

Lab Tests Search Trends Report FY'25 India

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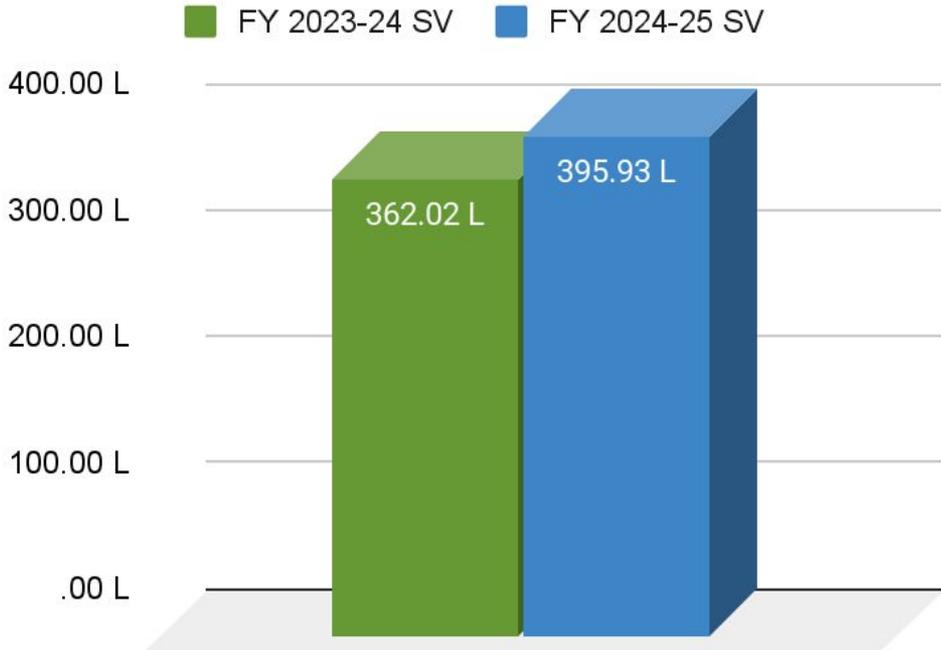
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Executive Summary

- In India, most healthcare diagnostic journeys begin with a Google search.
- Consumers search for lab tests, compare diagnostic centers, read reviews, check pricing, understand symptoms— making it essential to understand search behaviour for effective digital marketing in the diagnostic space.
- Our Lab Test Industry Search Trends Report reveals how consumer search patterns are evolving and how your brand can use these insights to boost online visibility, build trust, and drive bookings.
- We analyse over **20,000+** keywords to evaluate branded vs. non-branded queries, test-specific search volumes, seasonal health spikes, emerging diagnostic trends, and untapped digital opportunities for growth.
- The report also highlights the top diagnostic brands and health platforms that consistently lead the Google Search rankings in the competitive lab test market.

Lab Tests Search Trends



Category	FY 2023-24 SV	FY 2024-25 SV	% Growth
Lab tests	362.02 L	395.93 L	9.37%

Search Volume by Query Type

Type of Query	Search Volume FY'24	Search Volume FY'25	Growth %	Market Share
Brand	9.45 L	11.31 L	19.69%	2.86%
Non-Brand	352.57 L	384.62 L	9.09%	97.14%
Total	362.02 L	395.93 L	9.37%	100.00%

Top 10 Brands by Search Volume

	Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
	Dr. Lal Pathlabs	285.3K	345.9K	21.27%	30.58%
	Vijaya Diagnostic	116.6K	143.7K	23.28%	12.70%
	Apollo Diagnostics	93.9K	133.3K	42.05%	11.79%
	Redcliffe Labs	69.2K	86.8K	25.33%	7.67%
	Aarthi Scans	64.8K	76.8K	18.42%	6.79%
	Agilus Diagnostics	49.5K	60.5K	22.22%	5.35%
	Pathkind Labs	33.0K	50.9K	54.37%	4.50%
	SRL Diagnostics	74.6K	40.8K	-45.34%	3.60%
	Max Labs	29.8K	36.4K	22.27%	3.22%
	Anand Diagnostic	24.6K	25.1K	2.03%	2.22%
	Others(26)	104.0K	131.1K	26.08%	11.59%
	Total	945.2K	1131.3K	19.69%	100.00%

Top 10 Categories By Search volume

Buckets	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
CBC Test	54.04 L	60.67 L	12.26%	15.32%
Liver Test	47.25 L	54.50 L	15.36%	13.77%
ESR Test	36.94 L	36.76 L	-0.50%	9.28%
Sugar Test	30.17 L	31.20 L	3.41%	7.88%
Pregnancy Test	23.16 L	23.90 L	3.20%	6.04%
Inflammation Marker	16.54 L	18.12 L	9.56%	4.58%
Thyrotropin Test	8.73 L	9.20 L	5.40%	2.32%
Kidney Function Test	8.35 L	9.01 L	7.85%	2.27%
Urine Routine Test	7.05 L	7.75 L	9.90%	1.96%
Celastrol Test	6.40 L	7.37 L	15.16%	1.86%
Others(28)	123.39 L	137.46 L	11.41%	34.72%
Total	362.02 L	395.93 L	9.37%	100.00%

Top 10 Non branded Keywords

Keywords	Search Volume FY'24	Search Volume FY'25	% Growth
cbc test	1.65 L	1.65 L	0.00%
haemogram test	1.65 L	1.65 L	0.00%
liver test	1.65 L	1.65 L	0.00%
crp protein test	1.65 L	1.65 L	0.00%
hb1c test	1.10 L	1.35 L	22.73%
lipid profile test	1.10 L	1.35 L	22.73%
cholesterol profile test	1.10 L	1.35 L	22.73%
cgpt test	.50 L	.91 L	82.83%
hgpt test	.50 L	.91 L	82.83%

City-Wise Search Volumes

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Top 6 Cities	109.61 L	116.17 L	5.99%	29.34%
Next 10 Cities	45.78 L	46.65 L	1.90%	11.78%
Others	206.63 L	233.11 L	12.82%	58.88%
Total	362.02 L	395.93 L	9.37%	100.00%

Top 6 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Bengaluru	25.23 L	27.58 L	4.38%	23.74%
Delhi	25.57 L	27.51 L	0.44%	23.68%
Mumbai	16.22 L	17.25 L	1.92%	14.85%
Chennai	14.68 L	16.52 L	4.21%	14.22%
Hyderabad	17.90 L	16.34 L	-15.66%	14.07%
Pune	10.01 L	10.97 L	-1.45%	9.44%
Total	109.61 L	116.17 L	5.99%	100.00%

Next 10 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Lucknow	8.94 L	9.31 L	4.15%	19.96%
Jaipur	6.08 L	6.68 L	9.89%	14.32%
Indore	5.69 L	5.64 L	-0.88%	12.10%
Ludhiana	4.25 L	4.53 L	6.61%	9.71%
Coimbatore	4.77 L	4.18 L	-12.42%	8.95%
Nagpur	4.77 L	3.85 L	-19.30%	8.26%
Bhopal	3.04 L	3.58 L	17.91%	7.68%
Visakhapatnam	3.11 L	3.32 L	6.46%	7.11%
Surat	2.62 L	2.83 L	7.99%	6.07%
Vadodara	2.50 L	2.73 L	8.97%	5.84%
Total	45.78 L	46.65 L	1.90%	100.00%

“Vernacular” Searches

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	.00 L	.00 L	0.00%	0.02%
Non-Brand	.91 L	.59 L	-35.31%	99.98%
Total	.91 L	.59 L	-35.31%	100.00%

The contribution from brand vernacular keywords, was higher in 2025.

Non Brand keywords include:

- एमसीवी ब्लड टेस्ट
- ब्लड टेस्ट
- plt ब्लड टेस्ट

“Near me” Searches

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	2.14 L	2.79 L	30.40%	31.59%
Non-Brand	3.07 L	6.04 L	96.56%	68.41%
Total	5.21 L	8.83 L	69.40%	100.00%

The contribution from Non-brand keywords, when the term “near me” is included, was higher in 2025.

Brand keywords include:

- *apollo full body checkup near me*
- *dr lal pathlabs near me*

Non Brand keywords include:

- *labtest near me*
- *blood test close to me*

Top 5 Brands **with Highest Share of Voice (SOV)**

	Top Brands	Top 5 SOV
	Dr Lal Pathlabs	23.01%
	Webmd	17.74%
	Apollo Hospitals	13.65%
	Metropolis India	13.17%
	Redcliffe Labs	11.67%

SOV = Share of Voice (% of Ranked SV/Total SV)

SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Top 5 Brands **with Highest SOV in 'CBC Test'**

	Top Brands	Top 5 SOV
	Dr Lal Pathlabs	58.85%
	Apollo Hospitals	47.32%
	Metropolis India	36.69%
	Redcliffe Labs	26.75%
	Webmd	25.42%

SOV = Share of Voice (% of Ranked SV/Total SV)
SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Top 5 Brands **with Highest SOV in 'Liver Test'**

	Top Brands	Top 5 SOV
	Apollo Hospitals	48.87%
	Dr Lal Pathlabs	36.58%
	Metropolis India	34.35%
	Redcliffe labs	31.29%
	Yashoda Hospitals	16.27%

SOV = Share of Voice (% of Ranked SV/Total SV)

SV = Search Volumes

The brands listed here are consistently showing up in the Top 5 listings due to a strong SEO strategy being implemented.

Key Insights

- **Non-branded** queries dominate with **97.14% market share**, though **branded queries** grew faster at **19.69%**, suggesting increasing brand recognition and interest in specific lab service providers.
- **Pathkind Labs** shows the highest **growth at 54.37%**, indicating rapidly rising interest; **SRL Diagnostics**, however, saw a sharp **45.34% decline**.
- **CBC and Liver Tests** lead in volume with a **combined 29% market share**, while **Celastrol and Liver Tests** show the **highest growth** at over **15%**, highlighting growing interest in liver health and emerging diagnostics.
- **Smaller cities (“Others”)** drive growth with a **12.82% increase and 58.88%** market share, signaling expanding diagnostic demand beyond major urban centers.

Data-Collection Process

- The research was conducted for FY-25 using Google's Keyword Planner
- The data reflects Pan-India search volumes only, except where city-level data is shown
- Search volumes on Google Web Search for app-related keywords and not Playstore have been taken into account
- Search volumes for vernacular languages - where available - only reflect data for the Hindi language

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