

Think with Google

# YEAR IN SEARCH 2020

INDIA

India's determined progress



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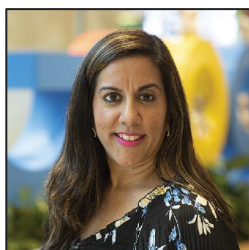
The world has seen very few years like 2020. Not only did we face highly improbable events, but the world as we knew it changed before our very eyes. In 2020, the internet became the backbone of our every day, setting the stage for unprecedented digital adoption rates across the nation. As it turns out, India's digital ecosystem hit its second inflection (the first being in 2017 when data prices dropped and internet access skyrocketed) and life as we knew it would never be the same again.

With rapid digitization and a never-seen-before growth in new users, the 3Vs — Voice, Video, and Vernacular languages — became even more central to the way Indians interact with the internet. **Voice** has emerged as the preferred way to use Search and YouTube.<sup>1</sup> Online **Video** has evolved from being a tool for entertainment to a destination for learning and sharing, and India's determination for progress is no longer limited by language barriers — Indians are increasingly demanding content in the **Vernacular**.

While Indians continue to be value conscious, they are now more comfortable transacting online, as evidenced by the surge in UPI transactions. (In 2020 alone, the number of UPI transactions surpassed the number of transactions in the 3 years prior.) A ripple effect of this is a shifted perception of value. Indian consumers are now more willing to pay for daily use products to be delivered to their door, to access on-demand entertainment options and to secure their future through learning & upskilling.

What we have seen in the last year shows the ambition, the flexibility, the pride, and the extreme innovation-driven momentum toward India's pursuit of progress. It's a call to all of us as businesses to reexamine our priorities and evolve at the pace our consumers have, while finding meaningful ways to contribute to India's growth.

With Google's "[Year in Search 2020 — India's Determined Progress](#)", we offer a sneak peek into what matters most to consumers to help marketers meet Indians on their search for a better tomorrow.



**Sapna Chadha,**  
Senior Country Marketing Director, Southeast Asia & India

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1. Think with Google, "Ok Google: How is voice making technology more accessible in India?", October 2020

# Country Themes

## 1 Local-first ▶ 04

India's internet users may have multiplied, but each individual continues to have a unique set of needs.

## 2 Value Redefined ▶ 10

While 2020 fueled Indians' curiosity about the world around them, it also helped them become more informed.

## 3 Learning Anything, Anywhere ▶ 18

2020 presented a unique challenge for a nation that deeply values education.



## Trend 1

# Local-first

India's internet users may have multiplied, but each individual continues to have a unique set of needs. In their pursuit for new information, fresh ideas and engaging entertainment - much of it in languages and formats of their preference - the 3Vs (Voice, Video, and Vernacular languages) have accelerated at an unprecedented rate.

## Voice:



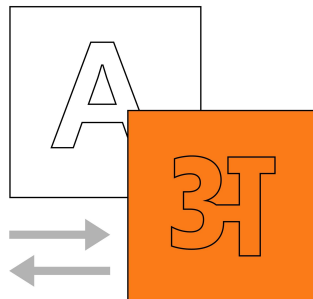
of users in India **interact with voice assistants** via their smartphones, making mobile the preferred device for many

## Video:



people come to **YouTube to learn something new**<sup>2</sup>

## Vernacular:



People across India **have used Google Translate features** over 17B times in the last year to translate web pages into Indic languages<sup>3</sup>

## Locally grounded.

‘Local’ may mean different things to different people, but Indians across the board are trying to better understand their context — from their city and languages to their community and interests.



YoY increase in Google searches for “Indian Premier League”



YoY increase in YouTube searches for “खेती” (farming)



YoY increase in Google searches for “local news”

## Locally speaking.

Indians are increasingly demanding content that is curated for them, and in their own local language. With more than 84% of online video viewers preferring non-English materials — it's no surprise that India's next wave of online content will be linguistically diverse.

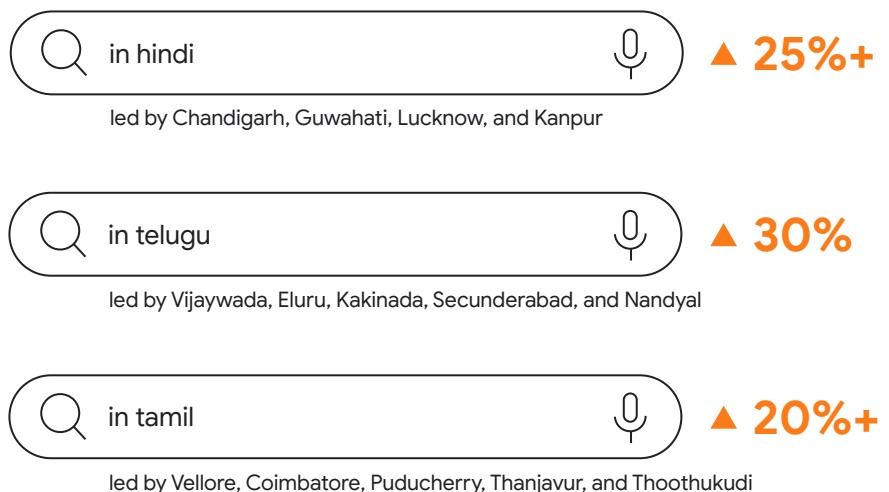


top searched **web-series in 2020**  
were **Indian content**



of YouTube viewers prefer **watching**  
**content in Indic languages**<sup>4</sup>

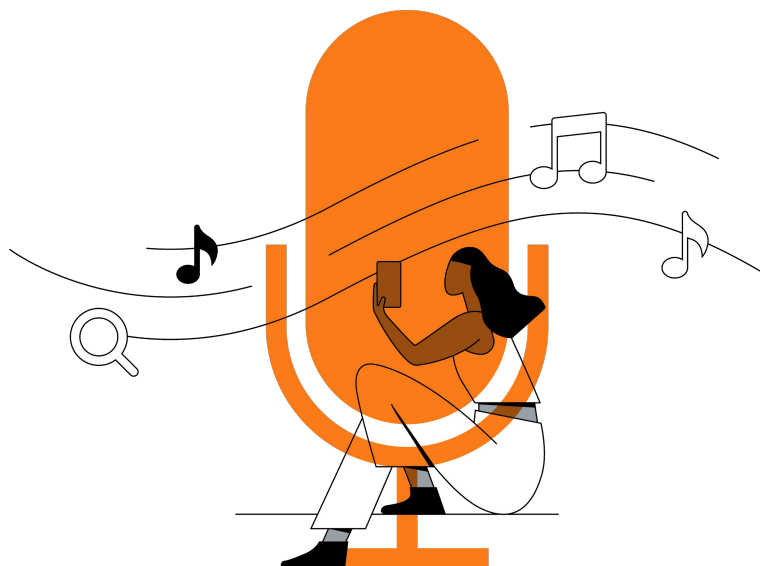
Searches for  
language-specific  
content **continue**  
to grow on  
Google Search:



# Thought starters for businesses

Respecting customers' preferences is a relatively straightforward concept so the steady rise in demand for Indic-language online experiences should serve as an indicator of a brand's next steps. Akin to any brick and mortar shopping scenario, a salesperson will speak to customers in whichever language the clients desire, and online interactions should be no different.

By using Indic-language ads and pointing them to Indic-language landing pages, brands can better connect with their current users and reach new audiences. Instead of simply translating the material, consider trans-creating inclusive, impactful assets to build meaningful experiences so users can interact with the brand in a way that is natural and familiar.





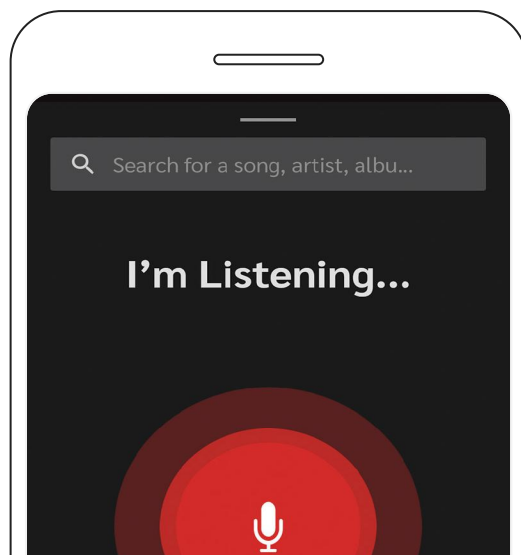
# Thought starters for businesses

**Bolero** established itself as a market leader in the Indian SUV market.



The auto giant wanted to target customers in Tier 2 and 3 cities as well as rural areas in the Hindi heartland more effectively and efficiently, while still providing a relevant and familiar user experience. To do this, they first translated high volume keywords and search terms into Hindi, and then created multiple variations of their ads in Hindi along with quality responsive search ads (RSA) to improve relevance. Finally, the auto giant leveraged their Hindi website and directed all the campaign traffic to the site. In the end, Bolero not only increased their Search coverage, but the incremental conversions as well. By building an engaging local-language destination, users were afforded a familiar online experience in their native language.

When **Gaana**, India's largest music streaming service, decided to expand into rural India, the brand introduced a voice search functionality as a way of overcoming literacy barriers. Within a year, 24% of all Gaana users were using voice to find their favorite songs.<sup>5</sup>



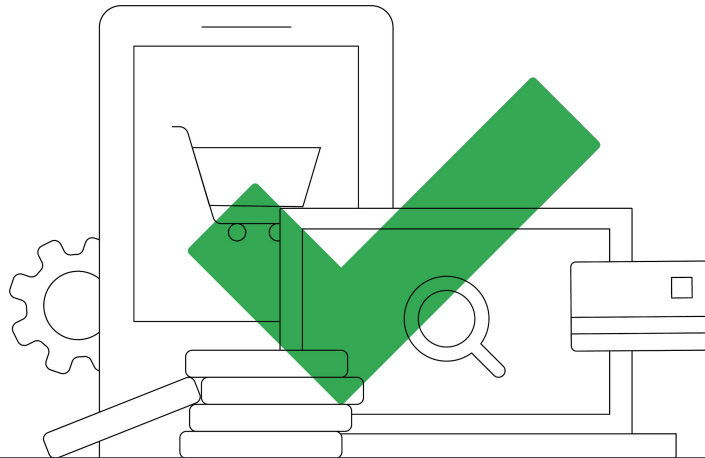


## Trend 2

# Value Redefined

While 2020 fueled Indians' curiosity about the world around them, it also helped them become more informed. The concept of "value" was redefined and online shopping was no longer merely a novelty or leisure activity - it became a necessity. It also broadened online interest in items such as smart TVs, laptops and even cars, which were traditionally considered high-value and high-involvement categories.

Over the course of a few short months, a large portion of the user journey - from brand discovery and product comparisons to quote sourcing and completing the purchase - now occurs online. As a result, a shift in expectations has surfaced: instead of heading to the nearest shop, Indians now demand that services and goods be delivered to them, and right away.



YoY growth in searches for  
“buy mutual funds”



of auto consumers — for both  
4-wheelers and 2-wheelers —  
would consider “buying online”  
if given an option<sup>6</sup>



increase in people shopping  
online in Rural India<sup>7</sup>

6. Google & ET Auto.com, Google Auto Gearshift India 2020, India, 2020  
7. Kantar ICUBE 2020

## Embracing the new.

With digital usage rising across verticals and geographies, Indians have also adopted a willingness to try new things online. This is especially true for products and services that were previously considered reliable only when done in person.



growth in searches for “**online doctor consultations**”, with the biggest surges in Manipur, Odisha, and Bihar



intenders have paid for **online games** and will most likely continue to; 20% of those who have not are likely to pay in the future<sup>8</sup>



of consumers who intend to buy a car claim that they would prefer to “**test drive at home**”<sup>9</sup>

## Deliver to me.

Over the last year, digital has been the primary adoption driver for most business categories. In particular, Indians now expect home deliveries for nearly every product and service, from groceries to cars, as demonstrated by the 100%+ YoY growth in searches for “online delivery”.



YoY growth in searches for “grocery”, led by cities like Chandigarh, Surat, and Indore



YoY growth in searches for “होम डिलीवरी” (home delivery)



YoY growth in searches for “online store”



## Prudent spending.

Not only have people’s daily habits and needs changed, their concerns and challenges have too. A primary worry has been around the future of the economy and its impact on individuals. Consequently, where people are spending — or not spending — have also shifted over the last year.



of parents interested in online children’s courses are willing to pay for it if they find it useful<sup>10</sup>



YoY growth in search queries for “invest”

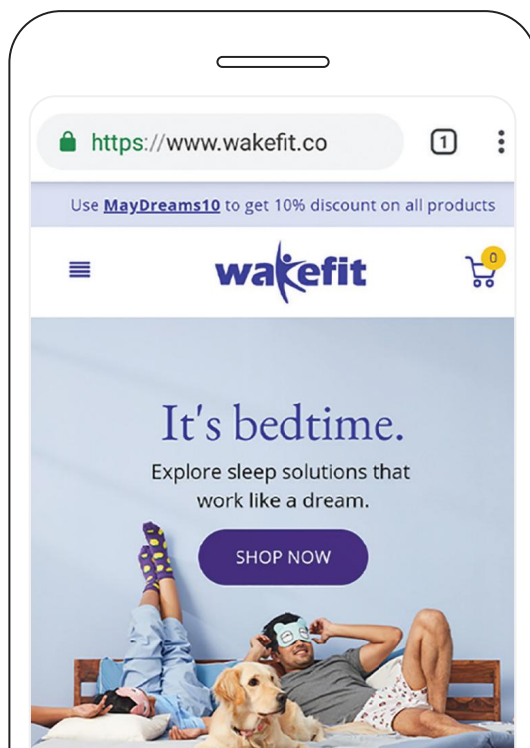


YoY growth in searches for “second-hand car”

## Thought starters for businesses

Last year's sudden surge in online demand meant that more than ever, consumers want convenience and that their needs be met on a real-time basis. To meet these expectations and still drive results (such as brand awareness, new leads or sales), brands had to quickly ramp up resources to optimize the user's digital brand experience.

To address these shifts, traditionally offline industries like retail, auto, and consumer goods can consider dialing up their investments in tech and audience engagement, as well as reinforce their direct-to-customer (D2C) models.

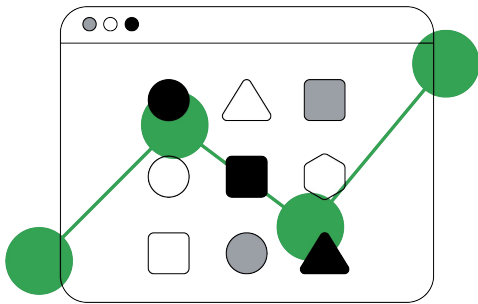


D2C brand [Wakefit.co](https://www.wakefit.co), one of the most prominent startups in the home and sleep solutions space, was mainly driven by a surge in demand for e-commerce beyond the top 8 cities. During the festive season (August to November 2020), over 40% of the company's revenue was generated by cities beyond the top 8, compared to just 30% in February 2020.



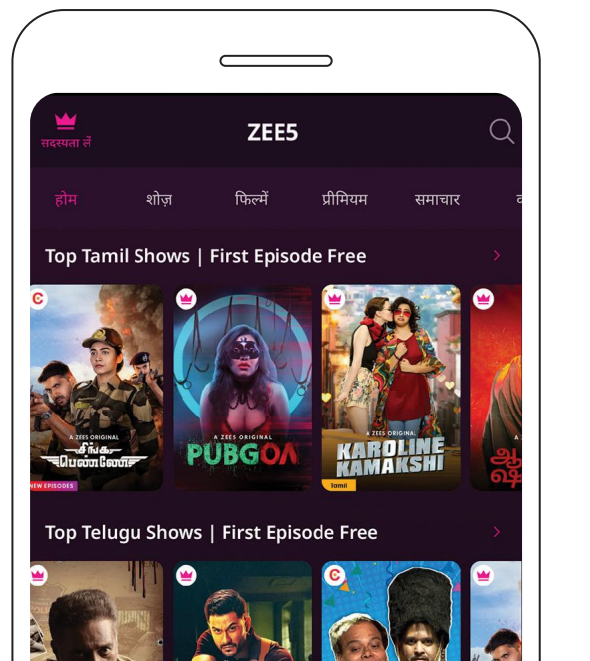
## Thought starters for businesses

On-demand has become a necessary feature in nearly every industry. More than ever, people expect to engage with the brand in a personalized way. Businesses need to adhere to this shift and reconsider their approaches and boundaries, specifically what new parameters of customer engagement may be most conducive to a positive brand experience.



OTT apps have seen extraordinary growth across the board, signifying consumers' switch from appointment-viewing entertainment to on-demand video.

Last year, Google searches for OTT services such as [Zee5](#) saw a 33% YoY growth, while searches for subscription-related queries swelled by more than 200% YoY — a sign that consumers in India are increasingly willing to pay for the content they like, and to view it when they want. In 2020, Zee5's overall subscriber base saw a 80% YoY growth — an upward trend that will likely continue for the foreseeable future.<sup>11</sup>



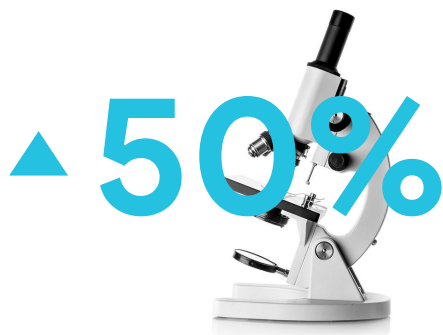
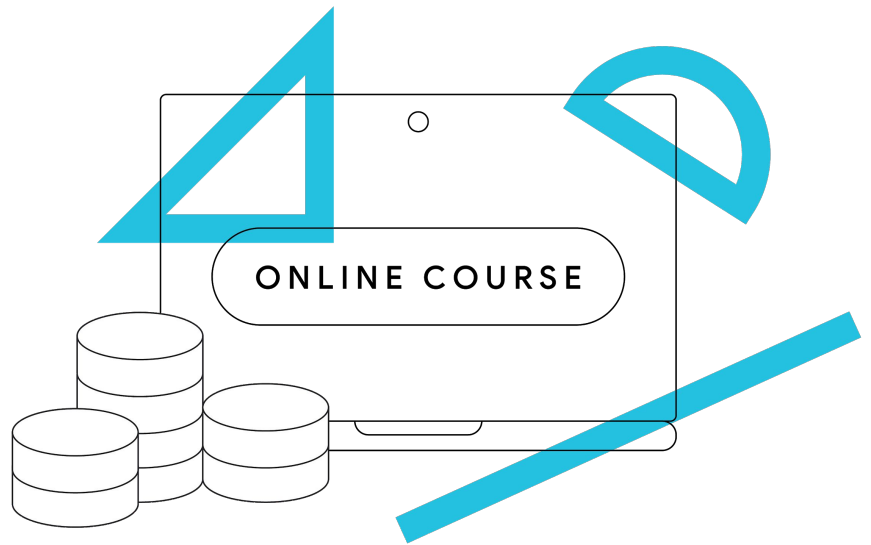
11. Financial Express, 2020: Rise of paid subscribers, January 2021



Trend 3

# Learn Anything, Anywhere

2020 presented a unique challenge for a nation that deeply values education. With students unable to attend schools and colleges in person, Indians, like the rest of the world, turned to digital to continue learning, upskilling, and developing themselves. Many also discovered new streams of income, including some they'd not considered before.



YoY surge in watchtime  
of **science-related videos**  
on YouTube<sup>12</sup>



YoY growth in searches for  
“**online course**”, compared to flat  
growth in the previous YoY



YoY growth in searches  
for “**how to sell online**”

## Learning for today.

As a result of lockdowns, Indians stepped out of their comfort zones to acquire new knowledge and skills that would either simplify their lives or make them more comfortable.



YoY increase in YouTube searches for “ऑनलाइन क्लास” (online class)



YoY increase in Google searches for “at home” in the Beauty & Fitness category



YoY increase in Google searches for “how to pay online”

## Learning for tomorrow.

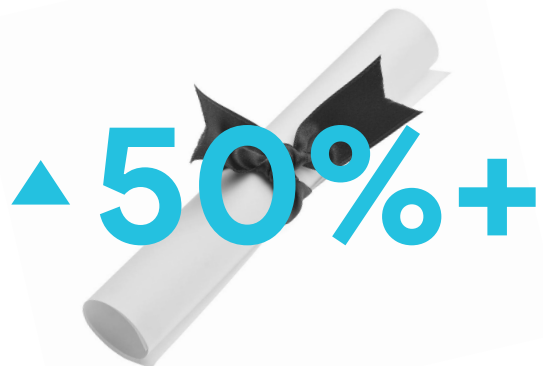
The pandemic resulted in many Indians reassessing and future-proofing their careers by learning skills that would either help them transition to a new career or progress in the existing one.



growth in Google searches for “**fundamentals of digital marketing**”, compared to the previous year’s flat growth



YoY growth in YouTube searches for “**कोडिंग**” (coding)

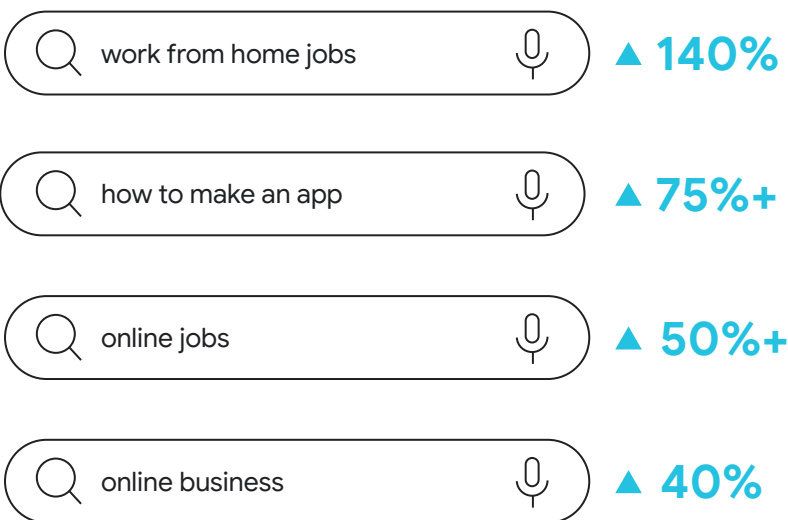


YoY growth in Google searches for “**certificate course**”

## Learning to improve income.

Indians quickly grasped that learning is an enabler of supplementary income, which helped them feel more in control of their current situation and of their future. They turned to digital to seek new opportunities, such as extra work or even entrepreneurship.

### YoY growth in searches for





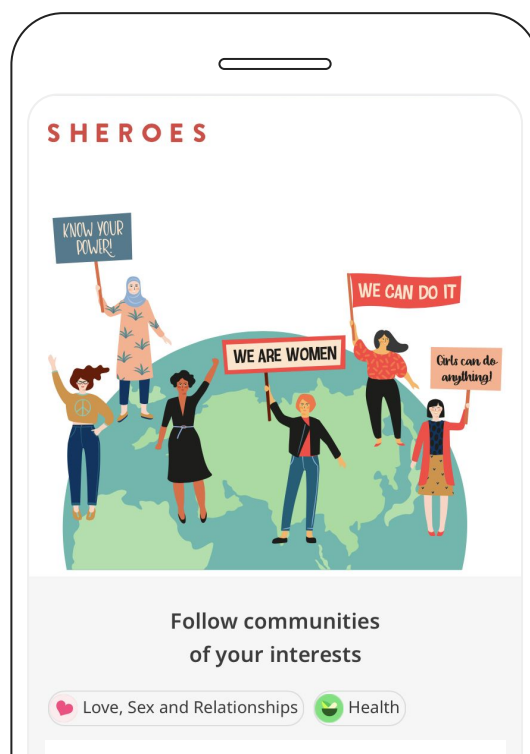
work from home



## Thought starters for businesses

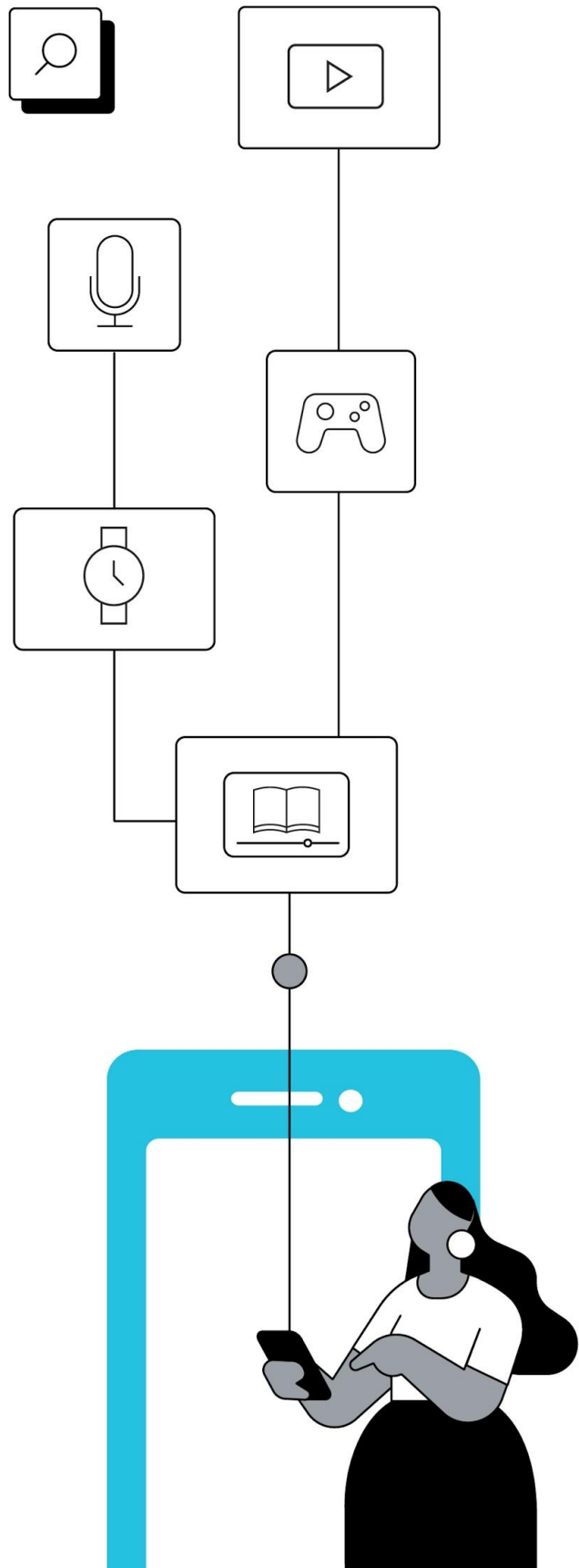
The lack of control last year spurred a need to manage the things that one could control. Future-proofing our lives wherever possible and seeking reassurance and peace of mind became paramount. With information at everyone's fingertips, Indians are seeking shared knowledge, collective support, and access to worlds beyond their own — but on their terms. Under these unique circumstances, companies now have an opportunity to help Indians upskill and even pave new income streams.

**SHEROES** is a women-only social network accessible via Sheroes.com and the SHEROES app. The services offer women a chat-based helpline, resources, mentorship, peer-to-peer conversations, a health tracker, a marketplace and work opportunities.



Designed as a safe and trusted space for community members to discuss and share their stories on health, careers, and relationships, the social network has been introducing meaningful products to support women in various ways, including buying and selling personal items, and even to seek work. The latest addition is a neo-banking platform that offers financial support and enables self-reliance.





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The internet has become a key destination for Indians to cultivate and feed their curiosity. From learning how to develop an app or pick up a new skincare routine to finding certificate courses to future-proof their careers. But we must also acknowledge that not everyone has access to a device or the internet yet. Together with the ecosystem, we must work to address this digital divide so that every Indian has equal access to the learning and opportunities that technology provides.

COVID-19's unprecedented disruption has challenged businesses to use every digital tool at their disposal to address the opportunities brought on by the sudden surge in online adoption. Whether it's an e-commerce delivering vital goods to rural India, the digitization of industries traditionally reliant on offline sales, or the pivot to "on-demand" experiences — India is undeniably undergoing rapid digital transformation.

The bottom line? The opportunity for brands to engage with customers online has never been more critical than now.

**For more insights from across the region, explore our interactive regional trend report below.**



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