Same Same, But Different

A report on how new and early internet users are united by digital and more alike than you think

Think with Google
Consumers across urban and rural India have dramatically increased their daily digital use. Understanding the impact of digital on consumer behaviour is essential for informing business and product strategy and creating the most effective messaging.

There are 500M internet users in India — that’s more than the entire population of the U.S., Mexico and Canada combined.

Source: WorldOMeter, Live world population
To understand the impact of this digital explosion and help businesses adapt, we conducted research nationwide covering seven metropolitan centers as well as peri-urban and rural areas.

Through our exploration, we discovered a set of trends that are common across two distinct Indian demographics: early and new internet users. These two segments turned out to be more alike than expected.
To determine the trends we took the following approach:

- Conducted 300+ in-depth consumer interviews encompassing different ages and lifestages.
- Collated the findings into observations that are common across both demographics.
- Validated the observations with 10 industry experts including heads of creative agencies, CMOs, and YouTube creators.

1. **Enduring Trends**
   These trends are consumer behaviours that will be sustained and not expected to change drastically due to COVID-19.

   1. **Proud to be desi**
      A growing confidence in our Indianness.

   2. **My roots, my bhasha**
      Regional pride and the vernacular as an expression of identity.

   3. **Watch her go! Independent everyday.**
      Everyday confidence amongst women.

2. **Accelerating Trends**
   These trends are likely to be amplified by COVID-19 and are expected to result in an acceleration of this consumer behaviour.

   4. **Balancing WE and ME**
      Blending individual and collective identities.

   5. **Never too late to learn**
      The rise of adult learning.

   6. **Entertainment — for me, by me**
      Instant escape, easy relaxation.

   7. **100% Authentic**
      Consumers gravitate toward the relatable.

*Since this research was conducted pre-Covid, this is Google’s point of view on the impact of Covid on the trends.*
Enduring Trends
Proud to be desi

A growing confidence in our Indianness

People once saw the internet as a window to idolise global personalities, there is now a shift from admiration that is externally focused to pride closer to home, with a sense that Indians are not “less than” others but equally accomplished.
Early internet users are no longer only in awe of international icons as they have enough role models from India who have made a mark on the world stage.

New internet users are expressing a clear admiration for homegrown local heroes who are making it at a national level.

“I am a big fan of Priyanka Chopra, and it’s really amazing how she moved from Bollywood to Hollywood and made a name for herself. I’ve watched all the seasons of Quantico. Watching it makes me very proud.”

“I am postmaster from Jabalpur, and I am writing a book. I have even spoken to a local publisher about it. I want to become famous. I want people to know me by my writing.”
Authenticity among people is increasing because they realise that they don’t have to be someone else to find their identity. They are much more confident about their own identity.

There is a strong belief that they, as individuals, can be at the forefront too - they can be looked up to and there is aspiration. Digitisation has only made this trend stronger.”
Traditionally a rural sport, Kabaddi has many star players coming from smaller towns. The success of this inherently Indian game in a country obsessed with the imported sport of cricket demonstrates India’s growing confidence in its identity.

Star Sports, one of India’s leading channels, launched the Kabaddi Premier League, which quickly became the second most popular sport in terms of TV viewership share.

35% growth in searches related to “India” and 20% rise in queries around “desi”

70% prefer YouTube videos that makes them feel a deeper human connection, grounded in personal experience.

Source: YoY increase in Average Weekly Searches, Google Trends Data, India, January to March 2019 vs January to May 2020; Google/Insight Strategy Group, Consumers & Video Consumption Research, IN, Aug 2019; n=1000 Online video viewers; What India Watched Report-2019, BARC
Today’s consumers are no longer embarrassed about speaking in Indian languages. Speaking in your mother tongue is considered an authentic way to showcase your regional identity, which now has cultural caché.
Early internet users are blending the language and customs of regional cultures with their modern, urban lives — creating a new kind of cultural chic.

Modern mix

New internet users are elevating their vernacular language and background as a badge of authenticity while aspiring to learn English to create better opportunities for themselves.

Paired for progress

“My son studies in an English medium school, and he is quite comfortable speaking with everyone in English. But I have now encouraged him to speak in Gujarati so that he is in touch with his culture and heritage and can speak his mother tongue.”

Prasham’s parent

“I think seeing sports in Bengali is great! Earlier, sports were always in Hindi or English, and some elders could not always connect with the sport. Plus listening to sports in my mother tongue is something special. It’s easier to understand the emotions and situations.”

Biswajit

Mumbai

Kolkata
“This shame or consciousness about my local language or Hindi, has completely gone. There is a certain pride in the fact that I know my local language.”

Akash Banerjee
Political Satirist and a Social Media Entrepreneur

“We slowly and steadily made our content from 80% English and 20% Hindi to 80% Hindi and 20% English. And that suddenly changed how people engaged or reacted to it.”

Prajakta Koli
YouTuber

“As marketers, we have not done justice to the regional language needs of our customers. We have probably failed the system on this, and you can see an overcorrection and massive movement to regional identity that is happening now as a result.”

Sapna Chadha
Senior Director of Marketing for SEA & India | Google
The Indian beverage brand PaperBoat built its product strategy, brand identity, and marketing communications on a strong regional identity rooted with nostalgia.

Paper Boat’s success with traditional flavours — like aam ras, jaleera, and kokum — shows Indian’s acceptance and celebration of its unique identity.

Bringing it to life

growth in average weekly searches for queries related to “in Hindi” and “in Tamil”

93% of YouTube viewers in India prefer watching content in Indic languages — mostly in Hindi, followed by Tamil, and Telugu.

Source: YoY increase in Average Weekly Searches, Google Trends Data, India, January to March 2019 vs January to March 2020; Google/Kantar, Video Landscape Research, IN, Sep 2019. n=6278 Online video viewers
Women are becoming more independent and autonomous in their daily lives. They’re increasingly living alone, following their interests and using digital tools to learn and grow.
Women are redefining opportunities and discovering autonomy — and using technology to facilitate their independence, whether it’s success in business, living alone, traveling, or pursuing other interests.

The internet is allowing women to break boundaries by learning new skills, exploring their environs, and gaining the confidence to be more independent.

“My parents could not comprehend the idea of a single girl living alone when her family is in the same city — but I needed my space, my freedom, and my own home.”

“Chitali Aarti
Mumbai

“I am from Madurai, and I have never really traveled on my own. When my son got a job in Mumbai, he suggested I come to Mumbai, but when I arrived I was so lost. He understood and downloaded all these apps on my phone and taught me to use them. From then on, it was like I had developed wings! I felt independent and efficient.”

“Aarti
Madurai
“The internet has given them confidence. The biggest change is in our nutrition business, where five years ago doctor recommendations used to drive our business. But today 78% of infant cereal purchases are done by moms through their own research. It’s a huge shift.”

Rashi Goel
Head of Marketing & Consumer Communications | Nestle

“The Internet is bringing more people to the mainstream. Once, a woman narrated an inspiring story about her journey of being able to translate her passion for clothing design into a home-run business, because of access to the Internet. Today, she employs many women like her from the neighbourhood, who are working from home and being a role model for their children.”

Vikas Gupta
Head — Customer, Marketing & Digital Business | Flipkart
Swiggy, one of India’s biggest food delivery services, ran a humorous campaign showcasing how their app freed women from cooking to spend time as they preferred.

The campaign demonstrated how women can continue in putting family favourites on the table without having to spend the day in the kitchen — which is a newfound autonomy.

**Bringing it to life**

8% YoY rise in average weekly searches related to “for women”

+120 Indian female creators grew to having 1 million+ subscribers in 2019 (compared to 3 who had reached that achievement in 2017)

Sources: Google Trends Data, India, January to March 2019 vs January to March 2020; Google/Insight Strategy Group, Consumers & Video Consumption Research, IN, Aug 2019, n=1000 Online video viewers
Accelerating Trends
Balancing WE & ME

Consumers have become more independent because of digital, but they still value a sense of belonging to their families and communities
As early internet users become more individualistic, they fear a sense of alienation, and are resolving to strengthen family connections to keep them anchored.

“While new internet users are getting a taste of personal independence, they are balancing this new experience with strong ties to their community.”

“Family matters”

“Community is king”

“Early internet users”

“New internet users”

“Vaishali
Jabalpur”

“My dad and I have busy lives: I’m in college all day and he’s at work. My dad has done a lot for me, and I make it a point to spend time with him in the evenings when he is back from work. This has become a daily habit for us now.”

“Chhaya
Mumbai”

“I love making short form videos. Initially, my mother-in-law did not like the idea. I got her involved in a couple of videos where she was cooking and showed her how people were liking her videos. Now she is always excited to make videos and cook together. Making videos has now become our time together!”
Because individualism has grown, there is a pullback saying ‘What are we doing together as a family?’. When we come together, we actually come together far more meaningfully than we did ever before. We are connecting with each other far more strongly.

We are a part of a social system. Even in the quest to excel, there is an inherent need to stay tethered to one’s roots and a growing desire to remain connected to a larger community.
Cadbury Celebration’s #BadiFamilyBadiDiwali ad campaign showcased the warmth of connections by featuring a wife surprising her husband with a visit from his whole family to celebrate The campaign captured both the anxiety of alienation and loneliness and the joy of coming together as a family.

**Bringing it to life**

25% YoY rise in average weekly searches “for family” and 30%+ YoY rise in average weekly searches for “with family”

+70% consider YouTube to be their personal screen, but one of the top motivations for watching is to be able to connect to people

*Source: Google Trends Data, India, January to March 2019 vs January to March 2020 Google/Insight Strategy Group, Consumers & Video Consumption Research, IN, Aug 2019*
Never too late to learn

Building wherever formal education leaves off, the internet has made it easier and more fun to learn about everything and anything.

The rise of adult learning
Early internet users are going online to add to their existing skill set or learn a new hobby. Their pursuit is to build richer inner lives as well as taking charge of their own professional advancement.

Enhancing my education

New internet users are more likely to be supplementing a basic education to gain essential skills and knowledge that help them get ahead.

Filling in gaps

“I watch YouTube videos about how you should walk, how to have a confident handshake, what kind of body language to adopt and eye contact to make during an interview. I’m learning a lot about personality development.”

“Rajat Dinesh
Delhi

“My dad was a contractor, and I too got into the business 10 years ago. I’m not afraid to experiment, and wanted to improve business. The neighbourhood college kids told me about YouTube, and I slowly I started learning how to make blueprints myself. Now, I construct small shops on my own.”

“Dinesh Udaipur

“New internet users

Early internet users

Trend 5

Think with Google
The internet has been a democratizer for education and learning, and not just for getting degrees, but learning about whatever I want to, my passions, my hobbies and everything under the sun — it’s a platform that allows for it. The opportunity to become educated through entertainment has exploded.

When you give people access to the internet in India, don’t underestimate their desire to learn something new. We see it across both rural and urban India. The desire to learn and advance is not unique to just certain segments.
upGrad, one of India’s biggest ed-tech companies, built their business strategy on helping professionals upskill themselves to the latest Industry standards.

Entering a market that had been focused on exam preparation, upGrad brought ed-tech courses to people across India, illustrating the breadth of India’s demand for continuous learning at all levels.

75% growth in searches for “learn online” and 2.5x growth for queries related to “teach online”

4/5 consumers watch YouTube to learn something new.

Source: YoY increase in Average Weekly Searches, Google Trends Data, India, January to March 2019 vs January to March 2020; Google/Insight Strategy Group, Consumers & Video Consumption Research, IN, Aug 2019, n=1000 Online video viewers
The internet is increasingly the entertainment destination of choice — whether to relax and unwind after a stressful day or to escape by getting immersed in a different experience.
Early internet users first flocked to the internet to inform and enrich their lives, but now it is also the key destination for entertainment — the perfect world to melt into after a long day.

For new internet users, going online and accessing the gamut of entertainment there is a way to overcome the monotony and boredom of daily life.
We have had generations of boredom. The entertainment that is coming now — we are so hungry for it. We have been starved of this entertainment for generations and generations.

“...

Our lives have become so crazy. At the end of a long day, I do not want to sit down and watch something that will make me use my brain. I want to sit down and watch something that’s simple and light.”
Flipkart, India’s leading homegrown e-commerce entity, is carving a niche in the nonfiction genre, by offering differentiated and interactive content, which is mobile-first.

Flipkart Video continues to introduce new offerings, and demonstrate the insatiable appetite Indians have for entertainment no matter where they are located.

Bringing it to life

5x

YoY growth in average weekly queries related to “entertainment” as a category

+85%

of consumers watch YouTube to relax and unwind

Sources: YoY growth in average weekly searches, Google Trends Data, India, January to March 2019 vs January to March 2020; Google/Insight Strategy Group, Consumers & Video Consumption Research, IN, Aug 2019, n=1000 Online video viewers
Consumers are no longer looking at icons and brands with wide-eyed wonder. Instead, they expect greater authenticity and accountability.
Accomplished yet authentic
After working hard for their achievements, early internet users want to present their best selves online, but they also recognize that it has to be authentic. There’s pushback on anything that feels fake.

Real and relatable
For new internet users, seeing people like themselves makes them comfortable online. If those relatable people have good fortune and provide a story of inspiring escape, all the better.

“I love making videos and putting up stories on social media, and I have followers. But I avoid putting a lot of filters on them. If I constantly put up pictures with filters, then people will think I am fake. It’s important to me that I don’t come across fake online.”

“I watch a lot of videos by Nakallites and BlackSheep on YouTube. They are from TN only and are very funny. They talk about situations that we can relate to like college life, exam preparation and all.”

Filomi Karthik
Mumbai

Karthik
Madurai
Because there is such vast access to information today, you can’t really pull the wool over the eyes of the consumer. Every consumer has access to other consumers’ points of view, their opinions, their reviews. So you have to be authentic in everything that you do.

It’s important to define who you are, and present yourself in an authentic manner at every single touchpoint. When you are not authentic, people will call you out. In today’s connected world, is it difficult to be anything but the ‘real you’.

A lot of content that we make right now needs to be more relatable. If there is a formula for content creation, it has to be relatability.
Google Pay, in their campaign to showcase “India’s biggest payments” took the help of real Indian icons who had changed India for the better — starting with a single payment

Google Pay’s campaign leveraged factual stories of people who had achieved success, thus making the campaign a lot more relatable, and authentic

Bringing it to life

+60% YoY rise in average weekly searches for queries related to “true story” and +55% YoY rise in average weekly searches for queries related to “behind the scenes”

+70% of consumers prefer watching content on YouTube that reflected their life, in a relaxing and stress-free setting

Sources: Google Trends Data, India, January to March 2019 vs January to March 2020; Google/Insight Strategy Group, Consumers & Video Consumption Research, IN, Aug 2019, n=1000 Online video viewers
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