Think with Google

2021 YEAR IN SEARCH

From “adapt” to “adept”

India

TABLE OF CONTENTS

1 Digital mainstreamed
2 Lives re-examined
3 Bridging distances
4 Truth seekers
5 Growing inequalities

This year, we accepted that the world as we knew it had been altered. While 2020 saw us learning to adapt to new ways of living, in 2021, we leveraged our experience, resilience, and inquisitiveness to become adept at these new ways.

Of the billions of searches we see every day, 15% are brand new[1] — from new user segments, across categories, and for all kinds of queries. And as people turn to the internet to fulfill their needs, they are faced with limitless information and abundant choices. Shoppers are increasingly relying on digital to evaluate their options and make sense of this torrent of information. For example, in 2021, we saw a 41% increase in search interest in "which brand is good"[2] as people looked to build their consideration sets.

As marketers, we play an integral role in helping consumers make more confident decisions. This means understanding their priorities and preferences. Our recent research found that 83% of Indian consumers agreed that they would purchase from a brand that provided helpful and trustworthy information when they were exploring options.[3] By offering relevant information, brands can help shoppers who face decision paralysis. This also means that trusted sources are more important than ever. People are increasingly concerned about privacy, security, and transparency, and are willing to invest time and resources into ensuring that brands align with their value systems and beliefs.

At Google, we're humbled to see people trusting us to help them with their queries. Whether they're existing internet users looking to reevaluate their lifestyles, or newcomers with fresh concerns, people all over India and the rest of the world rely on Search to answer their questions. In 2021, "sustainable" rose to its highest search interest within the last five years in India[4] as consumers now expect the brands they choose to share the same higher purpose.

Searches like these offer us unique insight into what people really care about. We hope that this edition of our Year in Search India report can help you make sense of the billions of searches that happen and guide your business strategy to be better prepared for what's next. We hope that our takeaways will inspire you to translate insights into action, and evolve your business strategies to be better prepared for 2022 and beyond.

Sources:

1. Google Internal data, 2021-22 (Global)
2. Google trends
3. Google commissioned Kantar/Quantum, "Emotional Value of Search 2021," B3. Brand Consequences and Benefits. Base: Those who have purchased from the vertical in the past 18 months, IN n=1002
4. Google trends

Digital mainstreamed

If 2020 saw millions of consumers migrate online, 2021 showed the staying power of digital. From shopping to services, **new users who may have begun their online journeys due to necessity are now proactively deepening their usage.** Speed, convenience, and price are just a few of the reasons more consumers are now choosing digital-first lifestyles.

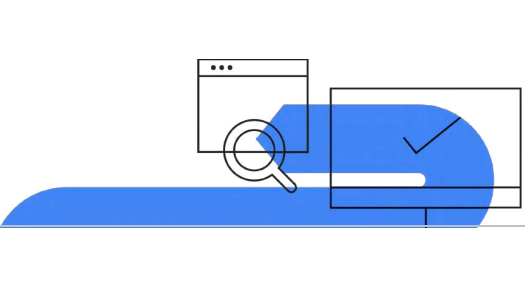
In 2021, digital acceleration continues with India posting higher digital adoption growth than other regions like the U.S., China, and the E.U. Indeed, we are seeing the staying power of digital. Rising searches in 2021 paint a picture of how the many new digital consumers have not only dipped their toes into the online world but also taken the plunge to integrate digital into their lifestyles. In India, users access more than four industries through digital channels.

And even as offline mobility resumes, consumers who have grown more comfortable with the digital world are now choosing to stay online, with 65% of Indian shoppers going online to buy a product they previously bought in-store. Benefits like time and cost savings, flexible payment options, diversity of product offerings, and delivery services are motivating shoppers to choose digital-first experiences.

In some cases, online shopping has even outpaced traditional retail. In 2021, India's retail sales grew by 25% as the offline market shrank.[1] Today, consumers are not only seeing digital as a easier option for completing their research, but also as an easier option for completing their purchases. Nine in 10 offline buyers are using an online touchpoint for information in their purchase journey.[2]

The rise in users pushed online by the pandemic meant that brands had to adapt and digitalize at a scale and pace they had never planned for or expected. This resulted, often quite successfully, in scrappy solutions and quick-fix pivots, as businesses forced moments of flexibility within traditional marketing and business models.

Now that consumer behaviors are no longer only fueled by the pandemic, but also by the draw of a digital-first lifestyle, brands need to set themselves up to not only be COVID-proof, but future-proof as well. This is a watershed moment to rethink the agility of your business model to be readier to respond to future changes that may lie ahead, while still keeping the customer at the center of what you do.



SEARCHES

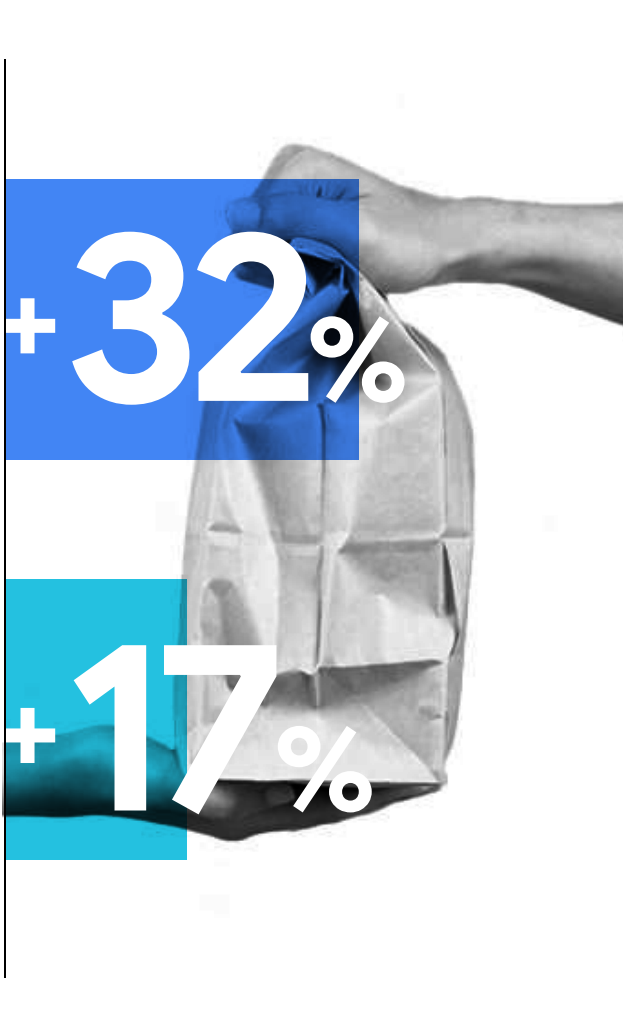
New users and businesses online

Today, India has 600 million smartphone users and that number is increasing by 25 million every quarter. As new users come online, businesses are evolving their digital strategies to meet them there. Growing searches show businesses seeking to understand more about digital transformation strategies and online inventory management, while new online shoppers are adopting new behaviors to search for information.

Search interest in (d2c brands) rose by 533% as businesses moved online to meet consumer needs.

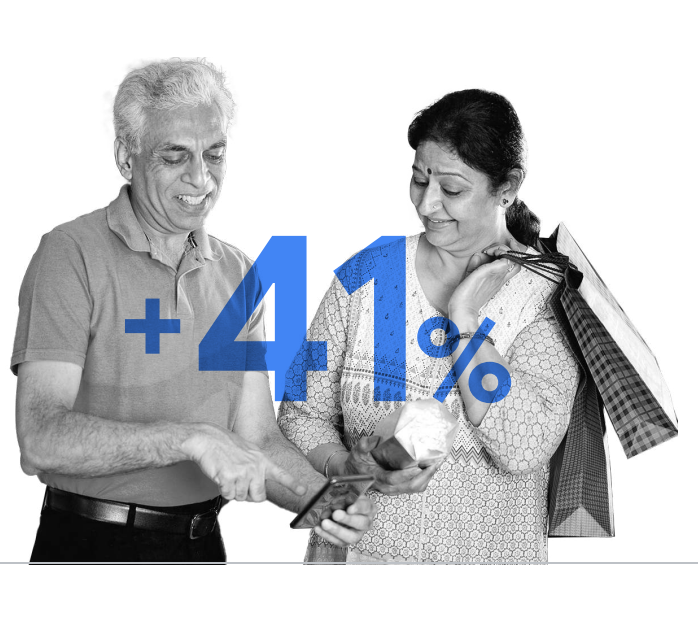
Search interest in (online shopping) has grown by 32% in India.

People are looking for ways to become online merchants, with search interest in (sell online) growing by 17%.



Online-first shopping experiences

In 2021, almost two-thirds of Indian consumers[3] surveyed made the majority of their purchases online. Rising searches show how shoppers are using digital channels as a helpful tool for decision-making, but are reluctant to endure downsides like delivery waiting times and costs.



We see a rise in searches by people looking to build their consideration sets online. Search interest in (which brand is good) grew by 41% in India.

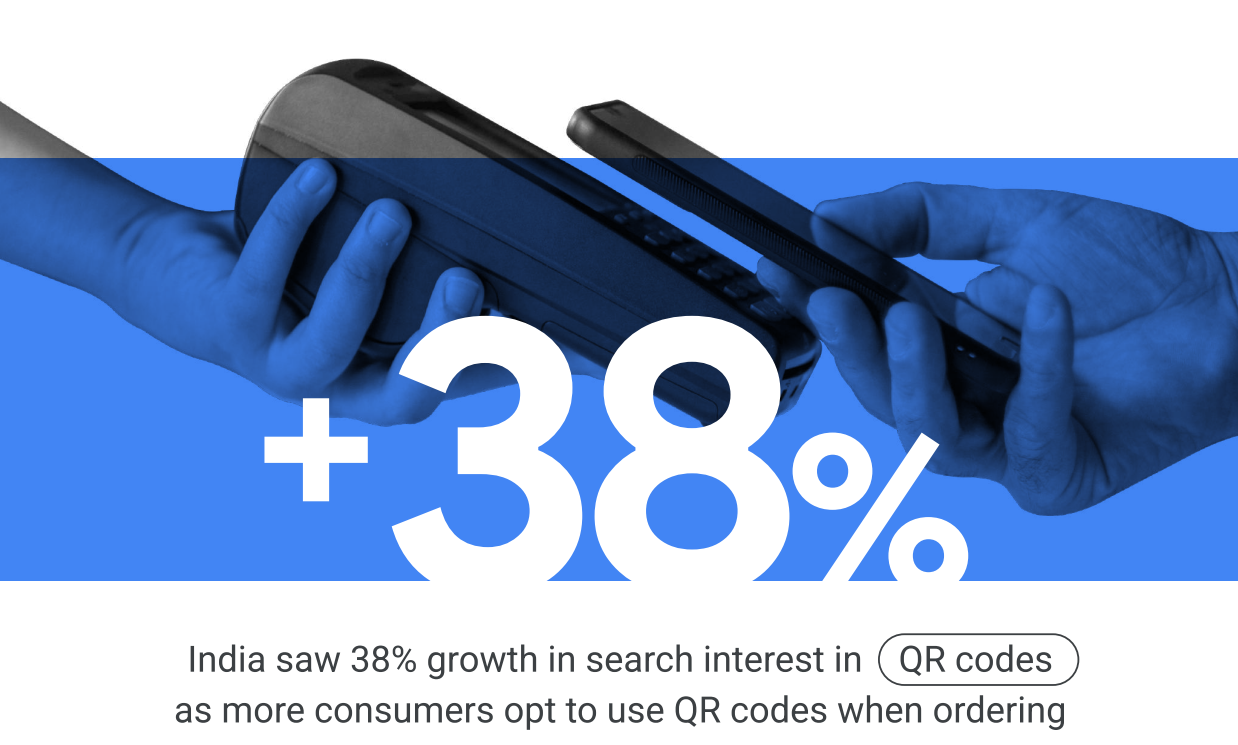
We see 100% growth in search interest in (online sale days) as people do more online research to find out when their favorite brands are holding sales.

Search interest in (same day delivery) grew by 38% as consumers seek to replicate the instant gratification of in-store shopping that they are used to.

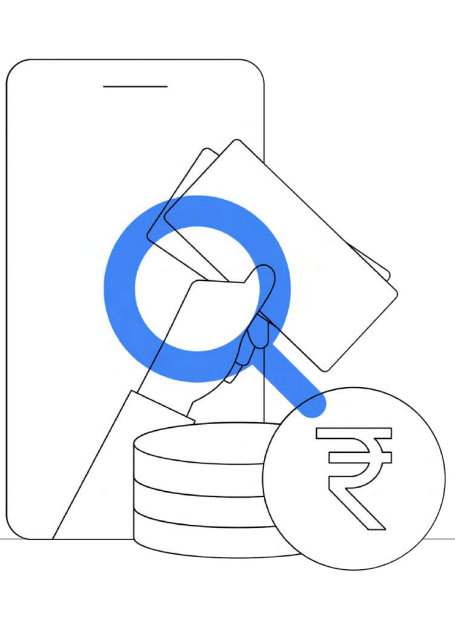
Shoppers are looking for free and reliable delivery, with up to 30% growth in search interest in (free delivery)

Digital in our day-to-day

People are expanding the use cases for apps and technology in their day-to-day lives, as well as experimenting with new digital services like online loans and contactless payments. The ease and convenience of digital wallets are converting consumers for good, with India seeing 5x growth in contactless payments in just five years.



India saw 38% growth in search interest in (QR codes) as more consumers opt to use QR codes when ordering food, getting more information, or making payments.



+90%

Search interest in (digital loans) grew by 90% as Indians explore the idea of lending through online platforms and mobile apps.

Preference for digital formats

Searches for digital formats continue to gain momentum as Indian consumers immerse themselves online. Streaming on connected TV has taken off,[4] and short videos are becoming popular more quickly. Live commerce is expanding its reach,[5] virtual try-ons are on the rise, and even when people take a break from the screen, they're opting for content like podcasts,[6] and audiobooks, which they can enjoy on-the-go.

Search interest in (livestream) grew by more than 28%.

Search interest in (virtual try on) increased by up to 55%, with consumers using virtual tools to try on makeup, apparel, and more.

YouTube search interest in (short videos) grew by more than 100%, as India embraces bite-sized digital content.

MARKETING IMPLICATIONS

From COVID-proof to future-proof

While COVID-19 created an urgency for more people and businesses to meet online, searches reveal a rise in digital-preferred behavior. At first, many brands responded to the initial rush online by finding flexibility in existing marketing strategies to solve for pandemic-related challenges. Now, the fast evolving online landscape calls for a more agile business model that is not only COVID-proof, but future-proof as well.

McKinsey

> “What many leaders feared, and the pandemic confirms, is that their companies were organized for …standardization and predictability that's [now] being overwritten by four big trends: a combination of heightened connectivity, lower transaction costs, unprecedented automation, and shifting demographics.”

1 Digital is where the masses are: From a complementary to elementary strategy

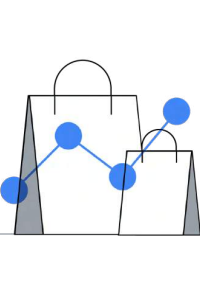
With the magnitude of the shift to online as a preferred channel for so many people in India, it's clear that digital is where the masses are at. This means that channel strategies that only rely on “above the line” advertising for mass reach are fast becoming outdated. Is your audience and media strategy reflecting the reality of where audiences are today?

1

Before deciding on your digital advertising strategy, check out best practices and tips for audience reach and segmentation strategies.

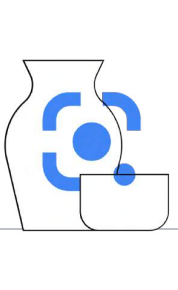
2

Stay on top of the latest consumer insights and best practices across marketing objectives and shopper moments, and use them to inform your digital strategies.



2 Bring your storefront to wherever shoppers are

Consumers expect to be able to fulfill their shopping needs whenever they need, and wherever they are. We know purchase decision-making is not linear, there is a complicated web of touchpoints that differs from person to person. And with new innovations like Google Lens, more people are browsing online for inspiration in fresh, unique ways.

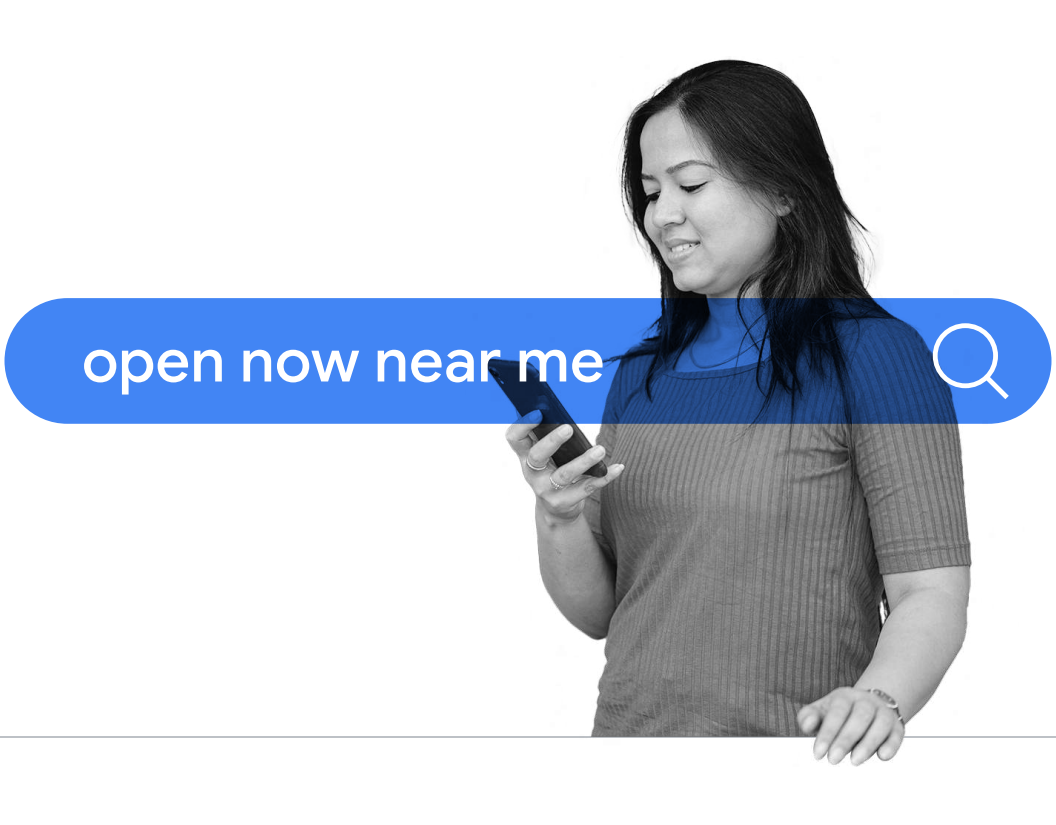


Be ready to meet people wherever they are on their shopping journeys and create helpful bridges to take them one step closer to your storefront.

Show up for people searching for what you're selling by featuring your products on free listings in the Shopping tab on Search.

Shorten the path from your ad to your virtual storefront by connecting your product feed to either Video action campaigns to drive customers to your site, or App campaigns to take them to your mobile app.

Search interest in “open now near me” has grown over 1.6x in India year over year. To create a seamless online to offline experience for your shoppers, use Local inventory ads to promote your products that are available for in-store or curbside pickup.



One of India's leading marketplaces, Flipkart, implemented Smart Shopping campaigns to reach more shoppers online. The brand successfully drove 1.3x higher ROI and 1.75x uplift in traffic.

Nandita Sinha
VP Marketing and Events, Flipkart

> “We leveraged Google's Smart Shopping Campaign at scale with our competitive targets on ROI to reach more metro customers and we have seen great results.”

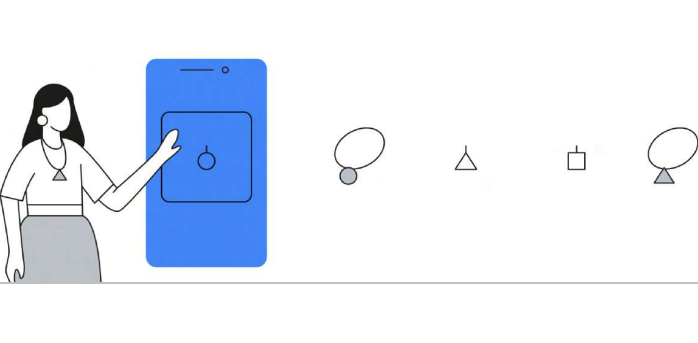
3 No more lines: Integrate and innovate across functions, channels, and formats

Digital is leveling the playing field for businesses. Traditional industry norms such as size of stores and retail legacy matter less in the next normal where, 68% of Indian consumers surveyed expect to buy from any store they want online.[7] Even those who purchase offline still refer to digital channels during their research journey — 63% of urban offline shoppers use Search just before their purchase,[8] and overall, there has been a 57% increase in the use of online touchpoints in consumers' paths to purchase.[9] This means that every brand has the opportunity to enjoy borderless growth, especially those that focus on seamless online-offline experiences for their customers.

1

Build an agile omnichannel strategy that enables your business to unlock short-term wins and long-term growth.

An omnichannel ecosystem doesn't just entail showing up online. More importantly, it requires an integrated, cross-functional business strategy. Transformation needs to come from within in order for your brand to meet ever-changing consumer needs and drive sustained business growth. This agility, coupled with customer-centricity, is what will open doors to new business opportunities.



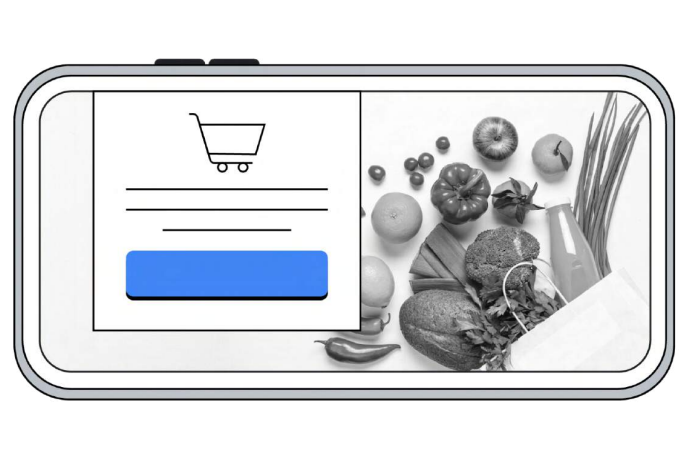
Seamless online-offline shopping experiences enable you to connect with customers, even for high involvement products like jewelry. CaratLane, a digital-first jewelry brand, provides virtual jewelry try-on experiences and AR-VR enabled consultations to create phygital experiences that transcend physical distance between the brand and consumers.

2

Connect and innovate the shopping experience, both online and in-store.

Simply moving a part of your business online will not satisfy the growing consumer demand for a seamless experience. Offer the best of online and offline shopping so that consumers can engage with your brand effortlessly, at their fingertips or in stores.

Get the last mile delivery right. Time and cost savings are the two benefits people value most in online shopping, while shipping fees and long delivery times are deal breakers.



Swiggy's Instamart specializes in delivering groceries within 15 to 30 minutes, mirroring the instant fulfillment shoppers would get from an in-store shopping experience. The grocery delivery service has expanded to seventeen cities in India and it has over two million transacting users.

Leverage immersive technologies to replicate offline shopping experiences online and elevate the in-store shopping experience.

Almost half of consumers surveyed felt that immersive technology like AR, VR, and 3D content helps them feel more connected with products, and 61% say they are more likely to buy from a brand that uses these technologies.[10]

Live commerce is fast gaining popularity for its immersive, participatory shopping experience, and YouTube's acquisition of Simsim presents opportunities for further e-commerce experimentation. As new internet users go online, the interactive seller-led experience with creators will replicate the offline e-commerce experience that consumers are used to.

Sources:
Google Trends, India, Sep 1, 2019 - Aug 31, 2020 vs. Sep 1, 2020 - Aug 31, 2021, unless indicated otherwise

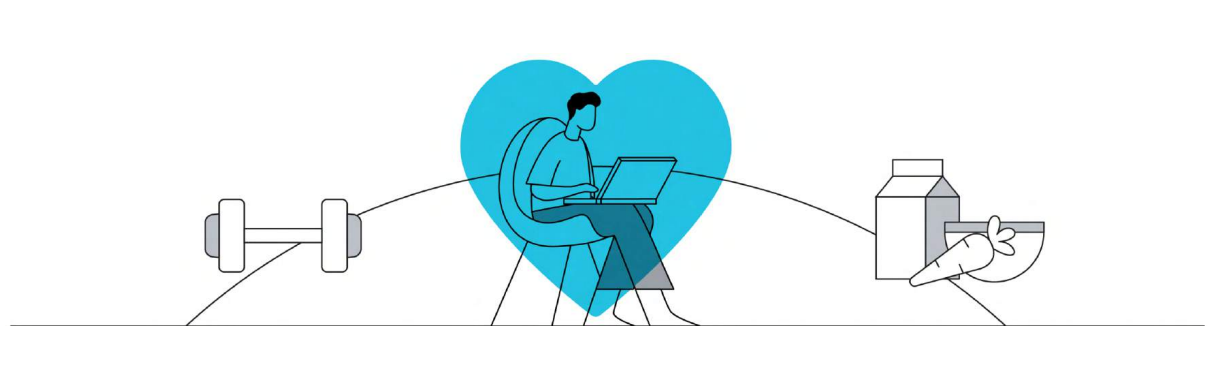
1. Bain & Company, How India Shops Online, Aug. 2021.
2. Kantar IN Shopper Path-to-Purchase 2021 Research
3. Google commissioned Ipsos COVID-19 Tracker, AU, BR, CA, CN, FR, DE, IN, IT, JP, MX, RU, ZA, KR, ES, U.K., U.S., n=500-1000 online consumers 18+ per market. Sept. 9, 2021–Sept. 12, 2021.
4. GWI, Wave Q1, 2020, ID, MY, PH, SG, TH, VN.
5. iKala, The Rise of Social Commerce in Southeast Asia, 2020.
6. GWI via CampaignAsia, June 2021.
7. Google commissioned Ipsos COVID-19 Tracker, AU, BR, CA, CN, FR, DE, IN, IT, JP, MX, RU, ZA, KR, ES, U.K., U.S., n=500-1000 online consumers 18+ per market. Sept. 9, 2021–Sept. 12, 2021.
8, 9. Google/Kantar, Multi Category Path-to-Purchase Research with Kantar, IN, n=4600+ offline & online shoppers, Jan. 2021.
10. Accenture Interactive, Immersive Experiences Survey, 2020.

Lives re-examined

Following the sudden disruptions of the pandemic, people emerged in 2021 with a realization that some changes weren't temporary after all. This prompted **a sense of introspection and a reevaluation of their values and lifestyle choices.** As a result, they looked for more comfort and ease in their lives, and shifted their focus to the things that matter most to them.

People have endured many waves of change on the global and local level over the past few years. As people try to embrace new unknowns in their lives, they're reexamining former lifestyle choices, once-familiar ways of life, and the comfort of established routines.

In a recent survey, half of consumers in APAC said the pandemic inspired them to reevaluate what was important to them in life, with the most significant shifts in priority being their approach to finance and savings, time with loved ones, and a greater sense of self-care and "treat yourself" mentality.[11] Indeed, emotional well-being is predicted to be a key focus for people in 2022 as they gravitate towards emotional acceptance and dedicating time to feel.[12]



From small everyday upgrades to more major life decisions, searches are showing how people are taking stock of their lives and assessing how closely their choices are aligning with what truly matters to them. In fact, 78% of Indians are now eating healthier foods, and 67% have been exercising more.[13]

Evidence of this shift is also seen in the "Great Resignation," a global trend where a significant number of people are leaving their jobs voluntarily, considering changing employers or planning a career change. In India, 59% of professionals surveyed are actively looking for new jobs.

Such significant, widespread shifts in life priorities among consumers should be studied closely by brands. The changing core values and priorities of people are often a strong indicator of how they will behave as consumers. But it's not just customers that businesses need to care about. Given how many people are reassessing their careers in APAC, employee satisfaction and well-being should be top priorities for attracting and retaining top talent.

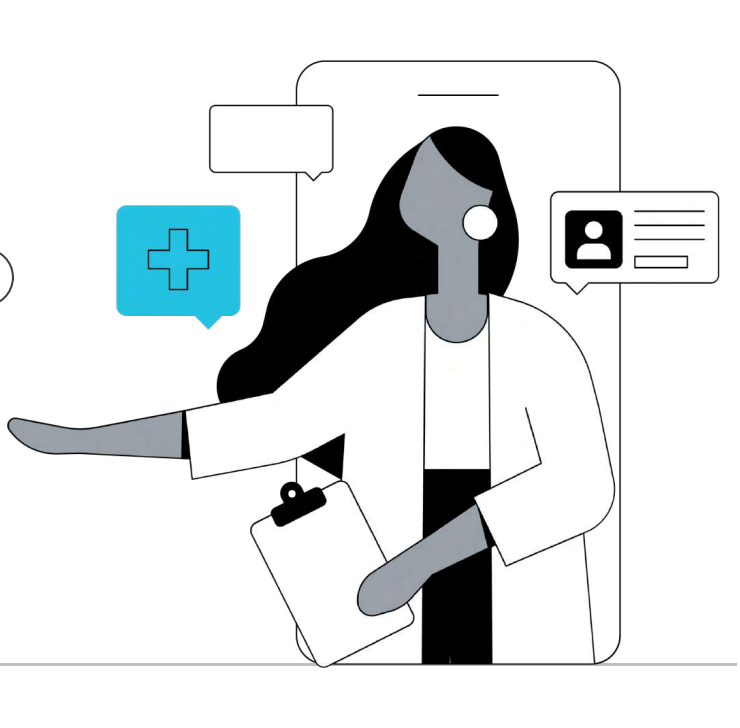
As people spring-clean their lives, there's a window of opportunity for businesses to reconnect and convince. How can you persuade your customers and employees to continue to make your brand a part of their new lives? How will you show the value your brand can bring to their newfound priorities?

SEARCHES

Acceptance of a blended life

Even as restrictions ease, it seems a blended way of living is likely to remain. Signs point to a semi-remote future of work, with 70% of organizations in India looking at hybrid work models beyond the pandemic.[14] Searches reflect this adaptation to a more flexible future for work and daily activities as people begin taking charge of their own time and space, particularly at home.

Search interest in (hybrid workplace) grew by 350% as people consider returning to offices in a hybrid setup.



Search interest in (online doctor consultation) rose by 80% as consumers look for online options for healthcare.

Reevaluation of finances

We see people changing the way they look at their finances. While some looked for ways to put their savings to work through investments, others searched for deals, discounts, and ways to stretch their rupee.

Search interest in (small investment) and (how to invest) grew by 30% and 43% respectively. Similarly, YouTube search interest in (best stocks) rose by 45%.

Search interest in (second hand car) and (second hand laptop) grew by 25% as people look for more economical ways to get around the high costs of ownership.

Quality time with loved ones

People in India have placed more value on spending time with their families, and some even see it as more important than being financially secure or successful. This is echoed in searches, with consumers looking for moments of quality time with their loved ones.

Search interest in (pet-friendly) grew by more than 70% as people seek to have their furry family members join them on their staycations and dine outs.

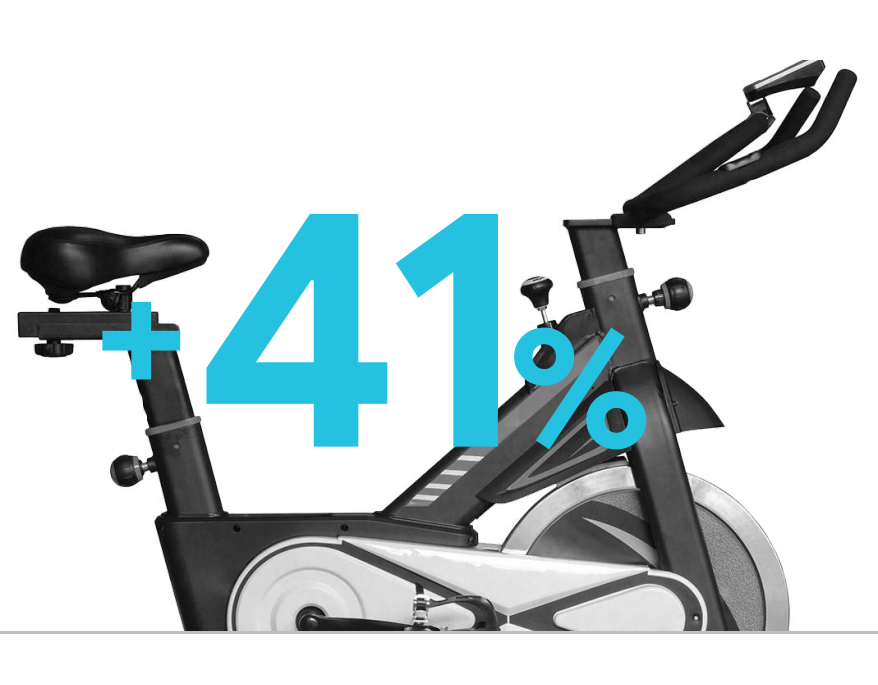
with children

People are seeking to build stronger familial relationships. Searches that include (with children) grew by more than 36% while search interest in (quality time) rose by 53%.

Self-care, introspection, and the reevaluation of lifestyle choices

Consumers today view wellness through a broader lens, valuing physical, emotional, and mental health. As people reevaluate their lifestyle choices, we see introspection and consideration for holistic wellness and the good of their loved ones playing a bigger role in their decision-making processes.

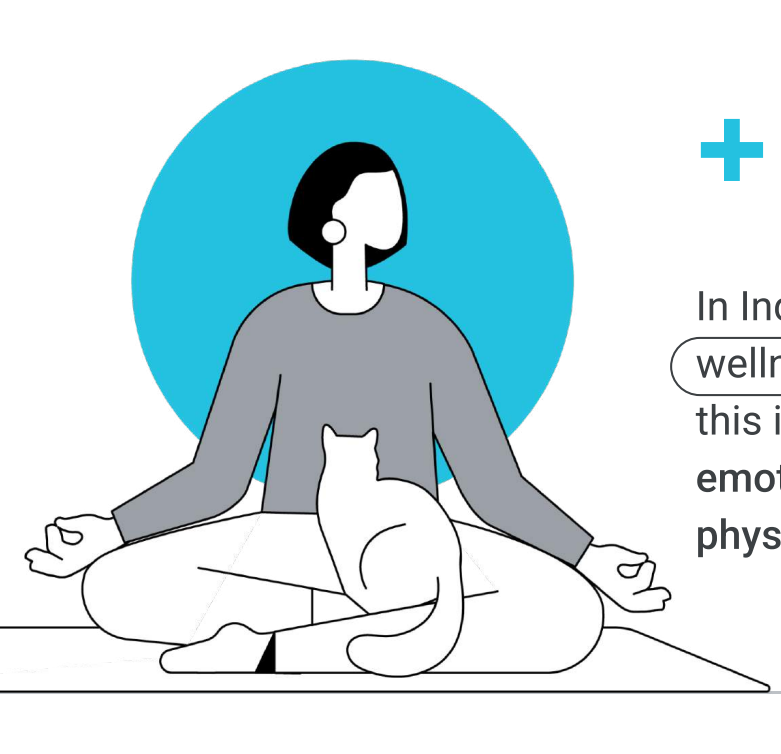
Search interest in (health insurance for family) grew by 44% as the pandemic spurred consumers to ensure their loved ones were insured.



Search interest in (cycling) grew by 41%, suggesting increasing awareness of the importance of physical wellness.

+37%

People's desire to keep their loved ones safe is encouraging more Indians to consider buying family cars like SUVs. Searches for this category of vehicles grew by 37% year over year.



+27%

In India, search interest in (wellness) grew by 27%, and this includes **mental wellness, emotional wellness,** and **physical wellness.**

MARKETING IMPLICATIONS

Your brand is back on the table: gain and retain

From reactive behaviors and short-term solutions, to a greater acceptance of our new blended lives, searches show that people are emerging from the pandemic with updated priorities. As people reevaluate their choices, **brands and businesses should also be updating how they show the value they can offer,** not just externally to their customers, but also internally to their employees.

Simon Kahn
Vice President, Marketing for Google APAC

"The next decade will be defined by a state of accelerated disruption. In order to enable people in the region to achieve better, more equitable outcomes in the face of increasing disruptions, businesses need to stay curious and cultivate a desire to understand what works and, more importantly, what doesn't to uncover and refine an understanding of users' true needs."

1 Ensure your brand makes the list as consumers reevaluate their options

Today, as shoppers look for the brands that best align with what they need and value, up to 75% are buying from newly discovered brands rather than familiar ones.[15] As consumers look to be empowered and confident about their purchase decisions, Search ranks as a top touchpoint for providing them with relevant and helpful information.

1

Tap into the power of Search and automation to grow your brand's discoverability.

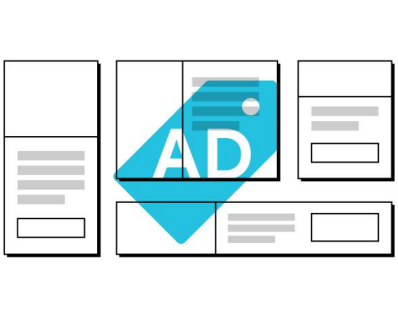
Fifteen percent of queries every day are brand new searches.[16] By broadening your keyword match type to Broad Match with Smart Bidding, you're able to automatically adjust your campaigns to capture the different ways consumers are looking for your products, and act on new opportunities as they arise.

When consumers research, they don't always have a specific product in mind yet. Responsive Search Ads can put your product in the spotlight with personalized ads that are relevant to the shopper.

MyFlightSearch, an all-in-one travel booking service, successfully used Responsive Search Ads to achieve 11% incremental clicks and 15% reduction in cost per booking.

Abhishek Mago
Chief Marketing Officer, MyFlightSearch Inc.

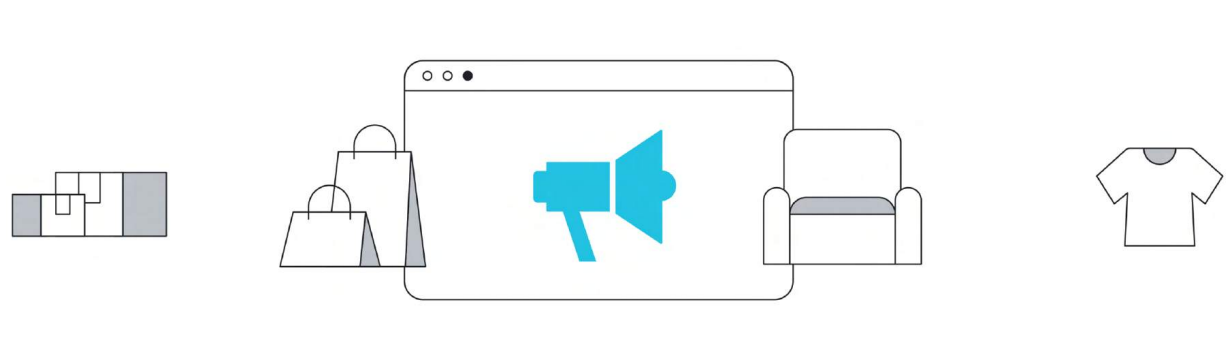
"Ad copies are the face of a brand on Search and at MyFlightSearch, we have always had multiple ad copies and shown different versions, based on relevance, to various users. With the new ad strength inputs from Google, we were able to make these ads best in class and more relevant to the search query, which resulted in great marketing and business metrics."



2

Create data-driven marketing cycles to keep up with evolving needs.

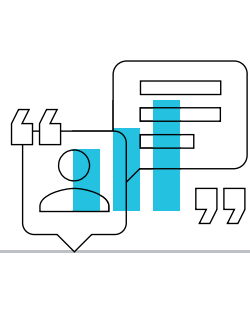
An adaptable advertising strategy allows you to act on what matters most to consumers in the moment, and adopt a test and learn approach for sustainable optimization.



Rising Retail Categories and Google Trends show you what the world is searching for at both a local and global level.

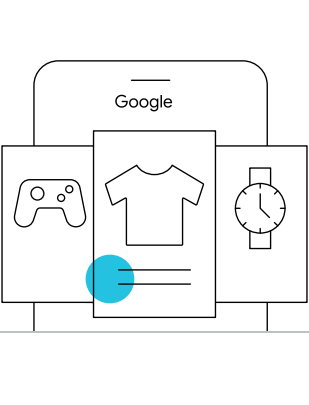
With the new Insights Page in Google Ads, you can forecast and capture demand with insights tailored to your ads business and identify products offering growth opportunities.

Get inspired by APAC industry leaders, who share how an experimental approach helps their marketing strategies stay data-driven and agile, and turn uncertainty into business growth opportunities.



2 Use direct-to-consumer strategies to own your brand presence and experiences

Consider owned, direct-to-consumer channels (a brand.com and app property) that can enable you to build a bespoke brand presence and experience, and showcase your brand values and consumer offerings without compromise. They also give you the freedom to experiment and evolve your platforms to make your brand stand out even more.



3 Don't overlook your internal stakeholders

During times of reevaluation and change, attracting and retaining top talent becomes ever more critical to ensuring sustainable business growth.

1

Prioritize building a diverse and inclusive workforce that will not only help to attract and retain top talent, but also increase innovation and profitability.

2

Recognize the importance of purpose beyond pay.
Nurture your employees as internal stakeholders and representatives of your brand.

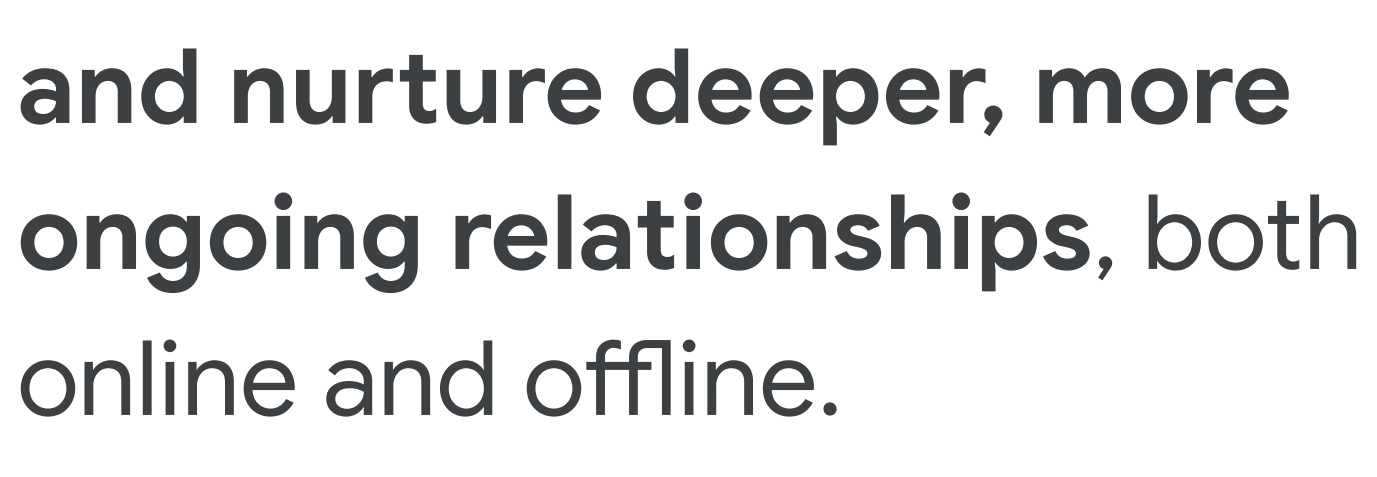
To encourage employees to find their unique purpose and build a workplace where people enjoy their work and are engaged, Unilever Sri Lanka ran a series of "Discover Your Purpose" workshops. The sessions combine e-learning with personal connections to challenge personal growth.

Sources:
Google Trends, India, Sep 1, 2019 - Aug 31, 2020 vs. Sep 1, 2020 - Aug 31, 2021, unless indicated otherwise

[11] GWI, Zeitgeist, 2021.
[12] WGSN, Future Consumer 2022, 2021.
[13] Google commissioned Ipsos COVID-19 tracker, BR, CN. IN, IT, U.S., U.K., n=1000 online consumers 18+ per market, Apr. 22, 2021–Apr. 25, 2021.
[14] NASSCOM, Return To Workplace Survey – Evolving Towards Hybrid Operating Model, Oct. 2021.
[15] Global Web Index Core, Sample Size by Country: All (n=3,919 internet users aged 16-64), ID (n=656), MY (n=651), PH (n=655), SG (n=650), TH (n=656), VN (n=651), April 2021.
[16] Google Data, July 2019.

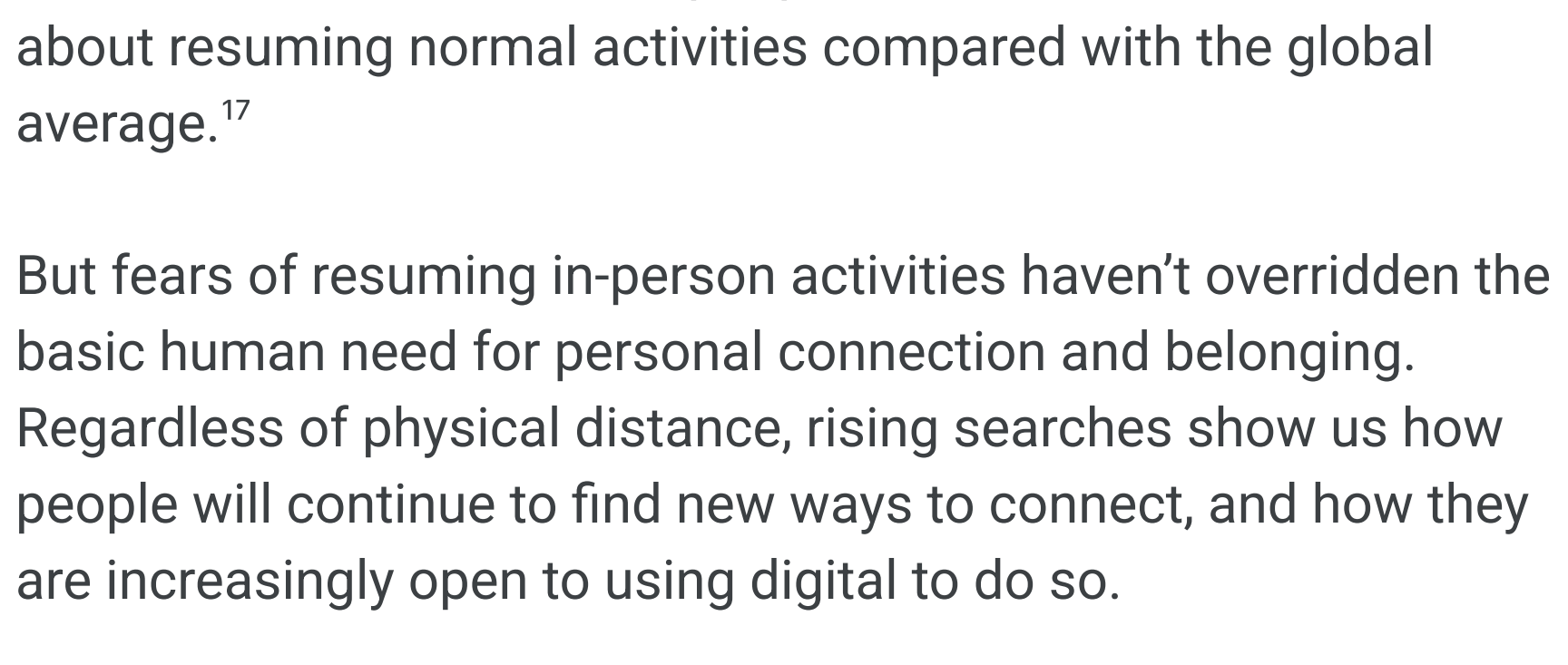
Bridging distances

The pandemic kept countless people physically apart, and consumers quickly found ways to adapt. But in 2021, we saw the sense of separation deepen. As a result, **consumers moved beyond finding brief moments of connection to finding new ways to express themselves and nurture deeper, more ongoing relationships**, both online and offline.

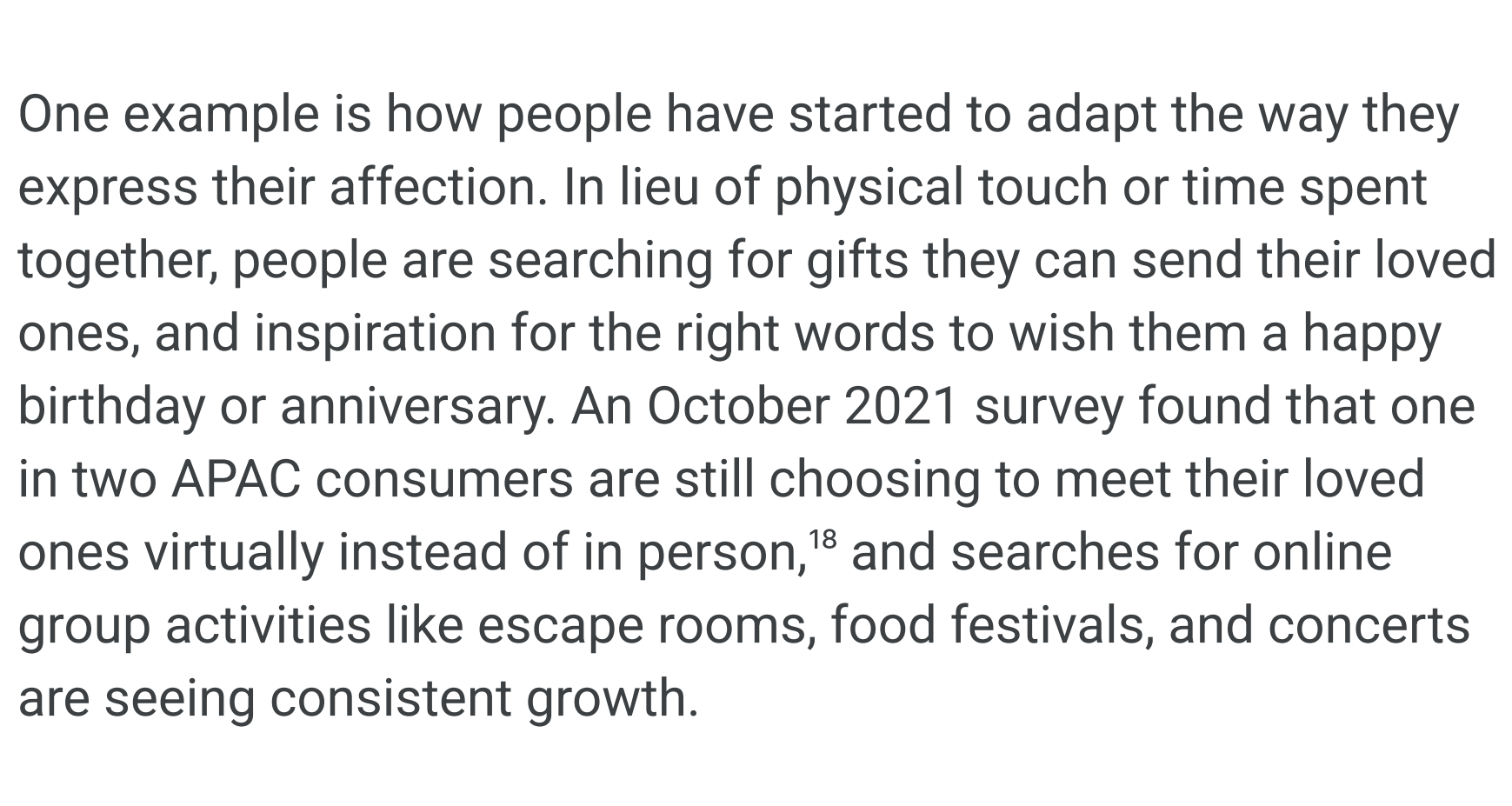


As more COVID-19 variants emerge, it's clear that the pandemic isn't quite over yet. COVID-19 is still a top concern for people, and consumers in APAC remain wary of being in close physical contact with others. In fact, people in India feel more anxious about resuming normal activities compared with the global average.[17]

But fears of resuming in-person activities haven't overridden the basic human need for personal connection and belonging. Regardless of physical distance, rising searches show us how people will continue to find new ways to connect, and how they are increasingly open to using digital to do so.

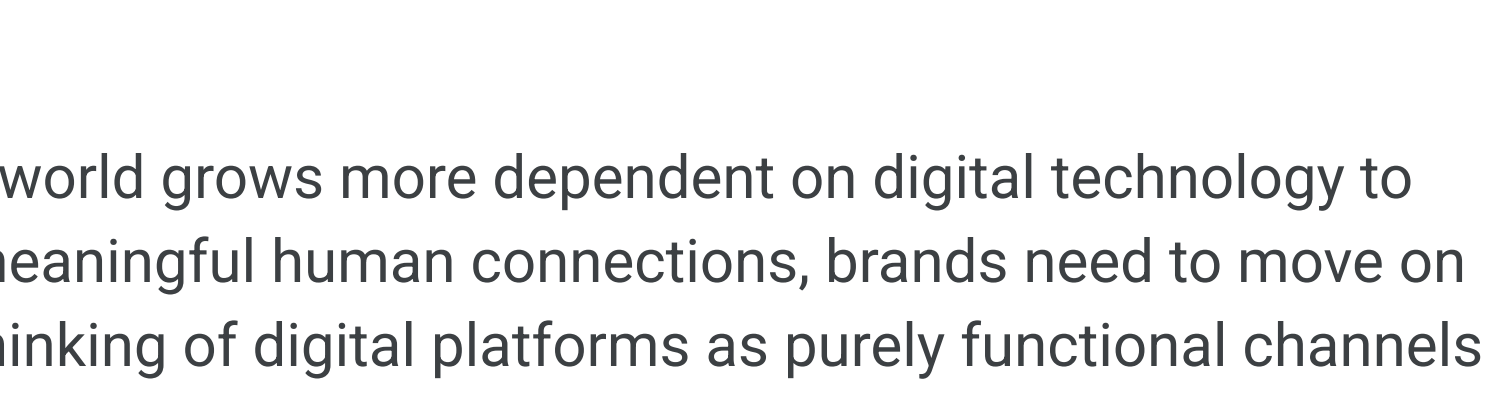


One example is how people have started to adapt the way they express their affection. In lieu of physical touch or time spent together, people are searching for gifts they can send their loved ones, and inspiration for the right words to wish them a happy birthday or anniversary. An October 2021 survey found that one in two APAC consumers are still choosing to meet their loved ones virtually instead of in person,[18] and searches for online group activities like escape rooms, food festivals, and concerts are seeing consistent growth.



As the world grows more dependent on digital technology to form meaningful human connections, brands need to move on from thinking of digital platforms as purely functional channels or just an online front end. Instead, consider how you can get longer-term value out of connecting meaningfully with your customers online.

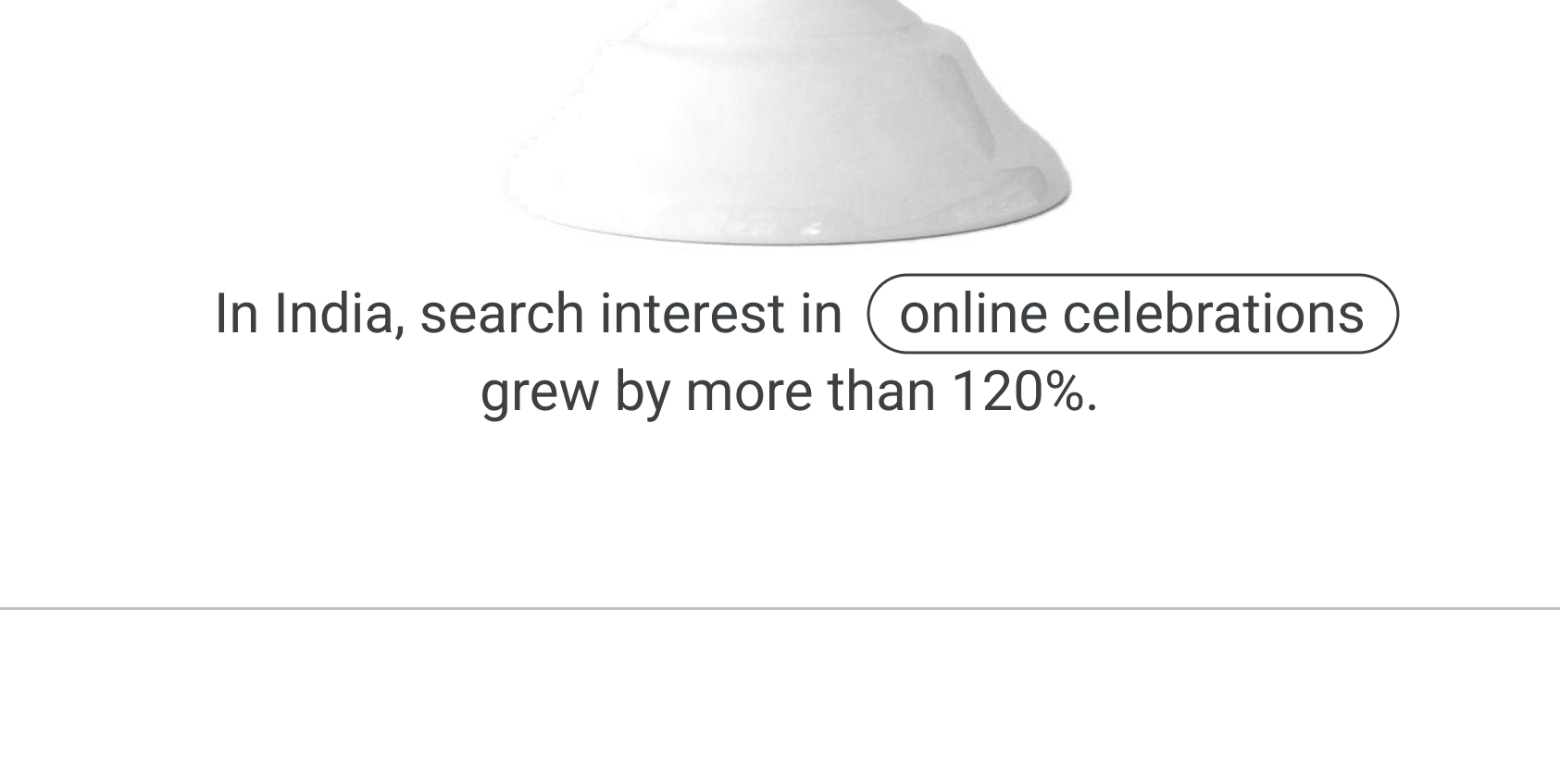
In marketing, we often say the medium is the message. But that doesn't mean that a channel should do all the hard work for you. How are you ensuring you're reaching the human behind every channel strategy? More importantly, what can you do as a brand to help facilitate better, deeper, more meaningful relationships for your consumers?



SEARCHES

Online expressions of affection

Love languages are keeping up with the changing times, with people searching for ways to show affection without in-person interactions. A recent survey showed that 63% of Indian respondents look online for inspiration on how to celebrate differently amid the pandemic, and some have even found new brands to help them do so.[19]



+120%

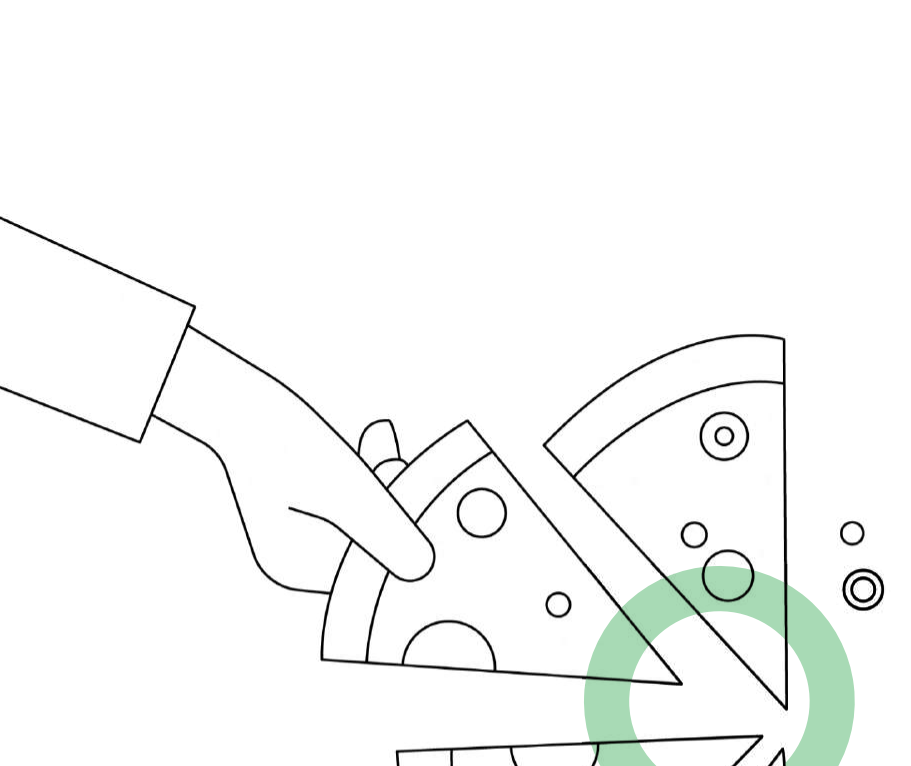
In India, search interest in (online celebrations) grew by more than 120%.

Digital for personal connection

Technology is enabling people to connect in innovative ways, sparking interest in virtual versions of activities such as group meals, escape rooms, and concerts. Even festive celebrations are going digital, with close to one in two Indians surveyed saying that they don't expect to host events at home for the upcoming holiday season, despite doing so in the past.[20]

+120%

We see more than 120% growth in people searching for the online or virtual equivalent of offline experiences, such as (virtual concert) (virtual escape rooms) and (virtual food festival)



+85%

As Indians look for ways to share meals together, even while apart, search interest in (group order) has grown by 85%.

MARKETING IMPLICATIONS

The emotional value of digital

Faced with physical distancing caused by the pandemic, people have adapted how they express themselves and increased their reliance on digital for building personal connections. As a result, brands that merely use digital as a functional channel are missing out on an **opportunity to build and nurture deeper relationships** with their customers, where both sides stand to gain and grow through emotional connection.

Harvard Business Review
An Emotional Connection Matters More Than Customer Satisfaction

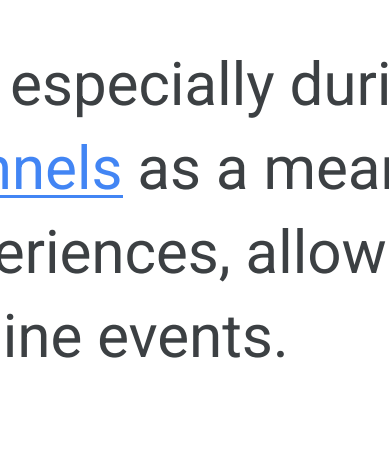
> "Emotionally connected customers buy more of your products and services, visit you more often, exhibit less price sensitivity, pay more attention to your communications, follow your advice, and recommend you more — everything you hope their experience with you will cause them to do."

1

Build customer love and loyalty by consistently delivering at each touchpoint

Research shows how the consumer's path to purchase is driven by emotions. At each and every touchpoint, shoppers want to feel reassured and empowered, rewarding brands who help them navigate the messy middle.

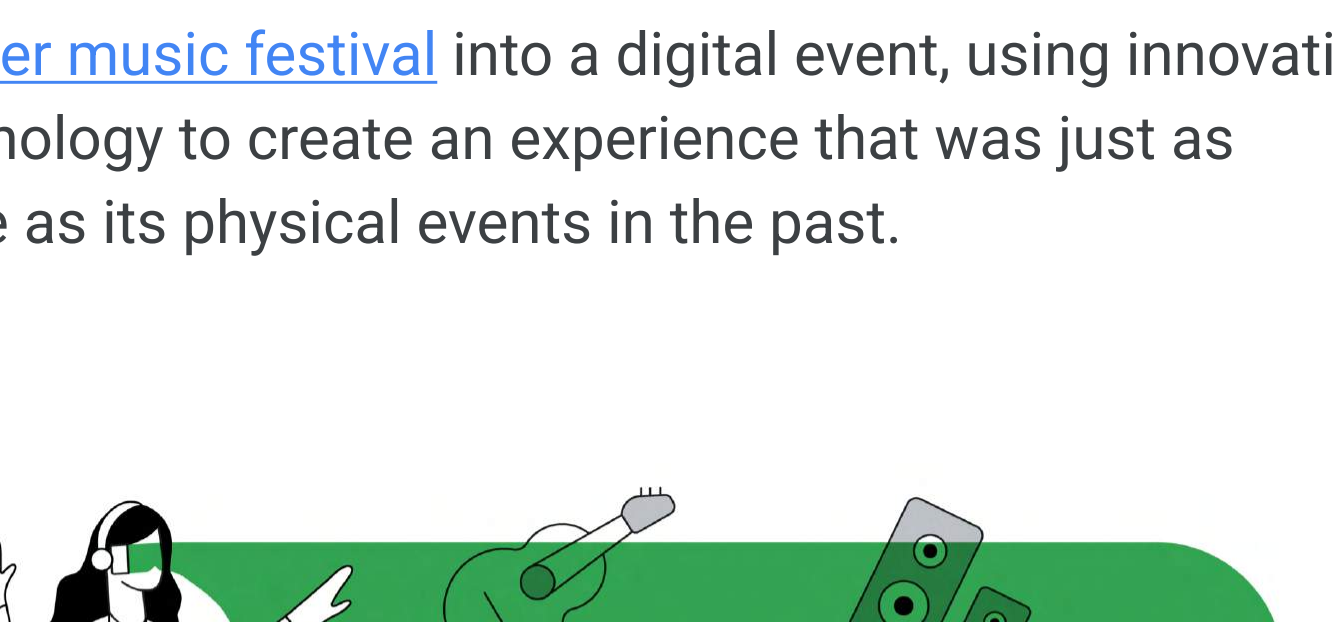
Leverage the emotional power of digital to provide timely, accurate and relevant information across your organic and paid communication channels.



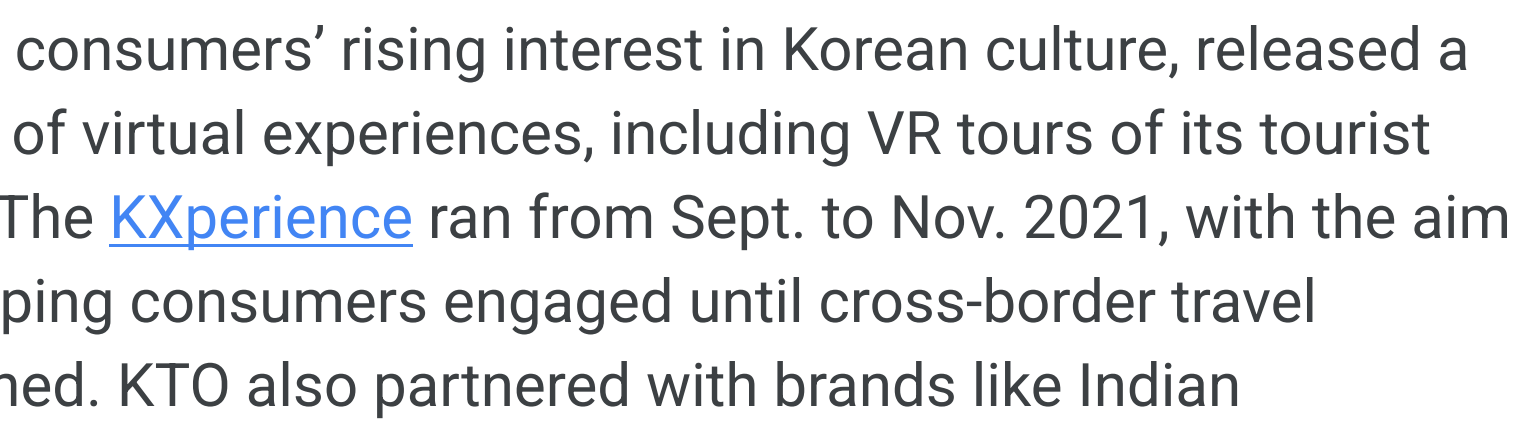
2

Tap into the value of virtual to augment real world experiences

Not everyone prefers in-person experiences, especially during a pandemic. Consider the value of virtual channels as a means of complementing or augmenting physical experiences, allowing the freedom of choice between online or offline events.

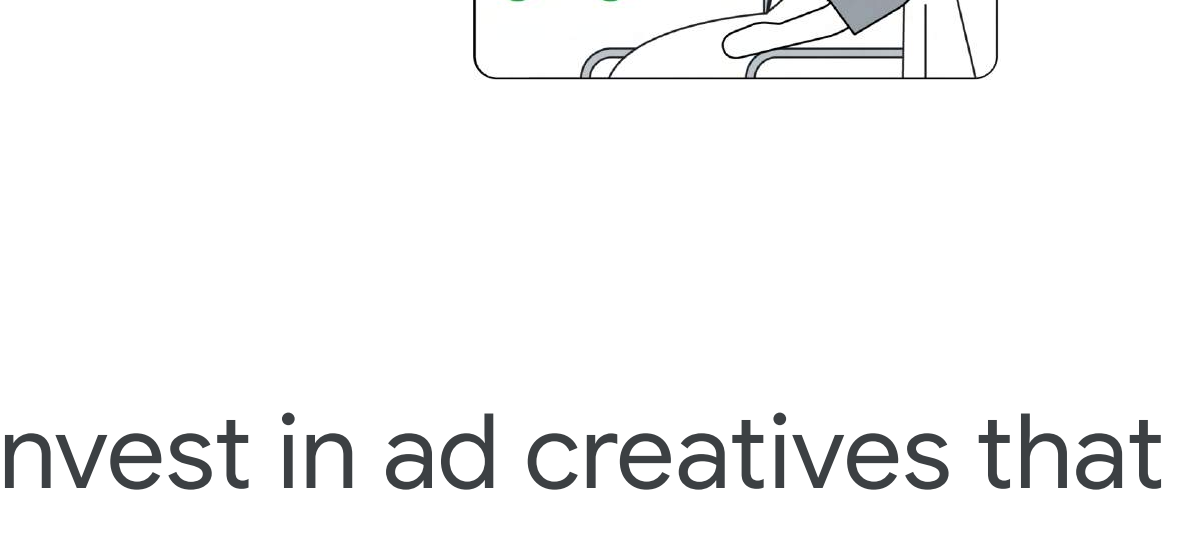


In November 2021, Bacardi India transformed its annual NH7 Weekender music festival into a digital event, using innovation and technology to create an experience that was just as enjoyable as its physical events in the past.



The Korean Tourism Organization (KTO), having recognized Indian consumers' rising interest in Korean culture, released a series of virtual experiences, including VR tours of its tourist sites. The KXperience ran from Sept. to Nov. 2021, with the aim of keeping consumers engaged until cross-border travel reopened. KTO also partnered with brands like Indian e-commerce platform KoliKart to run social media challenges, featuring prizes such as travel discounts.

Google Project Starline is a new 3D technology that combines advances in hardware and software to enable friends, families, and coworkers to feel like they're together even when they're apart.

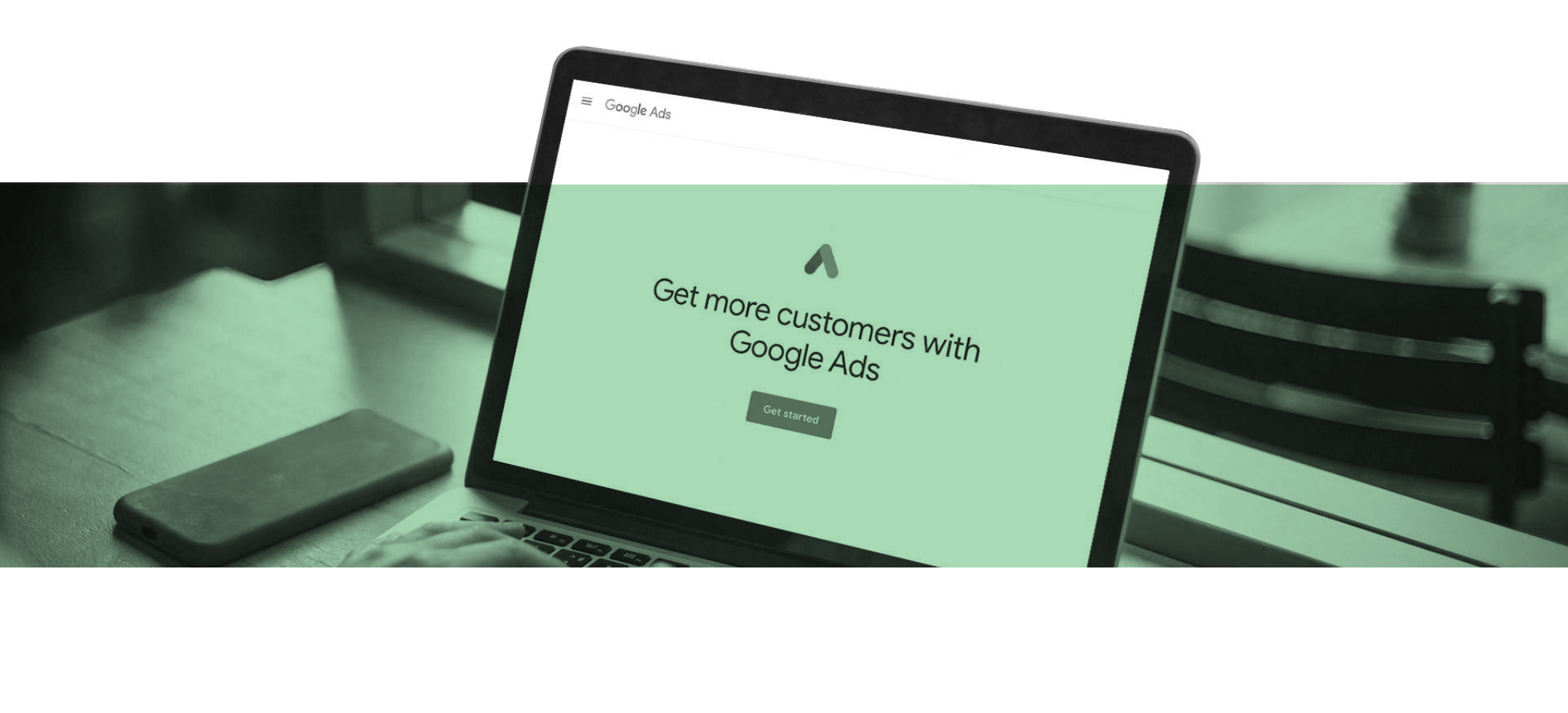


3

Invest in ad creatives that can connect and inspire

Your advertising efforts can be a key lever to build emotional connection and simultaneously drive campaign performance. In fact, creative is the dominant ROI driver across all media platforms, and especially so on digital.[21]

To bring your brand and products to life, ensure your ads showcase how your brand can help people in their everyday life in an authentic way.
Explore creative best practices to unlock better performance across Google Ads solutions.



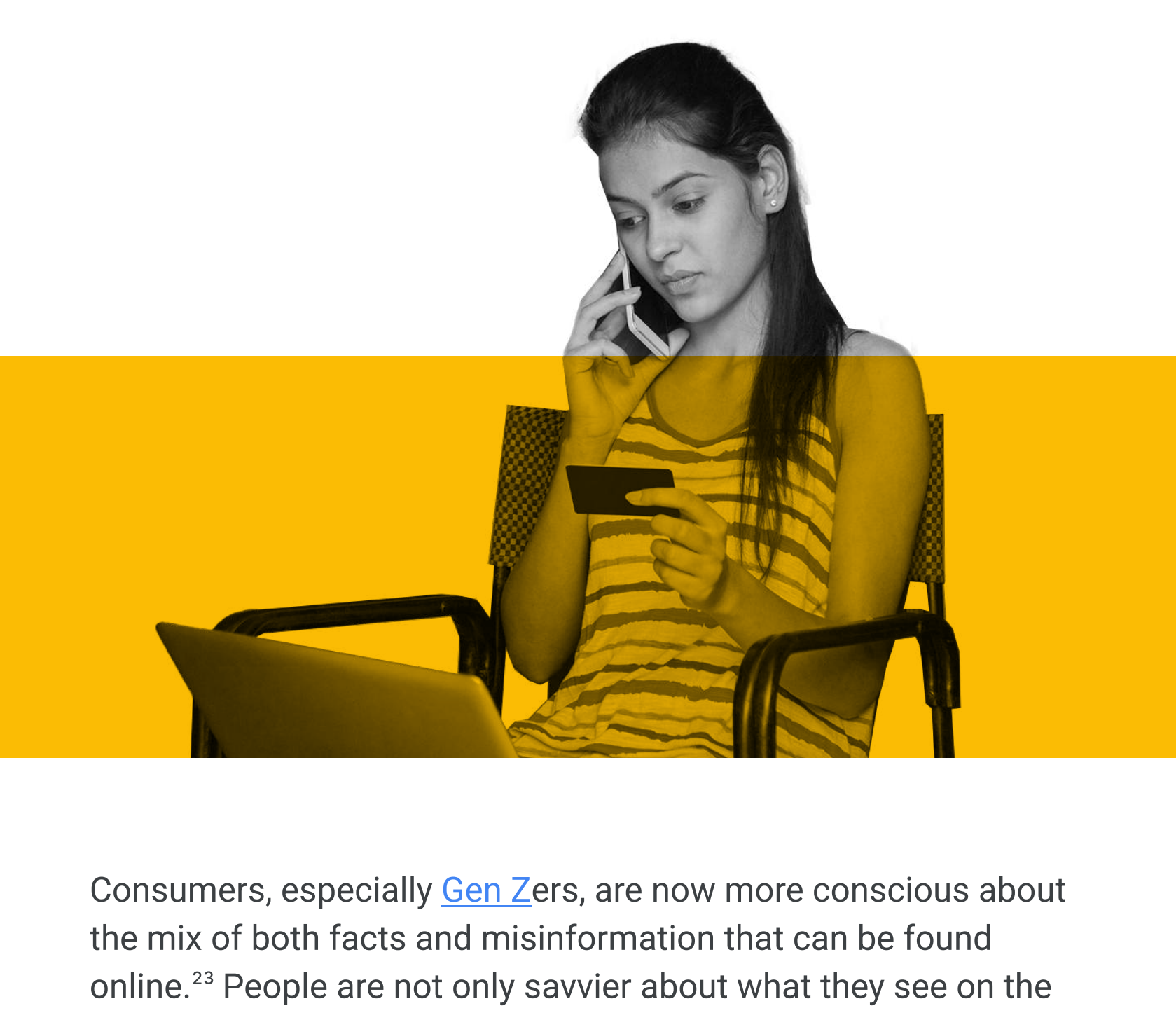
Sources:
Google Trends, India, Sep 1, 2019 - Aug 31, 2020 vs. Sep 1, 2020 - Aug 31, 2021, unless indicated otherwise

[17] Ipsos, Essential Report, Oct. 7, 2021–Oct. 10, 2021.
[18] Ipsos, Essential Report, Oct. 7, 2021–Oct. 10, 2021.
[19] Google commissioned Ipsos COVID-19 Tracker, AU, BR, CA, CN, FR, DE, IN, IT, JP, MX, RU, ZA, KR, ES, U.K., U.S., n=500-1000 online consumers 18+ per market. Sept. 9, 2021–Sept. 12, 2021.
[20] Google commissioned Ipsos COVID-19 Tracker, AU, BR, CA, CN, FR, DE, IN, IT, JP, MX, RU, ZA, KR, ES, U.K., U.S., n=500-1000 online consumers 18+ per market. Nov. 4, 2021–Nov. 7, 2021.
[21] Nielsen Catalina Solutions, 2017.

Truth seekers

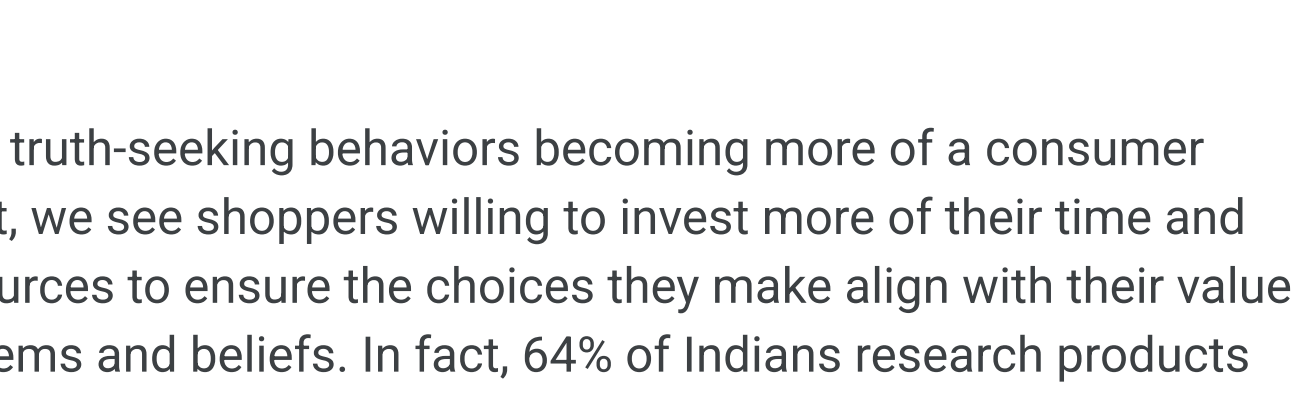
With online misinformation and data breaches on the rise, consumers are more skeptical than ever. **Wary of being misled and savvier about their choices**, they're also more proactive about finding trustworthy sources, using Search to fact-check claims, scrutinize brand values, and ensure authenticity from the brands they choose to engage with.

In 2021, the pandemic further exposed the dangerous consequences of misinformation, spurring governments across the region to enact "fake news" laws. At the same time, the public has become more aware of the spread of false information, and are constantly looking for trustworthy sources. In a recent survey, 80% of Indian respondents say it is now more important to find a trusted source of information, compared with before COVID-19.[22]



Consumers, especially Gen Zers, are now more conscious about the mix of both facts and misinformation that can be found online.[23] People are not only savvier about what they see on the internet, but are willing to proactively seek out accurate information on their own terms.

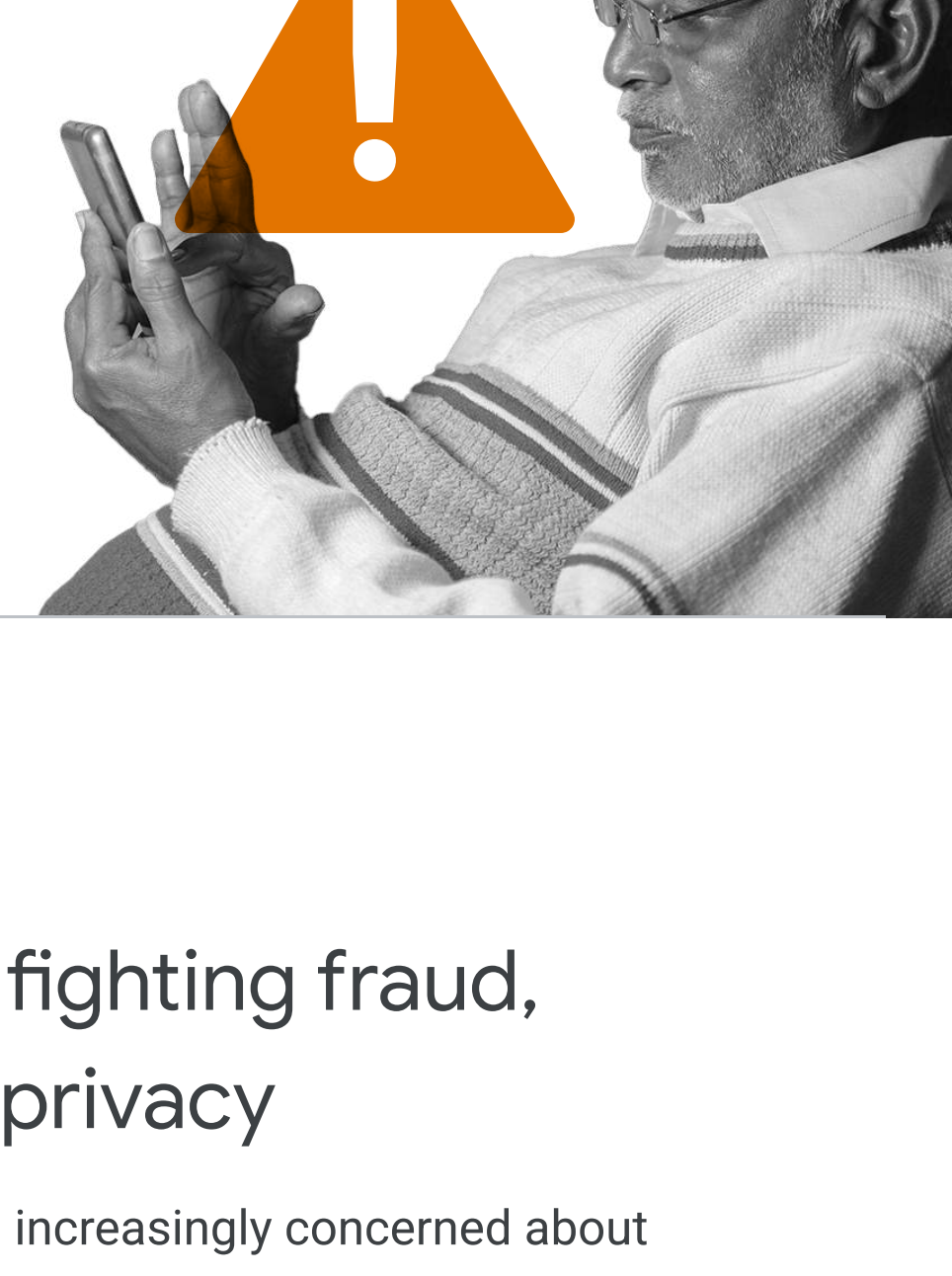
Searches reflect these growing anxieties, with consumers looking for ways to guard against the increasing pervasiveness of fraud and scams. As data breaches reached an all-time high in 2021,[24] searches related to privacy also continued to rise alongside people's growing concerns about their digital safety.



With truth-seeking behaviors becoming more of a consumer habit, we see shoppers willing to invest more of their time and resources to ensure the choices they make align with their value systems and beliefs. In fact, 64% of Indians research products before making a purchase to ensure they get the right product or service that meets their needs.[25]

Consumers today don't just check the list of ingredients on a label, they want brands to be accountable and transparent at every step of their value chain, including sourcing, production, and corporate sustainability policies. Regardless of how much they trust a brand, consumers across all age groups will conduct extensive research prior to making their purchases.[26] Instead of simply hoping that brands will be true to their word, consumers now expect brands to take proactive steps toward earning and keeping their trust.

This means that for brands, getting ahead of transparency, focusing on authenticity, and ensuring two-way continuous communication with their customers has become more important than ever.



SEARCHES

Fact-checking, fighting fraud, and protecting privacy

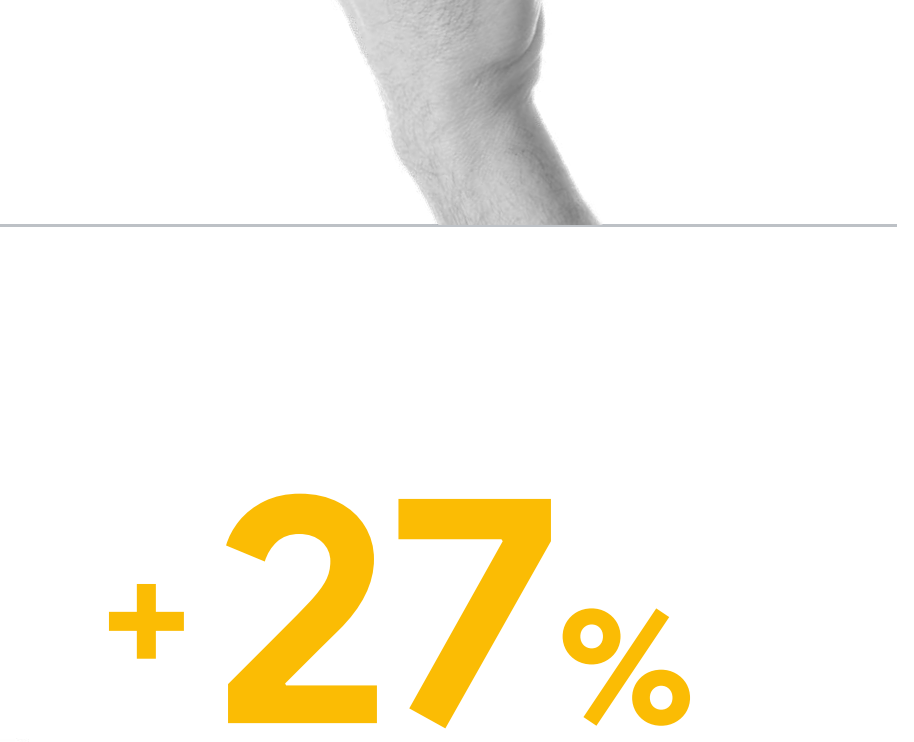
Searches show consumers increasingly concerned about misinformation and privacy, especially compared to pre-COVID times.[27] In 2021, 87% of APAC consumers say it is now more important to find a trusted source of information, compared with before the pandemic.[28]

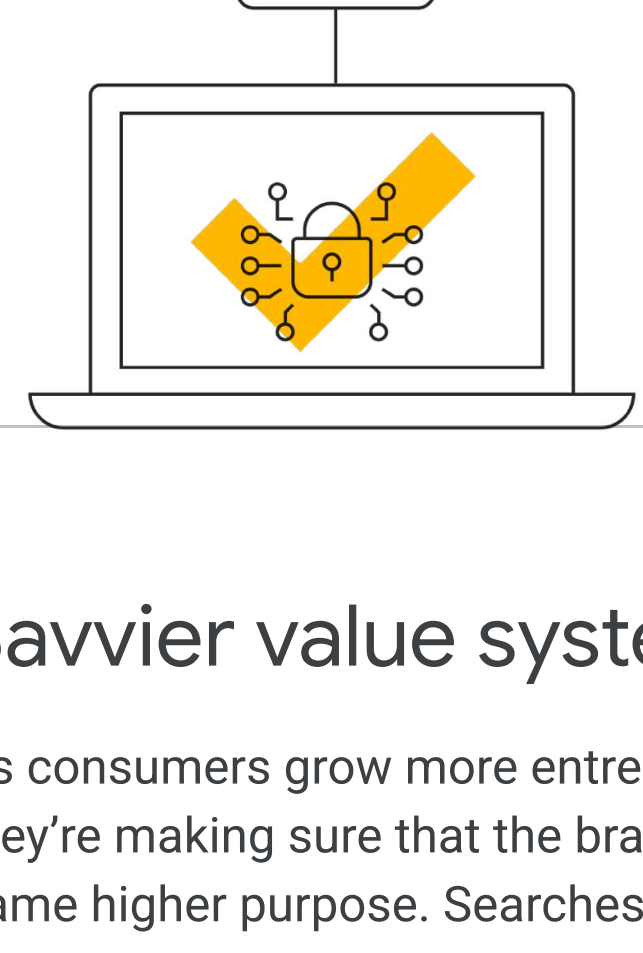
+35%

Searches about frauds and scams have grown by up to 35%.

+80%

In India, search interest related to misinformation, fact-checking, and fake news, such as is it true grew by 80%.





+27%

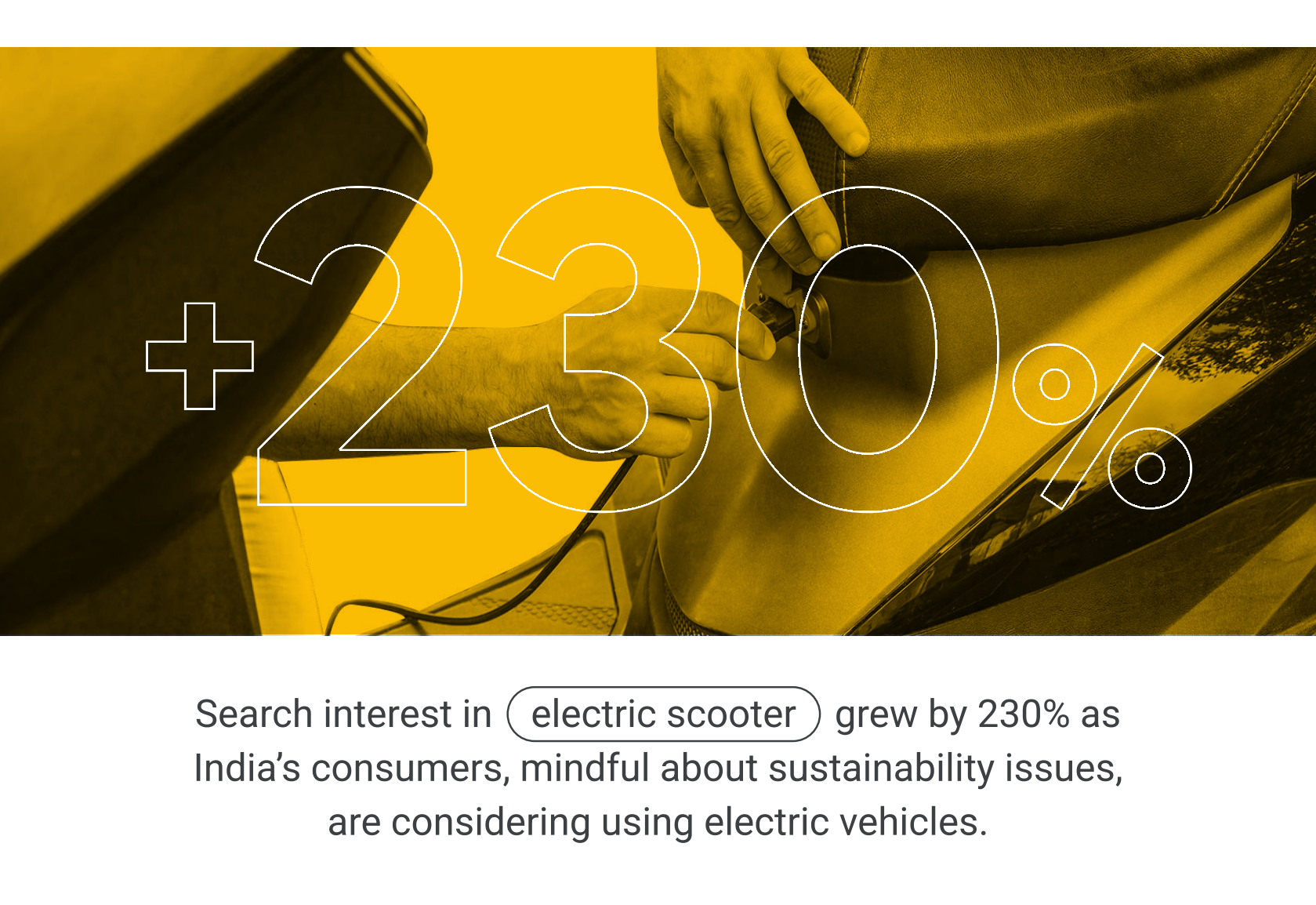
Search interest in privacy grew by 27%.

Savvier value systems

As consumers grow more entrenched in their belief systems, they're making sure that the brands they choose also share the same higher purpose. Searches are continuing to rise for topics like sustainability and ethics, while more than half of APAC's consumers have stopped buying products or services that have a negative impact on the environment and society.[29] Conscious consumerism is on the rise in India too, with over 86% of consumers saying that buying sustainable products makes them happy.[30]

+24%

Search interest in sustainability grew by 24%.



+230%

Search interest in electric scooter grew by 230% as India's consumers, mindful about sustainability issues, are considering using electric vehicles.

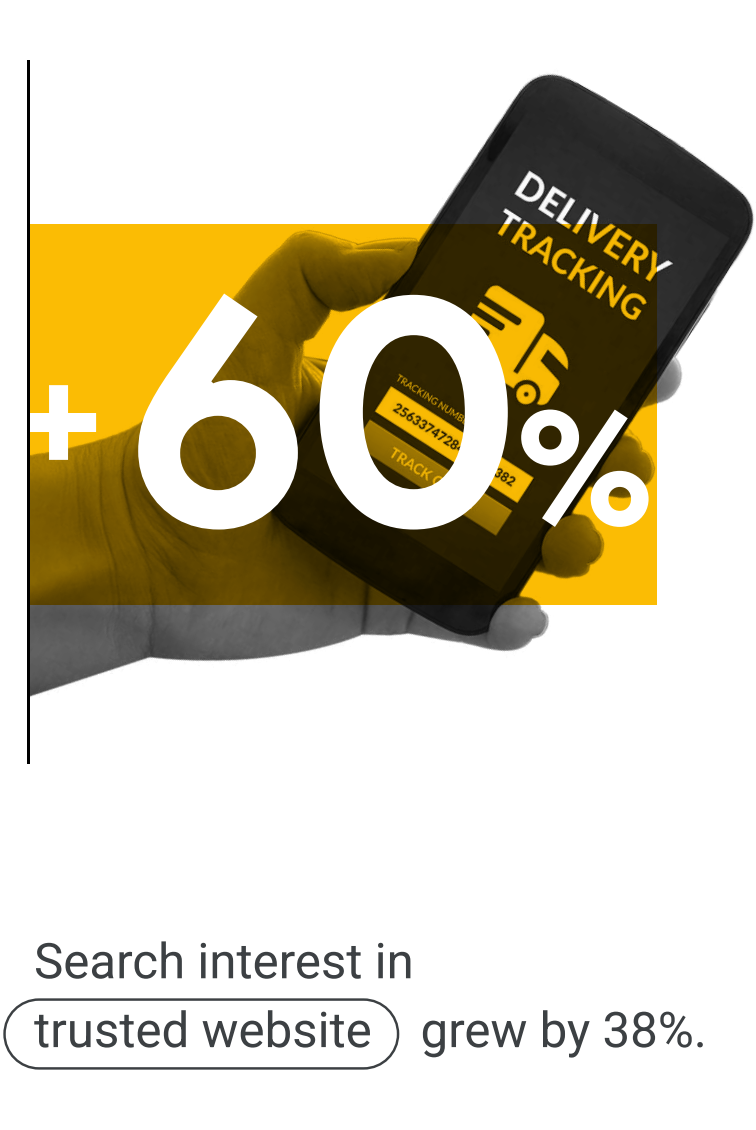
Consumer demands for reassurance

Consumers today expect to be reassured along their shopping journeys. Authenticity is a key issue on marketplaces for 31% of shoppers surveyed,[31] and we see increasing searches for delivery tracking and official stores of popular brands. In India, 83% of shoppers are inspired to purchase from brands that provide trustworthy information.[32]

As demand for authenticity increases, there has been up to 80% growth in customers searching for a brand's official store in India.

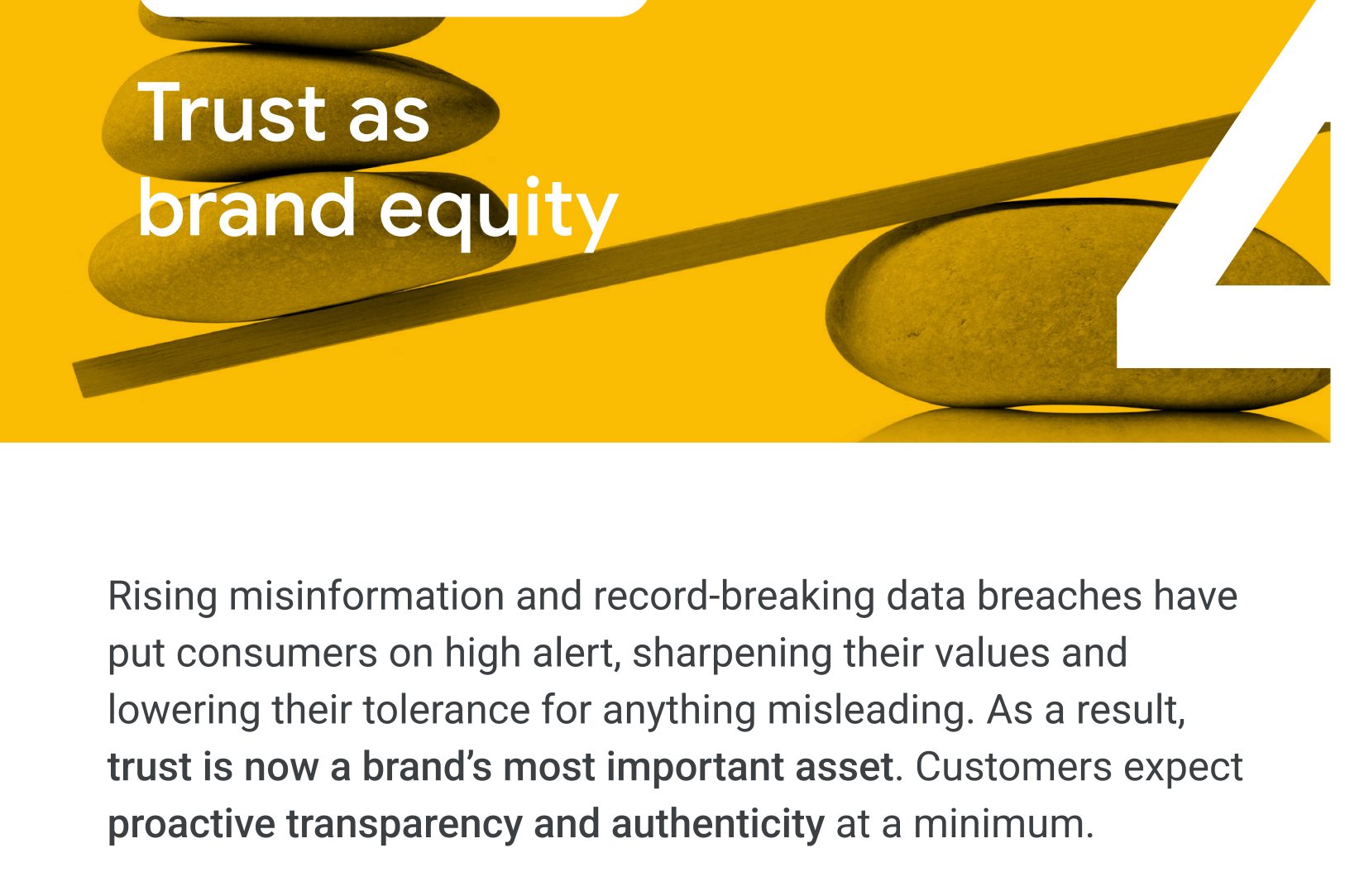
+80%

With an increase in deliveries, delivery tracking has become more essential. In India, search interest in delivery tracking rose by 60%.



+60%

Search interest in trusted website grew by 38%.

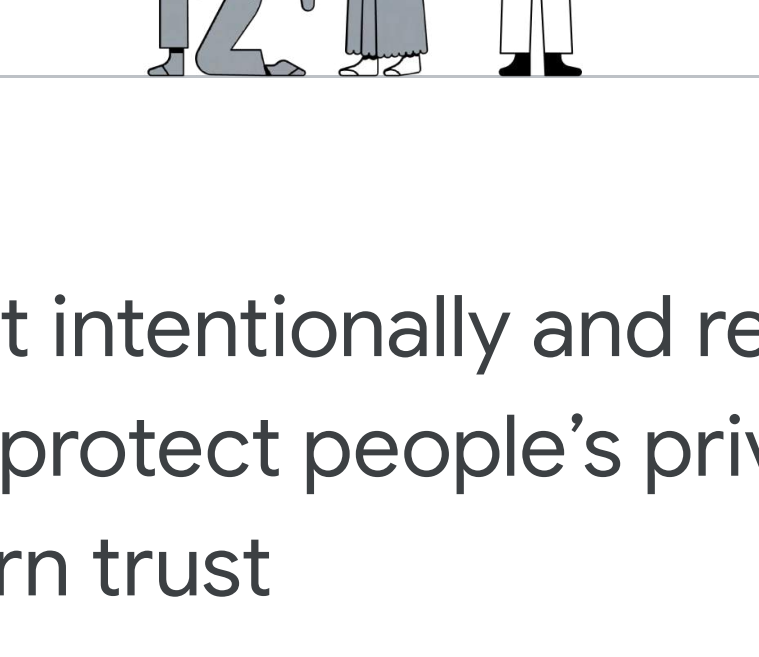


MARKETING IMPLICATIONS

Trust as brand equity

Rising misinformation and record-breaking data breaches have put consumers on high alert, sharpening their values and lowering their tolerance for anything misleading. As a result, **trust is now a brand's most important asset**. Customers expect **proactive transparency and authenticity** at a minimum.

> **Edelman**
> Trust, the new brand equity
>
> "Brands need to be for the people, and guided by the people. Why? Because brand trust ranks higher than brand love."



1

Act intentionally and respectfully to protect people's privacy and earn trust

When users have clear choice and control over their data, they're happy to share it with businesses they trust. However, just 30% of APAC marketers have a dedicated strategy to communicate with consumers about data privacy.[33] It's time to consider how you can prioritize your users' privacy concerns to earn their trust.

1

Use first-party data responsibly and effectively to find the right balance between privacy and the personalized interactions that consumers prefer.
Check out our marketer's playbook for privacy to deliver performance in a privacy-safe way and learn what industry leaders across APAC think about the region's key data privacy trends and how to create a privacy-first ecosystem.

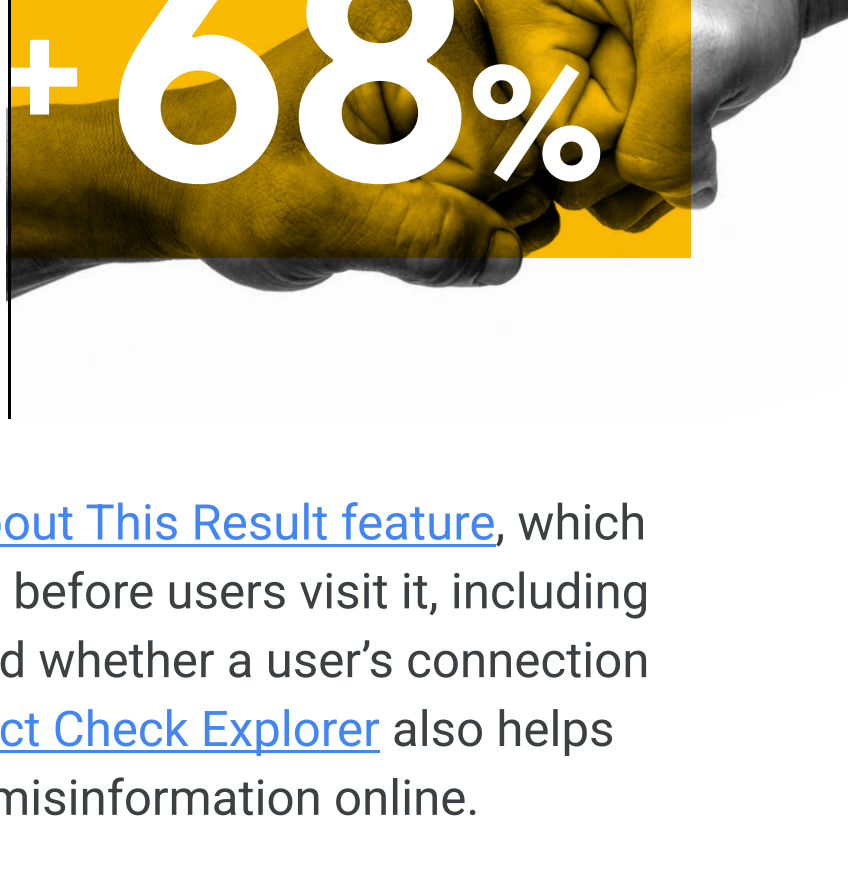
2

Prepare your digital ads ecosystem for a future without third-party cookies.
Explore privacy-preserving strategies that fuel continued business growth by allowing companies to reach people with relevant ads and measure results without needing to track people across the web.

3

Educate and empower your customers to protect themselves against misinformation, scams, and fakes.

With 68% of online shoppers in Southeast Asia rating **guarantee of product authenticity** as very important,[34] consider ways you can offer them this needed reassurance.



+68%

In 2021, Google launched the About This Result feature, which provides details about a website before users visit it, including whether the source is trusted and whether a user's connection to the site is secure. Google's Fact Check Explorer also helps counter falsehoods and reduce misinformation online.

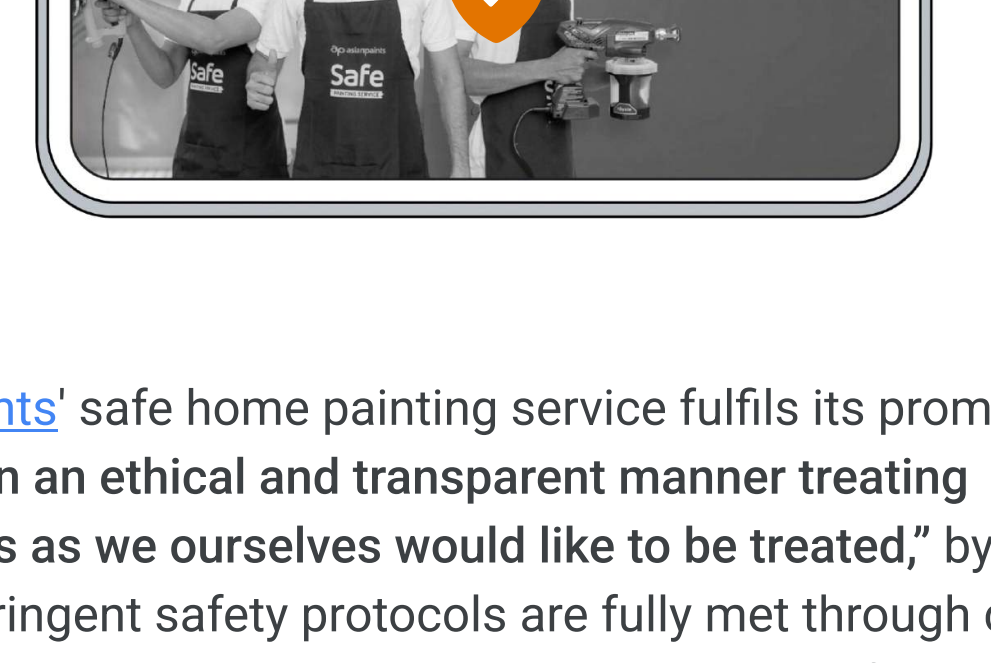
2

Hold your whole business accountable and get ahead of the conversion

When it comes to building trust, brands cannot afford to cut corners. As consumers feel increasingly empowered to hold brands accountable to their claims, earning and keeping trust requires consistent, authentic, and proactive communication.

Consider the full implications of your company values on building purpose and trust with consumers.

Purpose, as a contributor to brand equity, is 10x more important in India than any other country globally.[35]



Asian Paints' safe home painting service fulfils its promise to **"operate in an ethical and transparent manner treating customers as we ourselves would like to be treated,"** by ensuring that its stringent safety protocols are fully met through careful supervision, so that customers can enjoy peace of mind and a hassle-free experience.

Sources:
Google Trends, India, Sep 1, 2019 - Aug 31, 2020 vs. Sep 1, 2020 - Aug 31, 2021, unless indicated otherwise

22. Google commissioned Kantar/Quantum Report, Emotional Value of Search 2021, IN, n=1002.
23. A Brand Studio study of youth in APAC found that Gen Z users are heavily reliant but discerning users of the internet. To them, the internet is "a fantasy close to the truth" and "a mandala with all the good and bad things mixed together."
24. Identity Theft Resource Center, Q3 Data Breach Analysis, 2021.
25. Google commissioned Kantar/Quantum Report, Emotional Value of Search 2021, IN, n=1002.
26. IBM Institute for Business Value, Meet the 2020 consumers driving change, 2020.
27. Google commissioned Kantar/Quantum Report: Emotional Value of Search 2021, IN, ID, MY, PK, PH, TH, VN, n=5006, consumers who have purchased vertical in the past 18 months, 2021.
28. Google commissioned Kantar/Quantum Report: Emotional Value of Search 2021, IN, ID, MY, PK, PH, TH, VN, n=5006, consumers who have purchased vertical in the past 18 months, 2021.
29. Kantar, Asia Sustainability Foundational Study, 2021.
30. Capgemini Research Institute, Consumer Products and Retail: How sustainability is fundamentally changing consumer preferences, July 2020.
31. Google, Ipsos, and SixthFactor, Brand.com and Marketplace in the evolving online path to purchase, IN, SG, TH, n=3600, July 29, 2020–Nov. 14, 2020.
32. Google commissioned Kantar/Quantum Report, Emotional Value of Search 2021, IN, n=1002.
33. Forrester, "The State Of Privacy In Asia Pacific," 2021.
34. Google/Kantar, Shopper Pulse SEA + JP Core Report: Waves 1+2, Sept. 2021.
35. Kantar, BrandZ Report, Nov. 2021.

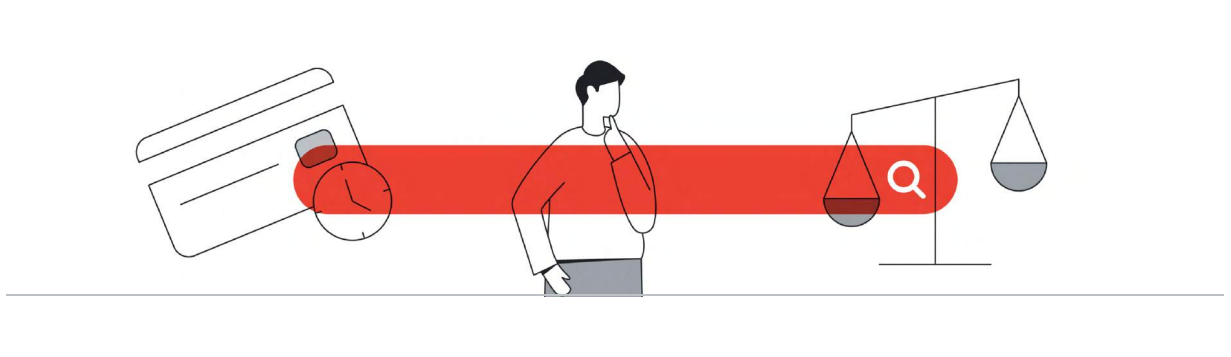
Growing inequalities

While everyone's way of life has undoubtedly shifted this past year, the pandemic didn't affect everyone the same way. It not only exposed existing inequalities, but accelerated them. People are turning to the internet for help: whether they're existing internet users with fresh financial woes, or newcomers with more basic needs, consumers are **searching for ways to overcome the challenges they face.**

Dubbed the "inequality virus," the pandemic has exposed many societal fractures along the lines of wealth, race, and gender. While many of these inequalities existed before COVID-19, the pandemic has played a role in exacerbating them, and the most vulnerable in society have been disproportionately hit.

Lower income households experienced a higher concentration of job losses[36] while their children missed twice as many days in a school year compared with those from high income families.[37]

To overcome these inequalities, people are searching online for solutions to help themselves and their communities. Their searches range from unemployment benefits and **"buy now pay later"** financing options to topics on discrimination and women's rights, reflecting their growing interest in social issues.



Unfortunately, not everyone has equal access to the support systems they need. The world's growing reliance on technology means it's crucial to equip the less privileged with access to digital solutions. Factors like unstable internet access, technical illiteracy, and language barriers can prevent people from joining the rest of the world online, and exacerbate the inequity they already experience.

Indeed, rising searches for local translations, line speed tests, and even free internet services reflect a growing section of society struggling to keep up. When cities shut down during the pandemic, millions of migrants across India had to return to their homes, many in rural areas. With lower access compared to urban centers, these workers and their families lost jobs and learning opportunities.[38] Widespread digital migration, on the other hand, has brought more users online from non-metropolitan areas in India, hastening the need for the digital ecosystem to evolve to address their specific needs through the acceleration of vernacular, voice, and video solutions.[39]

People recognize that these societal inequalities cannot be solved by governments and nonprofits alone. The expectation is now also on brands to help drive meaningful change.[40] Perceived to be more ethical and competent,[41] businesses are uniquely positioned to boost customer loyalty and trust by driving social change. This means that consumers will embrace brands who not only reflect diversity in their campaigns, but take action to create equity in societies as well.

SEARCHES

Finding familiarity through local language

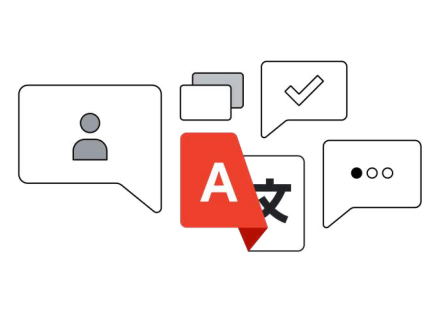
Searches show the anxiety that consumers face when transacting in a foreign language. In fact, up to 40% of consumers won't consider making a purchase unless they can access information in their local language.[42] With more new users coming online from non-metropolitan areas, the demand for local language is continuing to grow. In India, 86% of users use Google to search in their regional languages.

+100%

Searches for songs and videos in local languages grew, with search interest in (ಕನ್ನಡ) (kannada) rising by 100% on YouTube.

+15%

Searches for **translations and assistance** in comprehending words that are not in users' mother tongue grew by more than 15%. The highest growth in search interest were for "in hindi," "in marathi," and "in kannada."

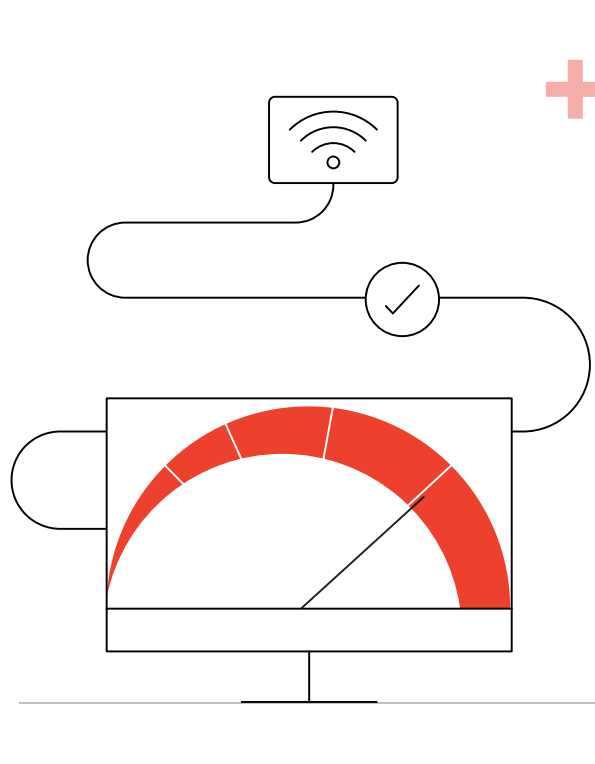


Access to stable and affordable internet

As more needs are being fulfilled online, people are increasingly focused on ensuring that they have reliable and affordable internet access.

+145%

Search interest in (5g) grew by 145%, as users encountered greater need for higher bandwidths.



+40%

In 2021, there was sustained momentum in searches testing internet speed and connectivity as more people came online. Search interest in (internet speed check) grew by up to 40% in India.

The need for financial support

India has been experiencing high unemployment rates fueled by waves of COVID-19,[43] and this has led consumers to search for different ways to alleviate economic concerns. Whether it's a business grant or a cash loan, people in India are looking for financial support to tide them over in an uncertain year. Women in particular are showing more concern, as their unemployment rates stand at 1.2x the national average.[44]

+53%

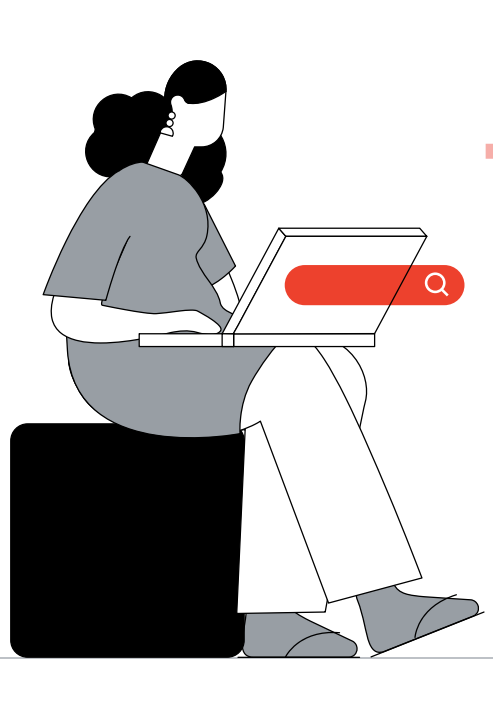
Search interest in (job security) grew by 53% as India's second wave of the pandemic led to significant job losses.

+38%

In India, search interest in (buy now pay later) grew by 38%

+30%

Search interest in (low interest loan) grew by 30%.



+25%

Searches containing the term (for women) increased in India. Search interest in **loans for women** and **jobs for women** grew by 25% and 33% respectively.

Social inequalities

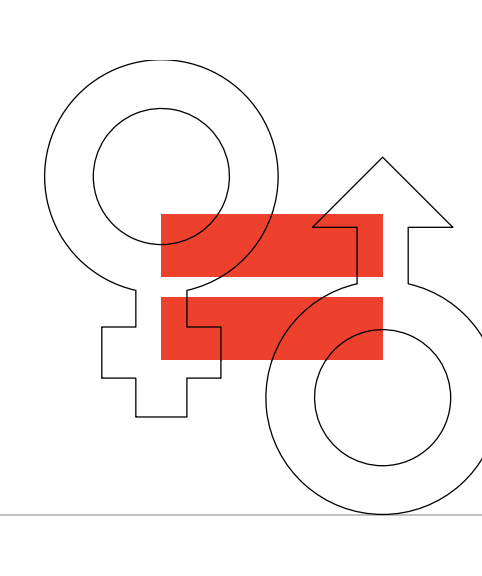
The general APAC region is still lagging behind the global average when it comes to the importance of equal rights,[45] but people are starting to become more curious about inclusion and equity. Continuing from 2020, searches reveal this nascent stage of exploration and awareness growing in APAC.

In India, search interest related to (discrimination), such as **what is discrimination**, grew by up to

+60%

+30%

Search interest in (women rights) and (equal pay) saw 30% growth.



MARKETING IMPLICATIONS

From reflecting society to changing it

Creating real change is not just about ensuring diversity and inclusion, it is about taking action towards ensuring equity as well. While the pandemic has impacted everyone's lives, not everyone has been affected in the same way, and rising searches reflect the need for help. Now, reaching customers **takes more than simply reflecting society.** Brands are also **expected to take actions to shape it.**

Edelman

> "With four converging global crises over the last year — Covid-19, economic insecurity, financial/health inequities and systemic racism — brands that take a stand get a giant boost in trust. This evolved role for brands offers a new opportunity for brand marketers and real risk if they fail to recognize consumers' call for brand action."

1 Cater to consumers' basic needs to enable them to participate and engage

1

Don't let language be a barrier.
Engage your global audience with a full language experience that conveys your brand, reputation and trustworthiness. This might entail having translation options for your web content, or adopting voice assistance to make interactions easier for your customers, regardless of literacy levels.

Apna, a professional networking platform, enables job seekers to interact in their first language and in turn, build up their confidence. More than half of its users opt for vernacular languages when searching for opportunities and growing their networks. The app is currently available in 11 Indian languages across 28 cities.

Fuji-fjellet
富士山

Google's Multitask Unified Model (MUM) has the potential to break down language barriers by transferring knowledge across languages. MUM can learn from sources in a foreign language and use those insights to find the most relevant results in your preferred language.

Google Meet has launched live translated captions to help video calls be more global and inclusive. This equalizes information sharing, learning, and collaboration.

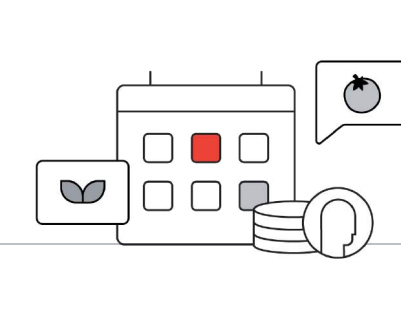
2

Help close technical, financial, and accessibility gaps.
Keep in mind that your quest for operational efficiency and digital transformation isn't leaving some of your customers behind. Not all users will have the same digital savviness levels, especially as more new users come online. Indeed, many new internet users still struggle with basic tasks.

For example, in India, 73% of users ask for help in getting their phones set up.[46]

+73%

Look at your engagement metrics as indications of how your online platforms or services are used. By paying attention to potential drop-off points, you can get insights on how to improve not least the onboarding experience for customers, but also the fundamental user experience.



Refyne aims to reduce the financial stress of India's salaried workers by providing them with access to earned wages before payday. The app, available in nine Indian languages, eschews monthly payments, interests, and penalties.

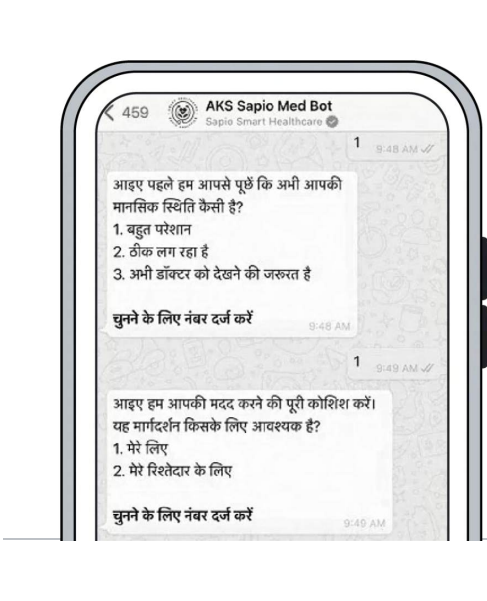
Goodbudget, a budgeting app, offers free educational resources like online courses, podcasts, and even a forum for consumers to learn more about money management.

2 Take a bigger stand

Consumers are drawn to brands that focus on the "we" over the "me." While 63% of consumers surveyed were more attracted to "brands that focus on making the world a better place," only 37% said they preferred "brands that focus on making me a better person."[47] The same survey found that 86% of respondents expect brands to act beyond their product or business,[48] suggesting that people are increasingly looking for brands that focus on contributing to society and the rest of the world.

1

Stand for something bigger than profits.
It's time to redefine success in business and build for a more inclusive and sustainable economy. Brands need to speak up and act beyond their traditional business boundaries, for both consumers and employees.



1

आइए पहले हम आपसे पूछे कि अभी आपकी मानसिक स्थिति कैसी है?
1. बहुत परेशान
2. ठीक लग रहा है
3. अभी डॉक्टर को देखने की जरूरत है

चुनने के लिए नंबर दर्ज करें

1

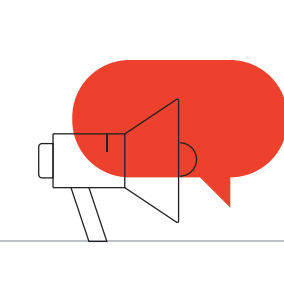
आइए हम आपकी मदद करने की पूरी कोशिश करें। यह मार्गदर्शन किसके लिए आवश्यक है?
1. मेरे लिए
2. मेरे रिश्तेदार के लिए

चुनने के लिए नंबर दर्ज करें

Sapio Smart Healthcare, a division of the government advisory firm Sapio Analytics, has created an artificially intelligent and empathetic chatbot to assist rural users with medical consultations. The AKS Sapio Med Bot is part of the organization's broader plan to create a comprehensive and accessible healthcare ecosystem.

2

Build inclusive marketing strategies that benefit both people and your bottom line.
Consumers are 4.5x more likely to buy from a brand if it addresses human rights, and 3.5x more likely if it takes on economic inequality.[49] As marketers, we are in a unique position to drive authentic and meaningful change, and it starts with the teams we build and the stories we tell. Get inspired by tips for inclusive marketing best practices.



Miss Piggy Banks caters to young millennials, especially women, who want greater access to financial advice. Launched in 2020, the India-based company makes investing less complex and more interesting for its users, including first-time investors, by offering them easy access to financial experts.

Sources:
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