

Women's Wear Search Trends Report FY'25 India



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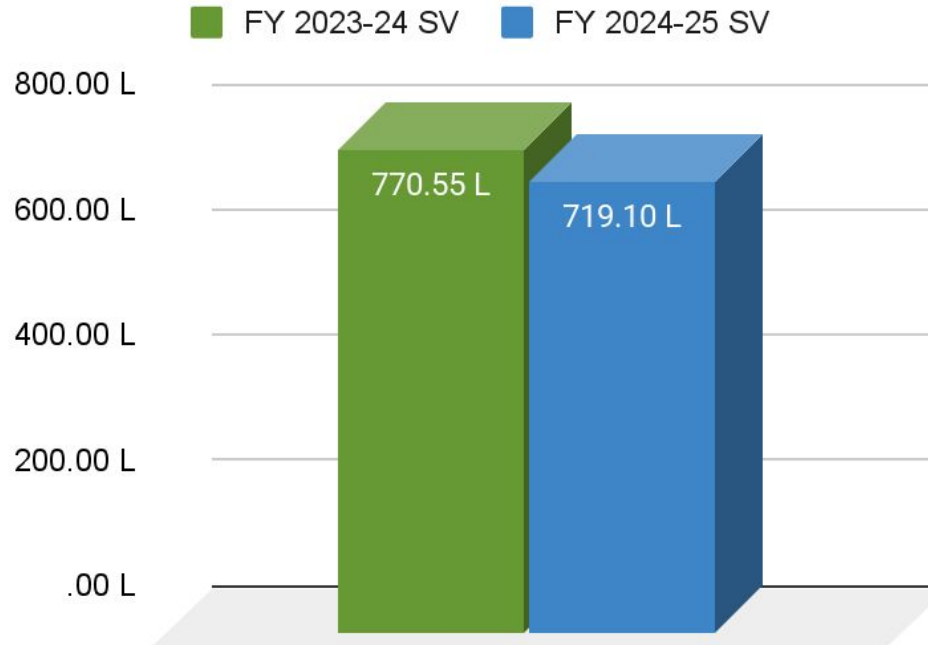


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Executive Summary

- In India, most shopping journeys for women **begin with a Google search.**
- People run queries on **women's wear**, 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 ***Women's Wear 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 **58K** keywords to evaluate the **brand and non-brand keywords, types & volumes of queries, opportunities for growth**, and so much more.
- We also include a list of **top-performing brands** who dominate Google Search.

Women's Wear Search Trends



Category	FY 2023-24 SV	FY 2024-25 SV	% Growth
Women's Wear	770.55 L	719.10 L	-6.68%

Search Volume by Query Type

Type of Query	Search Volume FY'24	Search Volume FY'25	Growth %	Market Share
Brand	43.52 L	35.35 L	-18.76%	4.92%
Non-Brand	727.03 L	683.74 L	-5.95%	95.08%
Total	770.55 L	719.10 L	-6.68%	100.00%

Top 10 Marketplaces by Search Volume



Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Meesho	8.05 L	5.46 L	-32.14%	29.65%
Myntra	5.16 L	4.33 L	-16.15%	23.50%
Flipkart	5.85 L	4.02 L	-31.35%	21.80%
Amazon	4.76 L	3.47 L	-27.10%	18.82%
Ajio	1.08 L	.75 L	-30.65%	4.05%
Nykaa Fashion	.20 L	.17 L	-13.53%	0.92%
Pantaloon's	.18 L	.14 L	-22.18%	0.76%
Shopsy	.08 L	.04 L	-49.34%	0.21%
Tata Cliq	.03 L	.03 L	-16.77%	0.15%
Snapdeal	.03 L	.03 L	-5.47%	0.14%
Total	25.42 L	18.43 L	-27.49%	100.00%

Top 10 Fashion Brands by Search Volume

	Brand	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
	Zara	3.05 L	2.79 L	-8.46%	16.51%
	H&M	1.72 L	1.70 L	-1.46%	10.04%
	Biba	1.56 L	1.46 L	-6.73%	8.60%
	Libas	1.13 L	1.16 L	2.48%	6.85%
	Puma	.67 L	.73 L	8.60%	4.32%
	Adidas	.68 L	.73 L	7.00%	4.32%
	Avaasa	.58 L	.53 L	-9.35%	3.11%
	W For Women	.66 L	.49 L	-24.84%	2.92%
	Levis	.40 L	.46 L	13.39%	2.70%
	Aurelia	.55 L	.42 L	-24.27%	2.46%
	Others(80)	7.09 L	6.46 L	-8.83%	38.18%
	Total	18.10 L	16.93 L	-6.50%	100.00%

Top 10 Categories by Search volume

Buckets	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Ethnic wear	186.11 L	165.99 L	-10.81%	23.08%
Indian top wear	149.62 L	139.34 L	-6.87%	19.38%
Western dress	114.67 L	108.89 L	-5.04%	15.14%
Western top wear	104.75 L	98.06 L	-6.39%	13.64%
Western bottom wear	82.94 L	84.14 L	1.45%	11.70%
Winter wear	55.78 L	55.01 L	-1.39%	7.65%
Indo western wear	25.18 L	21.47 L	-14.74%	2.99%
Active wear	18.58 L	17.69 L	-4.82%	2.46%
Western combo	14.14 L	12.18 L	-13.89%	1.69%
Indian bottom wear	8.19 L	7.27 L	-11.32%	1.01%
Others(2)	10.58 L	9.07 L	-14.23%	1.26%
Total	770.55 L	719.10 L	-6.68%	100.00%

Top 10 Non Branded Keywords

Keywords	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Chikankari kurti for women	.91 L	8.23 L	809.39%	19.28%
Dress for women	6.73 L	6.73 L	0.00%	15.76%
Short kurtis for ladies	3.01 L	4.50 L	49.50%	10.54%
Saree for women	3.68 L	4.50 L	22.28%	10.54%
Lehengas for women	3.01 L	3.68 L	22.26%	8.62%
Tshirt for women	2.46 L	3.01 L	22.36%	7.05%
Salwar suit anarkali suit	2.46 L	3.01 L	22.36%	7.05%
Pakistani suits	3.01 L	3.01 L	0.00%	7.05%
Gowns for women	3.01 L	3.01 L	0.00%	7.05%
Jeans for women	3.01 L	3.01 L	0.00%	7.05%

City-Wise Search Volumes

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Top 6 Cities	170.55 L	153.59 L	-9.95%	21.36%
Next 10 Cities	79.29 L	66.25 L	-16.45%	9.21%
Others	520.71 L	499.26 L	-4.12%	69.43%
Total	770.55 L	719.10 L	-6.68%	100.00%

Top 6 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Delhi	46.82 L	41.35 L	-11.70%	26.92%
Bengaluru	40.12 L	38.83 L	-3.22%	25.28%
Mumbai	27.31 L	23.99 L	-12.16%	15.62%
Chennai	17.19 L	17.35 L	0.92%	11.30%
Pune	17.72 L	16.06 L	-9.38%	10.46%
Hyderabad	21.39 L	16.01 L	-25.12%	10.43%
Total	170.55 L	153.59 L	-9.95%	100.00%

Next 10 Cities

Cities	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Lucknow	18.28 L	15.58 L	-14.77%	23.52%
Jaipur	12.00 L	10.52 L	-12.33%	15.88%
Indore	12.31 L	9.65 L	-21.60%	14.57%
Nagpur	8.85 L	5.55 L	-37.29%	8.37%
Bhopal	5.03 L	5.18 L	2.98%	7.83%
Ludhiana	6.01 L	5.00 L	-16.81%	7.54%
Surat	4.76 L	4.35 L	-8.49%	6.57%
Coimbatore	5.35 L	4.30 L	-19.60%	6.49%
Vadodara	3.20 L	3.07 L	-4.04%	4.63%
Visakhapatnam	3.51 L	3.05 L	-13.11%	4.60%
Total	79.29 L	66.25 L	-16.45%	100.00%

Top 10 Apps by Downloads



Apps	Nov 2022 – Oct 2023	Nov 2023 – Oct 2024	% Growth	Market Share
Meesho	1460.00 L	1700.00 L	16.44%	27.46%
Flipkart	1310.00 L	1350.00 L	3.05%	21.81%
Shopsy	1170.00 L	942.00 L	-19.49%	15.22%
Amazon India	708.00 L	620.00 L	-12.43%	10.02%
Myntra	469.00 L	502.00 L	7.04%	8.11%
AJIO	431.00 L	312.00 L	-27.61%	5.04%
Snapdeal	88.10 L	153.00 L	73.67%	2.47%
CityMall	75.90 L	116.00 L	52.83%	1.87%
Nykaa Fashion	122.00 L	102.00 L	-16.39%	1.65%
LimeRoad	198.00 L	68.60 L	-65.35%	1.11%
Others(16)	409.71 L	324.34 L	-20.84%	5.24%
Total	6441.71 L	6189.94 L	-3.91%	100.00%

“Vernacular” Searches

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	.08 L	.08 L	2.80%	5.33%
Non-Brand	1.98 L	1.43 L	-27.45%	94.67%
Total	2.06 L	1.52 L	-26.29%	100.00%

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

Brand keywords include:

- મીશો ઑનલાઇન સાડી
- મીઝેશો ઓનલાઇન

Non Brand keywords include:

- ઘરના
- ફેંસી લહેંગે

"Near me" Searches

Category	Search Volume FY'24	Search Volume FY'25	% Growth	Market Share
Brand	.01 L	.01 L	-7.35%	0.22%
Non-Brand	2.08 L	2.87 L	37.52%	99.78%
Total	2.09 L	2.87 L	37.37%	100.00%

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

Brand keywords include:

- *lyra leggings near me*
- *shree kurtis store near me*

Non Brand keywords include:

- *sarees shop near me*
- *dress shop near me*

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

	Top Brands	Top 5 SOV
	H&M	26.92%
	Libas	24.42%
	Only	14.00%
	Biba	11.94%
	Soch	11.81%

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

- Zara leads the market with a 16.51% share, but its declining search volume indicates potential challenges in maintaining dominance.
- H&M and Biba follow with 10.04% and 8.60%, respectively, though both saw a reduction in search volume.
- Ethnic Wear and Indian Top Wear maintain the largest shares at 23.08% and 19.38%, respectively, though both experienced declines in search volume.
- Western Bottom Wear stands out as the only category with growth (+1.45%), increasing its market share to 11.70%. This reflects rising demand for casual and versatile clothing like jeans and trousers.
- Delhi, Bengaluru, and Mumbai together account for 67.82% of the market share, maintaining their dominance despite declines in search volume.
- Chennai is the only city with positive growth at +0.92%, increasing its market share to 11.30%.
- The total search volume for "near me" searches grew significantly from 2.09 lakh (FY'24) to 2.87 lakh (FY'25), showing a 37.37% increase.

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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