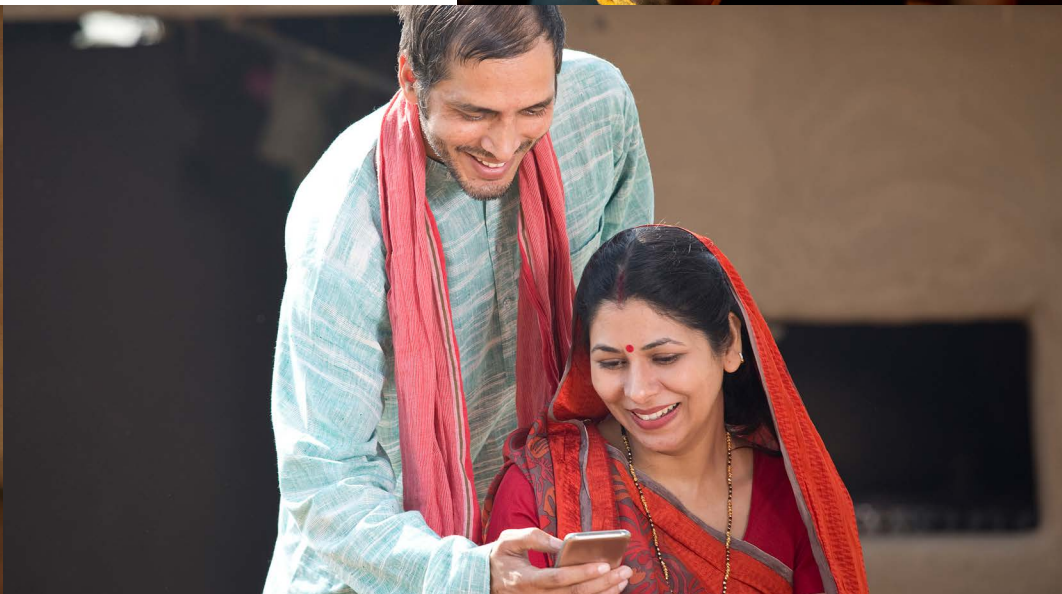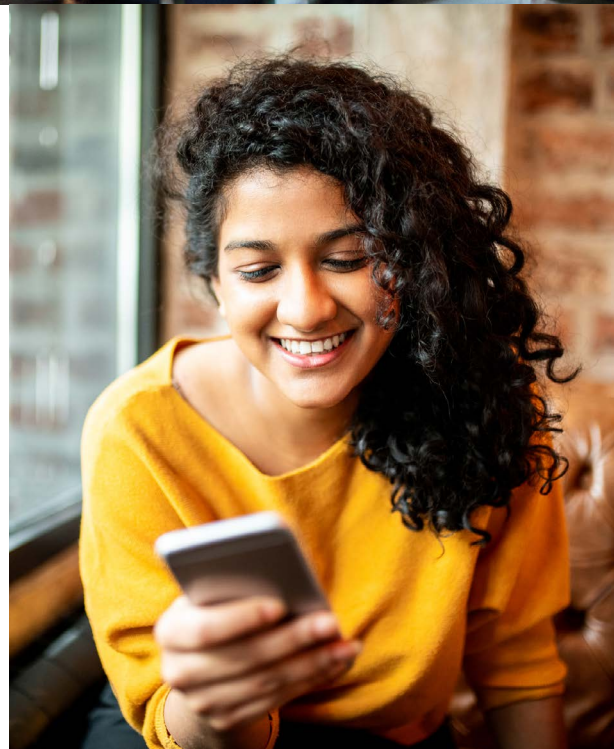what is India searching for?

Insights for Brands

Many brands are no strangers to change and crisis management, but as we witness the global scale of continued uncertainty, it is safe to say that this is a first for us all. As we collectively grapple with the **"new day to day" situations** and what these mean for us - as humans first, but also as professionals, there can often be more challenges than solutions.

In a country like India with **over half a billion netizens and one of the world's youngest internet populations, digital has become the source of an endless stream of information as Indians decide what to watch, read, learn, and buy using one of the most powerful real estate at the moment- the smartphone.** Whether it's looking for essentials, or managing routines when homebound, or even keeping up to date with the news and entertainment, digital dependence has seen a significant increase. From video to search, online to offline and vice versa, **digital touches multiple aspects of their lives, in every waking moment.** And while deciphering what people really want has always been a tough undertaking for marketers, they are now faced with the added challenge of understanding the transient nature of today's consumer in the midst of these extraordinary circumstances.

There are no playbooks for a time like this and even the most agile and nimble advertisers who are accustomed to evolving strategies and changing directions real time are trying to answer tough questions: **"How do we meet this unprecedented moment?".**

With Google's report **"What is India Searching for?" we try to uncover the latest insights for brands that can help marketers understand what's top of mind for their users and its potential implication for their businesses.**
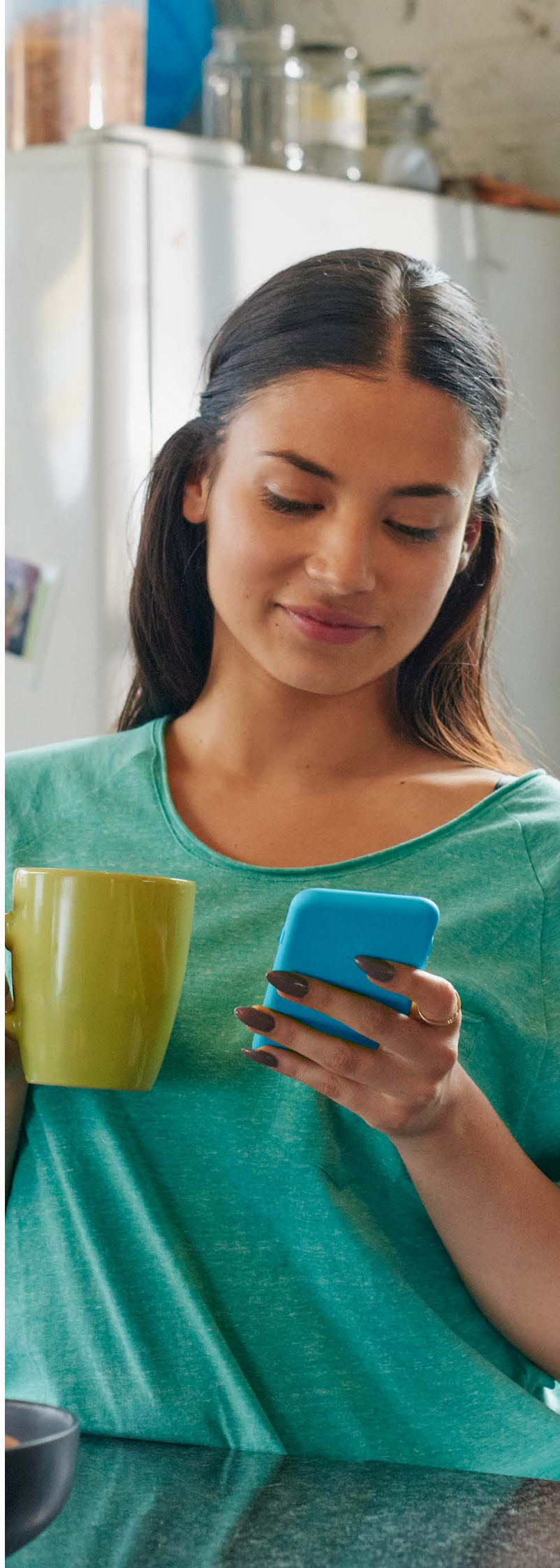
India in Numbers

🛜

500M
Internet users

📱

450M+
Smartphone users

▶️

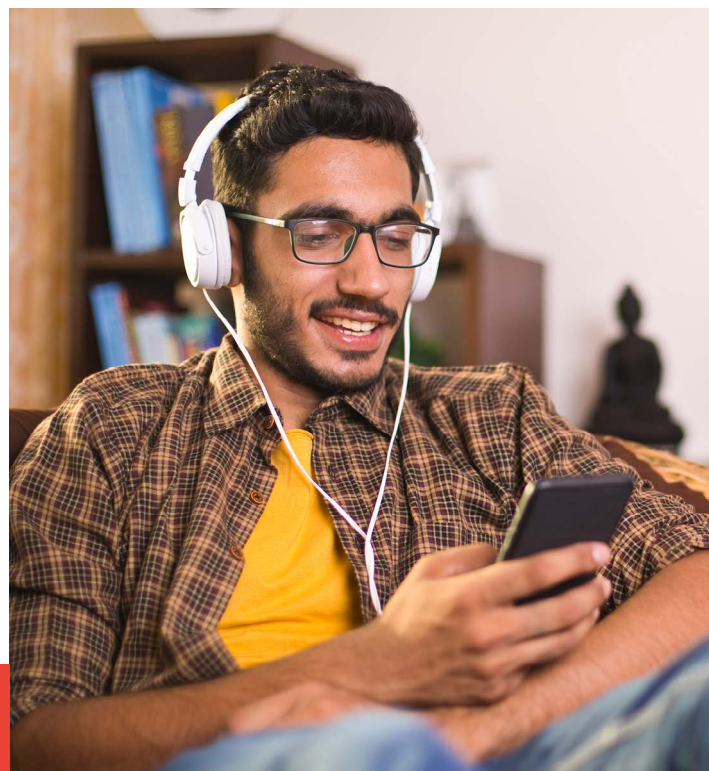## 1 out of every 3
Indians watch
online video

Changing Digital Behaviors:

Top five consumer trends

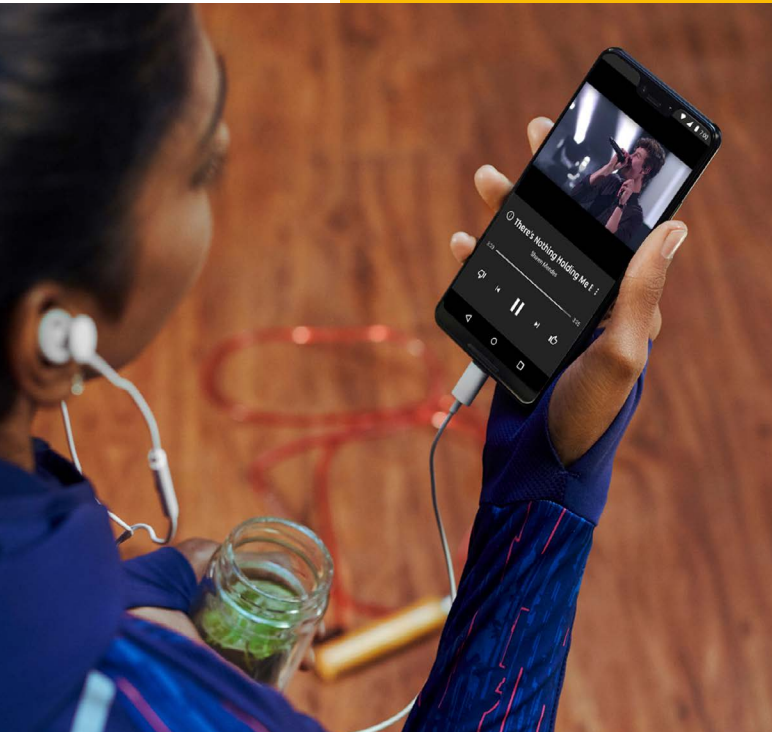**Always on: Lifeline not a distraction**
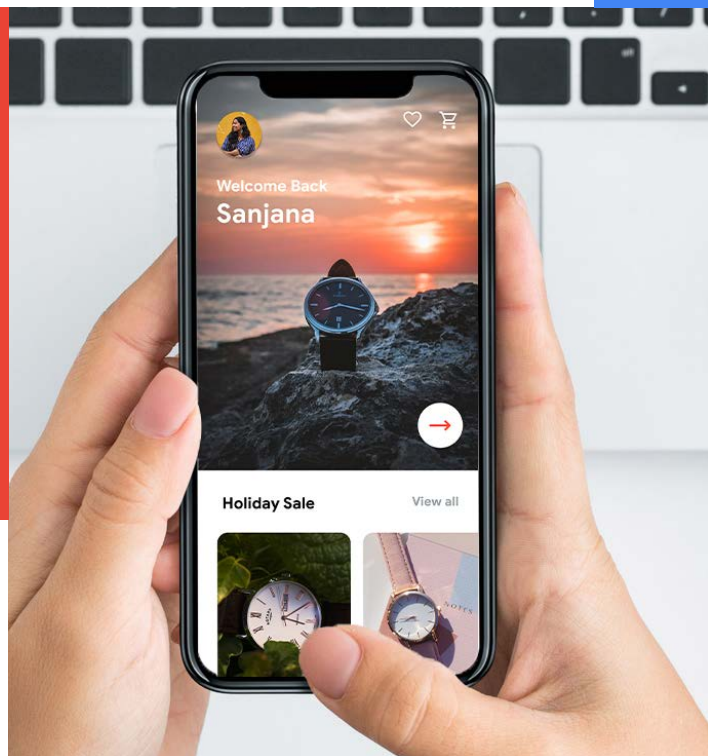
06

Power to know more

11

Tap and transact

Anything, anywhere, anytime, on-demand

Optimize, personalize & humanize

Always on: Lifeline not a distraction

A single powerful reality sits at the heart of every internet user in the country: **The exploration cycle.**

"Always-on search" has become an established habit for Indian consumers as they sit at the center of an endless stream of information reaping the benefits of the world's cheapest mobile data prices . While they may be holding back on any kind of discretionary spending at the moment,they are certainly more active online than ever before, discovering services and products that could satiate their exploratory instincts.

What's not uncertain? Their quest for convenience and quality.

Even in the wake of COVID-19, consumers are looking for **"the best"** of whatever they need and business that can help them find it safely, quickly and conveniently. With little to no brand preference, Indians are rapidly converging online to build their consideration sets, even before an actual purchase.

Source: BBC News, Mobile Data: Why India has the world's cheapest, March 2019

Growing digital dependence:

Time Spent on smartphones in **week 3** of COVID-19 disruption **inched towards 4.5 hours per day**

Source:Nielsen Smartphone Panel, COVID Disruption Data as compared to Pre COVID-19 Data, April 2020

Indians are **leaning on virtual communities** with chat VOIP (voice over Internet Protocol) and social networking **growing at more than 20%** in terms of time spent per user per week

They are revisiting their internet plans to ensure continuity of access to information: **4x growth** in searches since March '20 for

| 🔍 slow internet 🎤 | 🔍 broadband connections 🎤 |

Source: Nielsen- BARC Covid-19 Report, March 2020; Indexed Search Results as per Google Trends, Daily Average Volume Jan & Feb vs. March 2020

People are turning to the web to look for **"the best"** and build their **brand consideration sets** much before the actual purchase.

While this core behavior has been consistently observed over the years, it has **manifested to more niche categories** as we observe a **change in consumer priorities.**

	Searches	Growth
From 2019	🔍 best headset 🎤	▲ **140%**
	🔍 best/top 2W insurance 🎤	▲ **116%**
	🔍 best skincare brands 🎤	▲ **120%**
	🔍 best mattress 🎤	▲ **150%**
to 2020	🔍 best movies on YouTube 🎤	▲ **35%**
	🔍 best trading platforms 🎤	▲ **45%**
	🔍 best way to lose weight 🎤	▲ **180%**
	🔍 best way to learn english 🎤	▲ **100%**
	🔍 best way to study 🎤	▲ **70%**
	🔍 best telugu movies 2020 🎤	▲ **450%**
	🔍 अच्छे वाले कार्टून 🎤	▲ **60%**

While the sense of urgency to acquire a new product isn't a new trend, the extent to which it **accelerated for Indians post COVID-19 was extremely palpable.**

With the closure of major retail stores, search queries for **essential services "near me" or providing "delivery"** saw an unprecedented boost.

🛒 **1 out of 2**

consumers wanted to find out **how brands are responding to the situation** with respect to closing of stores, changing hours etc.

Sources: Google - Ipsos COVID-19 Pulse Survey, India, April 2020

2020   **Growth**

🔍 pharmacy near me   ▲ **58%**

🔍 internet provider near me   ▲ **140%**

🔍 ration dukaan   ▲ **300%**

🔍 online grocery delivery   ▲ **350%**

🔍 grocery delivery near me   ▲ **550%**

🔍 vet doctor near me   ▲ **60%**

2019   **Growth**

🔍 organic stores near me   ▲ **42%**

🔍 ayurvedic shop near me   ▲ **64%**

Sources: Google Trends Data, India, January to March 2020;
Google Internal Data, India, January to November 2019 vs January to November 2018

Related Searches that also generated interest:

🔍 chemist shop near me	🎤

🔍 grocery door delivery near me	🎤

🔍 Homeopathy pharmacy near me	🎤

As a result of this non-linear-exploratory journey of the consumer, brands may feel the need to be **omnipresent**. However, by leaning on digital footprints of their consumers, brands can optimize to **show up in the moments that really matter** the most to their users.

It is imperative that they hold a **seamless dialogue with potential shoppers,** from when they discover them online to before an actual purchase. And finally, **invest in post purchase redressal systems** to be top of mind for consumers

Power to know more

A **shift in consumerism** is unfolding as the modern internet user is becoming increasingly conscious of their choices and demanding **truly transparent and timely information from brands.**

Digital has evolved into a powerful tool for Indians as they seek both, real time answers, as well as visual inspiration to be reassured of their choices in order to be self sufficient. The explosive growth in searches witnessed across **lifestyle and edutainment** related categories is a clear marker of the Indian consumer's innate desire to know more & do more on their own. Indians are feeding off this **sense of empowerment powered by digital** to stay on top of things and find alternative means to continue with routines.

Online video accounts for more than 70% of India's total data usage. While some Indians are curious about their wellbeing, others are searching for content that can help them pursue their passion or upskill themselves. From **online education to "foodspiration" and "fitspiration"** consumers are pivoting to digital to cope and connect with others.

Source: BBC News, Mobile Data: Why India has the world's cheapest, March 2019

"How things are made" and ingredient based searches have been a growing category of interest for Indians over the past several years.

More recently, we observed a **massive uptick of 500% in "immunity" based searches** as consumers leaned on local language queries for **traditional homemade supplies and remedies.**

Top Searches

	Growth
🔍 गिलोय 🎤	▲ **380%**
🔍 काढ़ा 🎤	▲ **90%**
🔍 कैसे बनाते हैं 🎤	▲ **100%**
🔍 की विधि 🎤	▲ **30%**
🔍 how is this made 🎤	▲ **90%**
🔍 rice water 🎤	▲ **40%**
🔍 niacinamide 🎤	▲ **70%**
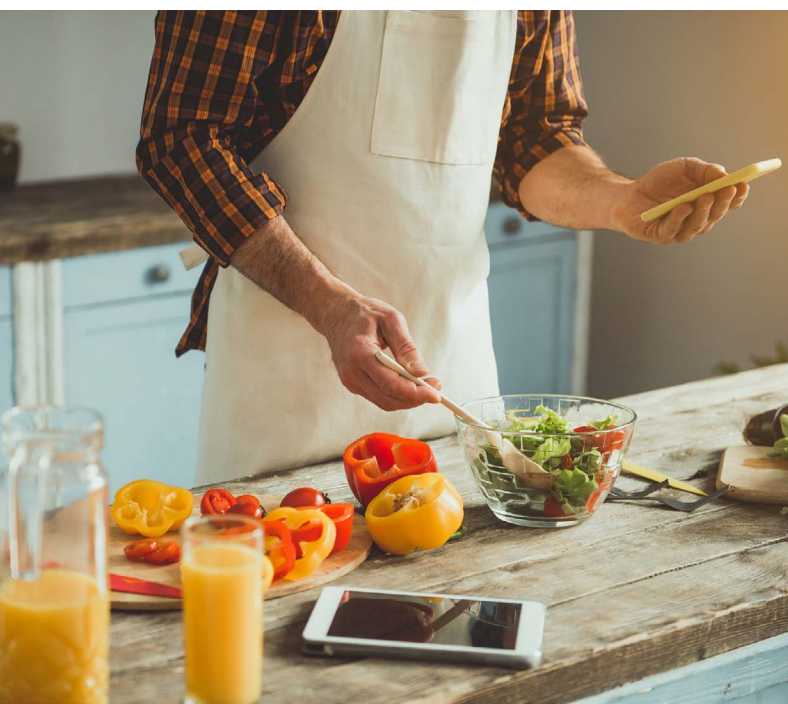
🔍 vitamin C 🎤

grew at 40% YoY until 2019 but more recently **surged to 150%**

Digital classrooms of the future

From everyday learning to advanced skillsets, **e-learning has been clocking hundreds of millions of views everyday** over the past couple of years and will likely sustain for a longer time.

Recently, we saw an **accelerated interest** in this category as searches for **"learn online"** and **"teach online"** saw a steadfast rise indicating the interesting dynamics of the current demand and supply in **edutech.**

Top Searches

Search	Growth
learn online	▲ 85%
teach online	▲ 148%
at-home learning	▲ 79%
classes online	▲ 300%
storybook	▲ 1.5x
DIY crafts for kids	▲ 6x

Source : Google Trends, Google Trends Daily avg. Volume first fifteen days of March v/s last 15 days of March; Google Trends, Daily average volume (March 2020 v/s January-February 2020)
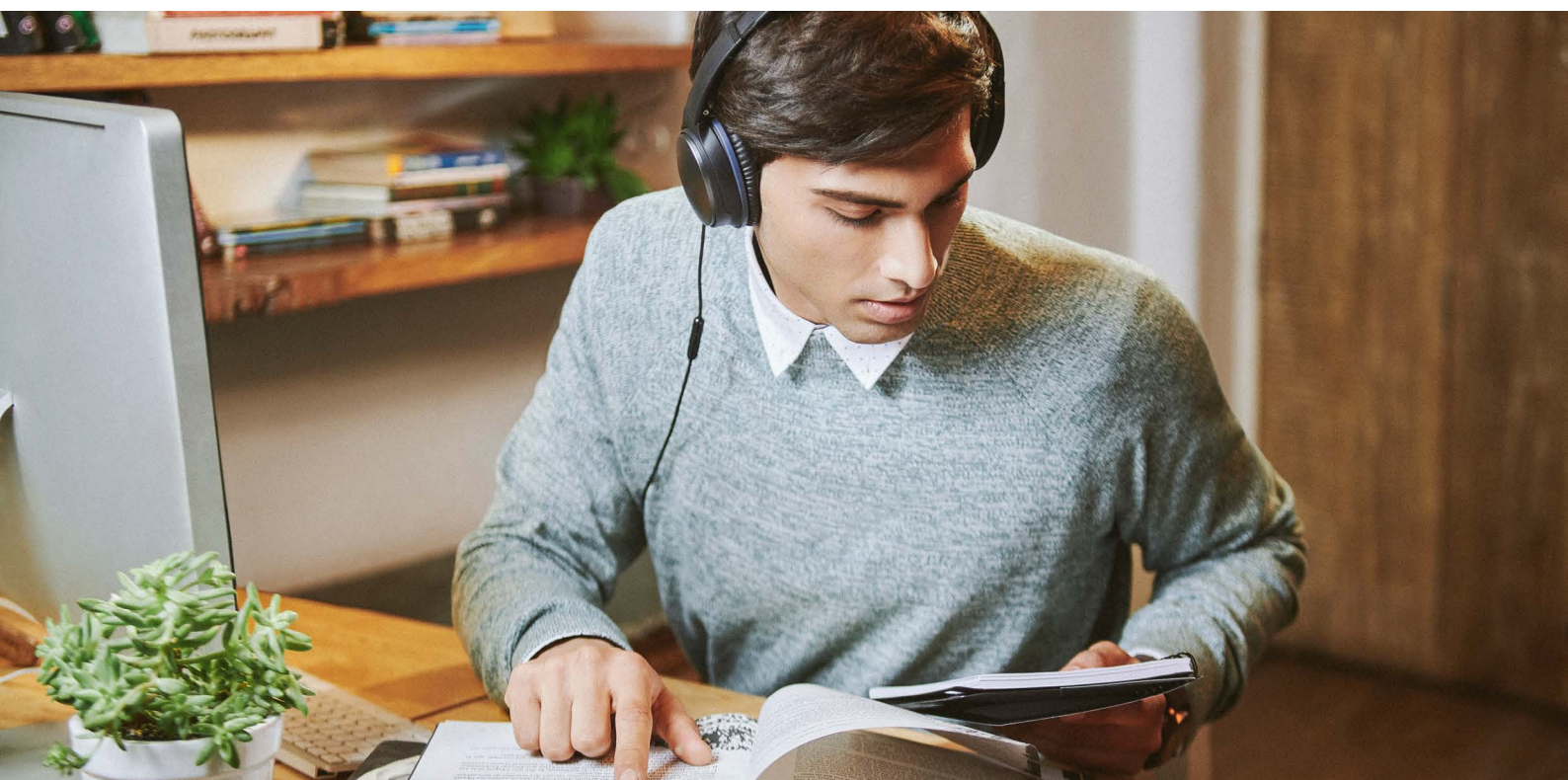
Searches for e-learning beyond K-12 and professional courses also accelerated as Indians spent more time at home

2.5x growth in searches for "**Python**"
making it one of the fastest growing programming languages

3x growth in "**Data science**" and "**machine learning**"
related searches over 2019-2020.

🔍 spelling game	🎤	▲ **128%**
🔍 gardening ideas for home	🎤	▲ **175%**
🔍 how to save tax	🎤	▲ **84%**

Sources: Google Internal Data, India, January to November 2019 vs January to November 2018
Google Trends Data, India, January to November 2019 vs January to November 2018

With job security and hiring cycles taking a hit, Indians **leaned on digital to navigate through these testing times** and find ways to support their living

We saw a steady rise in searches for jobs and internships

| 🔍 work from home jobs | 🎤 | ▲ **50%** |
| 🔍 work from home internships | 🎤 | ▲ **150%** |

From "foodspiration" to "fitspiration"

Hungry users turn to YouTube to learn how to put a fresh spin on their favorite dishes and also seek motivation to lose the calories. **Online video has been a popular destination for both and will likely continue to be.**

Top Searches	Growth
🔍 gym at home 🎤	▲ 93%
🔍 कसरत 🎤	▲ 20%
🔍 full body workout at home 🎤	▲ 90%

🔍 yoga 🎤 ▲ 16%

🔍 yoga asanas 🎤 ▲ 70%

🔍 yoga meditation 🎤 ▲ 40%

Source: Google Trends Data, India, Average Daily Volume January and February vs March 2020
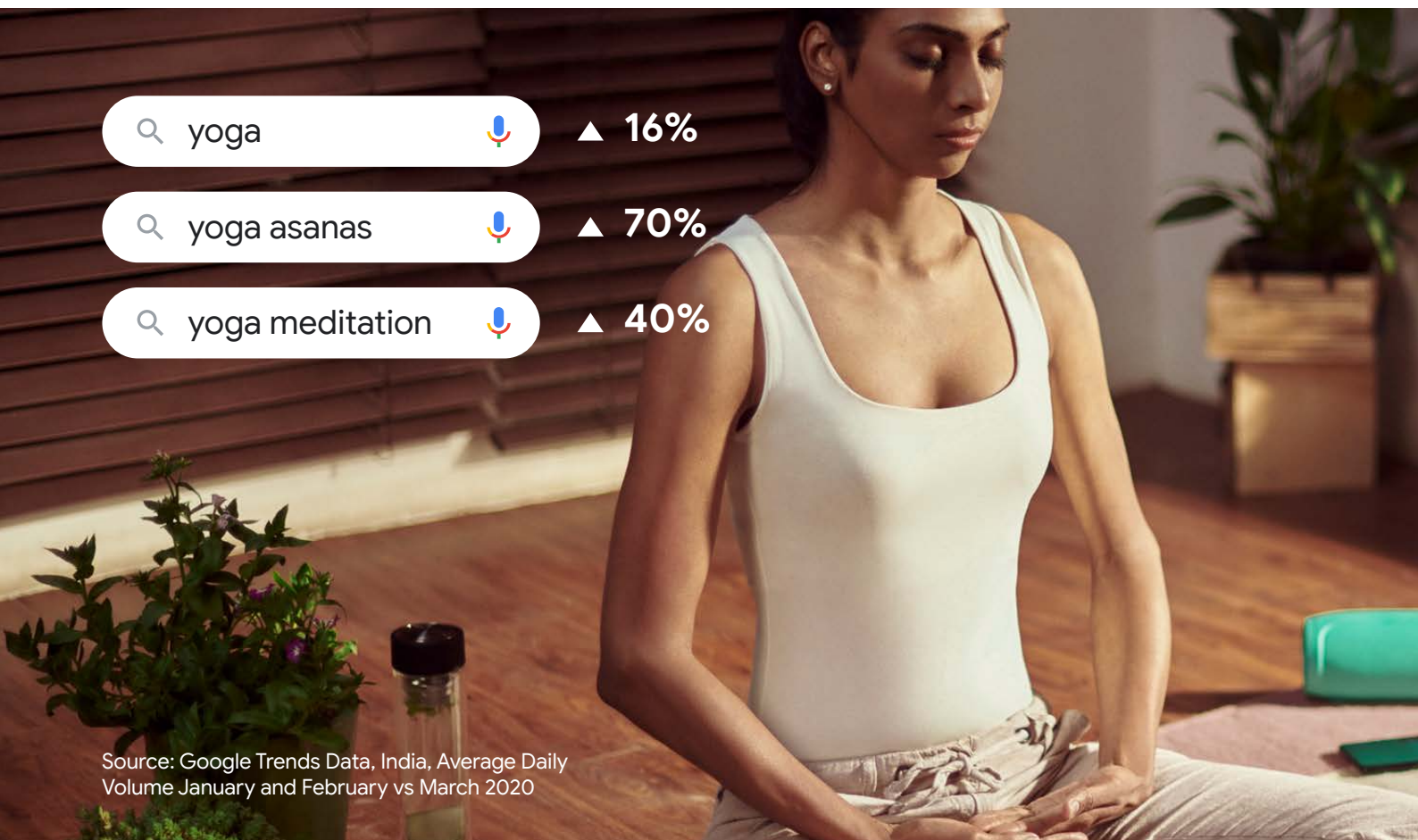
42% growth in searches to know **"what's normal"** for body stats like **BP, body temperature and blood sugar**

While overall **recipe related searches grew by 20%** on YouTube and have been dynamic in the past few months, we observed a **recent craving for street food.** On the other hand, **diet related searches saw a slight dip** but are likely to see a comeback.

Top Searches | Growth

Top Searches	Growth
🔍 5 minute recipes 🎤	▲ 56%
🔍 panipuri recipe 🎤	▲ 107%
🔍 chhole recipe 🎤	▲ 148%

Sources : Google Trends Data, India, Daily Avg. Volume Jan & Feb vs. March 2020
Google Internal Data, India, January to November 2019 vs January to November 2018

In 2019, some of the trending food related searches were:

🔍 keto diet 🎤

▲ **300%**

🔍 avocado toast recipe 🎤

▲ **60%**

Google Trends Data, India, January to November 2019 vs January to November 2018
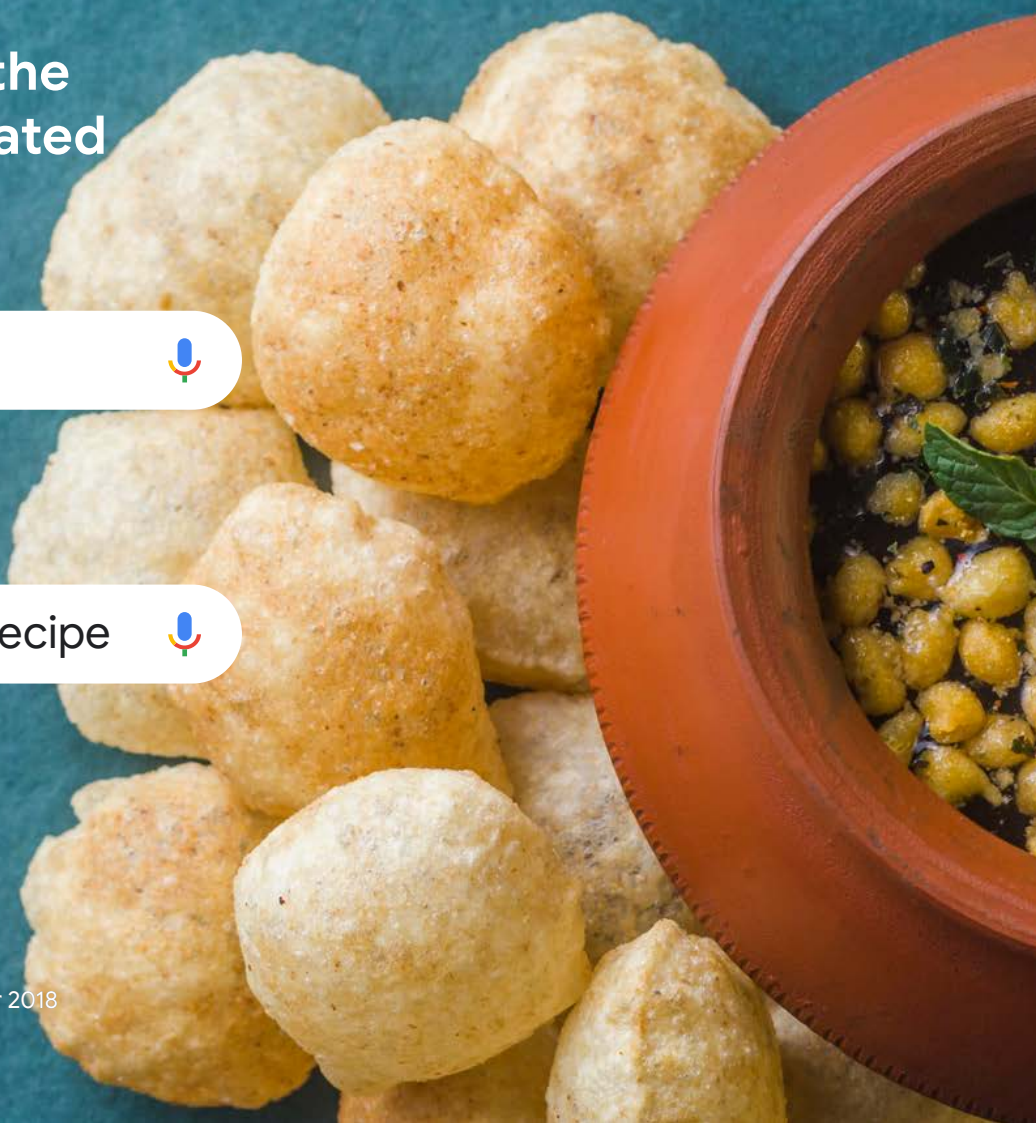
With the closure of retail stores, the options for ingredients have been narrowing. People are looking for alternative ingredient options to savor their favorite dishes without missing out on taste.

There has been **200%** growth in searches with **"without"** in the **Food and Beverages** category

🔍 cake without egg	🎤
🔍 pancakes without egg	🎤
🔍 bread without yeast	🎤
🔍 hummus without tahini	🎤

270% growth in searches with **"easy"** in same category

When unforeseen circumstances affect our communities, it's more important than ever for people to have access to **helpful advice and accurate information** that can help them with judicious decision making

With no dearth of content online, brands must look at **ways to break the clutter and position themselves as helpful experts** that can inspire a consumer to convert their attention to action whether online or offline

Tap and transact

In a country that houses the **world's second largest "unbanked" population,** digital has been at the forefront of helping Indians move towards a truly **inclusive financial ecosystem.** Cashless payments and mobile have simplified everyday transactions and Indians are growing more curious by the day to explore their options and even their limitations.

Consumers are leaning on digital, even more so recently, to not just take care of their routine payments but also navigate their long term financial goals amidst market volatility. While some users are interested in **risk mitigating investment plans and specific insurance schemes,** others are utilizing the time to understand the **best investment options and trading.**

Searches to understand newer payment modes have been on the rise:

Top Searches	Growth
🔍 QR code payment 🎤	▲ 66%
🔍 UPI transaction 🎤	▲ 55%
🔍 UPI transaction limit 🎤	▲ 70%
🔍 how to change upi pin 🎤	▲ 200%

More recently, these searches have evolved to bill payments as physical submission of checks and cash was discouraged in the country in the wake of COVID-19

Top Searches	Growth
🔍 how to pay online 🎤 🔍 UPI 🎤	▲ 31%
🔍 How to pay electric bill online 🎤	▲ 180%
🔍 बिजली बिल चेक 🎤	▲ 80%
🔍 How to pay house tax online 🎤	▲ 50%
🔍 recharge pack 🎤	▲ 40%
🔍 online recharge 🎤	▲ 35%

Source : Google Trends Data, India, Daily Average Volume January and February vs. March 2020

Amongst digital payments, **"UPI"** had 3x more search interest than **"IMPS"** and 1.5x more than **"NEFT"** in 2019. Searches about UPI from non-metros grew faster at 79% compared to metros at 28%

UPI transactions exceeded those of debit and credit cards in both value and volume. Unsurprisingly, merchants accepting UPI payments surged to over 10 million in the last 2 years.

Due diligence powered by digital

Indians relied on the web for deep research when it came to their lending and trading options. Searches from non metros across certain insurance categories grew **2x as fast** as metros.

Personal Loans
▲ 64%
▲ 34%
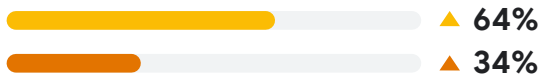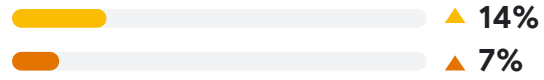
Life Insurance
▲ 14%
▲ 7%

● Non-metros   ● Metros

While overall insurance demands remained fairly stable, Indians revisited their policies in the early parts of 2020, to ensure medical coverage

Top Searches	Growth
🔍 Insurance renewal 🎤	▲ 112%
🔍 Corona insurance 🎤	▲ 1230%
🔍 Govt health insurance 🎤	▲ 52%
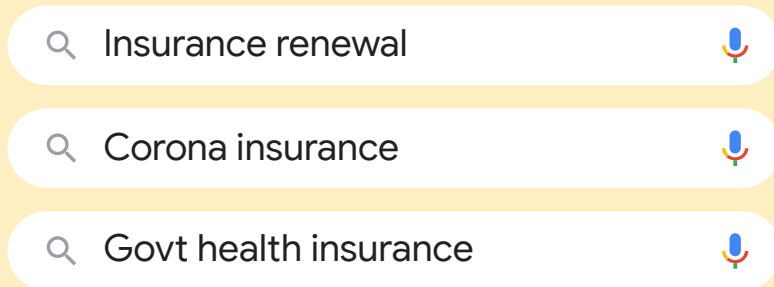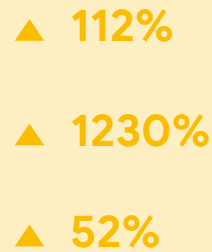
Local language searches also saw an increase

🔍 हेल्थ इंश्योरेंस 🎤

🔍 हेल्थ इन्शुरन्स 🎤

🔍 करुणा बीमा 🎤

🔍 कोरोना बीमा 🎤
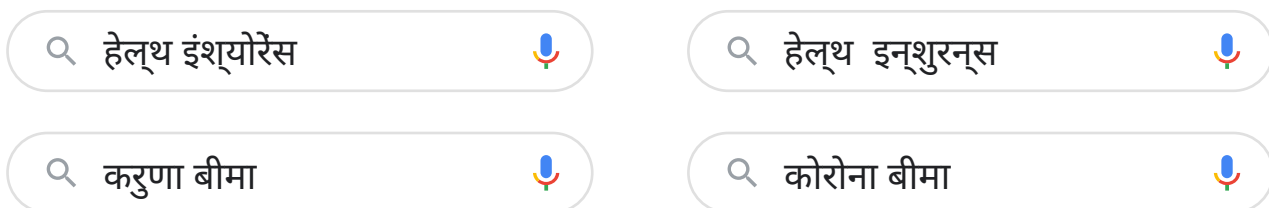
Government advisories have created a severe impact on financial searches as Indians turn to the web to get instant answers and advice

20x growth in searches in late November vs the prior 2 months

| 🔍 FASTag | 🎤 | ▲ **50%** |

Market volatility caused a massive surge for the follow terms:

| 🔍 overnight mutual funds | 🎤 | ▲ **4x** |

| 🔍 mutual funds to invest now | 🎤 | ▲ **2.5x** |
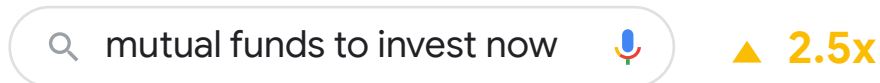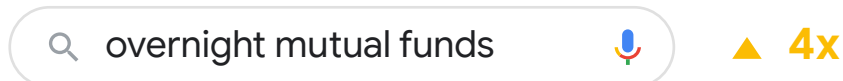
Source:Google Trends Data, India, January to November 2019 vs January to December 2018
Google Trends Data, India, Daily Average Volume January and February vs March 2020
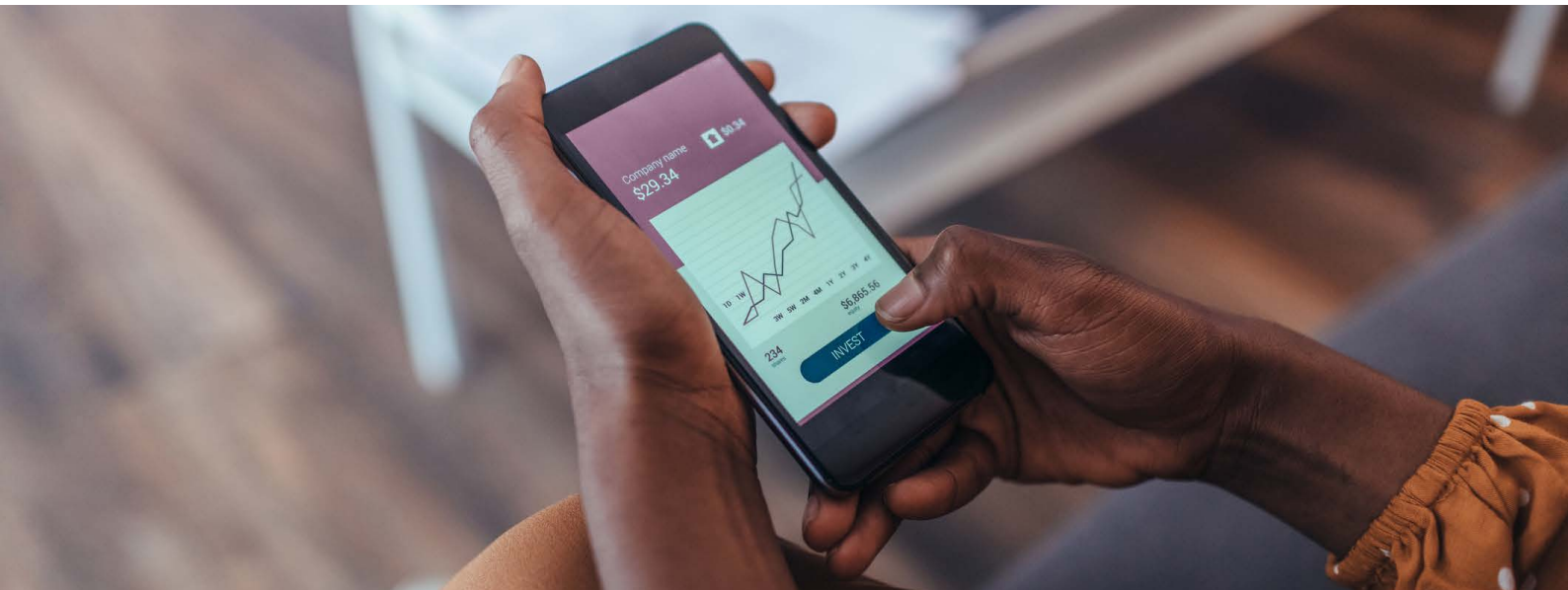
The rapid adoption of digital payments is a reflection the growing confidence of Indians in the evolving ecosystem

For brands in India, the challenge lies in not only exploring the mechanism of these payment systems but also understanding how consumers can adopt and build trust with these systems across categories.

Anything, anywhere, anytime, on-demand

Indians, **especially the younger internet population** are seeking brands that can help them complete their routine tasks in a convenient and hassle free way. **The urge for near-instant gratification has always driven Indian consumers to look for on-demand services and commitment free lifestyles.**

One of the fundamentals influencing their mindset is that **if they can get a cab on demand, why not everything else?**

These expectations go beyond content - think food, softwares and even medical essentials.

Even as we struggle to deal with these uncertain times, **users are looking for brands to meet their on-demand expectations at the tap of a button prompting a lot of traditional businesses to pivot to digital.**
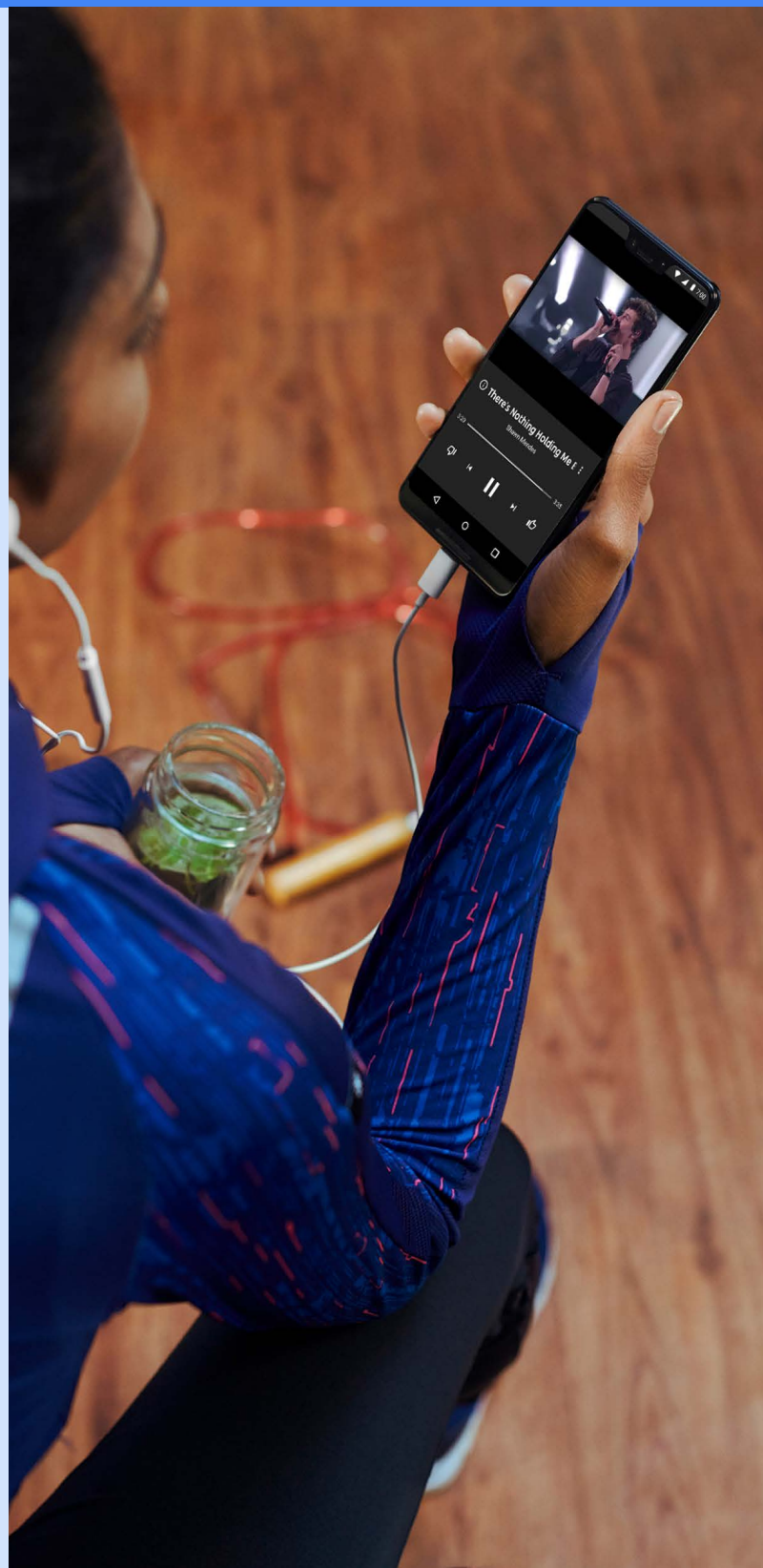
The ubiquity of digitized interactions

Catering to the desires of **on-demand services** and **near instant gratification,** has been a popular business model for a lot of digital first brands. In fact, **70% of funding to unicorn startups** in the last 3 years has been for **internet led businesses that are responsible for revolutionizing many traditional forms of consumer services.**

Source: BCG-Google report, Demystifying the online food customer, January 2020

In 2020, we observed a massive surge in consumers looking for alternatives for all their needs as face to face interactions became more limited.

Whether it was **doctor consultations, or collaborative softwares for work, or even online dating apps,** many businesses have transformed to being **internet-led** to help users interact and adapt in these testing times.

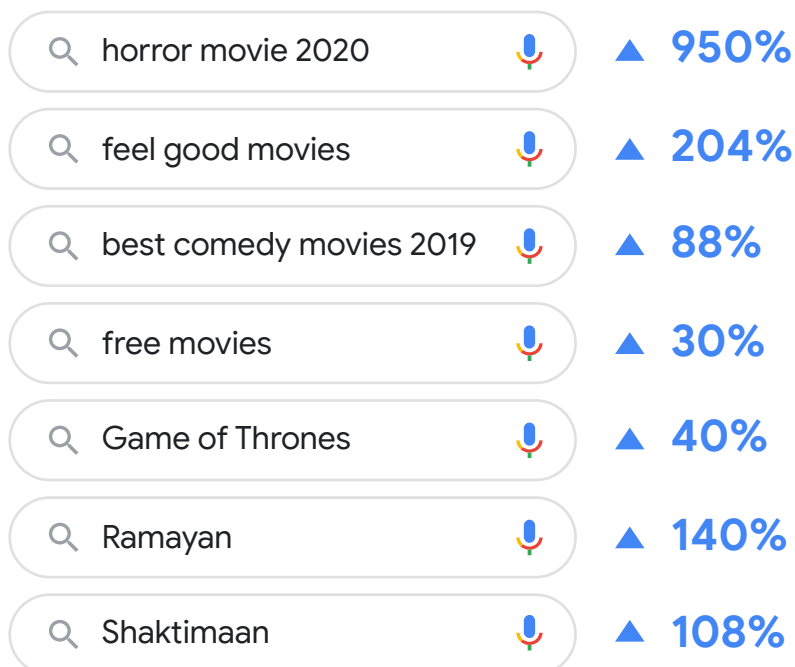| Searches	Growth
online doctor	▲ 29%
consult doctor online	▲ 60%
free video dating	▲ 70%
collaborative softwares	▲ 40%

Source: Google Trends Data, India, Daily Average Volume January and February vs March 2020

Finding comfort in the familiar

As Indians **look for both an escape as well as entertainment amidst social distancing norms**, the surge in interest for mobile app downloads as well as streaming platforms clearly indicates the step up change in the on-demand services universe

In the wake of the current global scenario, despite new releases, people were looking for **positive, mood uplifting content** when it came to entertainment

🔍 horror movie 2020	🎤	▲ **950%**
🔍 feel good movies	🎤	▲ **204%**
🔍 best comedy movies 2019	🎤	▲ **88%**
🔍 free movies	🎤	▲ **30%**
🔍 Game of Thrones	🎤	▲ **40%**
🔍 Ramayan	🎤	▲ **140%**
🔍 Shaktimaan	🎤	▲ **108%**

Sources: Google Trends Data, India, January to November 2019 vs January to November 2018; Google Trends Data, India, Daily Average Volume January and February vs March 2020

30%

growth in mobile app downloads in India in March'20 vs the previous two months

In 2020,

search interest for overall video streaming platforms saw a massive surge between **40-120% as Indians clocked almost 4 hours/week/person on video-on-demand**

Sources: eMarketer, Mobile app downloads and spending during the coronavirus outbreak, March 2020; Nielsen Smartphone Panel, COVID Disruption Data as compared to Pre COVID-19 Data

The best of both worlds

As music streaming comes of age in India, users are looking to merge the best of both worlds with audio and video. What is interesting is how **Indian languages are trailblazing this category** of on-demand entertainment.

Consumers prefer to watch videos along with the songs

🔍 वीडियो में 🎤   ▲ **100%**

Top Related Searches

🔍 गाना वीडियो 🎤

🔍 गाना वीडियो में 🎤

🔍 भोजपुरी में वीडियो 🎤

🔍 वीडियो हिंदी में 🎤

Source: Google Trends Data, India, January to November 2019 vs January to November 2018

They are also looking for **specific artists**

🔍 के गाने 🎤

🔍 का गाना 🎤

▲ **50% YoY**
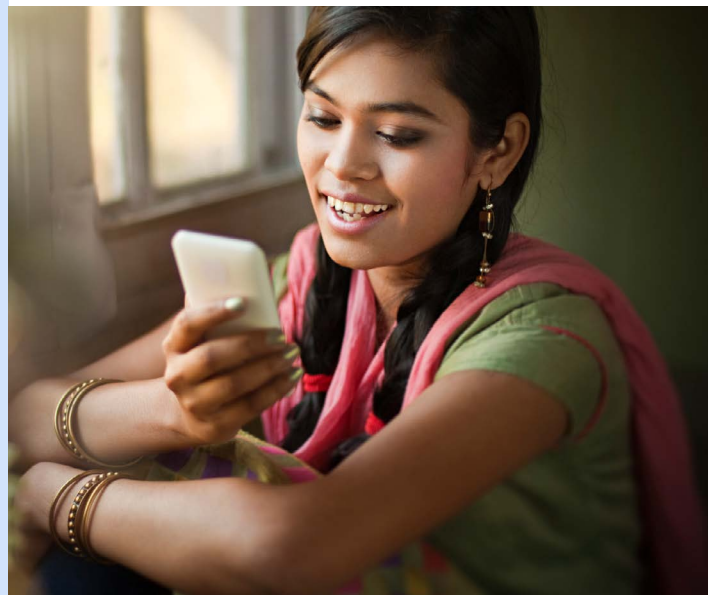
By **giving the power back to customers** to either start or stop a service they consumed and simplifying the fulfilment of their needs, brands have a clear **opportunity to reimagine the relationship with their consumers**

By leaning on to digital, businesses can understand the nuances of their customer's life cycles and needs to **build for agility and innovation**

Optimize, personalize and humanize

The **desire for personalization,** that is the need for objects and experiences that are just right, a perfect fit, is an eternal part of human nature.

And it's always been a part of the story of consumerism. No matter where they are or what time of the day, **users are increasingly looking for multi-moment brands** that understand their likes, dislikes and interests based on their online footprints and can talk to them one on one at almost every step of their digital journey.

Even as consumer behavior **continues to undergo a transient shift in 2020** as we collectively navigate through uncertainty, **the desire for personalised offerings stays strong.**

Source: Think with Google, New research reveals APAC brands are reaching new heights in digital marketing maturity, February 2020

1 out of 2

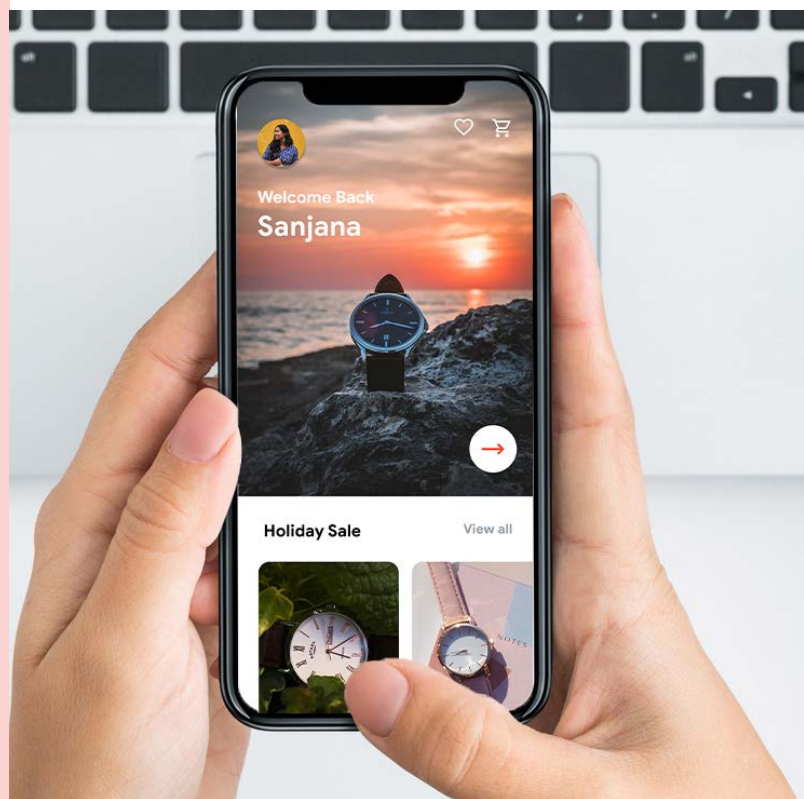consumers are interested in personalised information from brands like

"how to homeschool kids"

"how to work from home"

and more as they find it helpful in their everyday lives.

Source: Google - Ipsos COVID-19 Pulse Survey, India, April 2020

As backend operations and customer redressal systems take a hit in the wake of COVID-19, brands have an opportunity to lean on **AI and ML** to fulfill redundant ad recursive tasks in the absence of face to face interactions.

120% surge

in search interest in **branded and unbranded customer service related queries** in March alone v/s previous months

Source: Google Trends Data, India, Daily Average Volume January and February vs March 2020

To curb the spread of misinformation, the government itself launched an **AI powered whatsapp chatbot** that provides timely updates and **help citizens answer their queries about Covid-19.**

According to Haptik, more than 55 million messages have been sent by over 20 million users.

Previously, Sensodyne had gauged a rising interest in users looking for dental hygiene related information online. By connecting the dots between first party data, full stack technical implementation and using a Google Assistant chatbot as a channel, **the brand allowed users to virtually "talk to"** dental hygiene experts, give relevant information about the condition and even help book an appointment.
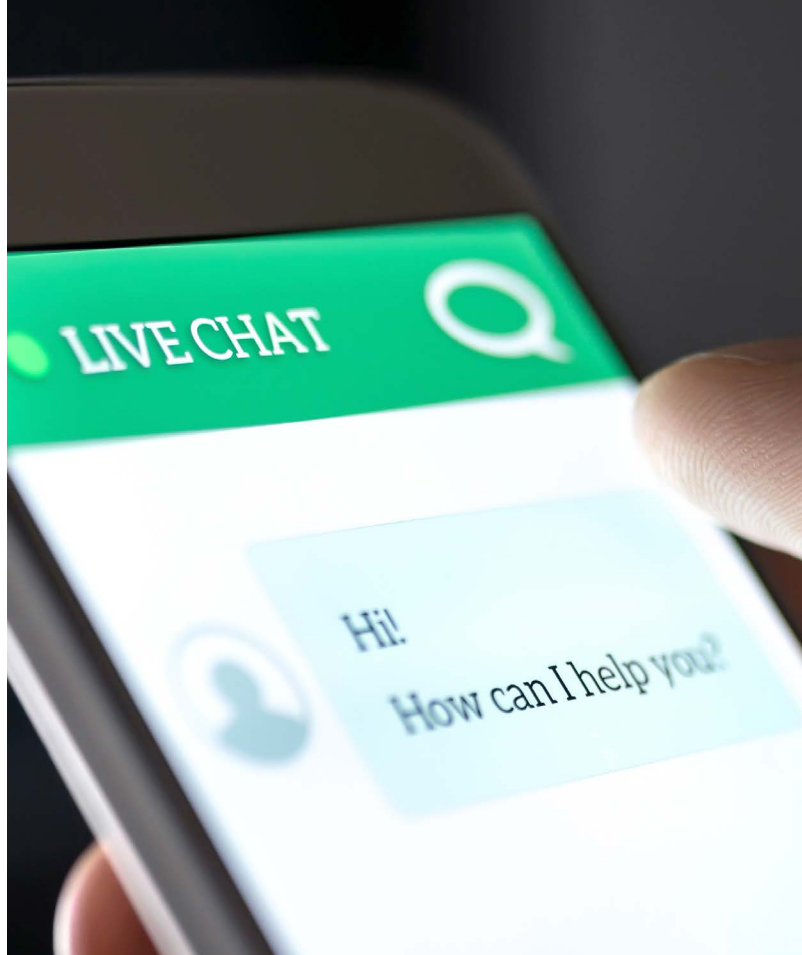
Flipkart too launched "Hagglebot" in 2019 leveraging voice based experience that allowed potential shoppers to haggle for deals on their website, thus humanizing their shopping experience.

So how can brands rise to meet the moment?
It's online, data-fueled personalization.

By keeping people first, analysing their digital footprint and learning from first party data, brands have a huge opportunity to not just provide helpful advisories but also optimize for personalisation at scale

As India witnesses a blip in how consumers shop, **the role of AI, ML and digital touchpoints has become even more critical** to help brands innovate and evolve

Glossary

Tier 1 cities / Top 8 cities / Metros

New Delhi, Mumbai, Chennai, Kolkata, Bengaluru, Hyderabad, Ahmedabad, Pune

Tier 2 cities / Non-Metros

All cities except Top 8 cities

Regional languages / Indic languages / Local languages

Google Search is available in 9 Indian languages apart from English - Hindi, Gujarati, Bengali, Marathi, Kannada, Tamil, Telugu, Malayalam, Punjabi

UPI: Unified Payment Interface

EV: Electric Vehicles

AI: Artificial Intelligence

ML: Machine Learning

IMPS: Immediate Payment Service

NEFT: National Electronic Funds Transfer

K–12: From kindergarten to 12th grade