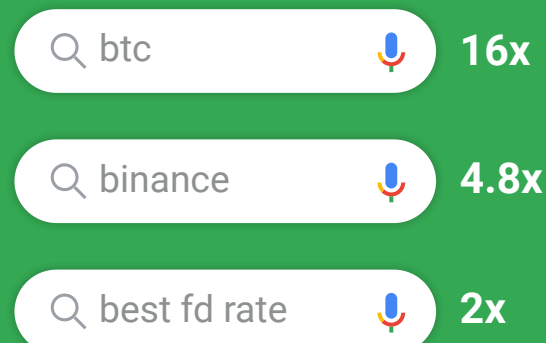
### Rise in searches:



# Crypto crazy

While Malaysians are showing massive interest in newer investment options like bitcoin and other cryptocurrencies, there is still a healthy interest in traditional instruments such as fixed deposits.

Increase in searches:





# Malaysians are always on the lookout for loan and credit card options, along with the best rewards, discounts, and promotions on offer

## 1 in 2

Malaysians used Search at some point during their path to purchase for **credit cards/personal loans**

## 1.9x

growth in **personal loan-related** searches

## 1.4x

growth in searches for **“best credit card”**



## Top credit card-related searches:

Q best prices



Q promotions/rewards



Q offer availability and feature specs



# Finance is complicated

Malaysians use “how-to” queries extensively to navigate the complexities of banking, investments, and other financial matters.

Q how to pay



1.4x

Q how to change



1.5x

Q how to calculate



1.4x

Q how to activate



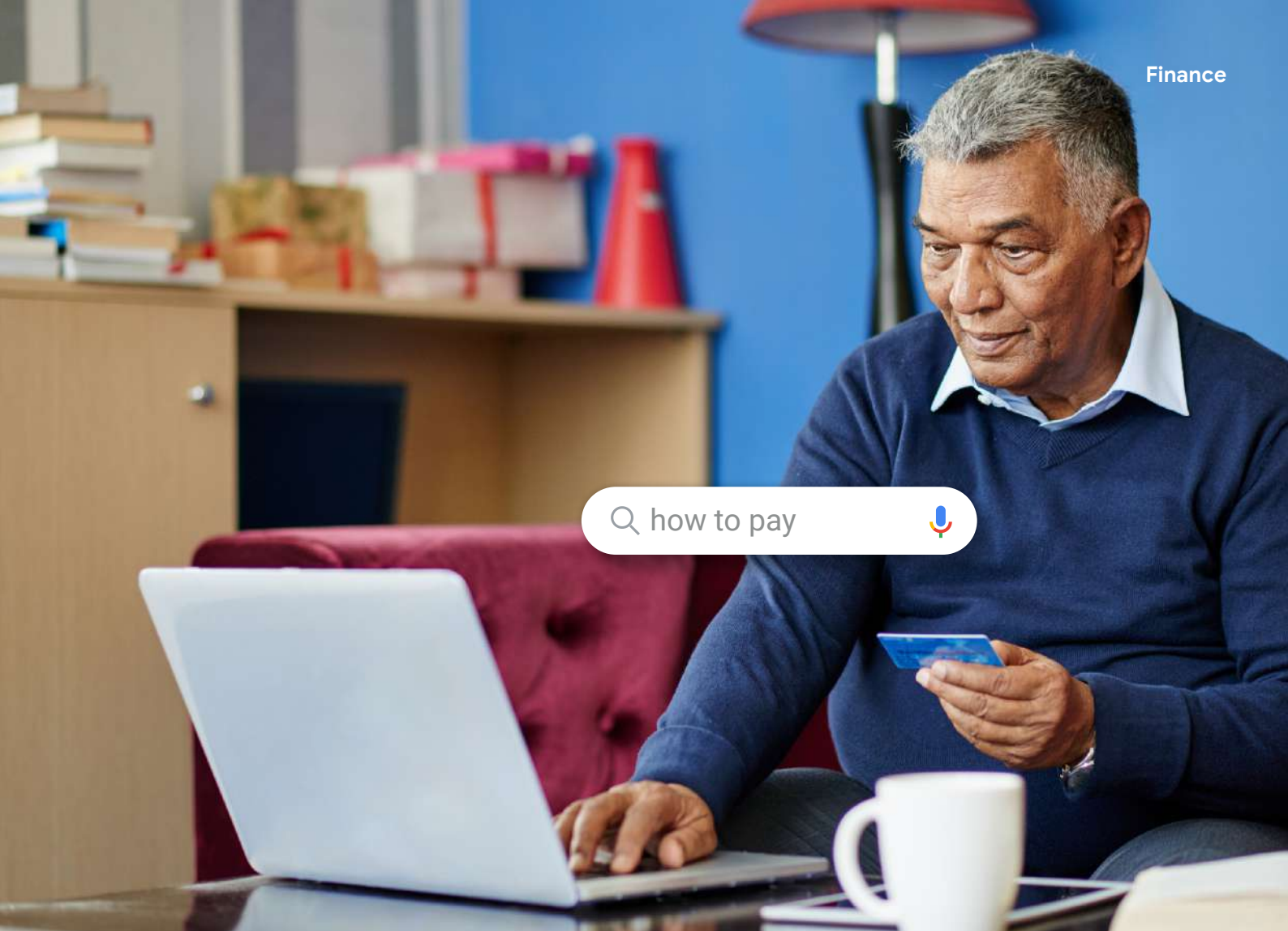
1.3x

Q how to apply



1.8x





“Our customers are spending a lot of time online—they’re turning to the internet to understand the intricacies of how to manage their finances and researching on the latest financial products—all before they set foot in a branch.

At CIMB, by understanding our consumer search behaviour, we can truly meet consumers in the moments that matter - be it when they are planning to buy a car or a house, starting a business, saving for retirement, or when they’re investing”

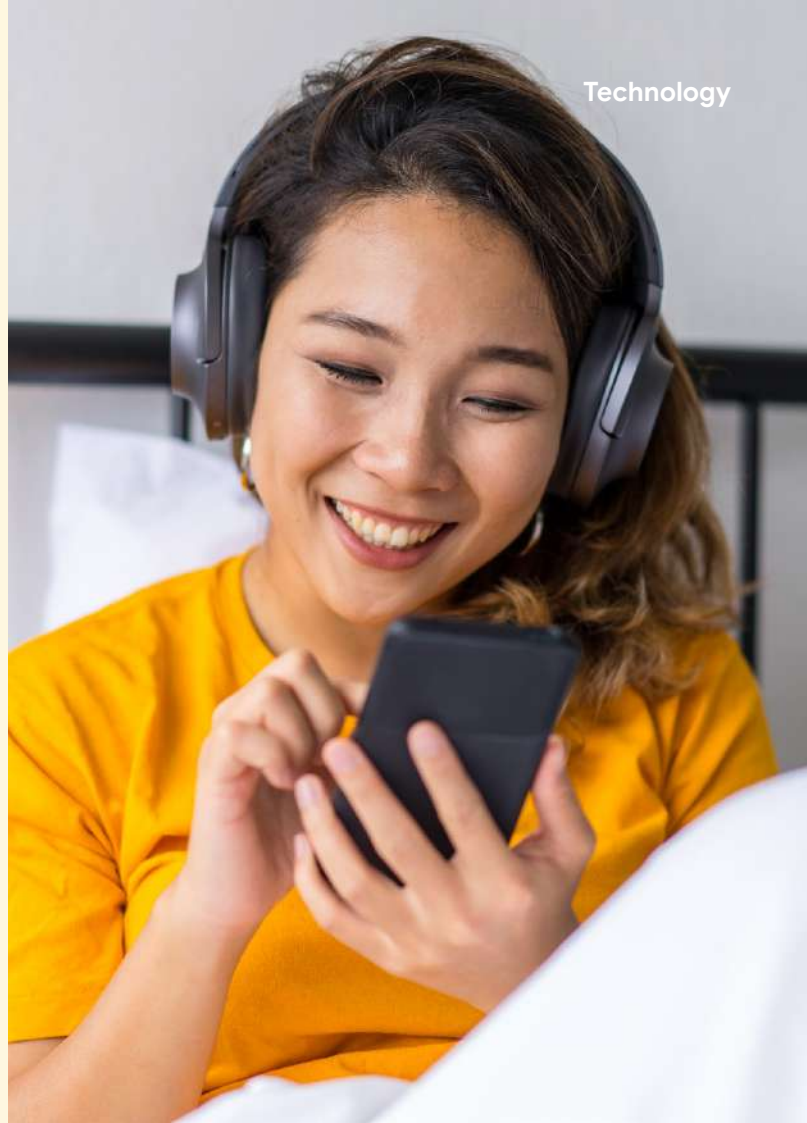
— **Mohamed Adam Wee Abdullah,**  
Group Chief Marketing Officer, CIMB



# Technology



Whether it's the latest smartphone or interests in the Internet of Things (IoT), Malaysians are big fans of the convenience and greater control that technology offers them



## Untangling tasks with wireless products

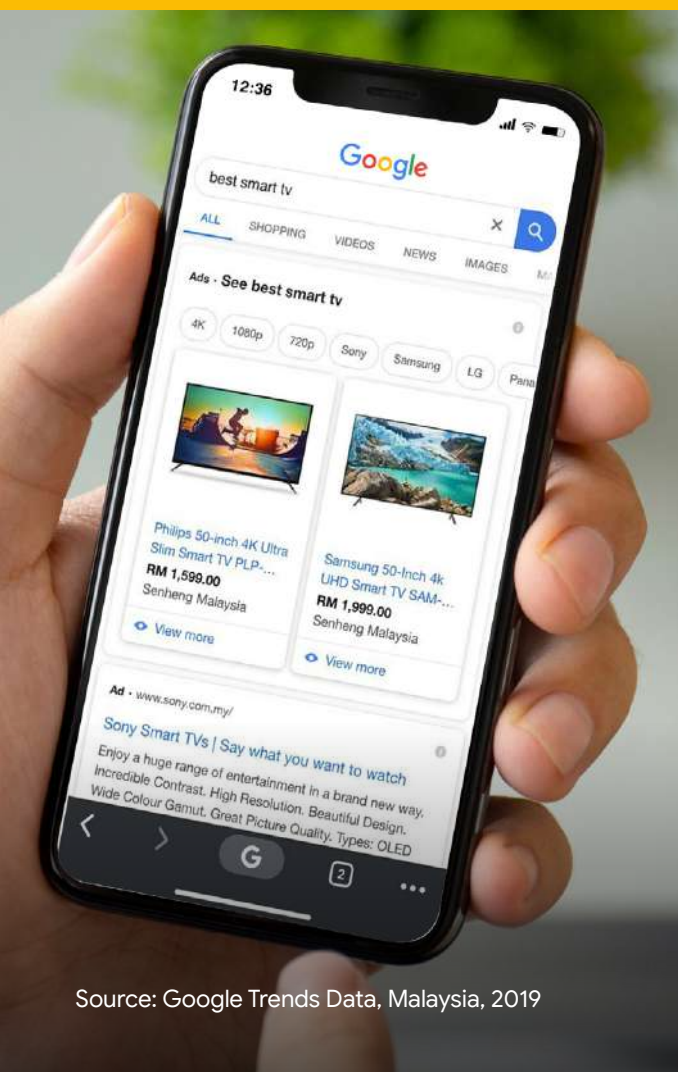
Growth in “wireless” searches:

Q wireless earphone 3.4x

Q cordless vacuum 2.6x

Q wireless charger 1.5x

IoT searches continue to rise across Malaysia, as consumers look to exercise greater control in life



smart tv 1.8x

smart watch 1.4x

smart lock 1.2x



# Malaysians are looking for the latest technology to meet their individual needs

## 1.8x

growth in searches for “best budget...”

Q phone



Q laptop



Q [device] for gaming purposes



As the fourth most engaged mobile users globally, it is no surprise that Malaysians love their smartphones



**78%**

of Malaysians are  
smartphone owners

**1 in 2**

Malaysians aspire to  
change their phones in  
**less than 2 years**





## Smartphone buyers make informed decisions with the help of Search

### 85%

of Malaysians who have purchased smartphones in the past 3 months use Search daily

### 66%

of Malaysians use Search to find information during their purchasing journey

### 61%

of premium smartphone buyers use Search before buying a phone





## Did you know?

Despite only 1-in-4 smartphones in Malaysia being purchased online, mobile search is a critical decision-making tool for in-store buyers

# 61%

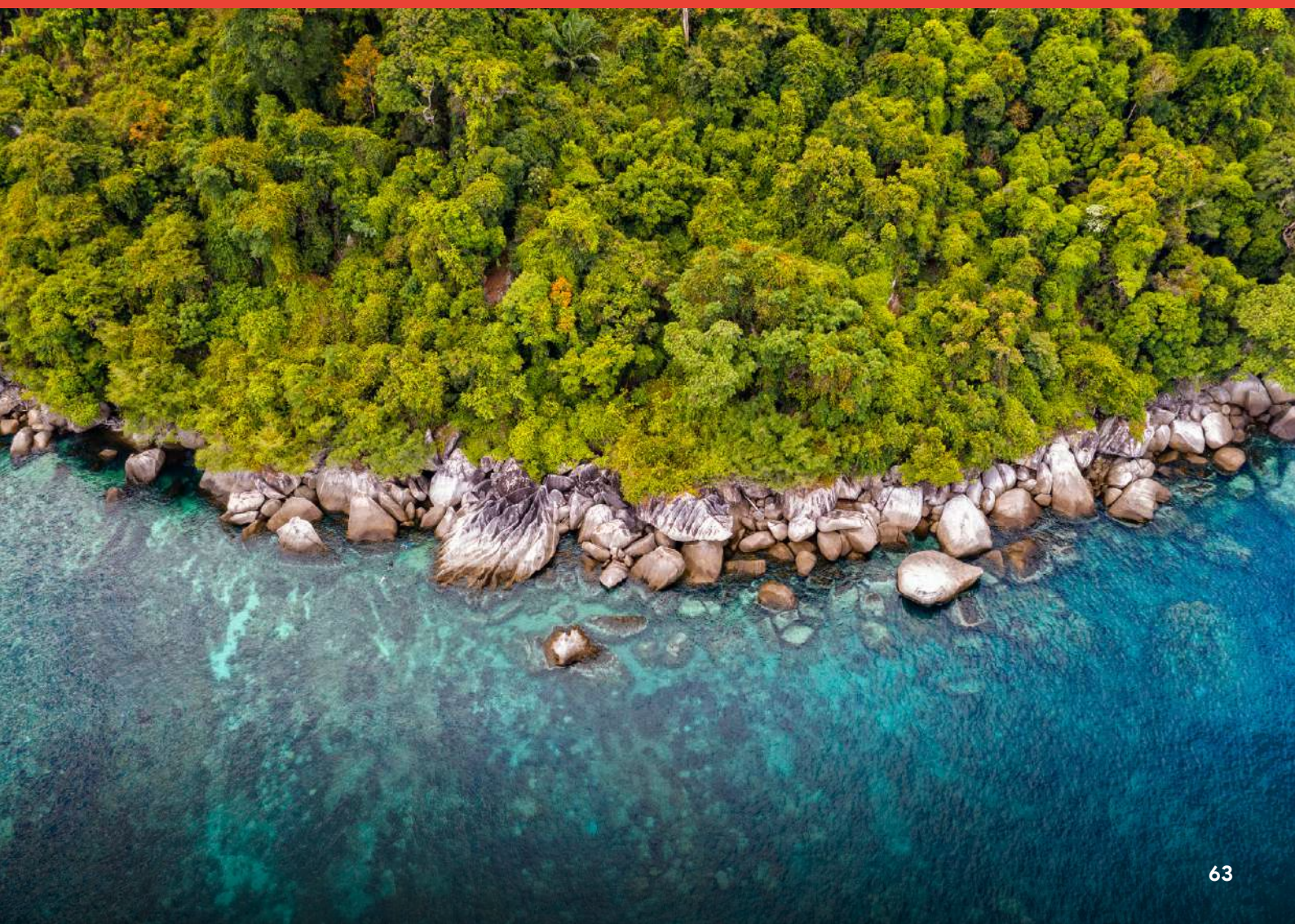
of all smartphone buyers still continue searching while in-store

# 21%

of all in-store buyers say that Search helps them find new models



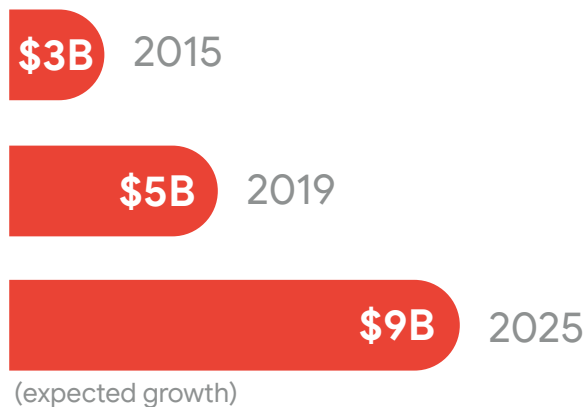
# Travel





# Malaysia's online travel market is almost doubling in size every five years

Online travel market  
in Malaysia:



## 10%

increase in **travel-related**  
searches







**Malaysians  
are now  
seeking more  
premium  
comfort and  
safety on  
their journeys**

**20%**

rise in “**lounge**” queries

**30%**

growth in “**reschedule**”  
searches

**60%**

increase in “**travel  
insurance**” queries

# From staycations to newer forms of travel, Malaysian travellers are looking for local experiences and activities they can immerse themselves in

Q staycation



+60%

Q glamping



+70%

Q boutique hotel



+30%





# 120%

growth in travel-related  
“near me” searches

## Top searches:

Q hotel near me



Q lrt near me/taxi near me/train near me



Q restaurant near me



# 20%

growth on “**things to do**”  
searches

# 40%

growth in “**theme park**”  
searches



# Highlands, small towns, and islands

Domestic destinations continue to see rapid growth as Malaysians go local

## Top 10 fastest-growing domestic destinations

Q Semporna



Q Genting Highlands



Q Simpang Empat Semanggol



Q Hulu Langat



Q Taiping



Q Sandakan



Q Labuan



Q Gambang



Q Fraser's Hill



Q Alor Setar



## Regional SEAsCapes

Spurred by the increase in low-cost, short-haul flights in the region, Malaysians are now frequently travelling to their Southeast Asian neighbors with a special preference for quiet, pristine getaways near the water

### Top 10 fastest-growing destinations within Southeast Asia

Q Can Tho



Q North Kuta



Q Surat Thani



Q Nusa Penida



Q Phu Quoc



Q Batam



Q Dalat



Q Hua Hin



Q Krong Preah Sihanouk



Q Koh Samui





Malaysians are also flying around the world to popular tourist destinations, with Europe being a favourite:

## Top 10 fastest-growing international destinations

Q Fukuoka



Q Frankfurt



Q Christchurch



Q Mecca



Q Barcelona



Q Adelaide



Q Madrid



Q Copenhagen



Q Lisbon



Q Milan







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