



what is Pakistan searching for?



Insights for Brands

Think with Google



We live in the era of hyper-communication. Information that was once difficult to obtain is now available at the tap of a screen, while services that were previously limited to a few people are now almost universally accessible. Today, the internet performs the role of a primary entertainer, food guide, personal shopper, travel agent, and an all-round source of knowledge.

The continuing transition of users from offline to online is leading to complex digital journeys and heightened consumer expectations. As people make decisions about where to go, what to do, or what to buy, keeping up with them has become a simultaneous mix of easy and hard.

In the midst of all this, marketers are faced with the challenge of clearly understanding what matters most to consumers in their moments of need, so they can be present at the right place, at the right time, with the right information.

There are no standard operating procedures for what is currently unfolding. Even the most astute advertisers, who are accustomed to dealing with evolving strategies and real-time changes in direction, are grappling with tough questions like: **How do we meet this new reality?**

With Google's **What is Pakistan searching for?** report, we offer the latest insights to help marketers understand what matters to consumers and empower them to effectively navigate through these unprecedented times.

Top Four Pakistani Trends

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05



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Sophisticated consumer

Pakistani consumers continue to become more sophisticated about their interactions with and expectations from brands. They want high-quality products that are available with a convenient digital experience

Size of Pakistan's e-commerce market in 2020:

\$1 billion



81%

of all connected Pakistani consumers **research products online before purchasing**

80%

of them say that they **switch between search and video** when researching a product

55%

of them search for a product on **Google and then use YouTube** to learn more



A vast majority of Pakistani consumers research products online before purchasing

% of people searching for products online:

Q womenswear ▲ 89%

Q smartphones ▲ 82%

Q skin care ▲ 72%

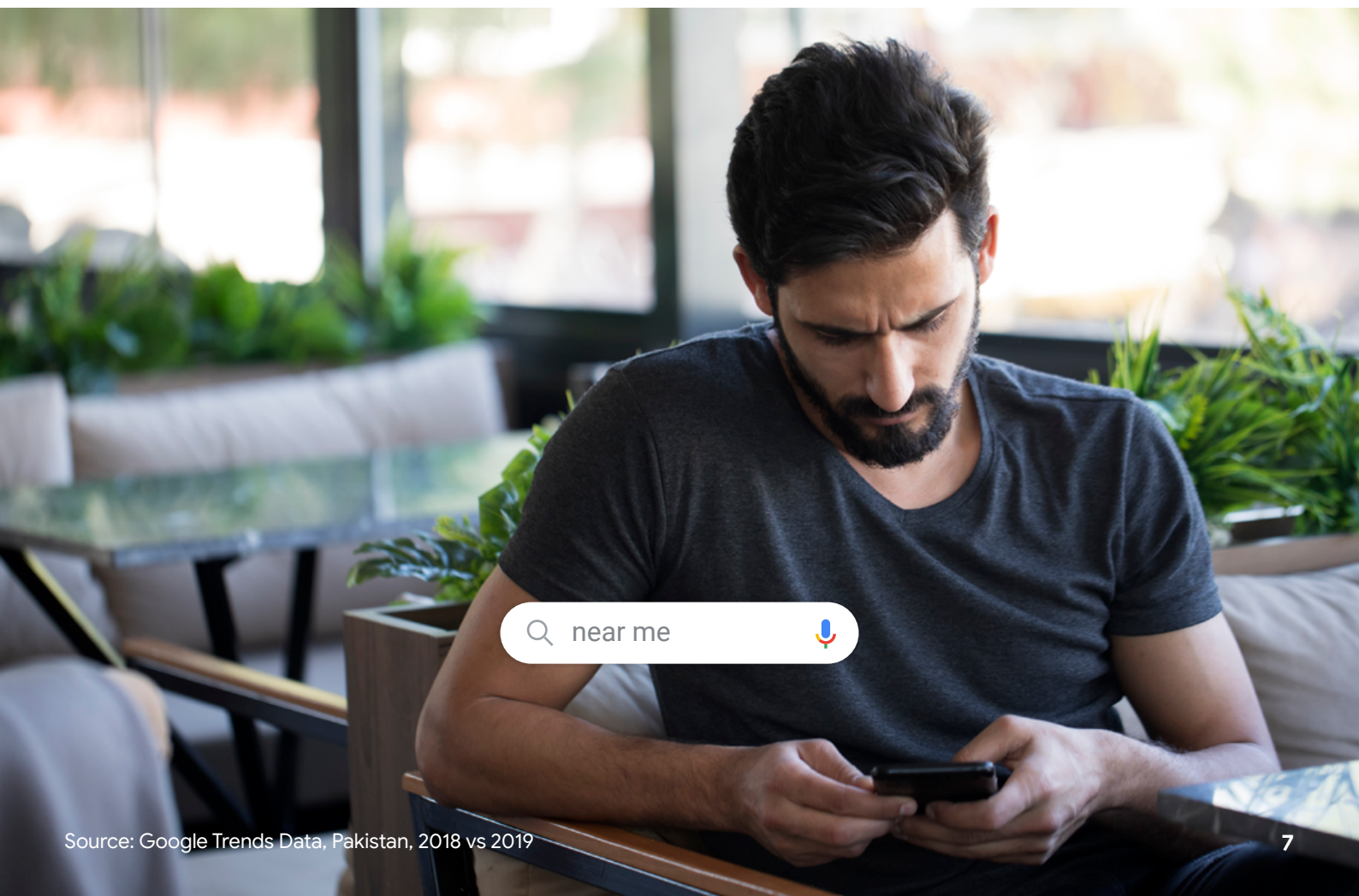
Pakistanis seek quick access to products and services. They either look for retail options nearby or for products offering delivery options that include same-day shipping

138%

growth in “near me” searches

1.5x

increase in “same day delivery” queries



This quest
for instant
gratification
includes a
desire for the
“best” products
to enhance
productivity,
increase
convenience,
and add comfort
to their lives



Source: Google Trends Data, Pakistan, 2018 vs 2019

1.3x

rise in “**best phone for**”
queries

Top categories include:

Q gaming



Q video



1.4x

growth in “**best tablet for**”
searches

Top categories include:

Q working



Q gaming



1.4x

increase in “**best serum
for**” searches

Top categories include:

Q acne



Q dry skin



When consumers go online, speed and convenience are essential

53%

of all consumers will leave a mobile site that takes longer than 3 seconds to load

20%

drop in conversions for every second of delay in mobile page loading time

76%

of all consumers are likely to purchase from mobile sites that make it easy to purchase or find answers



COVID-19 impact

Due to strict social distancing guidelines and other public safety measures enforced by the government, the movement of people across Pakistan is restricted. To fulfil their essential needs, more consumers are turning to online delivery services or retail outlets near their homes



Source: Google Trends Data, Pakistan,
Jan-Feb 2020 vs Mar-Apr 2020

Q fast delivery ▲ 1300%

Q grocery near me ▲ 168%

Q grocery delivery near me ▲ 200%

Q online grocery delivery ▲ 300%

Sustainability

A combination of natural disasters globally, government initiatives, and a rise in media coverage about environmental issues have ensured that sustainability is no longer just a buzzword.

Consumers are continually looking for information about environmental issues as they attempt to change the way they live and shop. This has prompted many to seek more eco-friendly solutions and best practices for day-to-day living.



Growth in searches:

Q electric cars ▲ 1.5x

Q reusable ▲ 1.3x

Q cloth bags ▲ 150%

Q car rental ▲ 81%

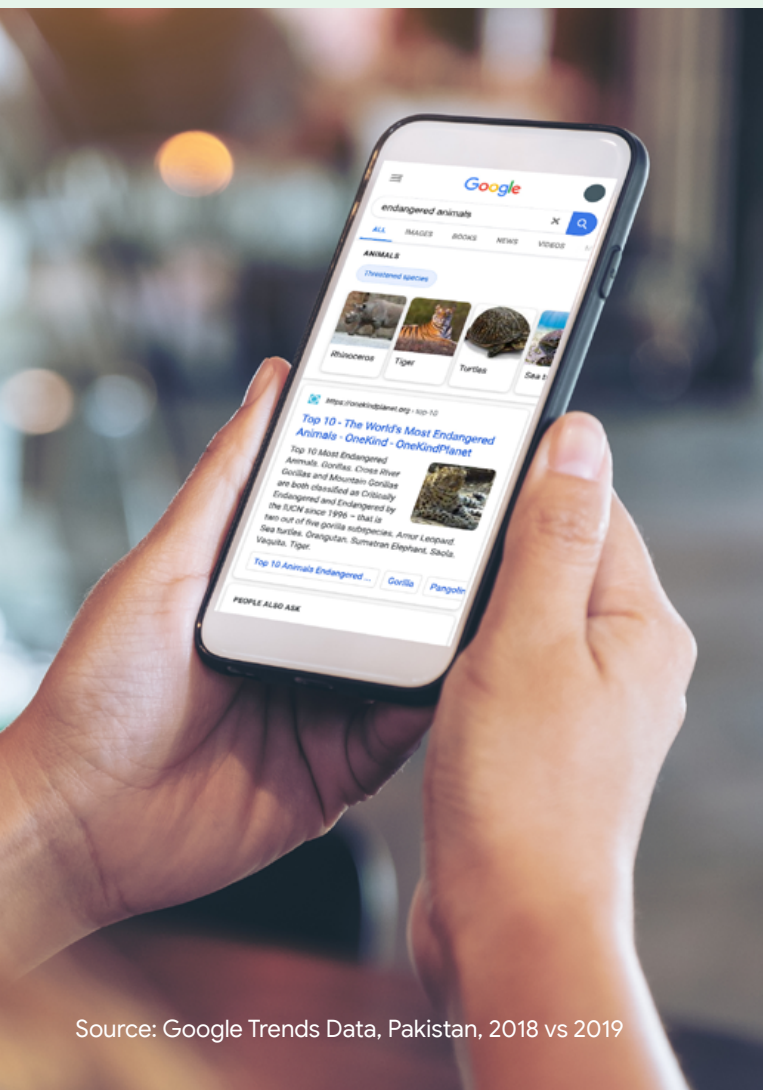
Q biodegradable plastic ▲ 73%

Searches for environmental issues have risen sharply across Pakistan

Consumers are increasingly driven to educate themselves about conserving water. Many of their searches are focused on issues that directly affect them, such as air quality or pollution levels.



| | |
|-------------------------------|--------|
| Q climate change | ▲ 1.5x |
| Q environment (on YouTube) | ▲ 1.4x |
| Q how to conserve water | ▲ 1.3x |
| Q pollution index | ▲ 700% |
| Q air quality | ▲ 175% |

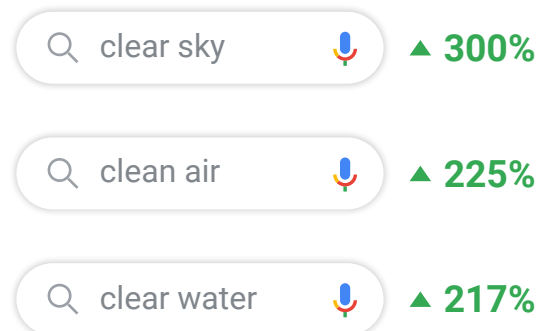
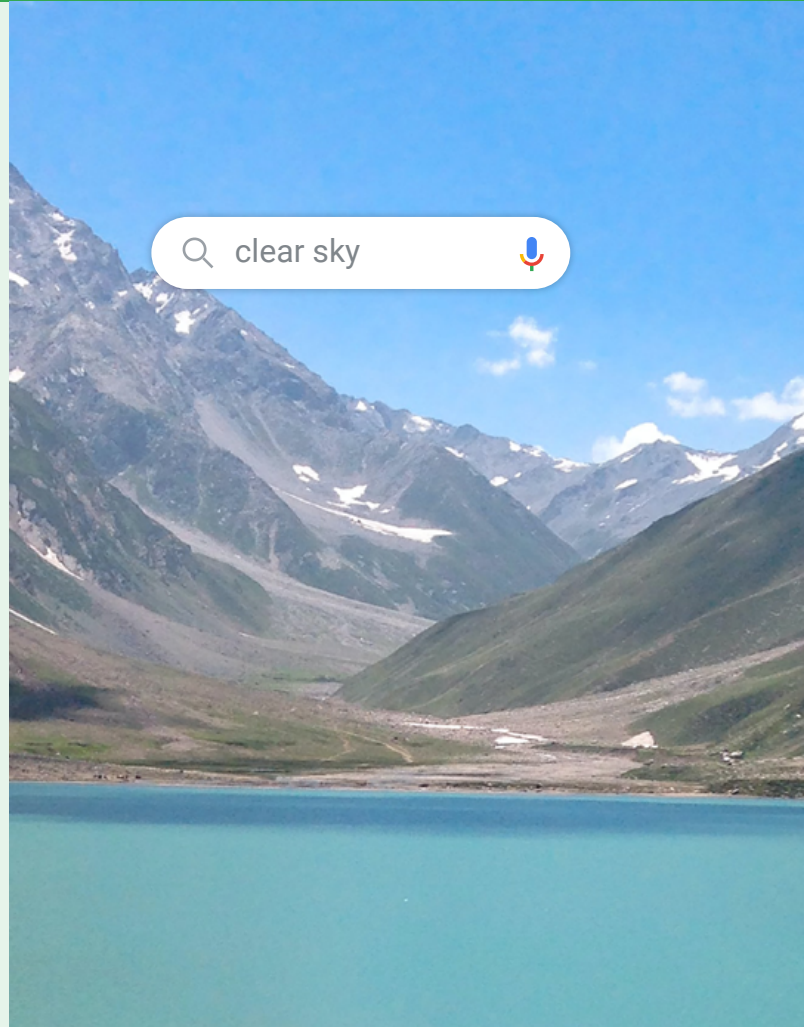


...as have queries for environmental NGOs and broader ecological issues

| | |
|----------------------------------|--------|
| Q friends of earth | ▲ 1.6x |
| Q endangered animals | ▲ 1.5x |
| Q global warming (on YouTube) | ▲ 1.5x |
| Q greenpeace | ▲ 1.2x |

COVID-19 impact

Searches around larger environmental issues have seen a decline as Pakistanis now look for information more relevant to the current situation. However, they have grown more curious about the impact of reduced human activity on the environment



Digital video boom



Pakistanis log on to video-sharing and streaming platforms to get their regular fix of information, entertainment, news, and cricket. Global players including YouTube, Netflix, Amazon Prime Video, and TikTok are commonly used by consumers in this thriving landscape

Across Pakistan, soap operas and serials, which were once primarily viewed on TV, are finding a huge audience online. Digital-only content, aided by the rise of indigenous channels and platforms, is garnering strong viewership numbers. This trend is illustrated by the popularity for 2019's hit television series, Do Bol. Viewership for the series was close to that of Hollywood's blockbuster, Avengers Endgame.

As more Pakistanis consume online content, local YouTube creators such as Irfan Junejo, Faiza Saleem, and creator groups like Bekaar films and Teeli have emerged as popular celebrities — titles that were formerly given only to established film stars, musicians, and cricketers.



The primary drivers of the growth in digital video include:

- **Increasing smartphone penetration**
- **Cheap mobile data**
- **The proliferation of streaming platforms**



YouTube is Pakistan's favourite video destination

73%

of all connected Pakistanis
use **YouTube** every month

78%

of all YouTube users in
Pakistan agree that the
platform is their first
stop when looking
for videos

63%

of them agree that they
often watch YouTube
with friends and family



Consumers are showing greater interest in video on demand and subscription services

82%

growth in “netflix” searches

111%

rise in “amazon prime video” queries

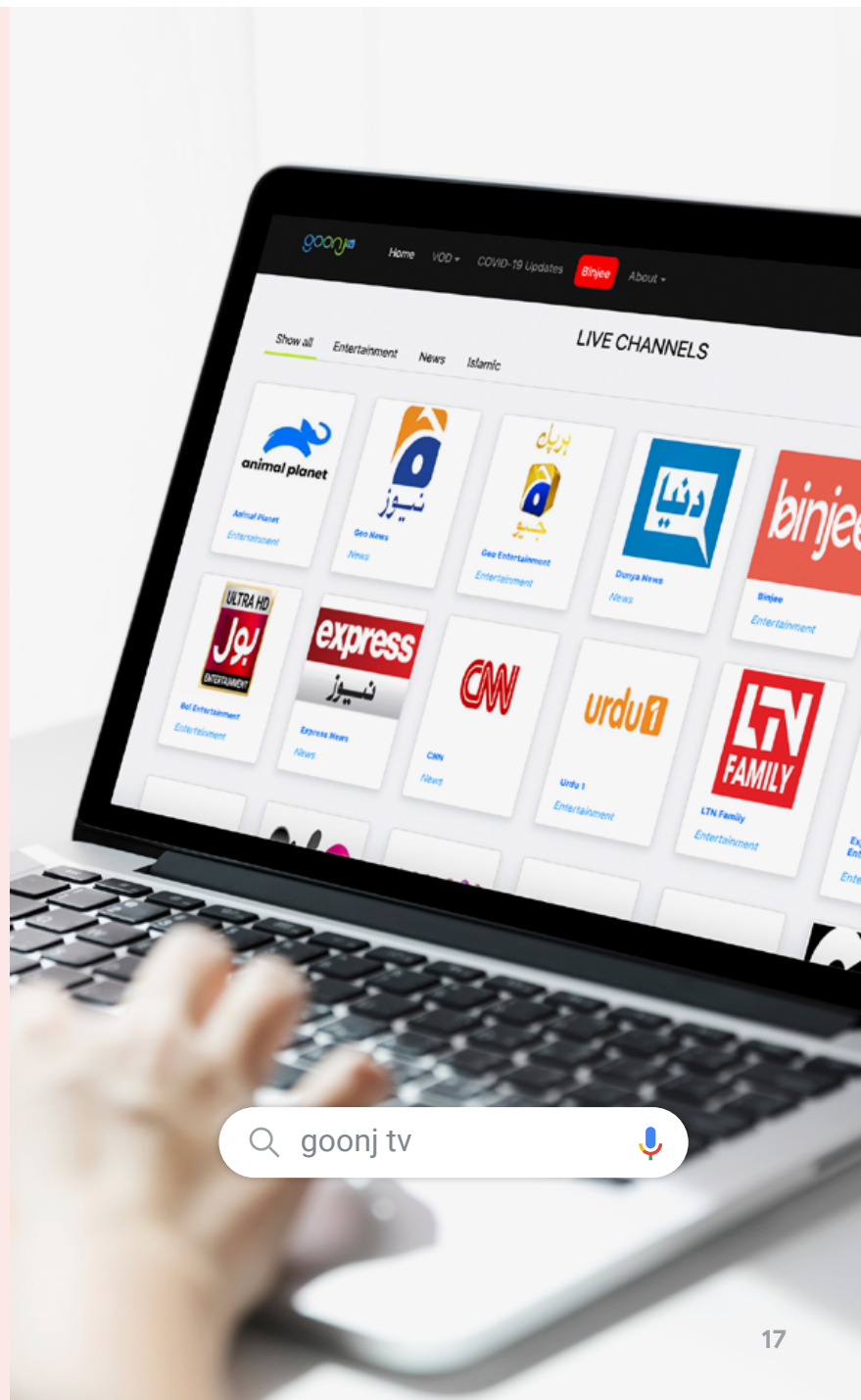
Local Subscription Video on Demand (SVOD) platforms are also gaining popularity

67%

increase in “goonj tv” searches

100%

rise in “jazztv” queries

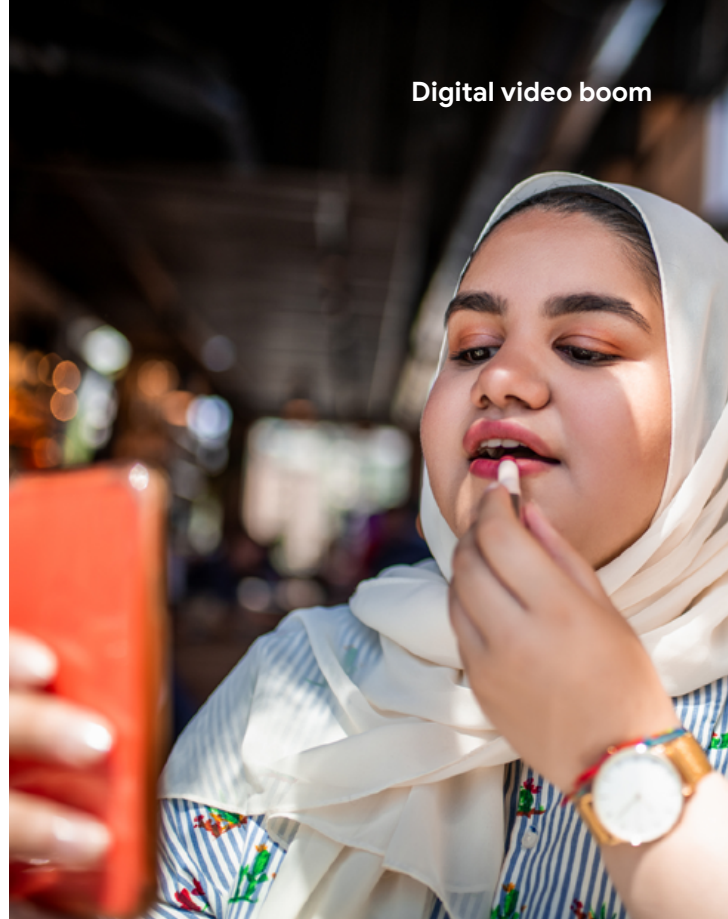


“With me” content is on the rise

More and more Pakistanis are watching “**with me**” content which emphasises the importance of gaining a sense of community. By viewing experiential online videos and livestreams, the creators of such content invite their viewers to be a part of the action as they undertake everyday activities like cooking, cleaning, packing, or eating.

150%

increase in the watch time of “**with me**” videos on YouTube



There is a local content boom in the country. Pakistani YouTube creators are garnering a lot of interest online

108%

rise in “**teeli**” searches

168%

increase in “**village food secrets**” queries

COVID-19 impact



As the country adjusts to working from home and social distancing, Pakistanis are turning to YouTube to learn, adapt, and make the most of their current situation



Source: Google Trends Data, Pakistan, Jan-Feb 2020 vs Mar-Apr 2020

93%

increase in “**recipe**” searches

Popular dishes include

Q aloo tikki ▲ 84%

Q pizza ▲ 150%

80%

increase in searches for home workouts

Q hiit ▲ 175%

Q abs workout ▲ 64%

144%

growth in “**make at home ideas**” searches

Healthy lifestyle

Pakistan has a richly diverse culinary tradition. No event or celebration is complete without a large number of delicious dishes to choose from. Yet, despite this love of food, many Pakistanis have become more conscious of the importance of what they eat. There is a rising number of searches for alternate diets and meal plans designed to enhance overall well-being

🔍 intermittent fasting 🎧 ▲ 1.5x

🔍 vegetarian cuisine 🎧 ▲ 1.5x

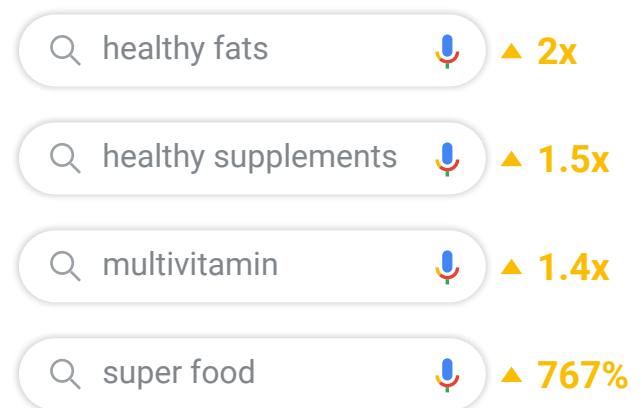
🔍 keto 🎧 ▲ 1.4x

🔍 low carb 🎧 ▲ 1.3x

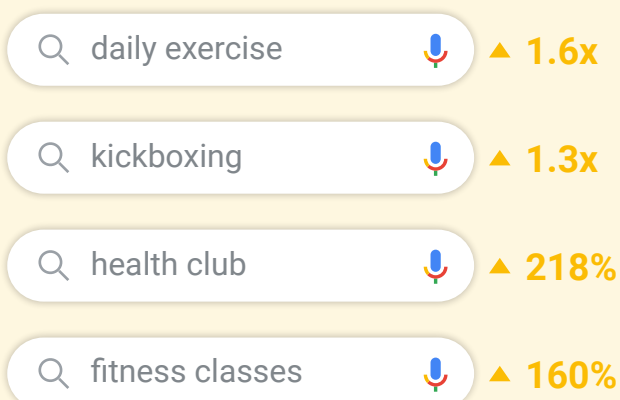
According to a study conducted by Euromonitor, Pakistan is the second-fastest-growing vegetarian country in the world.



Consumers have become increasingly aware of the importance of both micro and macro nutrients in their diets



Pakistanis are also searching for information on exercise regimes and club memberships in their quest for a healthy life



COVID-19 impact

Homebound users are turning to YouTube and Search to find exercise routines

🔍 hiit 🎤 ▲ 175%

(on YouTube)

🔍 abs workout 🎤 ▲ 214%

🔍 gym at home 🎤 ▲ 150%

As the current situation upends daily life, there has been a rise in searches for mental health in Pakistan

Stress and anxiety induced by the current crisis is leading many Pakistanis to seek out self-care and mental health solutions, beyond just physical exercise

🔍 self care 🎤 ▲ 1.7x

🔍 meditation video 🎤 ▲ 1.5x

(on YouTube)

🔍 guided meditation 🎤 ▲ 1.6x

🔍 self development books 🎤 ▲ 400%

Marketers need to be aware of heightened customer sensitivities. They should adjust their tone of voice and messaging accordingly.

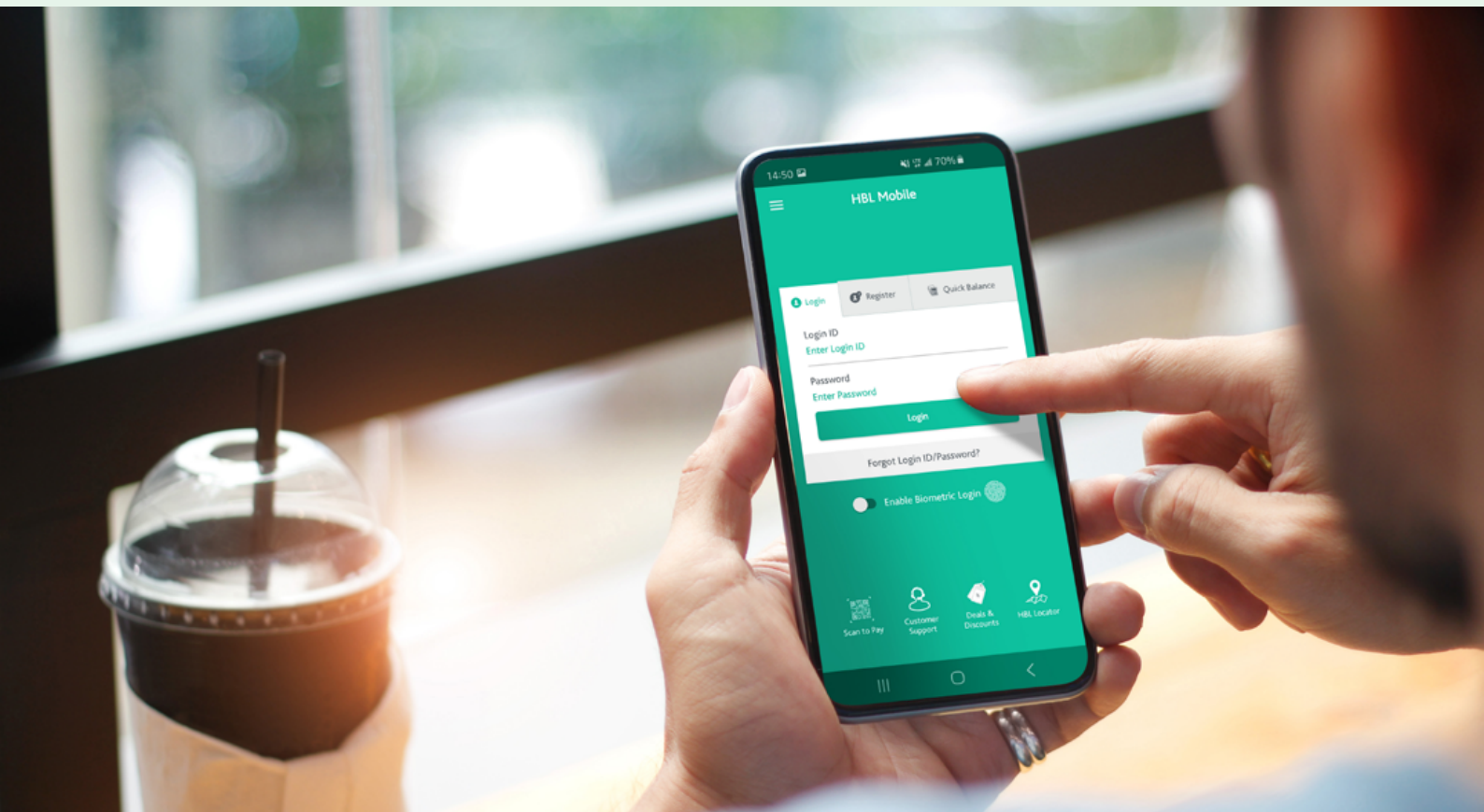
Industry trends



Finance/Fintech: Money matters



Across Pakistan, banking-related searches have seen growth. Both generic and brand-specific queries are rising



1.4x

growth in searches for both
generic and brand-specific
online banking options

134%

increase in searches
related to **brand-specific**
banking apps

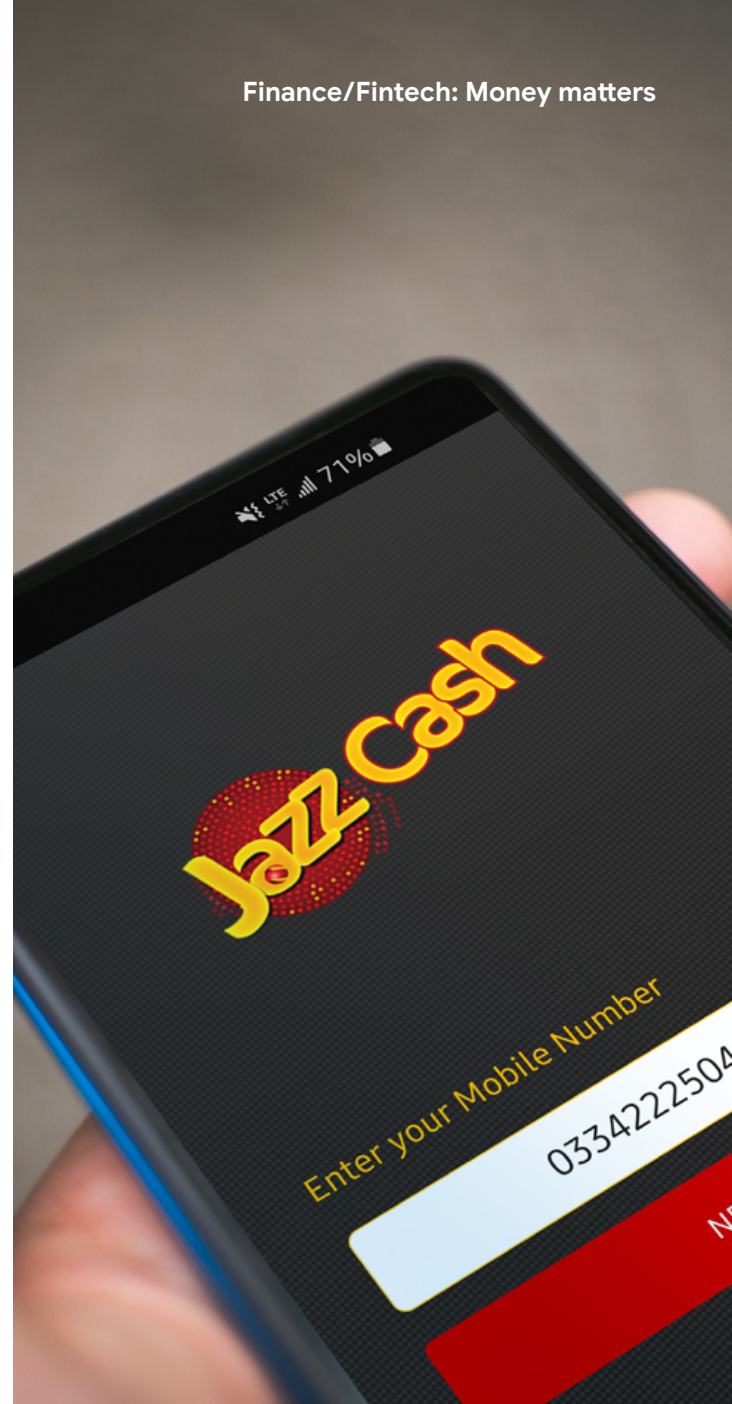
Consumers have become more curious about online payment options

1.5x

rise in searches for generic and brand-specific **mobile wallet** and **e-wallet** options

1.6x

growth in searches for specific **online payment apps**



Following the economic restructuring of Pakistan in 2018, there has been increased interest in exchange rates

Q exchange rates



▲ 1.3x

Q currency



▲ 1.3x

COVID-19 impact

Since the advent of COVID-19, there has been an increase in generic searches for internet banking and e-banking. Further, queries about financial management options without an attachment to brand loyalty are also on the rise



14%

higher growth in searches for **online banking** and **e-banking** in comparison to 2019

44%

decrease in **brand** and **bank-specific** queries since the end of 2019

The current crisis has had a significant impact on the economy

There has been a sharp increase in the number of searches related to the Pakistani Rupee. This rise in queries is similar to the period following the 2018 economic restructuring

57%

jump in
“pakistani rupee”
searches since
the beginning
of 2020, a 56%
increase in queries
in comparison
to 2019

Q pakistani rupees





Implications for marketers

Before the lockdown, Pakistanis were increasingly interested in the use of online payments and safe, secure investment options discovered through digital investigations. As the current situation evolves, this trend is gaining momentum.

To remain relevant and drive results to a successful conclusion during the current challenges, marketers will need to create effective strategies that encourage people to go digital. This approach can build brand loyalty through both the levels of convenience and value-added services on offer. Since Pakistan is a cash-first economy, marketers will also need to focus on consistent customer education regarding digital banking to take away potential barriers to adoption.

Delivery/Mobility: On-demand economy



Fuelled by increasing smartphone penetration and data affordability, Pakistan has seen strong growth in the Mobility as a Service (MaaS) market. This is also spurring traditional retail and delivery players to focus on e-commerce and fulfilment

1.3x

growth in “**delivery services**” queries, as people actively look for delivery solutions

1.8x

increase in “**pakistan post**” searches

The state-owned entity, which recently went through restructuring and rebranding, is now attracting more attention from consumers.



Digitally driven companies are experiencing faster growth than traditional organisations

Q cheetay



▲ 1.7x

Q bykea



▲ 1.6x

More Pakistanis are ordering in, and doing so more often. Searches for food delivery options, restaurants, and deals are rising rapidly across the country

1.6x

growth in “**food delivery**” searches

Q food delivery



Some of the top queries in this category were related to:

Q specific restaurants



Q delivery options



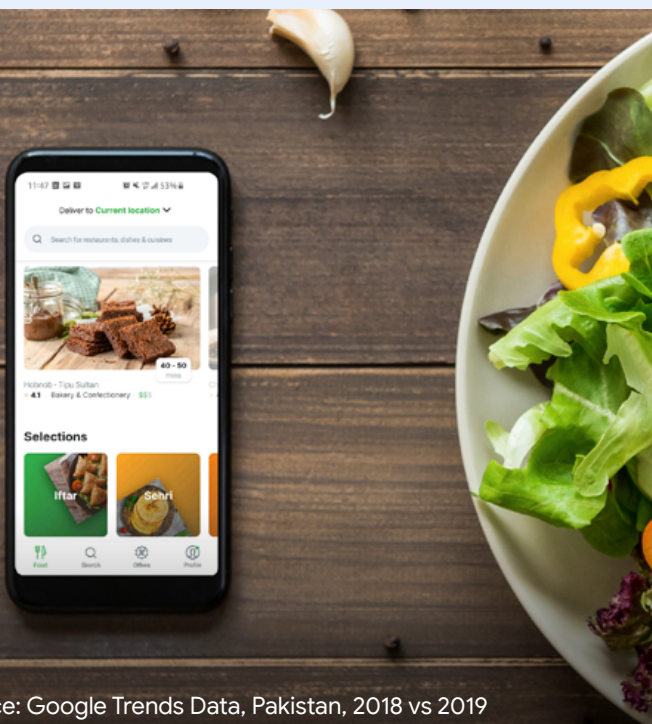
Q apps



162% growth in searches for food delivery apps like **Foodpanda**

324% jump in queries for new apps like **Careem NOW**

340% rise in searches for “**eat mubarak**”



Consumers
across the
country
increasingly
search for
information
on buses as a
primary form
of transport

Searches reflect
that Pakistanis are
increasingly interested
in bus riding options

469%

increase in “**bus ride**”
queries

2400%

jump in searches
for “**swvl**”

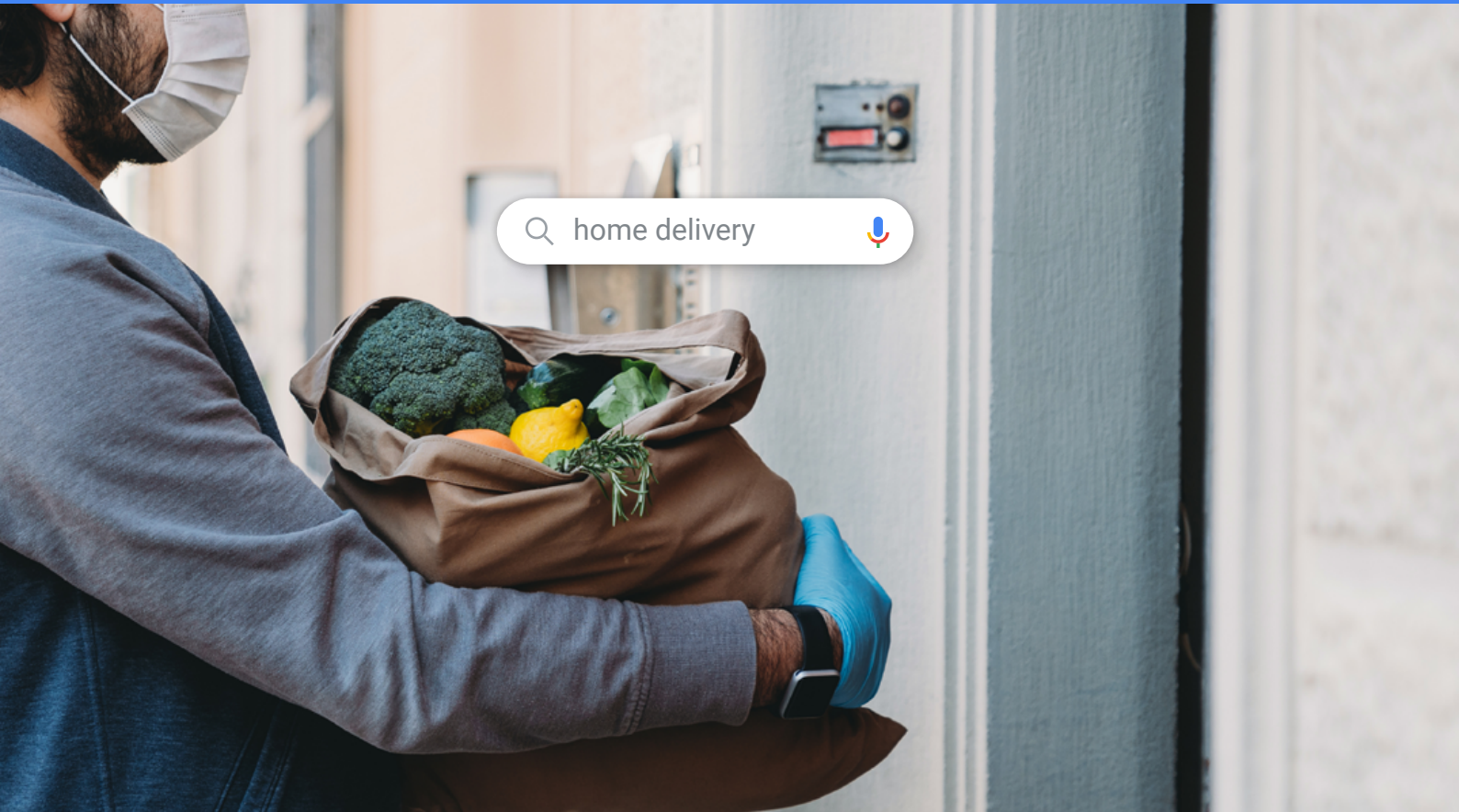
This preference for buses
has led to a drop in queries
for individual ride-share
services

0.2x

drop in **brand-specific**
searches



COVID-19 impact



Restrictions on movement due to a nationwide lockdown has resulted in growing demand for delivery services. Generic searches for delivery have increased since the onset of the current situation

Q online delivery ▲ 2x

Q home delivery ▲ 1.6x

These search terms have grown by **1.1x** since 2019



Implications for marketers

With the rapid influx of consumers coming online, businesses with a primarily-digital presence will surge ahead. Simple and intuitive product design, a more comprehensive range of choice, prompt order fulfilment, and customer education will drive success in this particular sector.

Within the MaaS market, mass transport is a relatively new segment. It has the potential to be a game-changer due to the economy of scale in an evolving market. The lack of public transport in a developing market such as Pakistan has created an opportunity for businesses that can meet this need. As consumer demand continues to grow, emerging public transport companies have an opening to establish successful businesses with a satisfied client base.

Telecom: Data in demand



Pakistanis have an insatiable appetite for mobile data and are constantly on the lookout for the latest, most accurate information on data packages, apps, and data technology

78%

rise in searches for “data technology”, “apps”, and “data packages”

15%

decline in “SMS” related search queries

1.4x

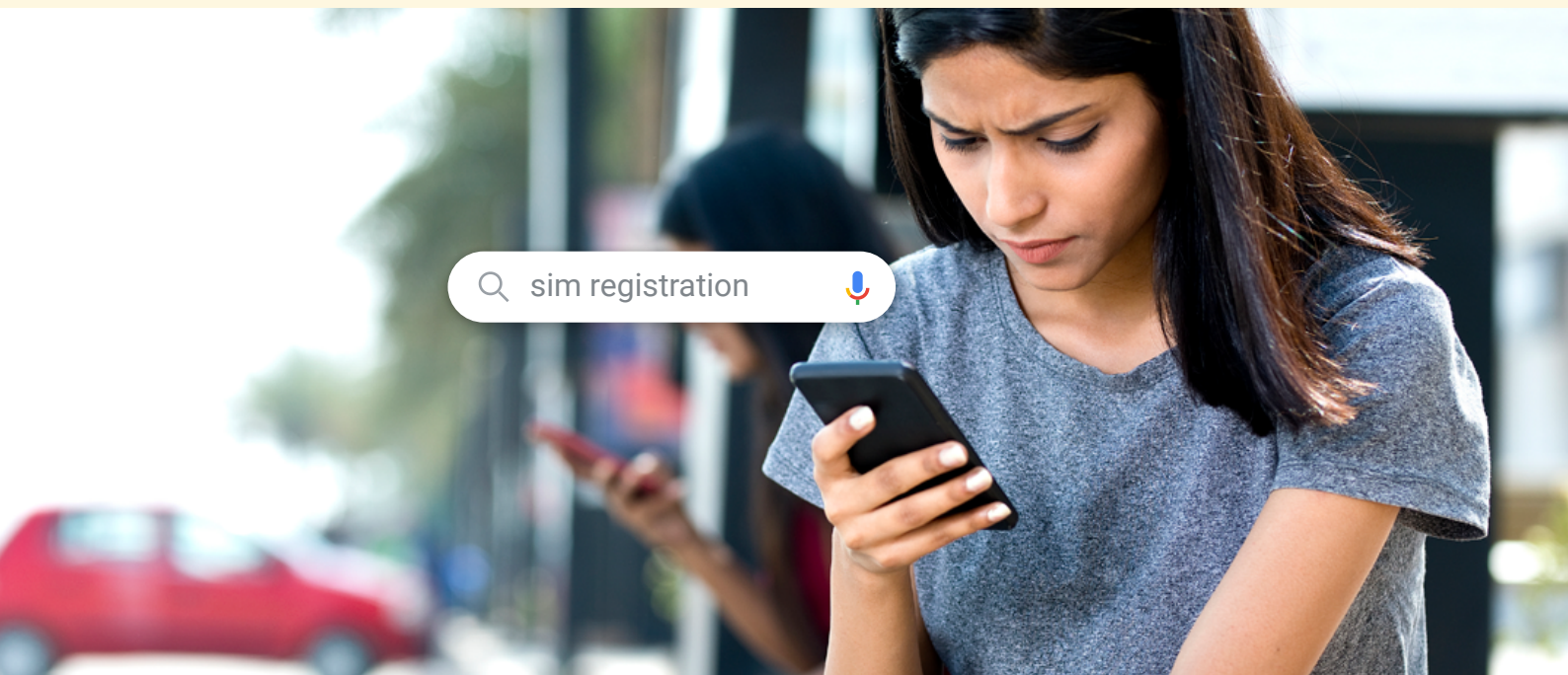
increase in “packages” searches, with people looking to explore all available data options



Consumer interest is shifting towards postpaid connections

1.8x

growth in “postpaid” searches vs 1.1x rise in “prepaid” searches



Since the national government launch of a drive to authenticate and verify SIM cards, and block those created using fake IDs, a growing number of users are seeking information about government guidelines

1.6x

rise in searches related to SIM registration guidelines and the status of their registrations

COVID-19 impact

As work from home becomes the norm during this period of social distancing, a majority of personal and professional interactions are taking place online, often via virtual calls



2200%

increase in searches for
meeting app with **1.8x**
increase in searches for
conference calls

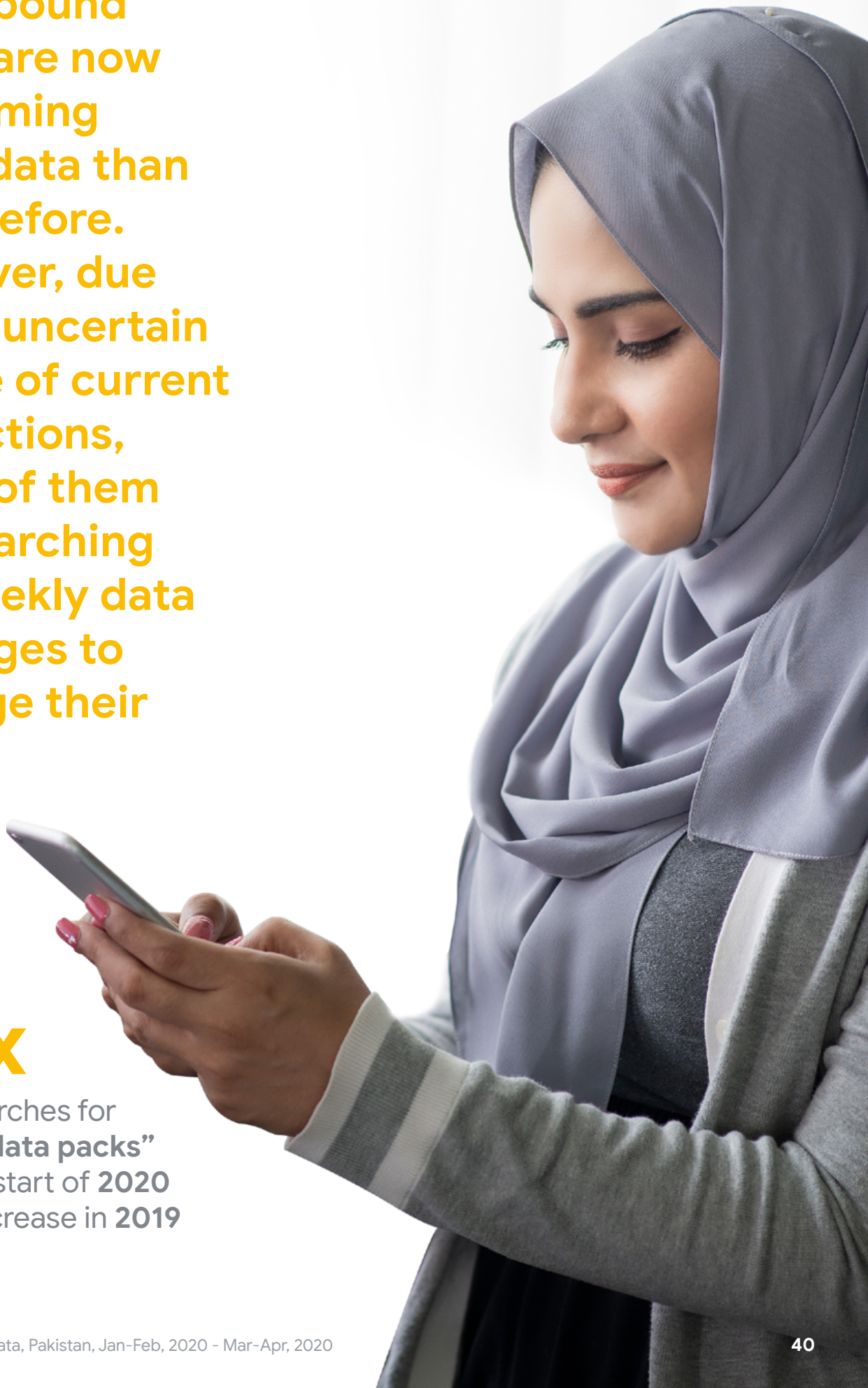
350%

increase in searches for
Google Hangouts, now
known as **Meet**

Homebound users are now consuming more data than ever before. However, due to the uncertain nature of current restrictions, many of them are searching for weekly data packages to manage their needs

1.9x

rise in searches for
“weekly data packs”
since the start of 2020
vs 1.3x increase in 2019



Implications for marketers

Interest in high-speed internet connectivity across Pakistan is being driven by rapid growth in video-based entertainment apps. While some price sensitivity exists in the market, there has been an increased desire for quality of service, along with a resurgence of interest in postpaid telco packages.

As the current crisis continues, these trends have remained constant as fast and reliable internet access is now regarded as a necessity. People are relying on digital more than ever before to connect, work, learn, and entertain themselves. The significant increase in demand, coupled with an influx of **“new to digital”** users, indicates that telco marketers should focus on quick adoption and building customer loyalty through value-added offerings.

Sports: For the love of the game



From personalities to teams, Pakistanis are curious about both their favourite sports and sportspeople

1.5x

growth in “sports” searches

183%

jump in “babar azam” queries, making him one of the fastest-growing sports celebrities searched for in 2019

118%

rise in “manchester united” searches

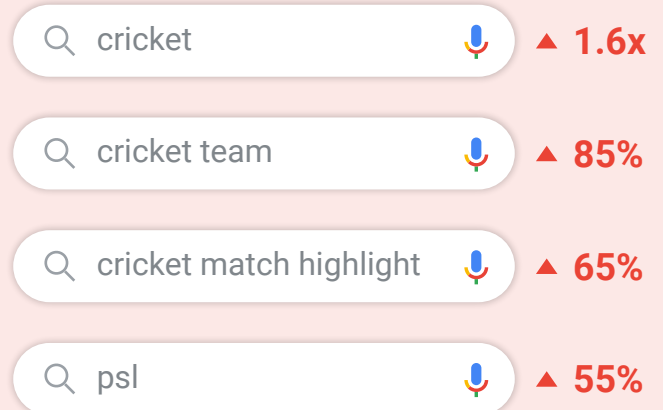
149%

increase in searches for ex-Pakistani wicketkeeper “rashid latif’s best catches”





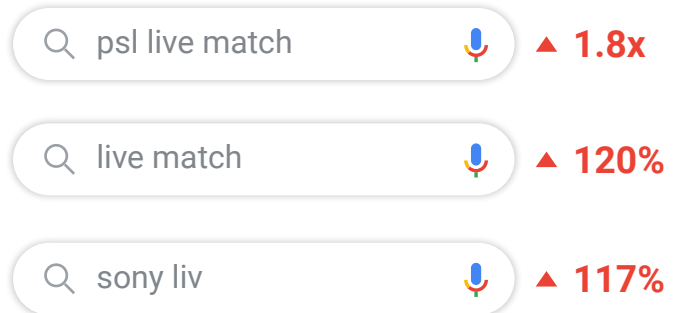
Cricket remains the dominant force of sports in Pakistan



Interest in streaming apps continues to grow across the country

106%

rise in searches related to **streaming sites, apps, and matches**





**With a 476%
jump in searches,
cricket-related
creator content is
seeing exponential
growth in Pakistan**

2700%

increase in searches
for “caught behind with
rashid latif, dr niaz, and
younis khan”

Q ramiz speaks ▲ 500%

Q shoaib akhtar ▲ 120%



**Beyond the
conventional,
Pakistanis are
interested in
learning more
about other
sports:**

Q snowboarding ▲ 3.3x

Q mountain biking ▲ 2.3x

Q skiing ▲ 1.3x

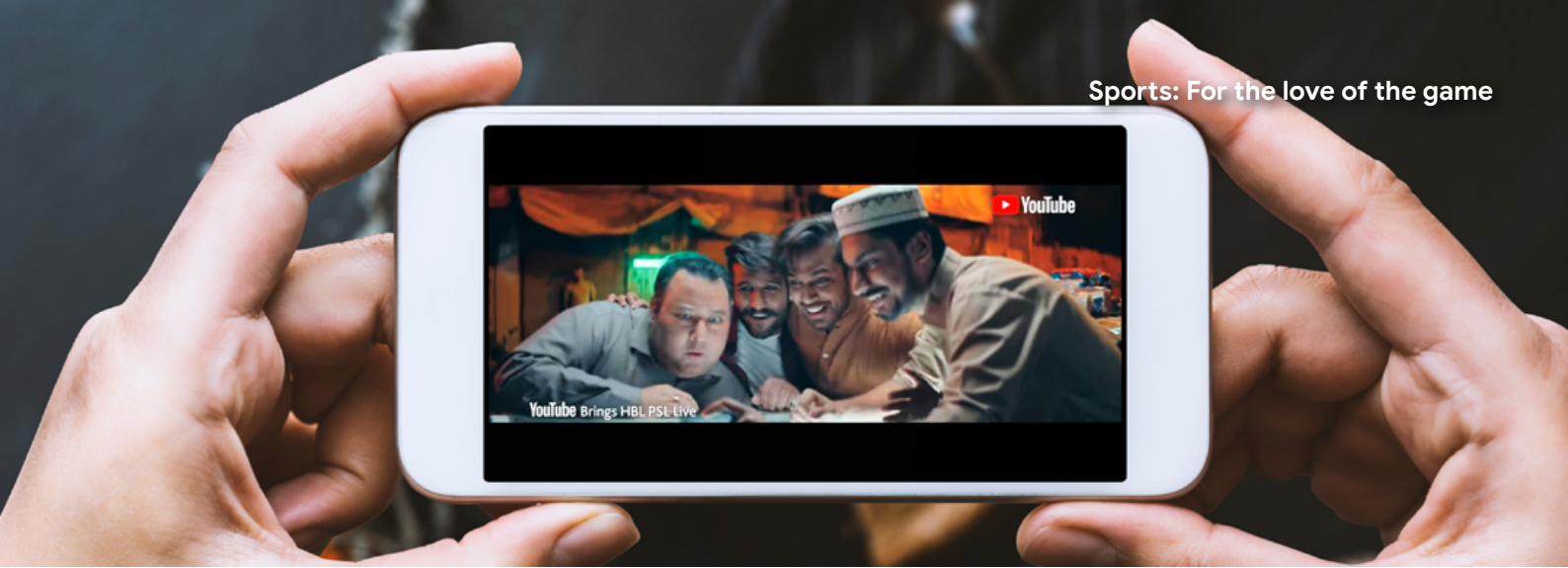
COVID-19 impact

The world of live sports has come to a complete standstill. Apart from highlights of old matches and sports-driven shows, there is no new content on the horizon. This has led to a noticeable drop in interest, as consumers grapple with the current crisis and realign their individual priorities



60%

decline since the start of 2020 in **top trending sports searches** of 2019



Implications for marketers

After previously playing second-fiddle to traditional media's sports coverage, digital has finally become the new frontier of sports engagement. Pakistanis still go online to seek the latest information and get live updates, but now they also go online to watch live sports content. Live streaming of PSL on YouTube and the ICC Cricket World Cup on SonyLIV has been the driving force for this shift.

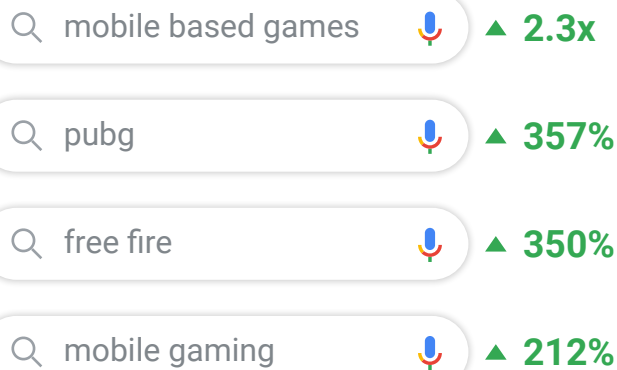
Sports celebrities are also turning to the internet to engage with their fan base and have, in the process, used platforms like YouTube to build a significant online following.

From a marketer's perspective, campaigns should be designed that reflect the fans' active engagement with both the game itself and the content that is created around the sport.

Gaming: Tap to play



Pakistanis are taking to mobile gaming at an unprecedented rate. From titles to mobile emulators, they are interested in every aspect of gaming



Specific, game-related search terms have seen a big jump

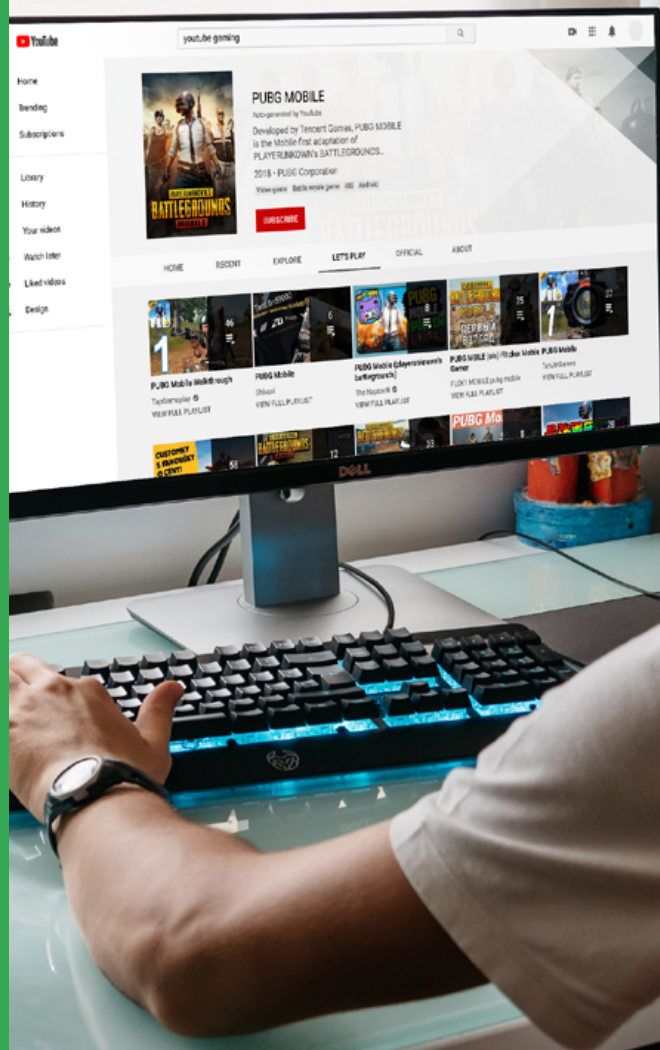
1600%

increase in searches for game currency like diamonds in Free Fire

427%

growth in “tencent buddy” searches

YouTube is the go-to source for gamers looking to find gameplay videos and hacks for games like PubG, Free Fire, and COD



call of duty mobile  ▲ 1700%

free fire  ▲ 688%

pubg  ▲ 545%

COVID-19 impact



Many Pakistanis are gaming in order to fill up free time during the lockdown

There has been a surge in interest for games and genres that were previously in decline

1.4x

growth in searches for **“clash of clans”** vs **0.5x** growth in **2019**

Gaming consoles, across brands, are seeing a strong revival in demand. This is a marked change from the stagnant growth of the previous year

1.7x

growth in **“PS4”** searches vs **1.1x** increase in **2019**

528%

increase in **“ludo star”** queries vs **-8%** decline in **2019**

1.5x



rise in **“Xbox”** searches vs **0.8x** growth in **2019**

Implications for marketers

As mobile gaming in Pakistan continues to grow, gamers are spending more hours online playing both old and new titles on their devices. Discovering gameplay videos, hacks, and competitions on YouTube is also occupying their time. Being required to remain safely at home has created free time for gamers to reactivate their skills and revisit their favourite games.

Marketers can reach out to these diverse users by partnering with major labels to provide co-funded, in-game perks or participate in gaming subcultures. Gaming influencers can also contribute content via co-creation. Marketers can also reach out to gamers by advertising against gaming content on YouTube, and by using affinity audience targeting.



 what is Pakistan searching for? 

Insights for Brands

Think with 

