

Mapping the Brand Competition Landscape Using Case Study of the Smartphone Google Trends Data: A Industry in Indonesia

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Abstract

This study maps the competitive landscape of Indonesia's smartphone industry, characterized by intense rivalry and high market volatility. Amid the rapid growth of the digital economy, traditional metrics such as shipment data and market share have proven insufficient to capture real-time consumer interest dynamics. Using Google Trends as the primary instrument, this study analyzes consumer *mind share*—the level of curiosity and brand consideration preceding purchase decisions. By tracking search interest patterns for leading and challenger brands during 2023–2024, the research reveals that challengers' momentum often precedes their market share growth. The findings highlight Google Trends as an early warning system and strategic diagnostic tool for marketers, providing a cost-efficient approach to assess brand health and monitor competitive movements. Theoretically, this study contributes a methodological framework for qualitative competitive analysis using digital trace data.

Keywords: Google Trends; Brand Competition; Mind Share; Digital Marketing Analytics; Smartphone Industry

JEL classification codes: M31, L16

Introduction

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The Digital Boom and the Centrality of Smartphones in Indonesia

Indonesia has emerged as one of the world's largest digital economies, driven by its vast population and rapid technology adoption. By early 2024, the country's internet penetration rate had reached 79.5%, meaning that more than 221 million people were connected to the online world (Asosiasi Penyelenggara Jasa Internet Indonesia (APJII), 2024). This phenomenon is fundamentally mobile-first, where smartphones are no longer merely communication tools but have evolved into the primary gateway for accessing information, entertainment, financial services, and commercial activities (Datareportal, 2023). The centrality of smartphones in daily life makes the industry a crucial and highly contested battlefield among global brands. The market's dynamism is underscored by post-pandemic recovery data, as smartphone shipments in 2024 recorded significant annual growth—Counterpoint Research reported a 7% increase (Counterpoint Research, 2025), while the International Data Corporation (IDC) noted a more aggressive 15.5% rise (Carreon & De La Cruz, 2024).

Indonesia's digital demographics further reinforce the relevance of online behavior analysis. Internet users are dominated by Generation Z and Millennials, cohorts that are inherently digital and accustomed to conducting extensive online research before making purchasing decisions (Datareportal, 2023). For these demographics, the consumer journey is no longer linear but rather a complex process involving information searches via search engines, specification comparisons across multiple platforms, and product review exploration (Think with Google, 2023). This behavior makes digital traces—particularly Google search queries—an aggregate reflection of consumer interest, curiosity, and consideration at the pre-purchase stage (Du & Kamakura, 2023). Therefore, the search volume for specific smartphone brands is not a peripheral activity but a direct indicator of mind share, making it a highly valid data source for competitive analysis (Google, n.d.).

Research Problem: Market Volatility and the Limitations of Market Share Metrics

Although market growth appears positive, the competitive landscape of Indonesia's smartphone industry is characterized by extreme volatility. Market leadership positions shift constantly, reflecting the fluidity of consumer loyalty and the speed at which competitive power can change. For instance, IDC data shows that Transsion Group—the parent company of Infinix, Tecno, and itel—became the top vendor in 2024 with an 18.3% market share, overtaking Samsung, which fell from the leading position to third place (Carreon & De La Cruz, 2024). However, Counterpoint's report for the same period ranked Xiaomi as the market

leader, while during Q3 2024, Xiaomi was also reported to lead with a 19% share (Counterpoint Research, 2024). These fluctuations illustrate the intense battle between established players such as Samsung, OPPO, and vivo, and aggressive challengers like Xiaomi and Transsion (Counterpoint Research, 2025).

The inconsistencies and rapid shifts in market share data highlight the core issue underlying this study: the limitations of traditional metrics. Market share data, typically based on shipment volume, is fundamentally a lagging indicator focused on the supply side. It records what has been sold and distributed to retail channels but fails to capture demand-side dynamics in real time—such as changes in consumer interest, brand relevance, and consideration levels before purchase. Discrepancies between credible research firms are not data anomalies but rather symptoms of the market’s inherent fluidity. This very uncertainty provides strong justification for seeking alternative, more dynamic metrics capable of narrating brand momentum—revealing who is gaining traction and who is losing relevance in consumers’ minds.

Table 1
Comparison of Smartphone Shipment Market Share in Indonesia (2023–2024)

Brand	Market Share 2023 (IDC)	Market Share 2024 (IDC)	Market Share 2024 (Counterpoint)	Rank Change (IDC 2023–2024)
Samsung	20.0%	17.2%	–	Dropped from #1 to #3
OPPO	19.1%	17.8%	18% (Rank #2)	Remained at #2
vivo	16.2%	15.3%	–	Dropped from #3 to #5

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Brand	Market Share 2023 (IDC)	Market Share 2024 (IDC)	Market Share 2024 (Counterpoint)	Rank Change (IDC 2023–2024)
Xiaomi	14.8%	16.5%	18% (Rank #1)	Rose from #4 to #4
Transsion	13.1%	18.3%	23%	Rose from #5 to #1

Source: Processed from IDC and Counterpoint Research data.

Literature Review and Research Gap

The analysis of brand competition and market structure represents a fundamental topic in marketing literature. Traditionally, such analyses have relied on sales data, brand awareness surveys, and econometric models. However, the digital era has introduced new data sources known as *digital trace data*, offering unprecedented insights into consumer behavior. Among these emerging sources, online search volume data has gained significant academic attention (Du & Kamakura, 2023). Several studies have utilized Google Trends (Du & Kamakura, 2023)—a public platform that provides search interest data—for diverse purposes, including *nowcasting* economic indicators, assessing the effectiveness of marketing campaigns, and serving as a proxy for constructs that are difficult to measure, such as public sentiment or interest in health-related issues (Rayhan, 2024).

Although the quantitative use of Google Trends for predictive purposes has been extensively explored, a distinct gap persists in the literature. Few studies have employed this data qualitatively and interpretively to construct a richer narrative about competitive dynamics within a specific industry. Most prior research has focused on the “what” (numerical prediction) rather than the “why” and “how” (interpretation of patterns and shifts). This gap becomes particularly pronounced in the context of emerging, hyper-dynamic markets such as Indonesia’s smartphone industry, where a narrative understanding of brand momentum is just as crucial as numerical market share itself. This study aims to bridge that gap by applying a qualitative lens to Google Trends data to deconstruct the complex competitive landscape.

Research Objectives and Contributions

The primary objective of this study is to map and interpret the competitive landscape of smartphone brands in Indonesia qualitatively by analyzing search interest data from Google Trends over the 2023–2024 period. Rather than predicting sales figures, this research seeks to uncover underlying consumer interest patterns that drive market dynamics. Accordingly, the study is expected to provide both theoretical and practical contributions.

Theoretically, this research contributes to the marketing research methodology literature by demonstrating a framework for utilizing publicly available search data in qualitative competitive analysis. It extends the use of Google Trends beyond a purely quantitative forecasting tool into an interpretive instrument capable of revealing market competition narratives.

Practically, this study offers actionable insights for industry practitioners, including brand managers, marketers, and analysts. The findings provide a cost-effective and real-time tool to assess brand health, monitor competitor momentum, and identify shifts in consumer interest long before they are reflected in sales data or quarterly market share reports.

Research Method

Approach and Research Design

This study employs a qualitative approach with an instrumental case study design. The qualitative approach was chosen because the primary objective of this research is to gain a deep and interpretive understanding of brand competition phenomena, rather than to test hypotheses or measure causal relationships statistically.

An instrumental case study design was adopted, in which the “case” under investigation is the competitive landscape of the Indonesian smartphone industry. Google Trends data serve as the main “instrument” to explore and illuminate the broader phenomenon—how digital consumer interest reflects and even shapes market competition dynamics.

This design is deemed most appropriate because the research focuses on understanding patterns, narratives, and shifts within a specific context rather than on generalizing quantitative results.

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Data Sources and Collection Techniques

The data used in this study are entirely secondary, obtained from the public platform Google Trends (Google, n.d.). Data collection was conducted systematically by following established procedures to ensure consistency and relevance.

First, the main search terms were defined to represent the leading smartphone brands competing in the Indonesian market “Samsung,” “Oppo,” “Vivo,” “Xiaomi,” and “Infinix.” These brands were selected based on their dominant positions in recent market share reports.

Second, the search parameters were set specifically: the geographical region was restricted to *Indonesia*, and the time period was defined from *January 1, 2023, to December 31, 2024*, allowing for longitudinal trend analysis. Finally, to improve accuracy, the searches were limited to the “Computers & Electronics” category.

It is important to understand the nature of the data provided by Google Trends. The figures displayed do not represent absolute search volumes; instead, they are normalized data on a scale from 0 to 100. A value of 100 indicates the peak popularity (highest search interest) for a given term within the specified time frame and region, while all other values are measured relative to this peak. This normalization enables comparisons of relative popularity between search terms and facilitates trend analysis over time, making the data particularly well-suited to the qualitative purpose of this study—understanding the comparative dynamics among competing brands.

Data Analysis

The data analysis in this study is qualitative and interpretative, with a primary focus on visual interpretation of trend graphs generated by Google Trends. The analysis was conducted using a visual thematic approach to identify significant patterns within the time-series data.

The process involved recognizing key elements such as peaks, which represent sharp spikes in search interest, and correlating them with external events such as new product launches, major marketing campaigns, or seasonal periods like the Eid al-Fitr holiday. Conversely, troughs, or periods of low search interest, were interpreted as indicators of brand dormancy or moments when a brand was overshadowed by competitor activity.

At the core of this analysis is a comparative examination, where trend graphs of multiple brands are displayed simultaneously to understand their relative positions

and competitive interactions (Du & Kamakura, 2023). The analysis emphasizes identifying long-term trajectories whether interest in a particular brand remains stable, increases, or declines throughout the observation period (Mavragani & Ochoa, 2018). Special attention is given to intersection points, moments when the trend line of a challenger brand crosses that of a more established competitor. These intersections are interpreted as critical turning points, signaling substantial shifts in consumer attention and consideration, and potentially serving as early indicators of future changes in market hierarchy.

Results

Consumer Interest Patterns Toward Established Brands: Stability and Reactivity

The Google Trends analysis for established brands such as Samsung, OPPO, and vivo reveals relatively stable search interest patterns with consistently high baselines. This sustained level of attention reflects strong brand recognition and long-standing presence in the Indonesian market. The trend lines for these brands do not exhibit erratic exponential growth; rather, they are characterized by a series of predictable and reactive peaks. These peaks consistently correlate with flagship product launch cycles—such as Samsung’s Galaxy S or Z Fold/Flip series and OPPO’s Reno line. This pattern indicates that their mind share is maintained primarily through cyclical marketing efforts and substantial promotional budgets accompanying each product release, rather than through organic growth driven by viral consumer curiosity.

Dynamics of Consumer Interest Toward Challenger Brands: Aggressive Growth and Volatility

In stark contrast to the established brands, search interest patterns for challenger brands—particularly Xiaomi and Transsion Group’s Infinix—demonstrate aggressive growth trajectories and higher volatility. For instance, Infinix began with a very low baseline in early 2023, followed by a sharp and sustained upward trajectory throughout the analysis period. This rapid rise in search interest, often marked as a “Breakout” by Google Trends due to increases exceeding 5000%, visually represents their aggressive market entry strategy and phenomenal shipment growth as reported by research firms (Carreon & De La Cruz, 2024). Meanwhile, Xiaomi’s trend line exhibits pronounced volatility with sharp peaks, often coinciding with the launch of high-value models such as the Redmi or POCO series, which consistently trigger intense online discussions and massive consumer search activity.

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Comparative Analysis of the Competitive Landscape: Turning Points and Shifts in Hierarchy

When the trend graphs of all analyzed brands are displayed simultaneously, a rich competitive narrative emerges. This comparative analysis highlights critical intersection points that signify shifts in competitive strength in capturing consumer attention. For example, the analysis identifies specific moments when search interest volume for “Infinix” surpasses that of “Vivo” or “OPPO.” While Infinix’s market share in shipments may still have been lower at that time, such intersection points serve as leading indicators suggesting that the brand has captured greater mind share than its rivals, a potential early signal of future market power shifts. Furthermore, the inclusion of Google Trends’ “Related Queries” feature enriches this analysis by revealing the specific models or attributes consumers associate with each brand (e.g., “Redmi Note 13 price,” “vivo V29 camera,” “Infinix Note 40 battery”) (Google, n.d.). This qualitative layer provides deeper context into what drives consumer interest for each brand, offering valuable insights into their respective appeal and positioning within the digital marketplace.

Discussion

Interpreting the Competitive Landscape: From Market Share to Mind Share

The synthesis between Google Trends analysis and conventional market share data provides a deeper understanding of the competitive landscape. The most significant finding is that the explosive growth in search interest for challenger brands—such as those under Transsion Group—consistently precedes their reported dominance in shipment figures. This temporal relationship validates the study’s core hypothesis: mind share, as captured through search interest, serves as a strong leading indicator of future market share. In a highly digitalized and research-driven market like Indonesia, the battle for sales is increasingly won first in the digital arena—within consumers’ minds during the consideration and research phases.

This interpretation effectively redefines the meaning of “competition” in the modern era. Competition is no longer confined to shelf space or quarterly sales volume; it has evolved into an ongoing battle for relevance and attention in the digital domain. A brand may still maintain a large market share based on legacy product sales while simultaneously losing mind share—signaling brand fatigue and potential future decline. Conversely, a new entrant with modest sales figures may exhibit rapid growth in mind share, indicating rising momentum. This nuanced perspective, distinguishing between past performance (market share) and

future momentum (mind share), represents the key theoretical contribution of this study.

Theoretical and Practical Implications

Theoretically, this research strengthens the argument for integrating digital trace data into qualitative marketing research. By demonstrating how time-series data from Google Trends can be utilized to construct dynamic longitudinal narratives about market structure, this study encourages scholars to move beyond static analyses and adopt methodologies that capture the fluidity of modern markets. The proposed framework offers a model for similar interpretive studies across other industries and geographies.

Practically, the implications are substantial for marketers and brand strategists. Google Trends can be operationalized as part of a brand's competitive intelligence toolkit:

- It functions as an early warning system, enabling brands to detect the rise of new competitors by monitoring "Breakout" search terms within their category;

- It serves as an evaluation tool for marketing effectiveness—significant spikes in search interest following a product launch or ad campaign provide real-time feedback on campaign performance and consumer curiosity;

- Through Related Queries, marketers can gain deeper insight into the specific features, issues, or product attributes that matter most to consumers—informing content strategy, marketing messages, and even product development.

Limitations of the Study

To maintain academic rigor, it is essential to acknowledge the inherent limitations of this research design. First, Google Trends data are anonymous and lack demographic context such as age, gender, or income level, limiting the ability to analyze specific consumer segments.

Second, there is ambiguity of intent behind each search—searching for a brand name does not necessarily imply purchase intention; it could also reflect interest in news, reviews, or technical support. Hence, the analysis should be interpreted as a reflection of interest, not a direct measure of purchase intent.

Moreover, Google Trends measures volume of interest, not sentiment. The platform cannot distinguish whether spikes in search activity stem from positive sentiment (e.g., favorable reviews) or negative sentiment (e.g., product failures or controversies). This limitation suggests that sentiment analysis from other platforms such as social media could serve as a valuable complement.

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Finally, it is important to note that Google Trends data represent a sample of total search activity, not the entire dataset, and some types of queries (e.g., duplicate searches in short intervals) may be filtered for accuracy. Nevertheless, given the billions of searches processed daily, this sample is considered sufficiently representative for macro-trend analysis.

Conclusion and Recommendations

Conclusion

This study concludes that the smartphone industry landscape in Indonesia is characterized by intense volatility, where traditional market share metrics are no longer sufficient to comprehensively capture competitive dynamics. Google Trends has proven to be a powerful and effective analytical lens for mapping consumer mindshare, serving as a key indicator of market momentum. Qualitative analysis of search interest data successfully uncovers the narratives behind the numbers, showing how aggressive challenger brands can build momentum in the digital realm before ultimately disrupting the market hierarchy.

Recommendations

Based on the findings and limitations of this study, several directions for future research are suggested. First, subsequent studies could combine Google Trends data analysis with sentiment analysis from social media platforms such as X (formerly Twitter) or discussion forums like Reddit. This multi-source approach would allow researchers to add a qualitative layer (positive, negative, or neutral sentiment) to search volume data, thereby providing a more holistic understanding. Second, the same methodological framework can be applied to study other highly competitive consumer industries in Indonesia, such as e-commerce platforms, ride-hailing services, or digital payment services, to examine whether similar patterns hold. Finally, future quantitative research could develop more sophisticated forecasting models that formally test the causal relationship between Google Trends search interest data and market share shifts in the Indonesian context, potentially providing a powerful predictive tool for industry practitioners.

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