Year in Search - India:
Insights for Brands

What Google Search told us about consumer behavior online

Year in Search - India:
Insights for Brands

https://bit.ly/2GZb8tl

India is coming online at an unprecedented rate

350M
connected
smartphone users

400M
active internet users;
2nd highest in the world

40M
The average yearly
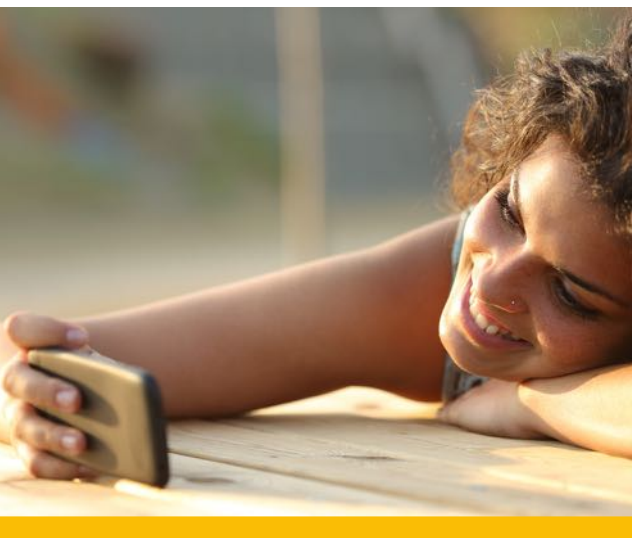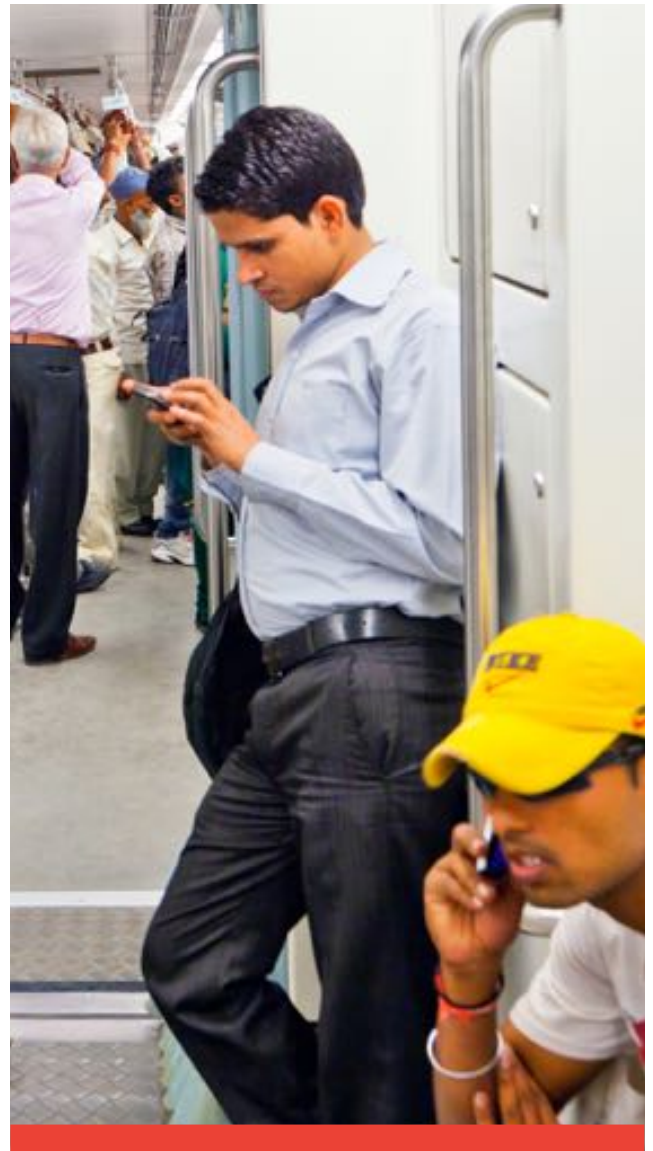addition of users; among
the fastest in the world

8 GB / month
The average mobile data
usage per subscriber,
which has reached levels of
developed markets

Top 5 country trends

Bharat is going online

Searches in non-metros are growing faster than the metros across categories through smartphones

Video: An unprecedented growth story

Online video is reshaping the way consumers gather information and make purchase decisions
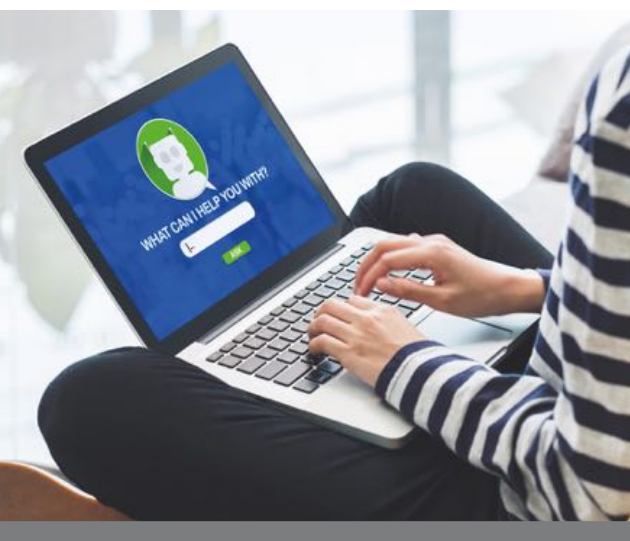
Indic languages and voice

Indian internet users are fast adopting this search tool and finding comfort in regional language

Omnichannel

Online and offline are coming together to fulfill customer needs and helping businesses maximize their potential

Assisting businesses

AI and machine learning are assisting businesses to enhance customer experience and improve ROI

Bharat
is going online

Non-metros[2] are driving
growth across all categories

With growing connectivity, the rise in searches from non-metro cities across categories is faster than that of the metros[1].

The online space in India has never been this vibrant. From driving search volumes in auto to the rise of personal beauty related queries, consumers across different regions of Bharat are becoming the engines of growth. They are no longer seeking cues from the metros, and are setting their own trends.

The internet has become the bridge to Bharat's[3] aspirations.

Consumers in non-metros are searching for products related to **international travel destinations**, **beauty**, and **life insurance** more frequently than their counterparts in the metros[1]. They are no longer restricted by the lack of information or access to technology.

55%

of **all car-related searches** come from **non-metro**[2] cities

61%

of all searches across **personal loans, health insurance, life insurance, and mutual funds** come from Bharat

49%

rise in **face powder** searches from Rajasthan

Interest in destination discovery, destination activities, and international travel is much higher in non-metros than in tier 1 cities
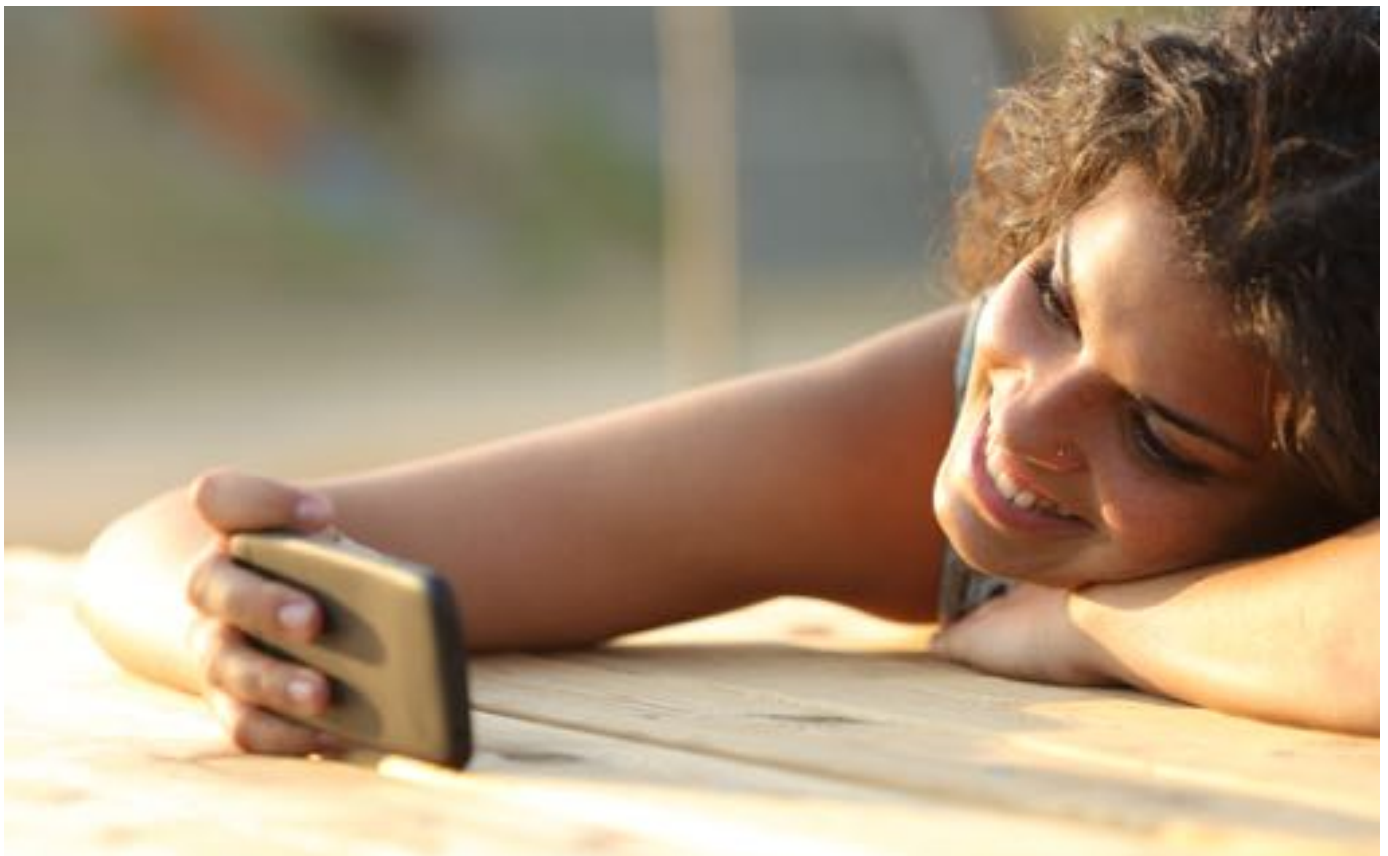
Video: An unprecedented growth story

Online video audience in India is expected to **grow to 500 million by 2020**

There is growing interest in audio-visual content across verticals, as watchtime on mobile phones rises rapidly

---

About 1/3rd of all searches for online video are entertainment related

Other categories like lifestyle, education and business have shown **1.5x - 3x growth in the last 2 years**

Sources: KPMG Report: Re-imagining India's M&E Sector, March 2018
Google- Kantar TNS Gearshift 2018 Report
Google Internal Data, January - November, 2018

Online video is reshaping the way consumers gather information and make purchase decisions

It is playing a big role in the car-buying path to purchase, with **80% of car buyers using it as a research destination**

More than 55% of shoppers say that they **used online video** while actually shopping in store

Indic languages and voice

The rise of the non-English user

9 out of 10 new Internet users in India are likely to be Indian language users

Voice search is becoming mainstream

The country has seen **270%** growth year-on-year in voice searches

Consumers across categories are fast adapting to this new search tool for seeking information and discovering content

11:06

Listening...
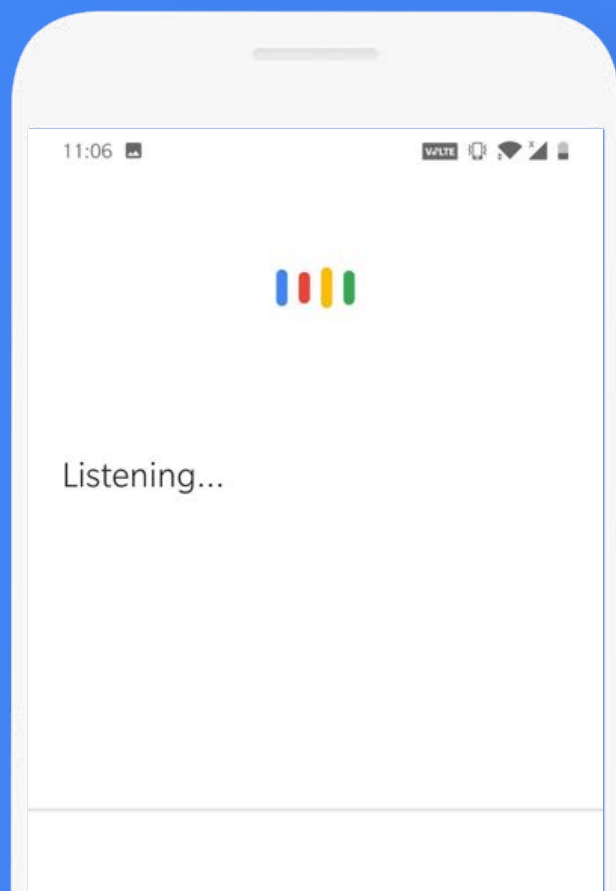
Omnichannel: The growing confluence of online and offline

The rise of omnichannel is enabling consumers to make the most of their online and offline experiences.

50%

of organized retail is likely to be influenced by digital in 2020

75%

YoY growth in "near me" queries

There has been a steep rise in searches for food aggregator brands as people are increasingly relying on apps to look for dining out and food delivery options

2.5X

jump in aggregator **brand queries** in comparison to the total growth of food tech queries

88%

increase in **"near me" searches** for telecom stores

Assisting businesses

The ascent of online automation

Artificial Intelligence (AI) and Machine Learning are helping businesses simplify processes and improve efficiency

Brands across various categories, such as CPG and travel, have started integrating voice assistants with their customer service to help customers

ML and AI assist users and businesses alike

7X

increase in number of active users for Assistant in India

2X

GSK's Otrivin doubled sales and achieved 2X CTR as compared to the industry benchmarks by using data driven solutions to run real time weather based campaigns

Brands like Uber, Ola and Meru made cab booking services available on Google Assistant. The users can simply tap on the desired ride and confirm the booking
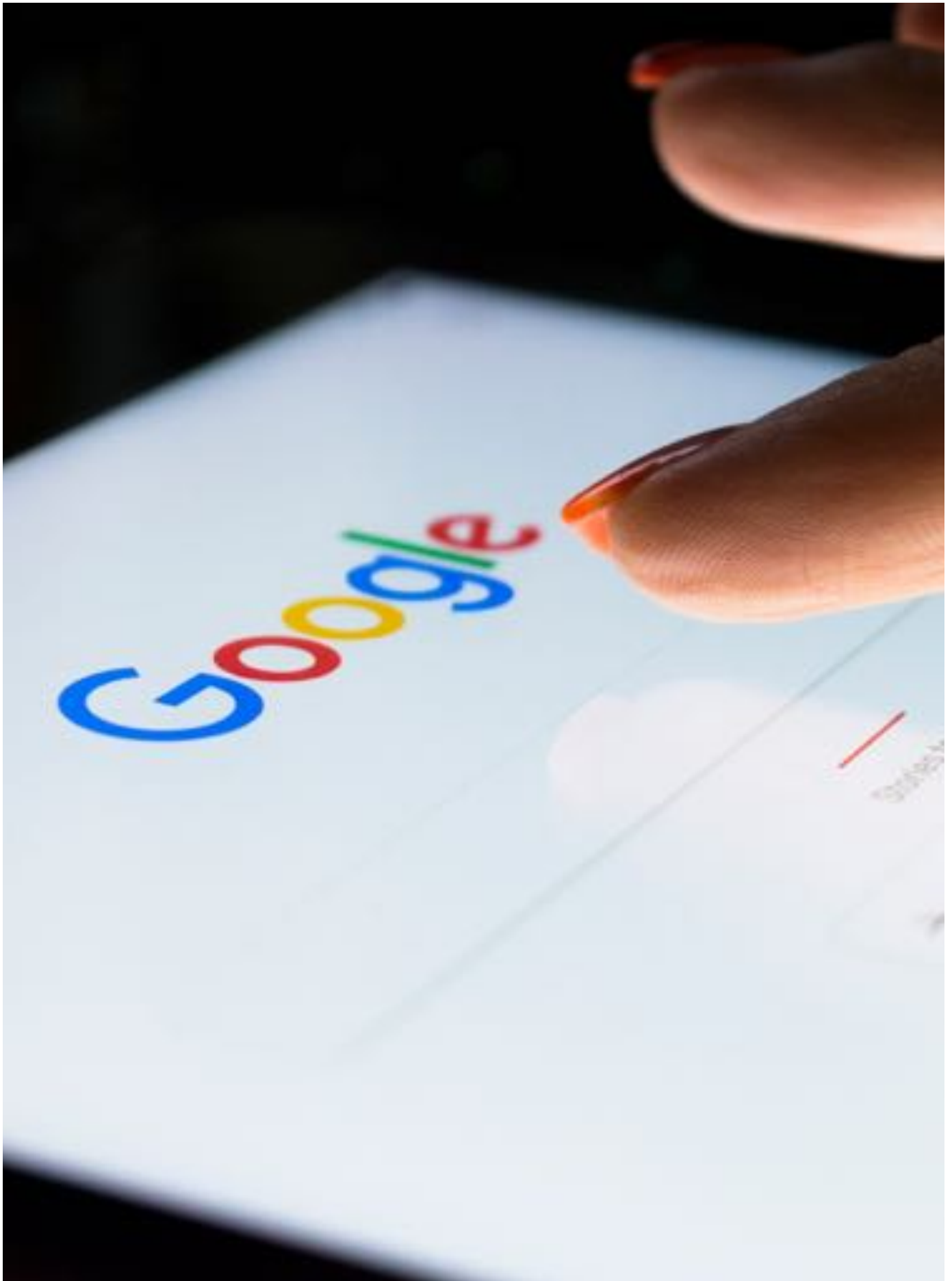
Sources: The Keyword: Building the Google Assistant on phones for everyone, everywhere, February 2019
Think With Google, Cloudy with a chance of sales: What weather-based marketing means for brands in India, 2019

G

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Auto

People are increasingly relying on Search for their vehicle purchase decisions

40%

increase in the volume of **commercial vehicle-related** searches

45%

rise in **commuter bike segment** searches, with more than **60%** queries coming from **non-metro[2] cities**

70%

jump in searches around **used car research**

40%

increase in **used car loan** searches

When it comes to auto, consumers have a whole **range of search queries**

64% YoY growth in queries related to **Servicing**

89% YoY growth in queries related to **Car Insurance**

55%

of all cars-related searches come from **non-metro[2] cities,** which is greater than the volume of queries from **tier 1[1]** cities

Consumers are now relying more on online research, immersive experiences, and online bookings than test drives and showroom walk-ins

90%

of car buyers research online before setting foot into a dealership

And once they're at the dealership, **65% of car buyers** will continue to do research on their smartphones

Average walk-ins per buyer have **fallen to 2 per purchase** from 4 in the last 3 years

Which means that consumers are more informed than ever when they enter a dealership — and that more and more walk-ins are being driven by digital

Sources: Google- Kantar TNS Gearshift 2018 Report

Maruti Suzuki

One of India's leading car maker built the auto sector's first integration with **Google Assistant** for the **2018 Auto Expo** to help users learn about new launches, Auto Expo details, and other relevant information.
It helped create a **seamless experience for users**

Royal Enfield

The iconic two-wheeler brand created a unique **Actions on Google** integration for the launch of its **Interceptor and Continental GT650** bikes. Users were encouraged to discover the price of the products

56%

of all users visited a **dealer website** during their car purchase journey, making it the **third biggest online touchpoint**

60%

of all buyers **find dealers online**

400%

growth for **"dealer near me"** searches

Digital solves for business metrics like calls to dealers and walk-ins

Digital now drives **incremental qualified leads** at most efficient **cost per lead (CPL)** for large **OEMs**[5] across Auto.

It helped **Renault** garner 23% more **qualified leads** and **reduced cost per lead by 19%.**

> "
>
> *We wanted to understand if digital has the same impact as print in driving leads for our dealerships. Google helped us pilot an experiment by developing a customised solution to drive qualified calls directly to our dealerships.*
>
> *The campaign has shown brilliant results and we're planning to scale it further in the coming months.*
>
> "

Virat Khullar
VP & Head of Marketing,
Renault India
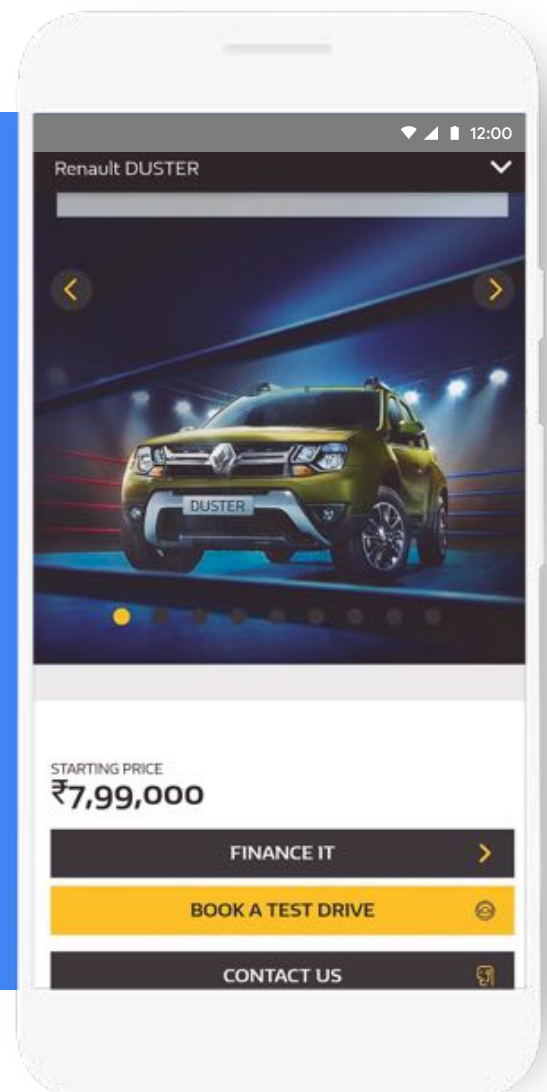
Before visiting a dealership, many buyers research online

41%

of them look for **maintenance programs**

32%

look for **reviews & recommendations**

35%

look for **dealer location / directions** to the dealership

37%

look for **promotional offers and deals**

YouTube has become one of the most important sources of independent information for **car buyers**

79%

of the buyers who watch car videos on YouTube **use it to find information**

81%

of them agree that they find **independent** and **credible** auto videos on YouTube

Video growth in auto

79%

of auto buyers find **answers** and **reviews** on Youtube before purchasing

45%

of new car buyers viewed videos regarding **feature highlights**

27%

of new car buyers watched videos regarding **vehicle performance** before making a purchase

Sources: Google- Kantar TNS Gearshift 2018 Report
Google Internal Data, January - November, 2018,
Google IN Data, 2018

87%

of those who watched online videos took at least one follow-up action

52%

visited a dealer's website

48%

located a dealer

45%

scheduled a test ride

Banking, Financial Services, and Insurance

Bharat is rising

There is **massive interest in life and health insurance,** from users outside the Top 8 cities[1]

Consumers across non-metros[2] are also very **interested in personal loans & mutual funds**

Life Insurance

61%

of all **life insurance related queries** are from **Bharat**, a growth of **43% YoY**

Health Insurance

59%

of all **health insurance related searches** come from Bharat, a growth of **78% YoY**

Mutual Funds

59%

of all **mutual fund** related queries are from **Bharat**[3], growing at **61%**

Personal Loans

57%

of all **personal loan queries** are from **Bharat**[3]; a growth rate of 109%
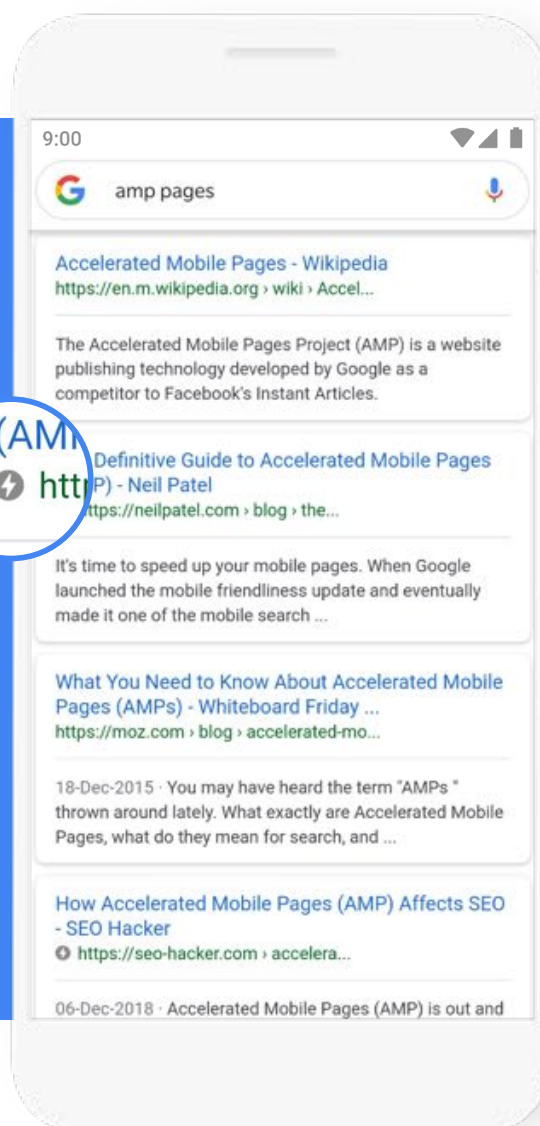
A majority of BFSI-related searches are on mobile

	% of searches on mobile	growth of mobile queries
Health Insurance	**67%**	121%
Life Insurance	**62%**	73%
Personal Loans	**75%**	122%
Mutual Funds	**60%**	75%

Accelerated Mobile Pages (AMP) are driving acquisition

Businesses are using **AMP** to make their processes more efficient and improve online acquisition on mobile

> *The new wave of users from non-metros searches heavily and only on mobile. Delivering a simple and quick experience is key for engagement. We achieved over 60% improvement in load time and over 10% incremental conversion in Search ads by implementing AMP.*

Jagmal Singh
CTO, PaisaBazaar

Source: Paisabazaar External Case Study 2018

AI is helping companies acquire and manage customers

Businesses
are now making
their services
available on
voice activated
assistants

270%

growth in
voice searches
across India

BFSI brands are offering a smoother customer experience with the help of Google Assistant

Paisabazaar

made their credit score facility available on Google Assistant, offering a convenient solution for consumers to interact and transact.

HDFC Bank

became one of the first movers in the space of voice chat after it linked its chatbot **EVA (Electronic Virtual Assistant) with Google Assistant** to offer its services on mobile.

SBI Mutual Funds

became the first mutual fund player to launch a voice assistant to help investors find product-related information, locate branches, and check KYC status.

Hi, how can I help?
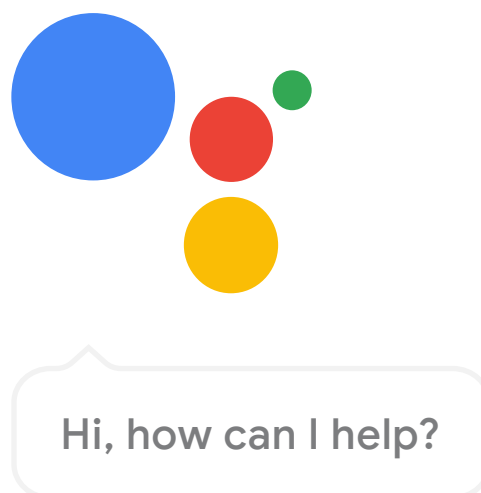
Machine learning is helping brands grow efficiently
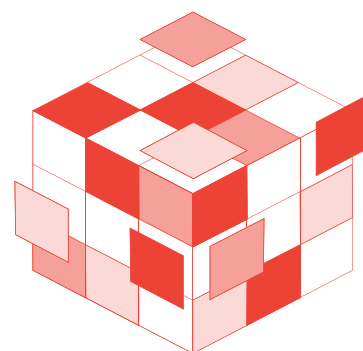
Google's Smart Bidding built on machine learning has helped customers improve efficiency in their marketing efforts on Search.

Smart Bidding capability has also come to video marketing on YouTube, where consumers can now bid on campaigns *based on final conversions*. Earlier consumers could only bid based on views / impressions

2x

increase in incremental scale across personal loans and credit cards for Bank-Bazaar, who used Smart Bidding

71%

increase in leads for ICICI Prudential Life Insurance after they started using the new YouTube format: **TrueView for Action**

Sources: ICICI Pru Life External Case Study
Google - BankBazaar External Case Study

Consumer
Packaged Goods

Search has become the go-to source for beauty

YouTube too, is emerging as the new beauty advisor

Watch time for Beauty Tips videos in India doubled YoY in 2018

40%

growth in searches related to **beauty**

Highest searches in the category are related to: 🔍

Hair care	50%
Skin care	30%
Makeup	20%

Regional language[4] support

is enabling millions of women across India look for beauty tips

Top 3 Indic beauty searches are

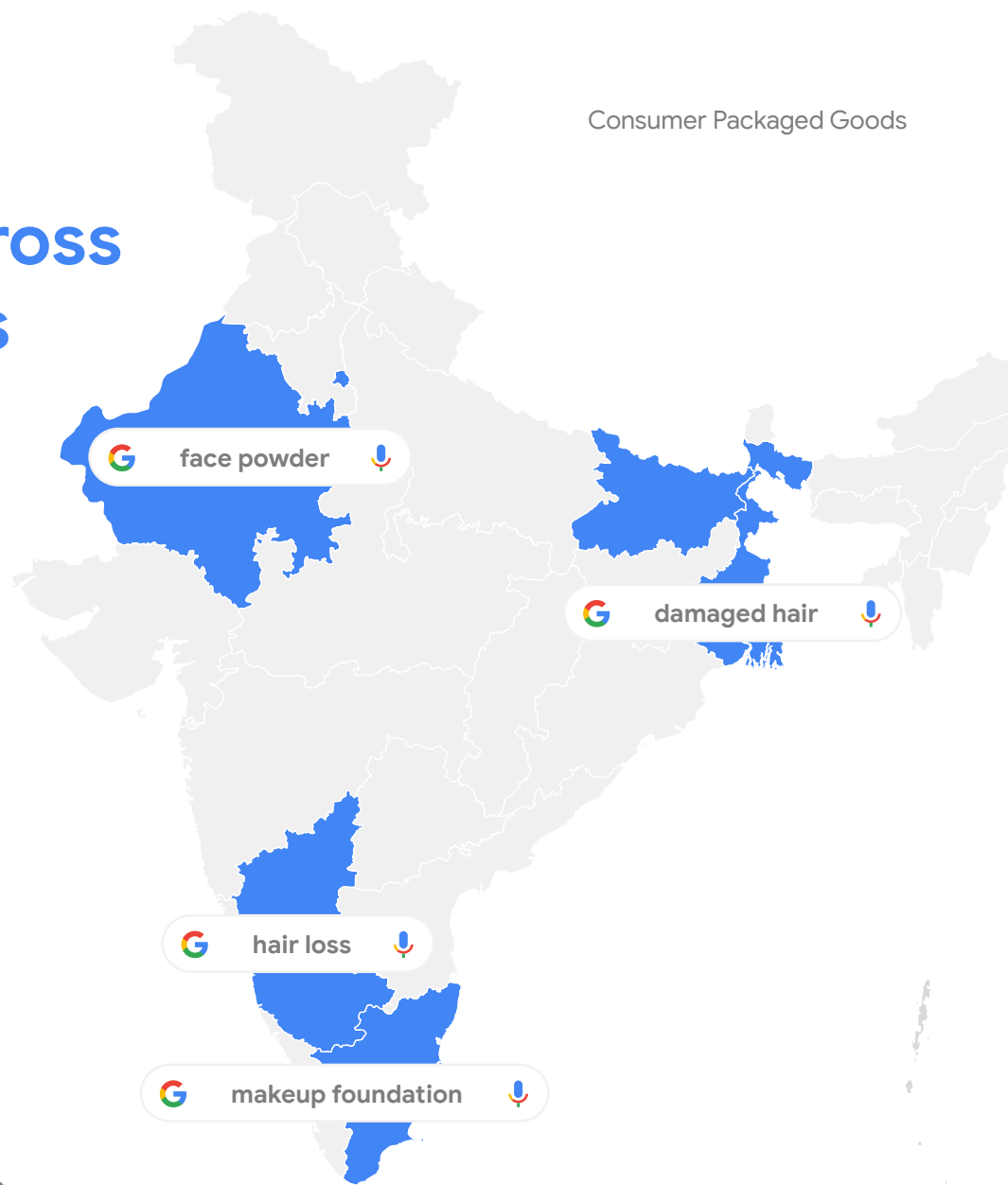G   मेहंदी 🎤

G   हेयर स्टाइल 🎤

G   मेकअप 🎤

"

By introducing vernacular search on ENO, not only did we get 40% lower CPCs, we got a step closer to the consumer in her experience journey.

Puneet Gulati
Head - Digital Marketing and Media, GSK Consumer Healthcare India

"

Winning across many Indias

face powder 🎤

damaged hair 🎤

hair loss 🎤

makeup foundation 🎤

In comparison to the rest of India, there is:

1.2X
more interest in **hair loss queries** in Karnataka

1.1X
higher curiosity about **damaged hair queries** in **West Bengal**

1.5X
greater interest in **face powder queries** in **Rajasthan**

1.2X
more curiosity about **makeup foundation** searches in **Tamil Nadu**

Source: Google Internal Data, December 2017- November 2018

Interest in **beauty** categories varies greatly across Indian states

1 in 3

lip care-related searches come from **Maharashtra, Karnataka, and Tamil Nadu**

1 in 4

skincare searches come from **Maharashtra and Karnataka**

The level of interest in makeup shown by people in Uttar Pradesh is similar to that of Tamil Nadu and Karnataka

Consumers want to know more & **"do it yourself (DIY)"**

**In India,
the birthplace of
Ayurvedic medicine,
there is:**

2.5X

higher search volume for natural ingredients than for scientific ingredients.

Consumers are increasingly researching **product ingredients** to develop DIY solutions for personal care

Top 5 "how to" searches

G   How to make lipstick   🎤

G   How to make lip balm   🎤

G   How to make aloe vera gel   🎤

G   How to make soap   🎤

G   How to make cream at home   🎤

There is a rising influence of international beauty trends in India

Rising aspirations coupled with increased exposure and access is driving the growth of international beauty trends in India
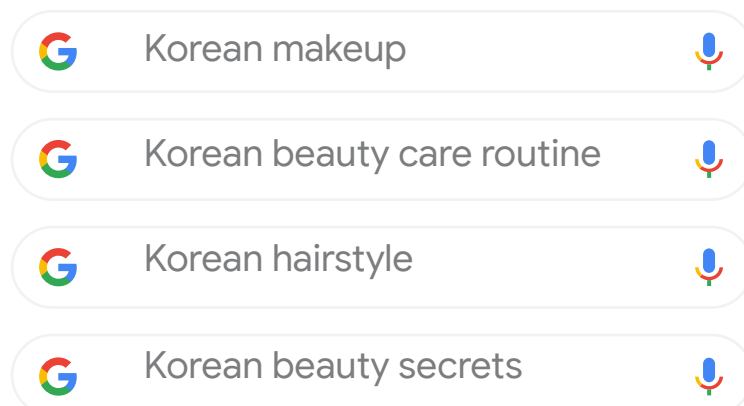
Top Korea beauty-related searches

G Korean makeup 🎤

G Korean beauty care routine 🎤

G Korean hairstyle 🎤

G Korean beauty secrets 🎤

85%

rise in **beer shampoo** searches

50%

increase in **beard oil** searches

30%

growth in **face mask** searches

80%

growth in searches related to **Korean beauty brands**

Indian consumers are adopting the latest trends in health consciousness

—

Keto diet

has become the **most popular diet** ahead of low carb and GM diets

—

Significant growth in queries for:

Protein bars — 40%

Sugar-free — 50%

Gluten-free — 37%

Rise of low involvement categories

Search volumes of these categories are growing faster than the overall CPG industry

40%
increase in **home care** searches

50%
rise in **oral care** searches

Consumers are increasingly looking to YouTube for cleaning solutions

Top 5 searches

G   How to clean your room 🎤

G   How to clean gas stove burners 🎤

G   How to clean iron 🎤

G   How to clean washing machine 🎤

G   How to clean microwave 🎤

E-Commerce

India influencing research and intent

Indic[4] queries are growing faster than English in e-commerce categories like **clothing**, **beauty**, and **personal care**

	Growth in Hindi searches	Growth in English searches
Clothing	178%	**33%**
Beauty and personal care	174%	**28%**

Source: Google Internal Data, January - October, 2018

Fashion, a dynamic and ever growing e-commerce category

—

Over 70% of all fashion searches come from two categories:

Clothing

Beauty and personal care

—

"how to" searches in skincare relate to concerns like:

G	Dark circles	🎤
G	Acne	🎤
G	Fairness	🎤
G	Blackheads	🎤
G	Tan	🎤

Rising trends in beauty and personal care revolve around:

Consumers in the **beauty and personal care** category are increasingly turning to Search for **research** and **to seek solutions to their questions and concerns**

Wants:
Long hair

Searches for tips to growing long hair and hair products

Concerns:
Fairness, hair fall

Searches for hacks and products

Seasonal trends can be seen for dress related searches in the Women's clothing category

over
55%

of all **dress-related searches** revolved around the term **black;** making it the **top colour** of the last quarter of 2018

Velvet was the most searched for material of the season, followed by **Silk, Cotton, Lace, Georgette, Chiffon, Denim, and Satin**

Celebrity weddings in India influence how Indian consumers search online

Deepika Padukone's wedding wear was searched **4x more** than that of Priyanka Chopra

---

Dresses and sarees are the most searched for items by women in the clothing category

India searches for sarees differently across regions/states

40%

of all **western wear** searches are for **dresses**

21%

of all **ethnic wear** clothing searches are for **sarees**

—

plus size clothing

is an emerging category with **62% growth**

laxmipati sarees

kanjeevaram sarees

jimikki kammal sarees

Men's clothing searches
are more brand centric, than women's clothing searches

over

25%

of all **top searches** are for **brands**

over

30%

of all searches are for **shirts**

60-70%

of all searches are for **specific items of clothing** and not designs or suggestions, **a trend more common with women's clothing queries.**

Accessories is the fastest growing category in fashion with **over 150%** increase in searches

Bags and eyewear are the two largest categories in accessories

60%

of all accessories searches are for **bags**

2.6X

more eyewear searches **for men** than **for women**

1 in 3

eyewear searches are for **sunglasses** and **goggles**

2.3X

more searches for **aviators** than for **wayfarers**

Source: Google Internal Data, October - December, 2018

Online Gifting
How Indian consumers are gifting

The concept of
gifting is becoming
more personalised

Consumers turn
to Search to look
specifically for ideas
and inspiration around:

Customised gifts

Unique gifts

Handmade gifts

Best gifts

Surprise gifts

Personal relationships drive gifting behaviour

Spouse/Partner	34%
Men	27%
Women	20%

All percentages represent YoY growth
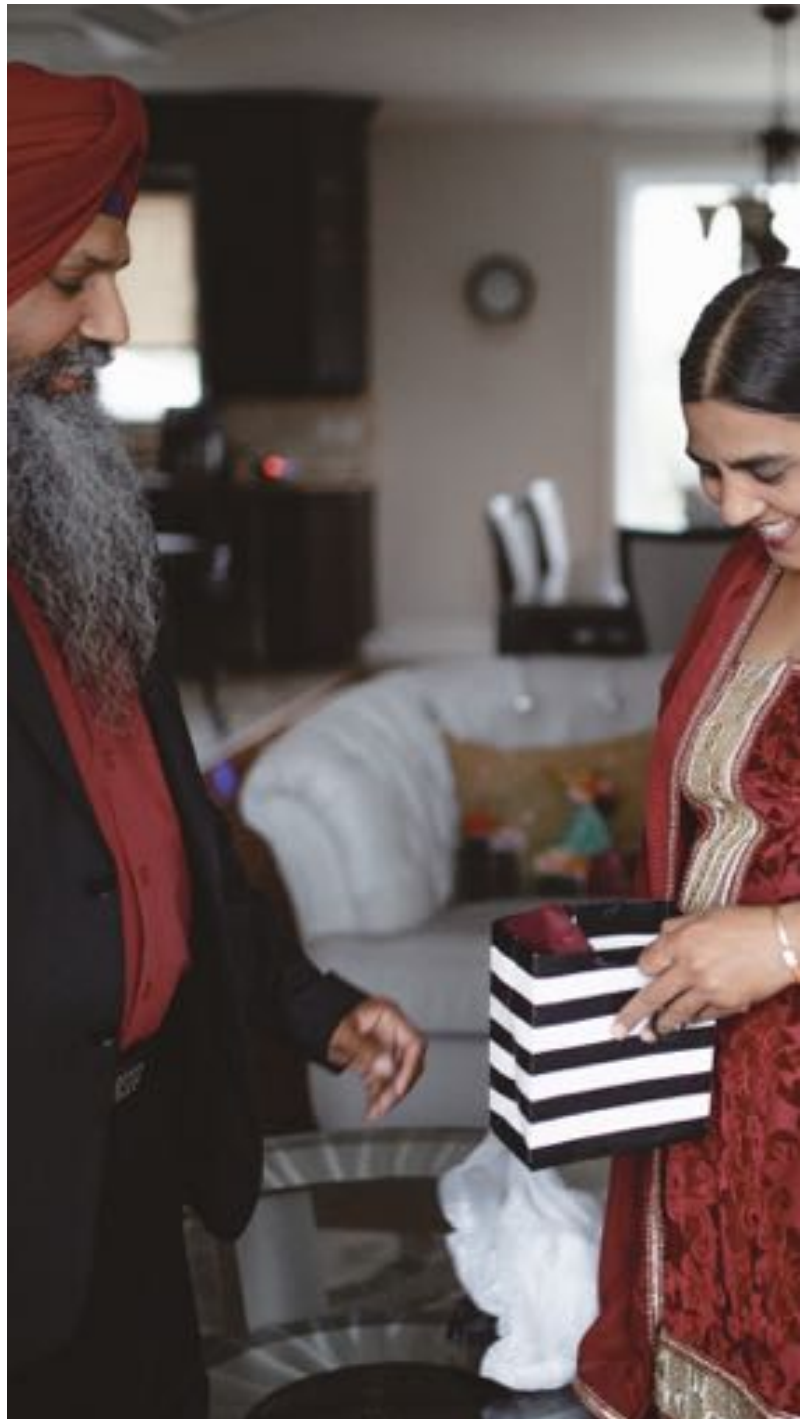
During festivals like Diwali, Rakhi, and Christmas, people search heavily for **"near me"** stores and **"delivery"** options

over
111%

growth in **"near me"** searches related to gifting

Popular gifting-related searches:

- Greeting cards
- Flower arrangements
- Fruit gifts
- Gift baskets

Video is becoming the new research tool for consumers

Consumers are increasingly **using videos** while **researching** and before **making a purchase**

More than 55% of shoppers say that they **used online video while actually shopping in store**.

YouTube drove performance as well as branding goals for Ferns N Petals with a 25% growth in traffic to our website and a whopping 230% brand uplift.

Sai Tota
Head, Digital Marketing,
Ferns N Petals Pvt. Ltd.

Retail

The influence of omnichannel is highly visible in retail

50%

of organized retail to be influenced by Digital in 2020

75%

YoY growth in "near me" queries

> " Search trends have really helped Future Group know customer insights, which in turn have helped the business in forecasting and new products. Also search queries have driven online to offline in a big way, thus, driving business & footfalls. "

Pawan Sarda
Group Head – Digital, Future Group

Digital is influencing in-store sales

21%

increment in
store visits with
YouTube led digital
only campaigns

- Lifestyle

10%

growth in store
walk ins with digital
campaigns

- Kalyan Jewellers

19%

increase in store
sales driven by an
integrated digital
campaign

- Homecenter

Source: Big Bazaar, Jan - Dec, 2018
Lifestyle numbers, Jan - Dec, 2018

28%

of people who clicked on an ad visited the store. **More than 50% of store visits came from people who clicked on an ad within the past 7 days** - Big Bazaar

9%

people who clicked on an ad visited the store. **46% of store visits came from people who clicked on an ad within the past 7 days** - Lifestyle

Education

Increasing demand for machine learning, AI, and software development courses

54%

increase in interest around **Machine Learning and AI courses**

74%

growth in searches related to **software development courses**

Google gave over 100K scholarships across India in 2018 to make courses like AI/ machine learning, cloud, data sciences, and others more affordable

" *AI and ML are one of our high performing courses and as a company, we foresee a lot of demand from both B2B and B2C customers. We closely analyze the Google keyword planner and Google trends data to identify growth opportunities. From this, we observed a clear increase in demand for AI and ML courses. Based on this, we ramped up our search campaigns for these 2 courses, which resulted in a proportionate increase in revenue for us. We have seen an 80 percent increase in consumer leads from Google Search Ads in the AI & Machine Learning categories QoQ (October 2018 with January 2019)* "

Mr. Mark Moran
CMO, Simplilearn

Watchtime for **Science videos** in India **more than tripled** year over year in 2018

Watchtime for **Hobby related videos** in India **tripled** year over year in 2018

$650 million

The **Edtech sector** showcases a steep rise in total investment from the **$350 million** in 2017

Local and Classifieds
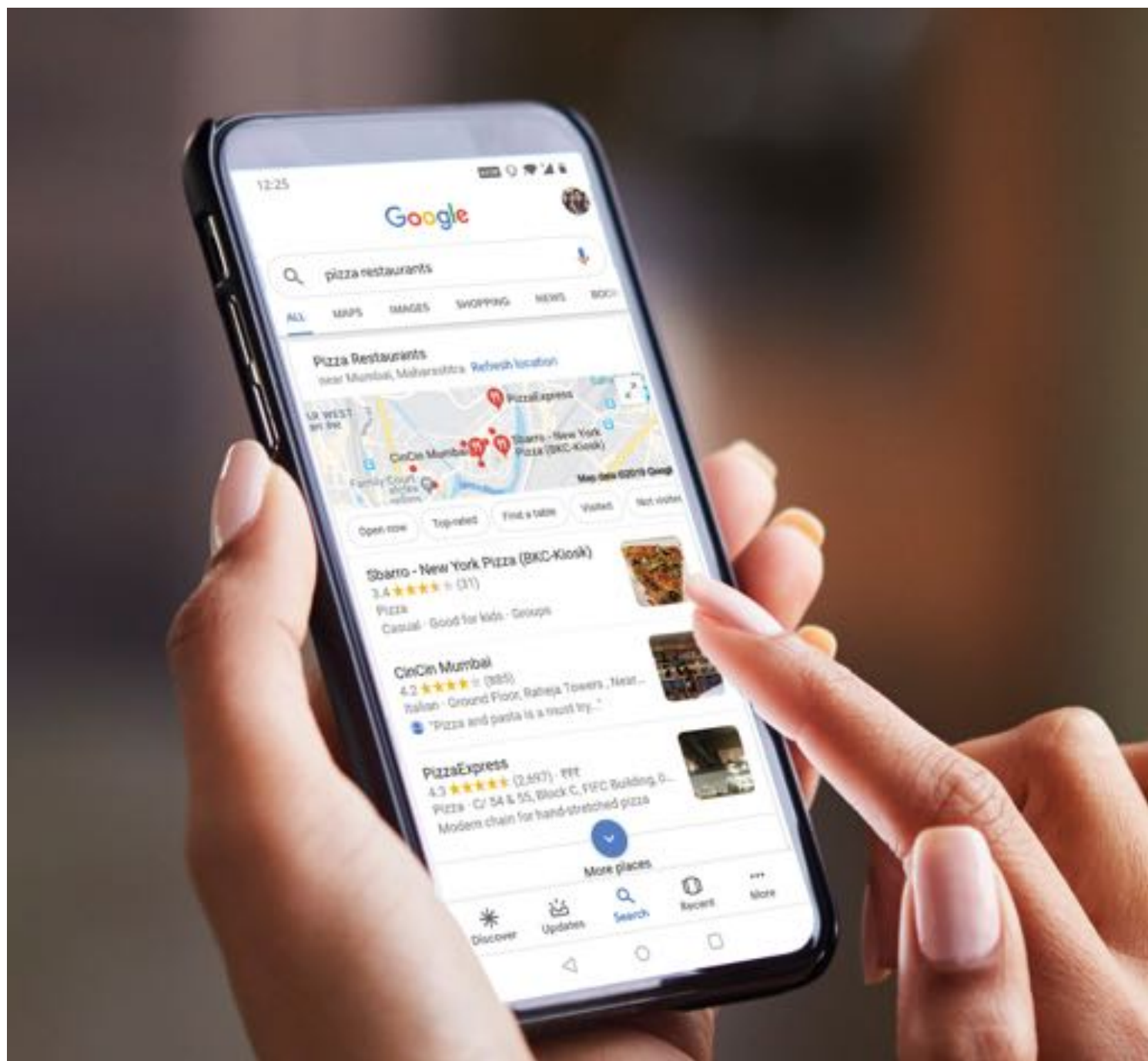
Explosive growth in food tech and hyper local services in 2018

1 of every 2

food tech queries are for aggregator brands

2.5X

jump in aggregator brand queries in comparison to total growth in food tech queries

Pizza is a favourite among Indian consumers when ordering online

It was the most searched term in 9 out of 11 states with the highest of the food tech queries

Online consumers are **turning to video** for food inspiration and research

237%

growth of hindi searches related to food

Watch time for Cooking videos in India **more than doubled** year over year in 2018

Source: Google Internal Data, January - December, 2018

Co-working spaces
The new way to work

100%

growth in queries for
co-working spaces
in real estate searches

Top destination for
co-working spaces:

Delhi NCR (Delhi, Gurgaon, Noida)

Dating searches are catching up with matrimony queries

40%

growth in **dating-related searches,** which are growing much faster than **matrimony queries**

37%

increase in **online dating brand queries** versus 13% increase in interest for matrimony brands

The total volume of matrimony searches, however, continues to remain high

3X

The total volume of **matrimony-related queries** in comparison to searches about dating

Media and Entertainment

Entertainment goes online
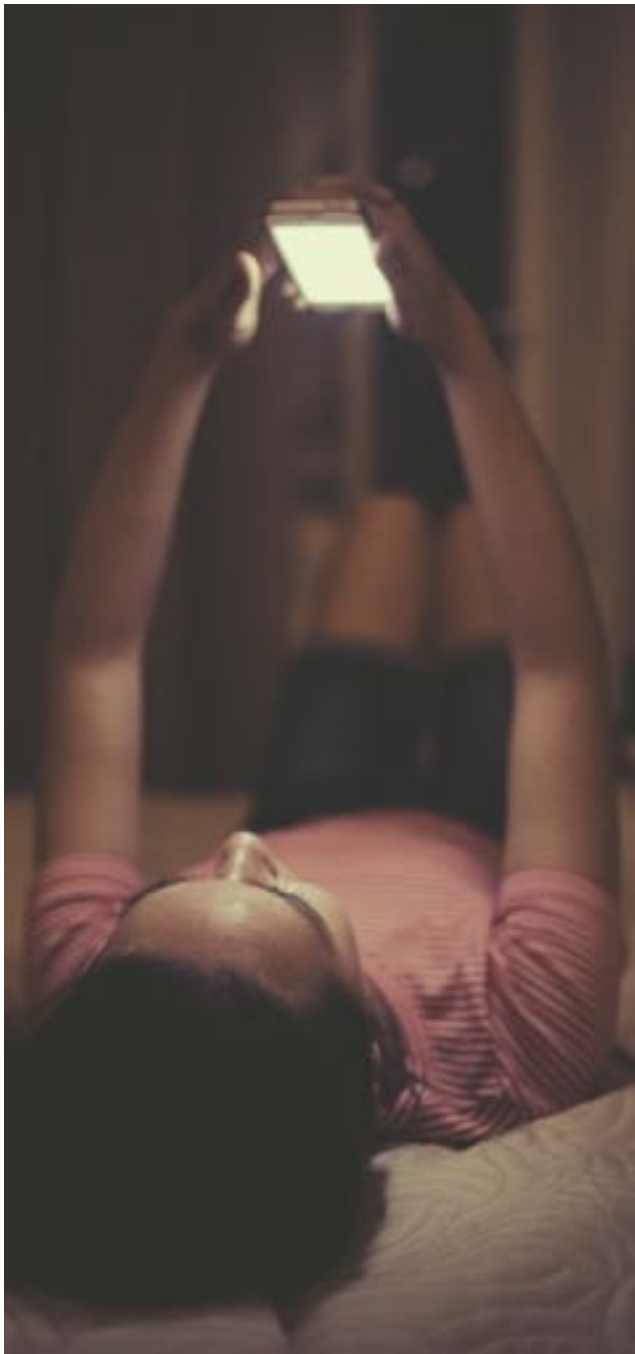
Video entertainment content accounts for the largest volume of internet usage on smartphones

Over **36 minutes per day per user** is the average video entertainment content watchtime on smartphones

1 in 3

hours of **video entertainment content** in India is already consumed on digital*

2 out of 3

entertainment users will access **OTTs by 2023**

* amongst internet users

Bharat[3] comes online for entertainment

Video, music, and **news** are the top queries of regional language search in India

Top 4 Hindi search queries

G   यूट्यूब   🎤

G   वीडियो   🎤

G   भोजपुरी गाना   🎤

G   मोटू पतलू   🎤

"

Search being an intent driven platform, is one of our key channels. Language content is one of our USPs and with consumers now searching in Indic languages, it helps us tap into the additional pool of non-English users

Manish Aggarwal
Business Head, ZEE5 India

"

Translations in order of appearance: YouTube, Video, Bhojpuri Songs, Motu Patlu
Source: Google Internal Data, 2017-18

Video drives video

India's leading OTT providers are turning to YouTube to engage entertainment lovers

Show marketing on YouTube for ZEE5 Original Karenjit Kaur, helped drive a 69% rise in branded search queries while reducing cost per engagement by 60%

Rangbaaz, a ZEE5 Original achieved a **20x rise in daily subscription** rate by following creative best practices for video

Over 60% growth in video on demand (VoD) searches

To drive app installs in a cost-efficient way, Voot ensured it showed up on YouTube by using multiple videos in its App campaign

The campaign resulted in a **300% higher click-through rate (CTR), 60% lower cost per install, and 57% lower cost per video view** compared to other video advertising platforms

Using a **"burst" approach** to generate more downloads before the elections, **DailyHunt** ran an App campaign across search, YouTube, and the Display Network

The unique strategy resulted in **86% more overall app installs,** than standard campaigns

Telecom
and Payments

The rise of the non-metro user

25%

growth in searches for **telcos** from **Bharat**[3], they now make up **60%** of all searches in the category

65%

growth in searches for **international roaming plans** from **Bharat;**

51%

of all **DTH** search queries are from **non-metros**[2]

As telecom connectivity grows outside the non-metros, users are seeking access in their own languages

——

21%

growth in **Indic**[4] **messaging app** downloads

1.9X

increase in **average data consumption**

——

Increase in 4G connectivity and access to mobile phones is driving the jump in content consumption

4X

increase in **4G enabled feature phone** shipments

24%

rise in **speed test-related searches** on mobile indicates that **consumers want high network quality**

Sources: January - June, 2017-18, IDC data
YouTube Internal Data 2017-18
Google Internal Data, January - September, 2018

Video is important to keep the brand love alive for telcos

—

1 in 4

telco-related brand searches are for their own **OTT services**

Nearly 75%

of all telco OTT searches originate from **outside of the top 8[1] cities**

2 out of 3

searches for **SVOD-telco bundled offers** come from the **top 8** cities

—

"

*Video is a core experience for our users. This is specially true for the youth segment which is the primary target group for this campaign. YouTube helped us leverage this trend with audience insights coupled with Director's Mix which allowed us to infinitely customise our campaign with local messaging to get 20% consideration uplift and 31% awareness uplift*

Sunita Bangard
President, Marketing,
Vodafone Idea Limited

"

Telcos are turning to AI for large scale customer servicing

Hi, how can I help?
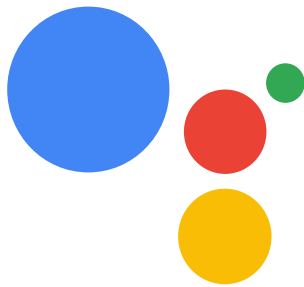
One of India's leading Telco players **Airtel collaborated with Google** to bring **Google Assistant-based Digital Customer Care experience** to its customers.

Both prepaid & postpaid users can get answers to various queries pertaining to their subscribed plans, data usage and account balance.

Telecom players are integrating their customer service with **Google's virtual assistant** to provide **innovative, AI-led solutions** for consumers.

"

As part of our digital transformation journey, this is yet another innovation to empower our customers. With smartphones fast becoming the norm for every Indian, this will make digital self-care much more interactive and step up the customer experience,

Sarang Kanade
Director, Customer Experience & Retail, Bharti Airtel

"

Sources: Google Internal Data, January - September, 2018

Consumers are sticking to **cashless payments**

Retail digital payments continue to grow

23%

growth in **credit and debit card transactions** at point of sale

7.5X

increase in **average transaction value** of credit cards

The rise
of UPI

—

11X

surge in **UPI transactions** between **January & November 2018** as compared to the same period during the previous year

10X

increase in **total volume of UPI payments,** surpassing mWallet transactions in the first nine months of 2018

—

Technology

Bharat is rising

Over 70% of all **smartphones-related searches** come from **Bharat**

Hindi gaining traction

2X

increase in Hindi queries related to **laptops and PCs**

2.3X

jump in Hindi queries about **smartphones and mobile phones**

Source: Google Internal Data, January - December, 2018

82

As the gap between offline & online blurs, brands are embracing an Omnichannel strategy

For **PC OEMs[5],** every rupee spent on search advertising is influencing over **Rs 38** in both offline and online sales

Out of all sales driven by media and promotion, digital contributed to **more than 70%** of those sales for Lenovo's notebooks between **January 2016 to December 2017**

For LG's panel TVs, every one INR invested on digital returned an impressive **88 INR**

> *While LG has been a proponent of digital marketing, the fact that digital media drives significantly higher sales impact and ROI than other media is a key business and marketing insight for us that will shape our media planning going forward*

Mr. Rahul Tayal,
Director, Strategic Business & Marketing,
LG India

Source: Think With Google India, "Lenovo and LG India experiment shows that digital investment leads to ROI," December 2018
PC OEM point to HP & Lenovo Client Case Study, 2018

YouTube: An important medium for tech product research

More consumers are using YouTube to browse and research tech products

Watch time for Consumer Electronics videos in India doubled year over year in 2018
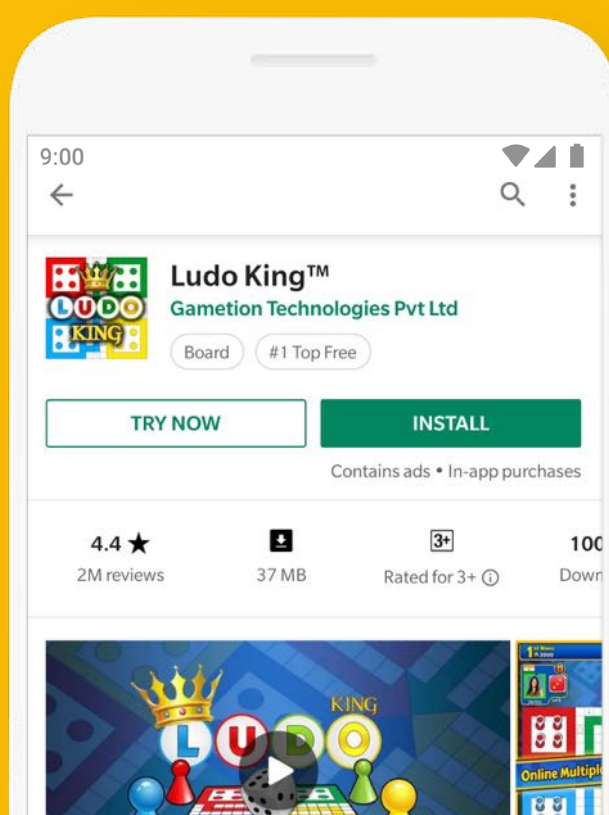
163%

growth in Unboxing related searches

Gaming is going big

Indian online gaming industry to add 190 million gamers and become a USD one billion opportunity by 2021

Top 3 downloaded games in India in 2018:

1 - **Ludo King**

2 - **Subway Surfers**

3 - **Temple Run 2**

9:00

Ludo King™
Gametion Technologies Pvt Ltd
Board   #1 Top Free

TRY NOW   INSTALL

Contains ads • In-app purchases

4.4 ★   3+   100
2M reviews   37 MB   Rated for 3+ ⓘ   Down

KING
LUDO

78%

growth in **gaming laptop queries**

2X

jump in **mobile gaming searches**

Online Gaming in India to hit $1B by 2021 at a CAGR of 28%

Source: "Online gaming in India: Reaching a new pinnacle," A study by KPMG in India and Google, May 2017
LiveMint Nov 2018
App Annie 2018 Ios and Play Store

Consumer searches have evolved from brands to specific phone features

Feature-led searches growing at 2X of the overall smartphone category

Digital influence on SaaS category grows

30%

growth in **SaaS categories**, with mobile playing a bigger role in influencing B2B decision making

2X

growth in SaaS related **searches on mobile**

The highest spike in consumer interest is for **live chat, recruiting, and accounting**

Travel

Bharat is rising

Non-metro[2] cities are driving growth
in non-conventional categories

	Bharat*	Top 8 Metros*
City and short trips	**28%**	11%
Car services and taxis	**16%**	4%
Packages	**7%**	1%
Destination activities	**28%**	14%
Pure destination discovery	**42%**	34%

*Growth in YoY %

Bharat[3] is searching for **more generic queries than specific brands** when it comes to **travel**

More users are looking at India as their next travel destination

42%

Growth of **inbound travel from US, UK and Italy**

40%

growth in searches related to **destination discovery terms**

10%

rise in queries for generics by travellers **when booking travel to India**

Indians are searching for more international travel options

42%

jump in **international travel related queries** by Indians

52%

growth in international travel queries in May, making it the peak month. A large number of queries were related to **hotel and pure destination terms**

3X

rise in **Australia-related queries**, making it the most favoured destination

Source: Google Internal Data, IN, All Devices, January – December 2018 vs. January – December 2017

90

What are non-metro[2] users looking for before their international travel?

Destination discovery terms	**40%**
Air	**17%**
Destination activities	**40%**

All percentages represent YoY growth

Domestic travel searches are growing

12%

growth in **domestic travel queries**

Bengaluru ⇌ Mumbai

was the **most searched air route,** with Bengaluru being the **highest searched location** for Hotels

21%

growth in queries for **Jaipur's tourist places**

20%

growth in domestic travel queries from Top 8 metros[1], which are growing at a much faster rate than Bharat[3] (11%).

Source: Google Internal Data, IN, All Devices, January - December 2018 vs. January - December 2017

Automation

Travel clients have seen efficiencies of around 20%-25% in acquisition cost after adopting Google automated bidding solutions and dynamic creatives

"
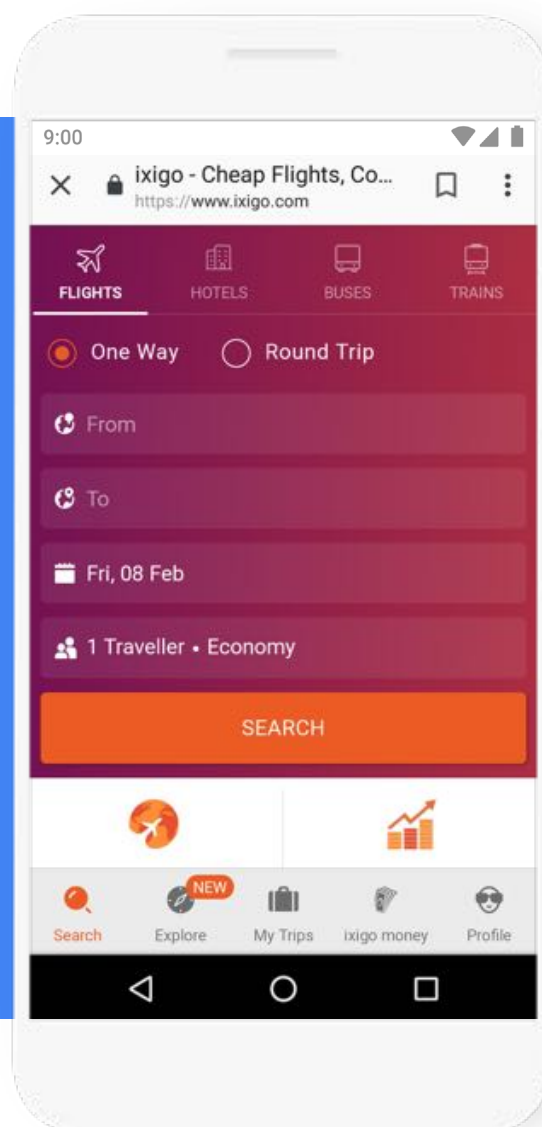
Scaling up flight bookings and improving ROI on marketing spends are key goals for ixigo. Using Google's search insights, smart bidding and automation first approach, we were able to reduce our cost per transaction by 70% over the last 9 months. Google has helped us scale well and we are looking forward to integrating with Google's latest set of automation tools to continue on this journey.
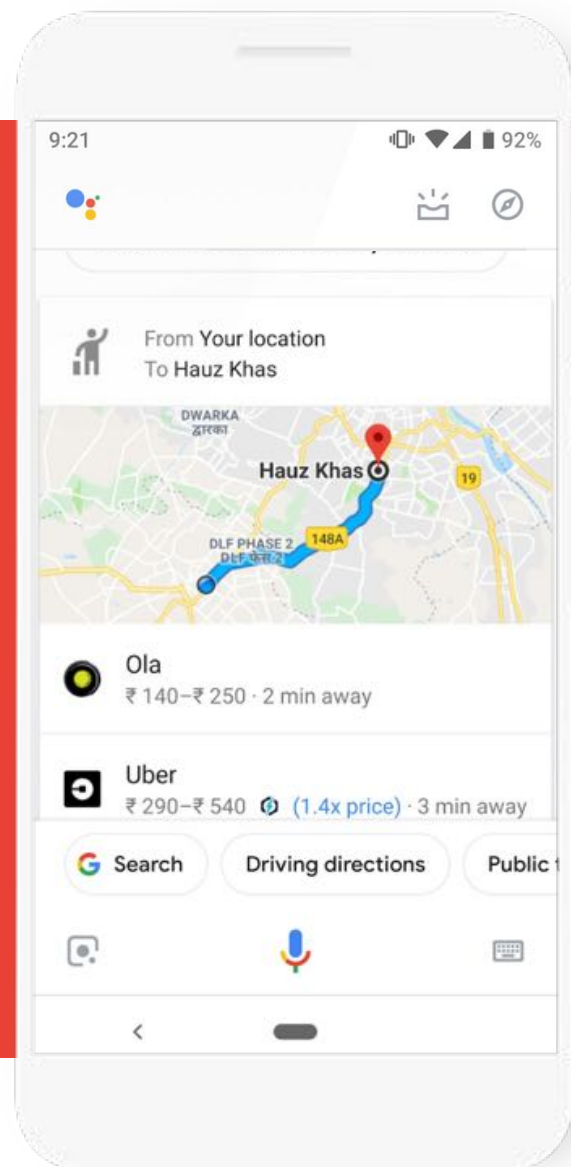
"

Himanshu Periwal,
VP - Growth, ixigo.com

Source: Customer Case Study - Ixigo - 2018

Getting a ride is a lot easier with Google Assistant

Brands like **Uber, Ola & Meru** made cab booking services available on Google Assistant

The users can simply **tap on the desired ride and confirm the booking**

What influences Indian travellers?

The top triggers for online purchase
in the travel category (air and hotel) are:

Multiple options in one place

Deals and discounts

The convenience of avoiding queues

Detailed travel information and verified user reviews

Digital drives offline

56%

of all leisure flight travellers
and **48%** of all leisure hotel
bookers **research online,
but book offline**

Glossary

1 Tier 1 cities (or) Top 8 cities (or) Metros

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

2 Non-metros

All cities except Top 8 cities

3 Bharat

All regions of India except the Top 8 cities

4 Regional languages (or) Indic languages (or) Local languages

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

5 OEM

Original Equipment Manufacturer

Power your business with the latest data, insights and inspiration from Google

Go to www.thinkwithgoogle.com