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

1.8x growth in loan-related searches

Rising searches:
- ASB loan
- car loan interest rate

1.5x growth in wedding-related searches

Top searches:
- kursus kahwin
- rukun nikah

Source: Google Trends Data, Malaysia, 2019
...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”

Source: Google Trends Data, Malaysia, 2019
...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”

Source: Google Trends Data, Malaysia, 2019
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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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:

Source: Google Trends Data, Malaysia, 2019
...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...”

Source: Google Trends Data, Malaysia, 2019
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

Source: Google Trends Data, Malaysia, 2019
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

Source: Google Trends Data, Malaysia, 2019
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

Source: Accenture Interactive, Masters of Mobile Study, SEA, 2018
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:

- movie
- car
- phone
- food
- games

Sources: IPSOS, Path to Purchase Study, Smartphones, Malaysia, July 2019
Google Trends Data, Malaysia, 2019
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

- best restaurant near me: 4.2x
- tempat makan best di...: 1.4x
- durian near me: 2.7x
- bubble tea near me: 18x
- best biryani near me: 2x

Sources: Google Trends Data, Malaysia, 2019
IPSOS, Path to Purchase Study, Smartphones, Malaysia, 2019
...solve their auto issues

- bengkel kereta terdekat (1.6x)
- petrol station near me (1.2x)
- kedai tayar terdekat (3.3x)

...provide financial solutions

- bank near me (1.6x)
- atm near me (1.5x)

...offer health, beauty, and wellness solutions

- klinik gigi terdekat (3.2x)
- hair salon near me (1.3x)
- massage near me (1.4x)

Source: Google Trends Data, Malaysia, 2019
“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
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:

**Metros**
Kuala Lumpur/Klang Valley

$681

**Non-metros**
Outside of Kuala Lumpur/Klang Valley

$227

*Source: e-Conomy SEA Report, Google, Temasek, Bain & Company, 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

Source: e-Conomy SEA Report, Google, Temasek, Bain & Company, 2019
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.

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

Source: IPSOS, Path to Purchase Study, Haircare, Smartphones, Malaysia, 2019
... except when it comes to food

Top 3 most searched categories:

**Metros**
- Shopping
- Technology
- Dining and Restaurants

**Non-metros**
- News
- Entertainment and Arts
- Dining and Restaurants

Source: IPSOS, Google Search User Insights, Malaysia, 2018
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.

Percentage of Malaysians buying smartphones online:

- **27%** Non-metros
- **23%** Metros

Source: IPSOS, Path to Purchase Study, Smartphones, Malaysia, 2019
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.
Local content is exploding 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

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**Top 5 most-watched YouTube categories:**

- Music
- Movies
- TV Shows
- Hobbies
- Food

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Sources: Google Trends Data, Malaysia, 2019; Comscore VMX Multi-Platform, Total Audience, Malaysia, July 2019; Google Internal Data, Malaysia, 2019
Growth in content-related YouTube searches:

- Vlogs: 1.6x
- Gaming: 1.4x
- 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

Source: Google Trends Data, Malaysia, 2019
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:

- metal straw: 3.8x
- eco shop: 1.8x
- biodegradable plastic: 2x
- 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.

- sustainable fashion: 2.1x
- haze index: 12x
- carbon footprint: 1.4x
- climate change: 1.5x
- zero waste: 1.8x

Source: Google Trends Data, Malaysia, 2019
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.

<table>
<thead>
<tr>
<th>Search Term</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>second-hand furniture</td>
<td>1.7x</td>
</tr>
<tr>
<td>rental car</td>
<td>2.1x</td>
</tr>
<tr>
<td>used car</td>
<td>1.3x</td>
</tr>
<tr>
<td>dress rental</td>
<td>1.9x</td>
</tr>
</tbody>
</table>

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:

- hair care +25%
- face care +20%
- sun protection +95%

Source: Google Internal Data, Malaysia, 2019
Rise in searches:

- serum terbaik: +190%
- oil cleanser: +135%
- hydrating toner: +100%
- mask muka: +80%
- double cleansing: +70%

1.4x growth in YouTube watch time for beauty tips-related videos

1.7x growth in halal-related beauty searches

Top searches:

- pewarna rambut halal
- halal nail polish
- produk kosmetik halal

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

Sources: Google Internal Data, Malaysia, 2019; Google Trends Data, Malaysia, 2019
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:

- perfume
- hair colour
- skin care
- shaver
- face wash
Many consumers are looking for ingredients that address their individual skin concerns

Increase in searches:

- niacinamide 8.8x
- tamanu oil 1.9x
- retinol 1.7x
- micellar water 1.7x
- alpha arbutin 1.6x

Source: Google Trends Data, Malaysia, 2019
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

Source: Google Trends Data, Malaysia, 2019
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

Source: Google Trends Data, Malaysia, 2019
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.

- mask n95: 19.1x
- air purifier: 1.6x
- hand wash: 1.4x
- vitamin c: 1.4x
- hand sanitizer: 2.0x

Source: Google Trends Data, Malaysia, 2019
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:

- recipes
- restaurants
- chicken
- cooking
- cake

Source: Google Trends Data, Malaysia, 2019
And while local foodies are curious about global cuisine

Top international cuisines on Search:

- Thai
- Japanese
- Korean
- French
- Italian

Source: Google Trends Data, Malaysia, 2019
...Malaysian food still reigns supreme

Top 5 Malaysian food searches:

- ayam masak...
- nasi ayam
- durian
- nasi lemak
- nasi goreng

Source: Google Trends Data, Malaysia, 2019
Malaysians’ love for culinary trends is the biggest contributor to food-related searches in the country, spanning across:

**Health food**

- chia seed: 1.4x
- plant-based food: 1.6x
- vegan food: 1.8x
- kombucha: 1.7x

**Food trends**

- ghost pepper: 15.7x
- bubble tea: 8.8x
- black thorn durian: 2.7x
- bomboloni: 79x

Source: Google Trends Data, Malaysia, 2019
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.

Source: Google Trends Data, Malaysia, 2019

Delivery is going beyond fast food

Source: Google Trends Data, Malaysia, 2019
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

Sources: Google Internal Data, Malaysia, 2019; Google Trends Data, Malaysia, 2019
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:

- **best e-wallet**: 13.3x
- **e-wallet**: 5x
- **how to use e-wallet**: 6.2x

Source: Google Trends Data, Malaysia, 2019
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:
- btc 16x
- binance 4.8x
- best fd rate 2x

Source: Google Trends Data, Malaysia, 2019
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”.

Sources: Kantar, Path to Purchase Study, Personal Loans, Credit Cards, Malaysia. 2017; Google Trends Data, Malaysia, 2019.
Top credit card-related searches:

- best prices
- promotions/rewards
- 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.

Source: Kantar, Path to Purchase Study, Personal Loans, Credit Cards, Malaysia, 2017; Google Trends Data, Malaysia, 2019
“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:

- wireless earphone: 3.4x
- cordless vacuum: 2.6x
- wireless charger: 1.5x

Source: Google Trends Data, Malaysia, 2019
IoT searches continue to rise across Malaysia, as consumers look to exercise greater control in life.

Source: Google Trends Data, Malaysia, 2019
Malaysians are looking for the latest technology to meet their individual needs

1.8x
growth in searches for “best budget...”

Source: Google Trends Data, Malaysia, 2019
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.

Sources: We Are Social, Hootsuite, Digital 2019 Report, Global; Malaysian Communications and Multimedia Commission, Hand Phone Users Survey, 2018; IPSOS, Path to Purchase Study, Smartphones, Malaysia, 2019.
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

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

Source: IPSOS, Path to Purchase Study, Smartphones, Malaysia, 2019
Travel
Malaysia’s online travel market is almost doubling in size every five years

Online travel market in Malaysia:

$3B 2015

$5B 2019

$9B 2025 (expected growth)

10% increase in travel-related searches

Sources: e-Conomy SEA Report, Google, Temasek, Bain & Company, 2019; Google Trends Data, Malaysia, 2019
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

Source: Google Trends Data, Malaysia, 2019
From staycations to newer forms of travel, Malaysian travellers are looking for local experiences and activities they can immerse themselves in.

- staycation: +60%
- glamping: +70%
- boutique hotel: +30%

Source: Google Trends Data, Malaysia, 2019
120% growth in travel-related “near me” searches

Top searches:

- hotel near me
- Lrt near me/taxi near me/train near me
- restaurant near me

20% growth on “things to do” searches

40% growth in “theme park” searches

Source: Google Trends Data, Malaysia, 2019
Highlands, small towns, and islands

Domestic destinations continue to see rapid growth as Malaysians go local

Top 10 fastest-growing domestic destinations

- Semporna
- Genting Highlands
- Simpang Empat Semanggol
- Hulu Langat
- Taiping
- Sandakan
- Labuan
- Gambang
- Fraser's Hill
- Alor Setar

Source: Google Trends Data, Malaysia, 2019
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

- Can Tho
- Surat Thani
- Phu Quoc
- Dalat
- Krong Preah Sihanouk
- North Kuta
- Nusa Penida
- Batam
- Hua Hin
- Koh Samui

Source: Google Trends Data, Malaysia, 2019
Malaysians are also flying around the world to popular tourist destinations, with Europe being a favourite:

Top 10 fastest-growing international destinations

- Fukuoka
- Frankfurt
- Christchurch
- Mecca
- Barcelona
- Adelaide
- Madrid
- Copenhagen
- Lisbon
- Milan

Source: Google Trends Data, Malaysia, 2019
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