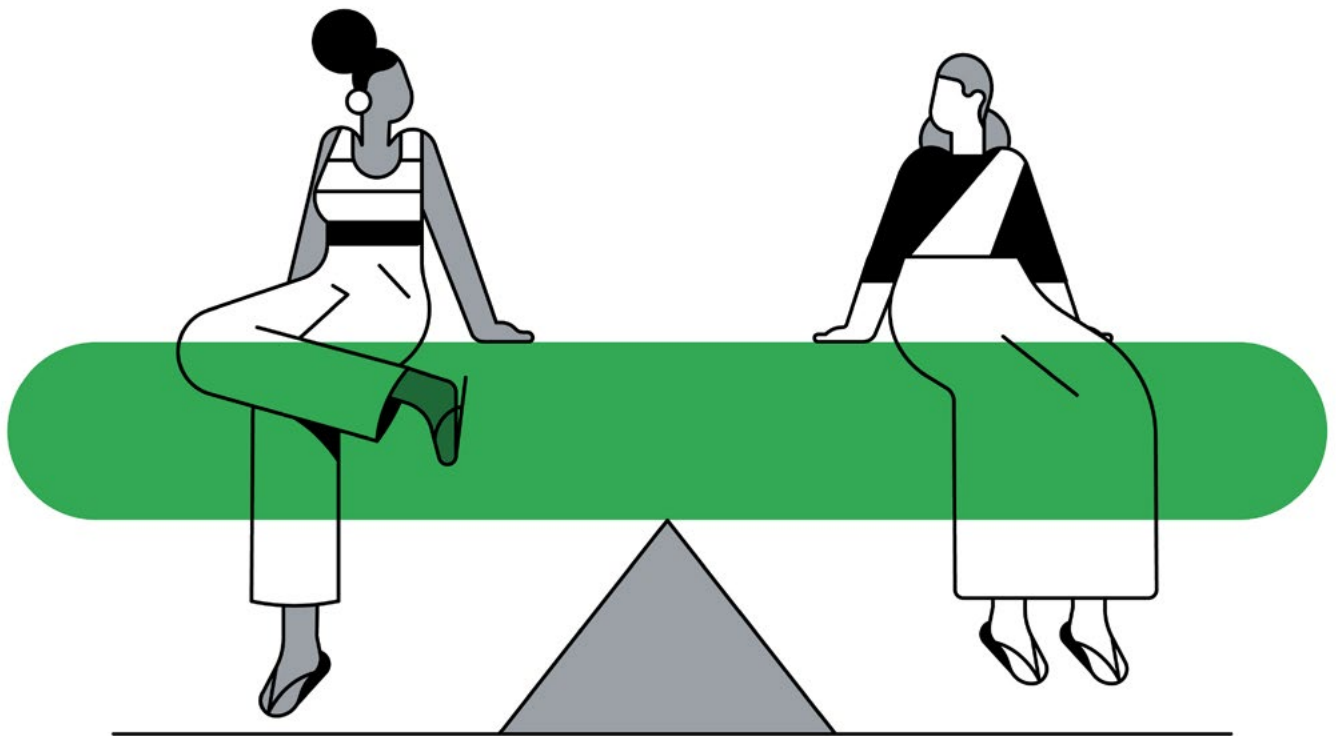


2020

Same Same, But Different

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



Think with **Google**

There are **500M internet users in India**

— that's more than the entire population of

the U.S., Mexico and Canada combined



Consumers across urban and rural India have **dramatically increased their daily digital use**

Understanding the impact of digital on consumer behaviour is essential for informing business and product strategy and creating the most effective messaging

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

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



Early internet users

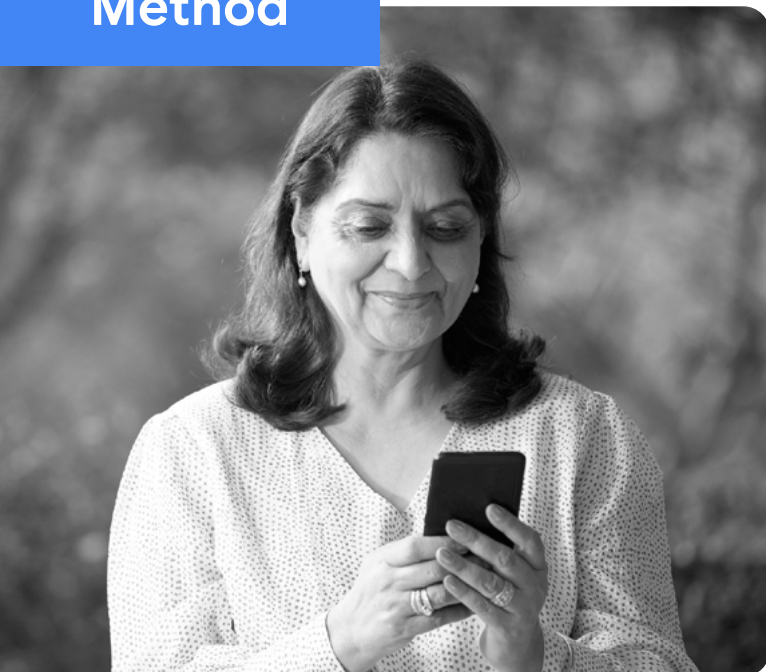
Comfortable reading, writing, and speaking in both English and their local language, these users live in tier 1 cities and have integrated the internet into most aspects of their daily lives.



New internet users

Comfortable reading, writing, and speaking primarily in their local language, these users live in the smaller cities and towns of India and have come online only in the last 12 months.

Method



To determine the trends we took the following approach



Conducted **300+** in-depth consumer interviews encompassing different ages and lifestyles



Collated the findings into observations that are **common across both demographics**



Validated the observations with **10 industry experts** including heads of creative agencies, CMOs, and YouTube creators

1 Enduring Trends

These trends are consumer behaviours that will be sustained and not expected to change drastically due to COVID-19

1 Proud to be desi

A growing confidence in our Indianness

2 My roots, my bhasha

Regional pride and the vernacular as an expression of identity

3 Watch her go! Independent everyday.

Everyday confidence amongst women

2 Accelerating Trends

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

4 Balancing WE and ME

Blending individual and collective identities

5 Never too late to learn

The rise of adult learning

6 Entertainment — for me, by me

Instant escape, easy relaxation

7 100% Authentic

Consumers gravitate toward the relatable



Enduring Trends





Proud to be desi



A growing confidence in our Indianness

People once saw the internet as a window to idolise global personalities, there is now a shift from admiration that is externally focused to **pride closer to home**, with a sense that Indians are not “less than” others but **equally accomplished**



Early internet users



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

New internet users



“I am postmaster from Jabalpur, and I am writing a book. I have even spoken to a local publisher about it. I want to become famous. I want people to know me by my writing.”



A growing national pride

Early internet users are no longer only in awe of international icons as they have enough role models from India who have made a mark on the world stage



A growing regional pride

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



Sonal Dabral

ex -Chief Creative Officer | Ogilvy

“

Authenticity among people is increasing because **they realise that they don't have to be someone else** to find their identity. They are much more confident about their own identity.”

“

There is a strong belief that they, **as individuals, can be at the forefront too** - they can be looked up to and there is aspiration. **Digitisation** has only made this trend stronger.”



Vikas Gupta

Head — Customer, Marketing & Digital Business | Flipkart

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

Traditionally a rural sport, Kabaddi has many star players coming from smaller towns. The success of this inherently Indian game in a country obsessed with the imported sport of cricket demonstrates India's **growing confidence** in its identity.

Bringing it to life



35%

growth in searches related to **"India"** and **20% rise** in queries around **"desi"**

70%

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

My roots, my bhasha



Regional pride and the vernacular as an expression of identity

Today's consumers are **no longer embarrassed** about speaking in Indian languages. Speaking in your mother tongue is considered an **authentic** way to showcase your **regional identity**, which now has **cultural caché**.

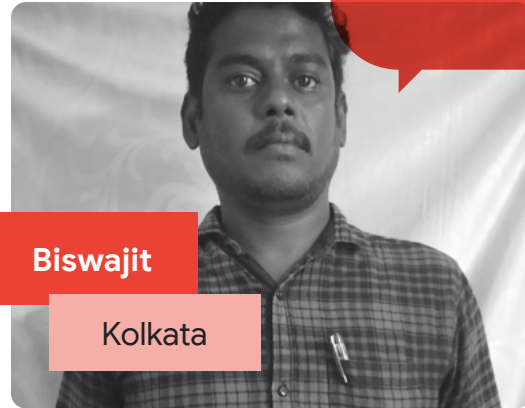


Early internet users



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

New internet users



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



Modern mix

Early internet users are blending the language and customs of regional cultures with their modern, urban lives — creating a new kind of cultural chic



Paired for progress

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



Akash Banerjee

Political Satirist and a Social Media Entrepreneur

“

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

“

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



Prajakta Koli

YouTuber

“

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



Sapna Chadha

Senior Director of Marketing for SEA & India | Google

The Indian **beverage brand PaperBoat** built its product strategy, brand identity, and marketing communications on a **strong regional identity rooted with nostalgia**

Paper Boat's success with **traditional flavours** — like aam ras, jaljeera, and kokum — shows Indian's **acceptance and celebration of its unique identity**

Bringing it to life



+30%

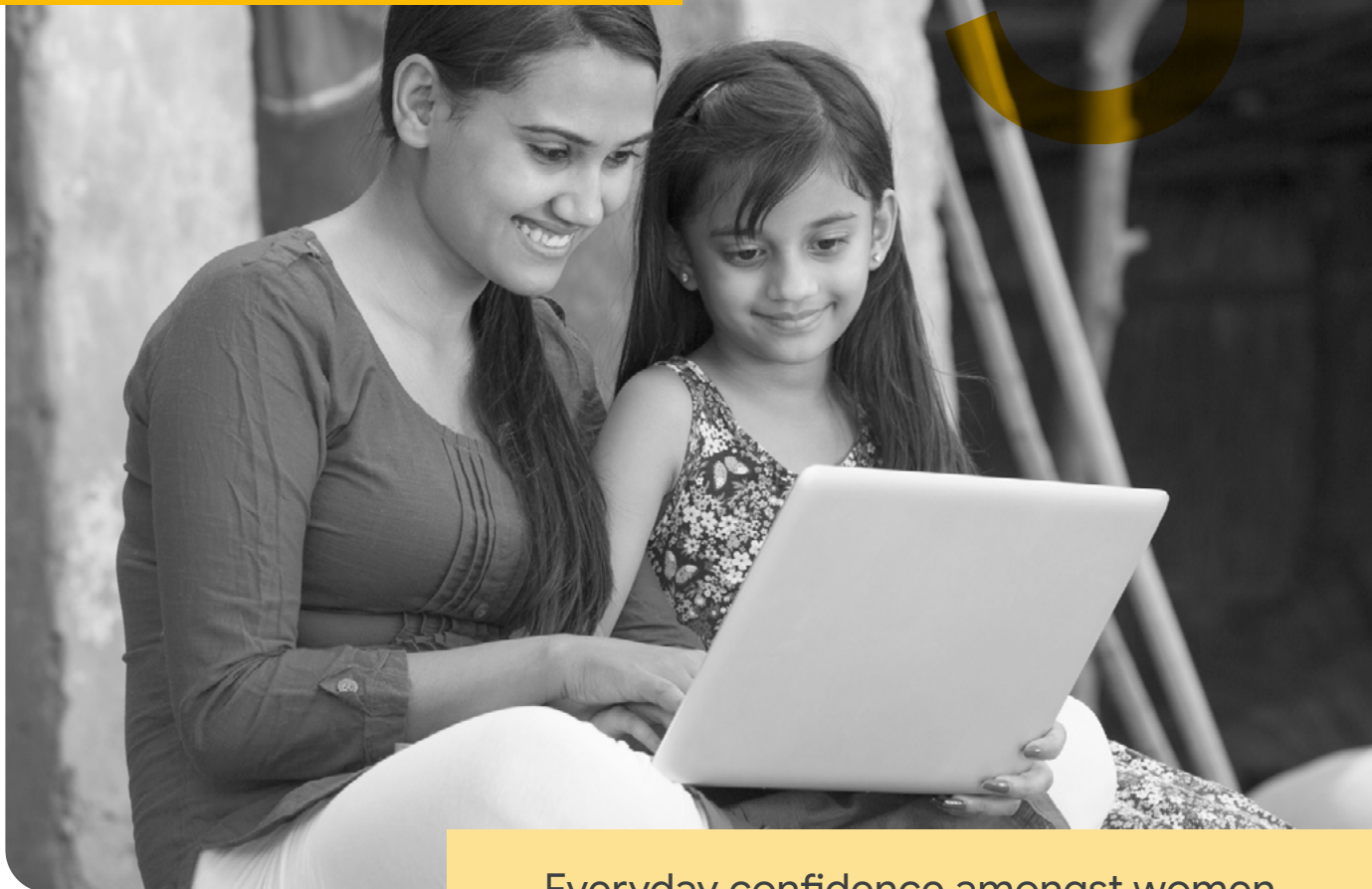
growth in average weekly searches for queries related to **“in Hindi”** and **“in Tamil”**

93%

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

Watch her go!

Independent everyday.



Everyday confidence amongst women

Women are becoming **more independent** and autonomous in their daily lives. They're increasingly living alone, following their interests and **using digital tools to learn and grow.**



Early internet users



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

New internet users



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



Defining their own lives

Women are redefining opportunities and discovering autonomy — and using technology to facilitate their independence, whether it's success in business, living alone, traveling, or pursuing other interests.



Taking steps toward independence

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



Rashi Goel

Head of Marketing & Consumer Communications | Nestle

“

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

“

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



Vikas Gupta

Head — Customer, Marketing & Digital Business | Flipkart

Swiggy, one of India's biggest **food delivery services**, ran a humorous campaign showcasing how their app freed women from cooking to **spend time as they preferred**

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

Bringing it to life



8%

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

+120

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



Accelerating Trends



Balancing WE & ME

4

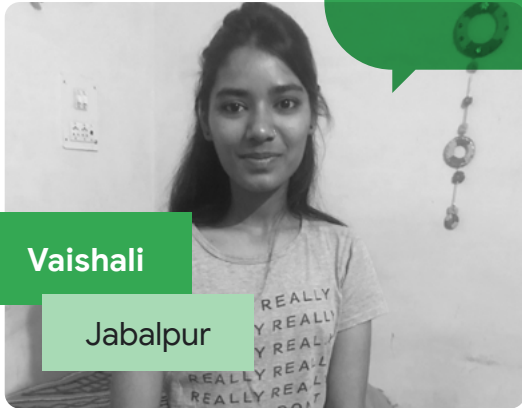


Blending individual and collective identities

Consumers have become more independent because of digital, but they still **value a sense of belonging** to their families and communities



Early internet users



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

New internet users



“I love making short form videos. Initially, my mother-in-law did not like the idea. I got her involved in a couple of videos where she was cooking and showed her how people were liking her videos. Now she is always excited to make videos and cook together. Making videos has now become our time together!”



Family matters

As early internet users become more individualistic, they fear a sense of alienation, and are resolving to strengthen family connections to keep them anchored



Community is king

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



Manish Makhijani

Global CMI Director | Unilever

“

Because **individualism has grown**, there is a pullback saying ‘What are we doing together as a family?’. When we come together, we actually come together far more meaningfully than we did ever before. We are **connecting with each other far more strongly**.

“

We are a **part of a social system**. Even in the quest to excel, there is an inherent need to **stay tethered to one’s roots** and a growing desire to remain **connected to a larger community**.



Vikas Gupta

Head — Customer, Marketing & Digital Business | Flipkart

Cadbury Celebration's **#BadiFamilyBadiDiwali** ad campaign showcased the **warmth of connections** by featuring a wife surprising her husband with a visit from his whole family to celebrate

The campaign captured both the **anxiety of alienation and loneliness** and the **joy of coming together** as a family

Bringing it to life



25%

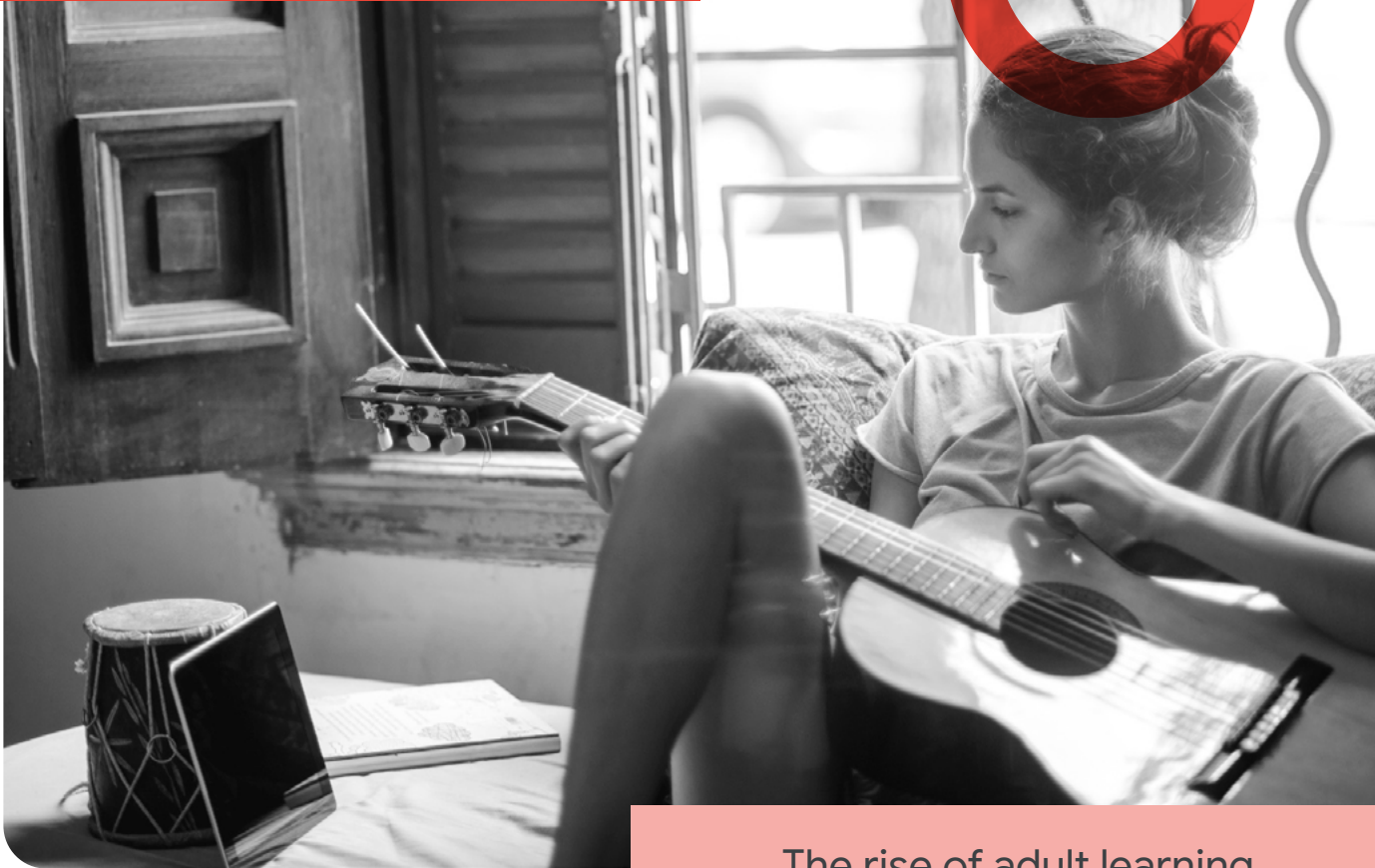
YoY rise in average weekly searches **“for family”** and **30%+ YoY** rise in average weekly searches for **“with family”**

+70%

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

Never too late to learn

5



The rise of adult learning

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



Early internet users



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

New internet users



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



Enhancing my education

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



Filling in gaps

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



Madhukar Sabnavis

Country Head, Discovery and Planning | Ogilvy

“

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

“

When you give people access to the internet in India, **don’t underestimate their desire to learn** something new. We see it **across both rural and urban India**. The desire to learn and advance is not unique to just certain segments.



Sapna Chadha

Senior Director of Marketing for SEA and India | Google

upGrad, one of India's **biggest ed-tech companies**, built their business strategy on helping professionals **upskill** themselves to the latest Industry standards

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

Bringing it to life



75%

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

4/5

consumers watch YouTube to **learn something new**

Entertainment

— for me, by me

6



Instant escape, easy relaxation

The internet is increasingly the **entertainment destination of choice** — whether to **relax and unwind** after a stressful day or to **escape** by getting immersed in a different experience



Early internet users



“My daughters love creating their own scripts for plays and dance videos and posting online. I encourage them since I think it makes them extroverted and confident.”

New internet users



“I used to play music while doing household work, but now I watch the Kapil Sharma show on my phone. It is like work with entertainment.”



Unwind your mind

Early internet users first flocked to the internet to inform and enrich their lives, but now it is also the key destination for entertainment — the perfect world to melt into after a long day



The great escape

For new internet users, going online and accessing the gamut of entertainment there is a way to overcome the monotony and boredom of daily life



Manish Makhijani

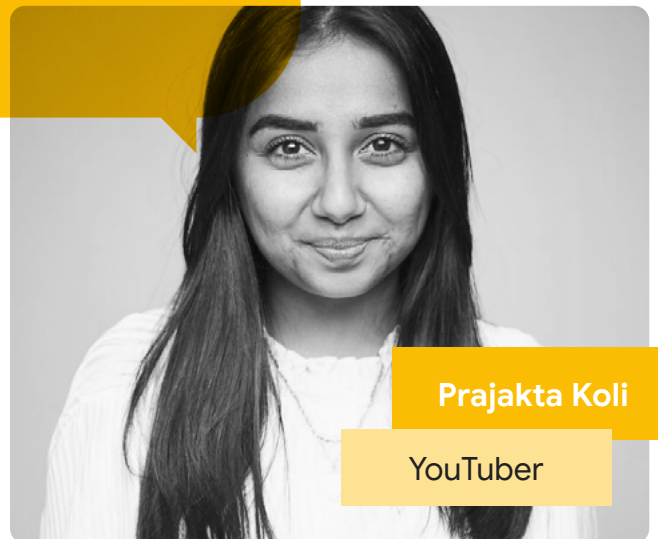
Global CMI Director | Unilever

“

We have had **generations of boredom**. The entertainment that is coming now — we are so **hungry for it**. We have been starved of this entertainment for generations and generations.

“

Our **lives have become so crazy**. At the end of a long day, I do not want to sit down and watch something that will make me use my brain. I want to sit down and watch something that's **simple and light**.



Prajakta Koli

YouTuber

Flipkart, **India's leading homegrown e-commerce entity**, is carving a niche in the nonfiction genre, by offering differentiated and interactive content, which is **mobile-first**

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

Bringing it to life



5x

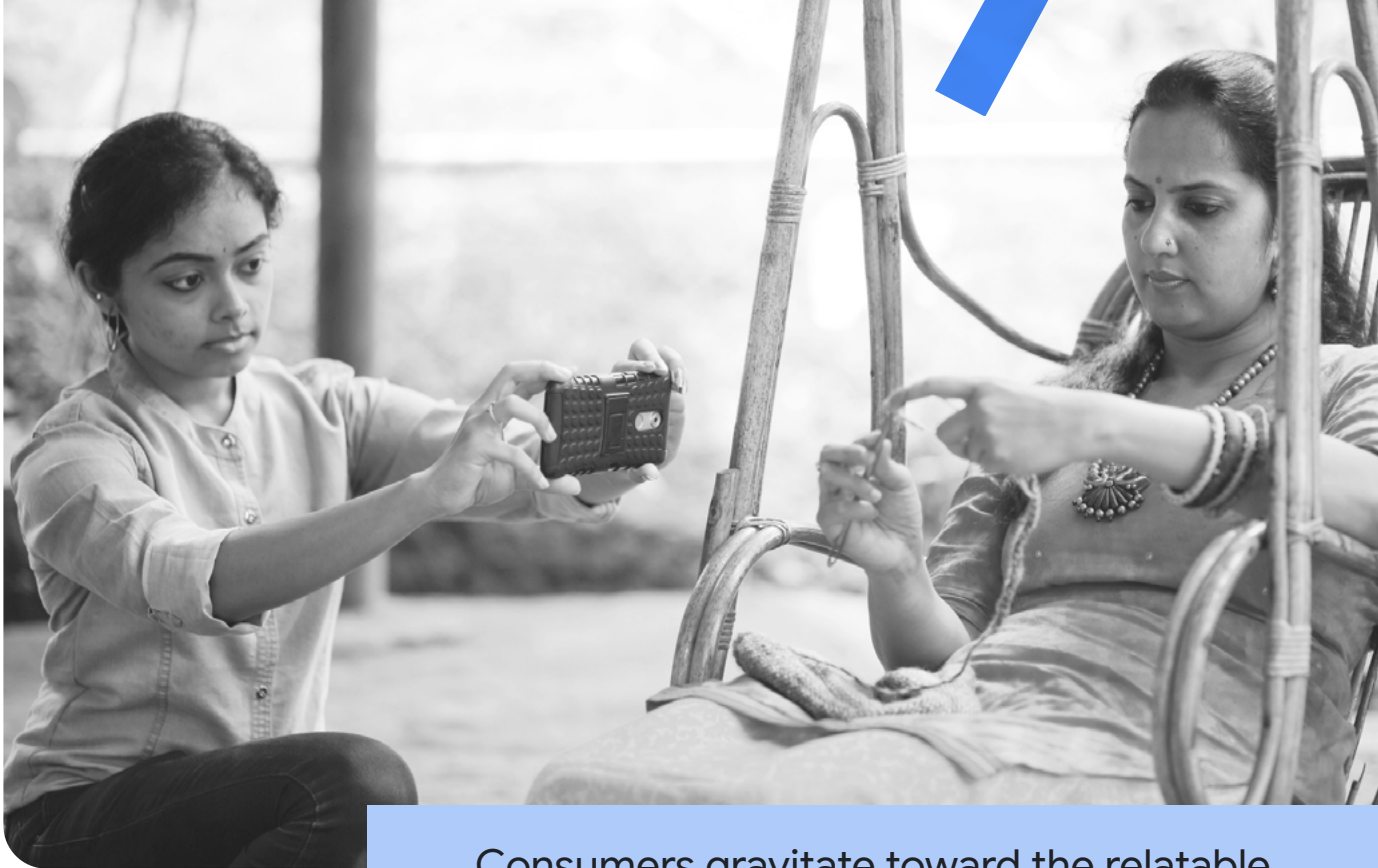
YoY growth in average weekly queries related to **"entertainment"** as a category

+85%

of consumers watch YouTube to **relax and unwind**

7

100% authentic



Consumers gravitate toward the relatable

Consumers are no longer looking at icons and brands with wide-eyed wonder. Instead, they **expect greater authenticity and accountability.**



Early internet users



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

New internet users



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



Accomplished yet authentic

After working hard for their achievements, early internet users want to present their best selves online, but they also recognize that it has to be authentic. There’s pushback on anything that feels fake.



Real and relatable

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



John Thangaraj

National Planning Director | FCB Ulka

“

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

“

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



Vikas Gupta

Head — Customer, Marketing & Digital Business | Flipkart

“

A lot of content that we make right now **needs to be more relatable**. If there is a formula for content creation, it has to be relatability.



Prajakta Koli

YouTuber

Google Pay, in their campaign to showcase “India’s biggest payments” took the help of **real Indian icons** who had **changed India** for the better — starting with a **single payment**

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

Bringing it to life



+60%

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

+70%

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

Think with Google

Same Same, But Different

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

Read more on: www.thinkwithgoogle.com/intl/en-apac/

