

Online Pharmacy

Search Trends Report

FY'24 India



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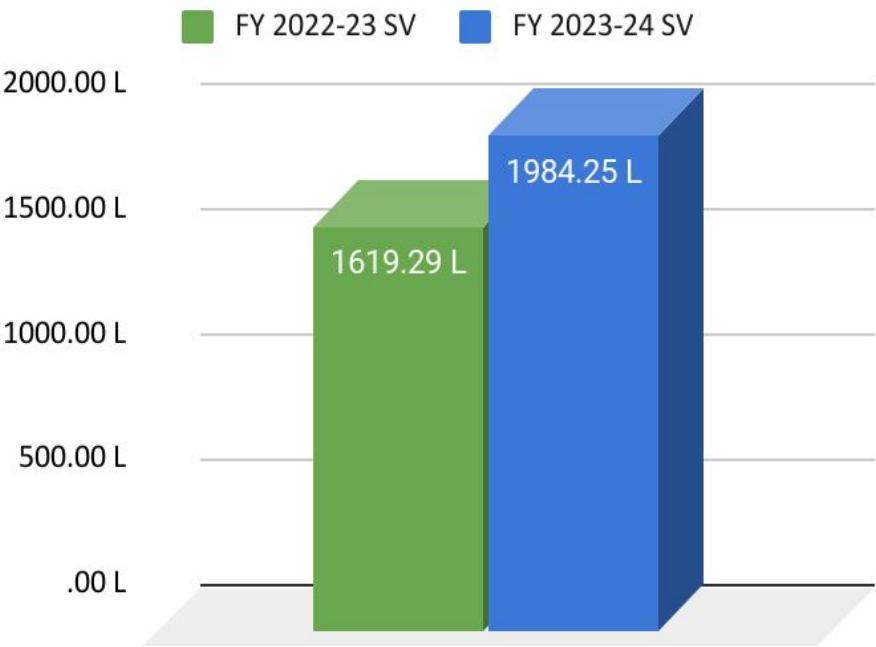


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Executive Summary

- In India, online searches for medicines are triggered by various reasons and the journey **begins with a Google search.**
- People run queries on medicines, compare & contemplate their options, and make their decisions; which is why a clear understanding of **search behavior** is necessary for a **strong path to better digital marketing.**
- Our *Online Pharmacy Search Trends Report* **examines how customer behavior is evolving** and how your brand can leverage these trends to create a stronger digital presence.
- We investigate over **78,000** keywords to evaluate **brand and non-brand keywords, types & volumes of queries, opportunities for growth**, and so much more.
- We also include a list of **top performing Online Pharmacies** who dominate Google Search.

Online Pharmacy Search Trends



Category	FY 2022-23 SV	FY 2023-24 SV	% Growth
Online Pharmacy	1619.29 L	1984.25 L	22.54%

Search Volume by Query Type

Type of Query	Search Volume FY 2022-23	Search Volume FY 2023-24	Growth %	Market Share
Brand	37.91 L	37.38 L	-1.40%	1.88%
Non-Brand	1581.38 L	1946.87 L	23.11%	98.12%
Total	1619.29 L	1984.25 L	22.54%	100.00%

Top 10 Brands by Search Volume



Brand	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Apollo Pharmacy	7.99 L	9.84 L	23.21%	27.66%
1mg	9.02 L	8.23 L	-8.73%	23.13%
Medplus	3.12 L	4.85 L	55.28%	13.63%
Netmed	5.45 L	3.52 L	-35.42%	9.88%
Pharmeasy	4.77 L	2.68 L	-43.86%	7.52%
Healthkart	1.89 L	1.60 L	-15.49%	4.50%
Medibuddy	1.91 L	1.49 L	-21.91%	4.20%
Wellness Forever	.85 L	1.34 L	57.21%	3.78%
Truemeds	.70 L	1.23 L	74.90%	3.45%
Flipkart Health Plus	.61 L	.50 L	-18.67%	1.41%
Others(2)	.26 L	.30 L	17.30%	0.84%
Total	36.58 L	35.58 L	-2.72%	100.00%

Top 10 Buckets

Buckets	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Medicine Name	691.55 L	857.13 L	23.94%	43.20%
Salt	262.65 L	291.53 L	10.99%	14.69%
Medicine Uses	236.54 L	287.25 L	21.44%	14.48%
Beauty & Personal Care	56.91 L	85.37 L	50.02%	4.30%
Device Name	35.91 L	45.19 L	25.85%	2.28%
Disease Medicine	28.92 L	36.93 L	27.66%	1.86%
Medicine Price	27.77 L	31.40 L	13.08%	1.58%
Medicine Benefits	10.42 L	14.61 L	40.18%	0.74%
Side Effect	10.83 L	13.14 L	21.33%	0.66%
Ayurvedic & Herbal	9.97 L	10.66 L	6.88%	0.54%
Others (8)	247.82 L	311.05 L	25.51%	15.68%
Total	1619.29 L	1984.25 L	22.54%	100.00%

Top 10 Keywords

Keywords	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Zerodol sp	2.93 L	3.80 L	29.62%	16.34%
Meftal-Spas	2.83 L	3.13 L	10.88%	13.49%
Azithromycin Drug	2.21 L	2.35 L	6.42%	10.12%
Levocetirizine	2.20 L	2.27 L	3.23%	9.75%
Neurobion Forte	2.13 L	2.19 L	2.74%	9.42%
Chymoral Forte	1.89 L	2.14 L	13.36%	9.22%
Medicines	2.20 L	2.01 L	-8.53%	8.65%
Cough Syrup	1.91 L	1.81 L	-5.31%	7.77%
B-Protein Powder	1.50 L	1.79 L	19.33%	7.70%
Augmentin 625	1.68 L	1.75 L	3.81%	7.52%

City-Wise Search Volumes

Cities	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Top 6 Cities	404.86 L	459.65 L	13.53%	23.17%
Next 10 Cities	183.18 L	213.49 L	16.54%	10.76%
Others	1031.25 L	1311.11 L	27.14%	66.08%
Total	1619.29 L	1984.25 L	22.54%	100.00%











Top 6 Cities

Cities	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Delhi	100.85 L	116.34 L	15.37%	25.31%
Bengaluru	80.00 L	88.82 L	11.03%	19.32%
Hyderabad	69.83 L	77.75 L	11.34%	16.91%
Mumbai	62.27 L	74.60 L	19.80%	16.23%
Chennai	47.89 L	54.12 L	13.01%	11.77%
Kolkata	44.02 L	48.01 L	9.06%	10.44%
Total	404.86 L	459.65 L	13.53%	100.00%

Next 10 Cities

Cities	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Lucknow	43.18 L	51.00 L	18.11%	23.89%
Jaipur	28.61 L	35.13 L	22.77%	16.45%
Indore	25.12 L	29.51 L	17.49%	13.82%
Nagpur	18.24 L	20.73 L	13.66%	9.71%
Surat	15.06 L	17.10 L	13.57%	8.01%
Visakhapatnam	14.43 L	16.23 L	12.44%	7.60%
Vadodara	9.91 L	11.23 L	13.28%	5.26%
Bhopal	10.03 L	11.24 L	12.07%	5.26%
Kanpur	9.45 L	11.53 L	22.03%	5.40%
Chandigarh	9.15 L	9.79 L	6.94%	4.58%
Total	183.18 L	213.49 L	16.54%	100.00%

Top 10 Apps **by Downloads**

	Apps	Downloads FY 2022-23	Downloads FY 2023-24	% Growth	Market Share
	Apollo 247 - Health & Medicine	82.30 L	73.00 L	-11.30%	28.20%
	Flipkart Health+ Medicine App	88.90 L	45.80 L	-48.48%	17.69%
	Truemeds - Health & Medicine	30.60 L	27.50 L	-10.13%	10.62%
	TATA 1mg Online Healthcare App	44.10 L	38.40 L	-12.93%	14.83%
	PharmEasy - Healthcare App	65.90 L	26.10 L	-60.39%	10.08%
	Netmeds - India Ki Pharmacy	78.20 L	18.00 L	-76.98%	6.95%
	MedPlus Mart - Online Pharmacy	11.10 L	10.10 L	-9.01%	3.90%
	MediBuddy-Online Dr, Lab, Meds	24.70 L	15.70 L	-36.44%	6.06%
	Wellness Forever Pharmacy App	6.00 L	3.30 L	-45.00%	1.27%
	Healthmug - Healthcare App	1.80 L	1.00 L	-44.44%	0.39%
	Total	433.60 L	258.90 L	-40.29%	100.00%

“Near-Me” Searches

Category	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth	Market Share
Brand	1.68 L	2.78 L	65.74%	22.36%
Non-Brand	5.86 L	9.65 L	64.80%	77.64%
Total	7.53 L	12.43 L	65.01%	100.00%

Brand keywords include:

- *Apollo pharmacy near me*
- *netmeds pharmacy near me*

While Non-Brand keywords include:

- *near me pharmacies*
- *online medicine delivery near me*






Vernacular Search Volumes

Category	Search Volume FY 2022-23	Search Volume FY 2023-24	% Growth
Non-Brand	96.55 L	130.90 L	35.57%

Non-Brand keywords include:

- *zerodol sp tablet uses in hindi*
- खांसी की दवा
- सिप्ला
- रिवाइटल कैप्सूल

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

	Top Brands	Top 5 SOV	Organic Search Traffic
	Tata 1mg	73.77%	1134.11 L
	Apollo Pharmacy	55.57%	314.94 L
	Pharmeasy	48.06%	176.82 L
	TrueMeds	40.45%	82.96 L
	NetMeds	33.52%	70.05 L

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

- The total search volume for online pharmacy related keywords increased by **22.54%** in FY'24 and has largely been driven by the growth in Non-Brand queries.
- **Apollo Pharmacy** leads the market with the largest search volume in FY'24 (**9.84 L**) and a significant **23.21%** growth, capturing **27.66%** of the market share. However, brand searches for **Medplus**, **Wellness Forever**, and **Truemeds** grew by **over 50%**.
- The **Medicine Name** keyword bucket dominated a **43.19% market share** indicating a sharp increase in consumer awareness.
- The **Beauty & Personal Care** category saw the highest growth rate at **50.02%**, though it only represents **4.30%** of the total searches, suggesting a growing interest in healthcare-adjacent categories.
- **Delhi** remains the top city in search volume, commanding the largest market share at **25.31%**, but Mumbai is experiencing the fastest growth at **19.80%**.

Data-Collection **Process**

- The research was conducted for FY 2023-24 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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