

Diagnostics Industry Search Trends Report FY'25 India



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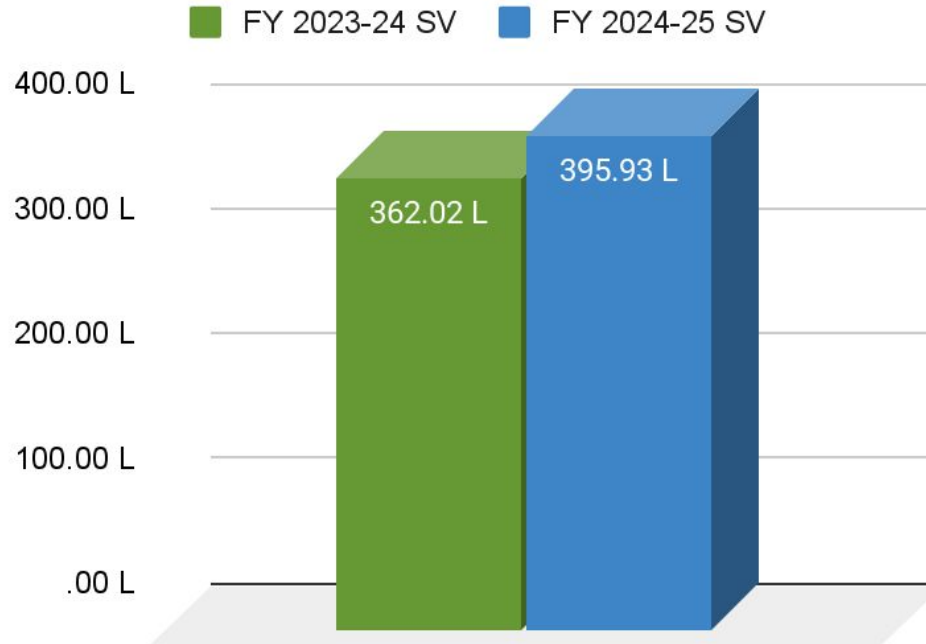
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Executive Summary

- 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 Diagnostics 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.

Diagnostics Industry **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%
Cholesterol 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 **Cholesterol 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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