



INTERNET IN INDIA 2013

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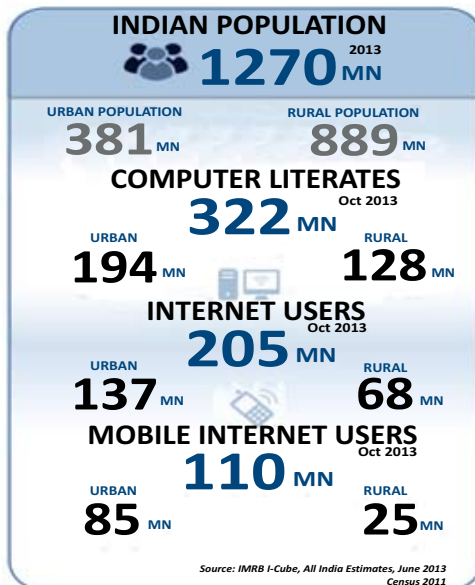
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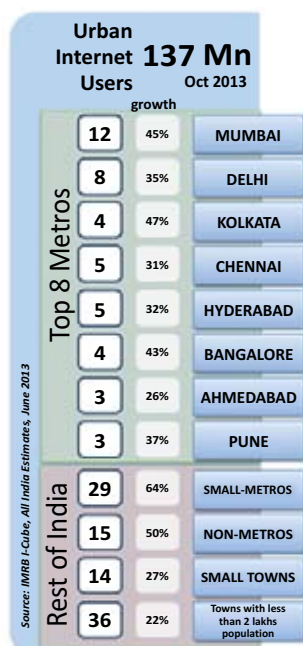
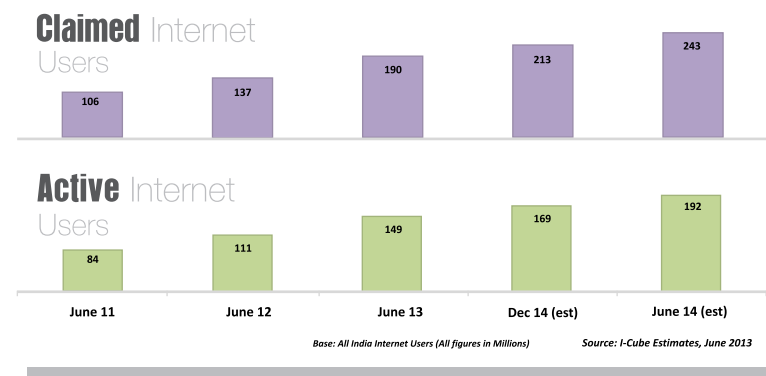
EXECUTIVE SUMMARY



The latest round of I-Cube, a research conducted by IAMAI and IMRB International in June 2013, indicates that the Internet usage in India has gone up with more and more Internet Users using the Internet on a regular basis. In June 2013, India had **190 Million Internet Users**. Of this **130 Million belonged to Urban India** and the rest **60 Million were from Rural India**. In October, the number of internet users reached **205 Million** and is **estimated to reach 213 Million by December 2013**. The number of internet users in urban India is **137 Million in October 2013** and is estimated to touch **141 Million by December 2013**. In Rural India, there are **68 Million Internet users in October 2013** and will reach **72 Million by December 2013**. Mobile Internet, too, has garnered a huge base among the Active Internet Users. In India, there were 91 Million users accessing the

Internet on Mobile devices in June. In Urban India, there were **70.2 Million Mobile Internet users in June 2013**. This number rose to **85 Million in October** and is estimated grow by 47% and reach **103 Million by December 2013**. Rural India is not that far behind in this regard with a base of 21

Overall Internet Users



Million Mobile Internet Users in June 2013. It reached **25 Million in October 2013** and will touch **27 Million by December 2013**.

Internet users can be divided in two major segments: **Claimed Internet users** and **Active Internet Users** based on the frequency of Internet usage. Claimed Internet users are not so frequent users of the Internet, whereas Active Internet users access the Internet at least once a month.

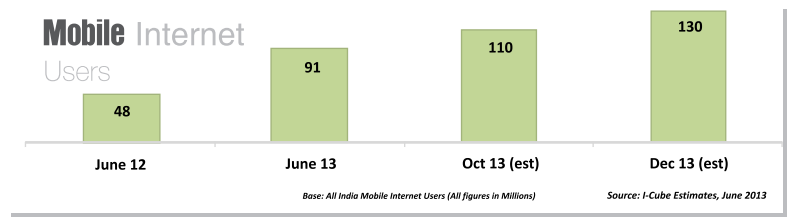
Some of the key take aways from the **June 2013** Urban Segment Report are:

- June 2013 numbers show that Urban India currently has 108 Million Internet Users accessing the internet at least once a month. This indicates that almost 85% of the Internet Users have been using Internet Actively.

- There has been a **29% growth** over the last six months and this growth has not been restricted to the bigger towns and the upper SEC. The major chunk of growth has come from people belonging to smaller towns and lower SEC.
- Like last year, Youth (College Going Students) account for the largest set of Internet Users. There has also been a growth of **24%** in the number of Internet Users among the Young Men. In fact their proportion has grown even more.
- Communication over the Internet continues to be the primary purpose of accessing the Internet. Another activity, in which around three quarters of the population engages in is - Social Networking and over **75%** access the Internet for the sake of entertainment.
- There are **12 Million Internet users in Mumbai**, one of the highest internet users in any city. This is followed by Delhi. The city of **Mumbai** has seen a **growth of 45%** Internet users since last year whereas the number of Internet users in **Delhi** has **grown by 35%** over last year. The Non Metros are also witnessing good growth in terms of Internet usage.

There are close to 50% of the users who access the Internet **at least once a day** and more than 90% access **at least once a week**. The frequency of Internet usage has been growing tremendously over the years. With the advent of connectivity on Mobile devices, Internet access is becoming ubiquitous.

The Internet access from Mobile Devices will see huge growth in the coming years. Mobile Internet is going to be the next game changer for Internet in India.



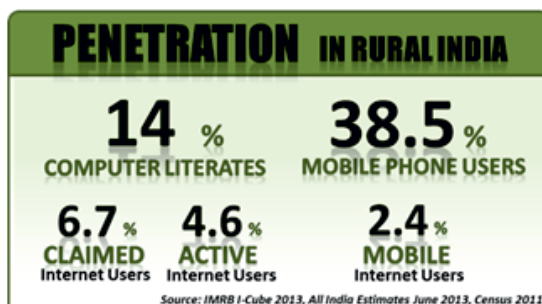
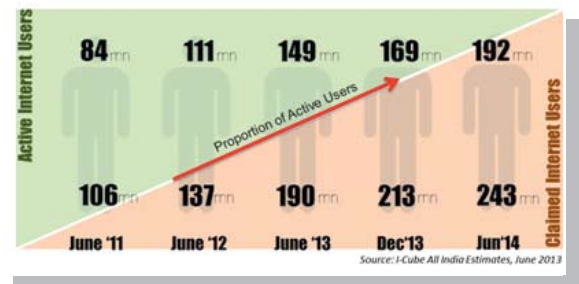
Some of the key takeaways from the **June 2013 Rural Segment Report**:

- **Around 61% (i.e. 25 Million)** of Internet users who access Internet at least once a month are observed to be accessing Internet at least once a week
- **18-30 years age group** accounts for the highest percentage of Daily Usage among all other Active Internet Users
- **42%** people prefer accessing Internet only in **Local languages**
- **Entertainment** is observed to be the main purpose of Internet access. Majority of the users like to access Music/ Videos/ Photos and Movies for Entertainment. Whereas, Online Transaction is still an area about which the population needs to be educated since only **9%** is seen **conducting online transactions**.
- There has been a notable increase in the CSC availability with over **three quarter of them** being within a radius **4-6 km** from the village.
- Only **8%** of Non-Internet Users are making use of the CSC and accessing Government Services is the primary reason for almost **five sixth** of them. Low PC literacy is the prime cause for not accessing the Internet.

CHAPTER 1

Internet in India

Current population of the country stands somewhere around 1.27 Billion of which 381 Million are in Urban India and the rest 889 Million are in Rural India. Urban India, as of June 2013, has 184 Million people who claim that they know how to use a computer. Out of this, 130 Million claim that they have used Internet at least once in their life. From the set of Claimed Internet Users, 85% are active users of the Internet (i.e. they have used the Internet at least once in the past one month). We are witnessing a rise in the proportion of Claimed Internet Users who are Active Internet Users. This ratio has been gradually increasing over the past few years and is poised to grow further. Rural India, as of June 2013, has a population of around 889 Million. PC Literacy stands at 14% and out of this 60 Million users have accessed the Internet at least once. But the most encouraging fact is that there has been a 57% growth in the number of Claimed Users. The count of Active Internet Users in Rural India stands at 41 Million.

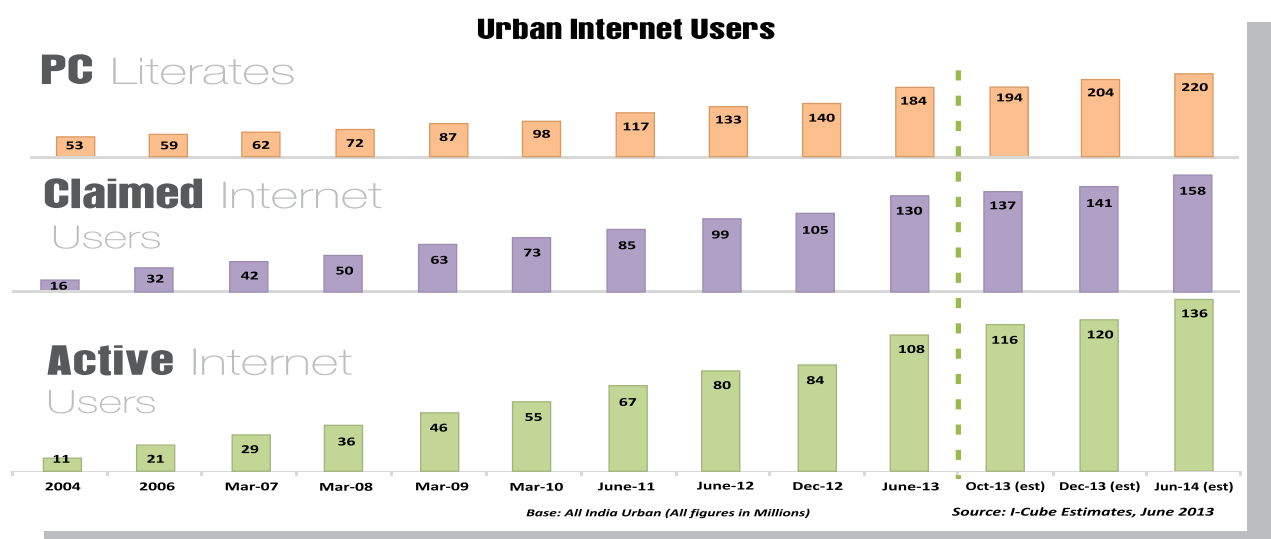


The penetration of the computer literates among the rural population has shown a sizeable increase from 8.4% in 2012 to 14% in 2013. The penetration of claimed internet users in rural India has gone up by 2% to 6.7% in 2013. Thanks to the fast emerging communication category, the penetration of Active Internet users has grown from 3.7% in 2012 to 4.6% in 2013. This translates into majority of rural families owning at least one internet enabled mobile phone.

Mobile usage and hence, mobile internet usage has seen huge jump from the 2012 penetration levels. Compared to the 0.4% mobile internet users in 2012, the penetration has grown to 2.4%, indicating a substantial growth in the mobile internet user penetration levels.

1.1. Growth of Internet

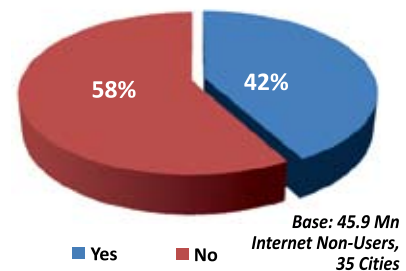
We have witnessed a huge leap in PC Literacy in both Urban and Rural India the reasons of which can



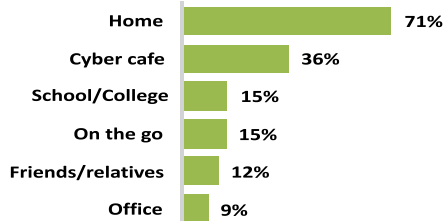
be attributed to the increased impetus on computer education in schools, colleges and offices.

In Urban India, around one out of every two individuals is computer literate. As of June 2013, there are 130 Million Claimed Internet Users and this figure should touch 141 Million by December 2013 and 158 Million by June 2014. Active Internet User count currently stands at 108 Million and is poised to grow at 11% over the next 6 months. It will reach 136 Million by June 2014.

Intention to Use Internet In next 12 months



Intended Points of Access for Internet



Base: 19.2 Mn Internet Non-Users intending to use internet in next 12 months, 35 Cities

In Urban India, out of all the Internet non-users surveyed in the 35 cities as part of this study, 58% have said that they will be accessing the Internet in the next 12 months and the majority of them intend to do so from their home. So even if 40% of these actually end up using the Internet we should be able to reach the estimated figure.

Rural

India has shown a significant growth in the number of Claimed internet Users. There has been a 57% growth in the number of CIUs and a 32% growth in the numbers for AIUs. An increase of 40% in the number of Community Service Centres (CSC) has played a big part in bringing about this change. It is estimated that the number of AIUs will grow by 20% to 49 Million by December 2013 and by 37% to 56 Million by June 2014.

Rural Internet Users



The I-Cube 2013 Rural Survey was conducted in 7 states viz. Andhra Pradesh,

Assam, Maharashtra, Orissa, In these states, as of June 624.5 Million were aware of used internet at least once in these Claimed Internet users, at least once in the past one

In the I-Cube 2013 Survey PC Literacy is highest in the 94% and lowest in the city of Internet Users is highest in Coimbatore at 48%.

Penetration of Active Inter-



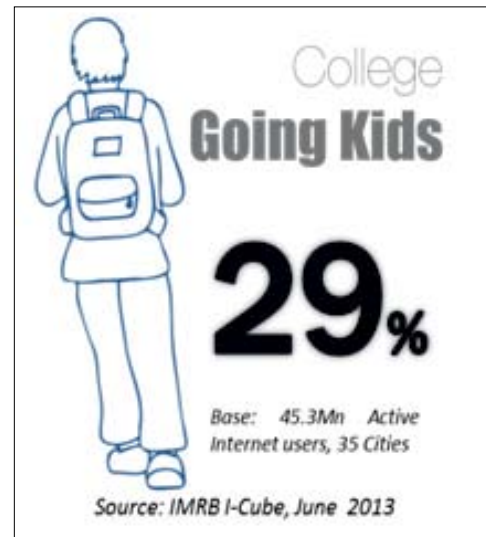
Rajasthan, Tamil Nadu and Uttar Pradesh. 2013, 95.8 Million out of a population of Internet and 36 Million Claimed to have their lives (i.e. Claimed Internet Users). Of 25.6 Million users have accessed internet month (i.e. Active Internet Users).

conducted in the 35 cities of Urban India, city of Pune, Aurangabad and Amreli at Belgaum at 19%. Penetration of Claimed the city of Mumbai at 55% followed by net Users is replicated with the highest

level in the city of Mumbai at 47%. Chennai follows in with a penetration of 41%. Overall the top 4 metros have a 37% penetration of Active Internet Users. Among the other 4 Metros, Hyderabad leads the charge with a penetration of 37% Active Internet Users. Coimbatore with a 40% penetration leads in the Small Metros category.

1.2. Demographics

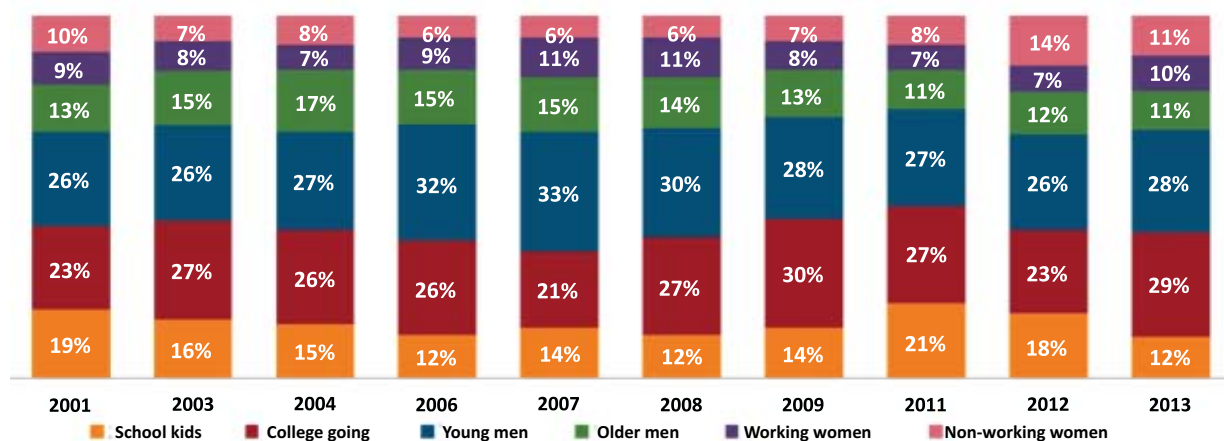
There has been a shift in the demographic segment which accounts for the largest number of AIUs. College Going Students, having grown by 26%, have surpassed Young Men and now account for 29% of the AIUs. There are various factors which have been instrumental in bringing about this change with the major ones being the increase in mass media exposure and also the rising number of social networking apps targeting the youth. Also, internet as a medium has given power to the youth to do things which were not possible earlier like taking active part and generating support for social causes etc. And this is making it easier for the youth to share his/her voice with the world.



Although no longer the leaders, the Young Men are not far behind when it comes to being active on the Internet. They have grown by 8% and account for 28% of the AIU. But the most phenomenal growth is seen in the Working Women segment. Having grown by 43% over the last year, they currently account for a tenth of the Active Internet Users.

Urban India

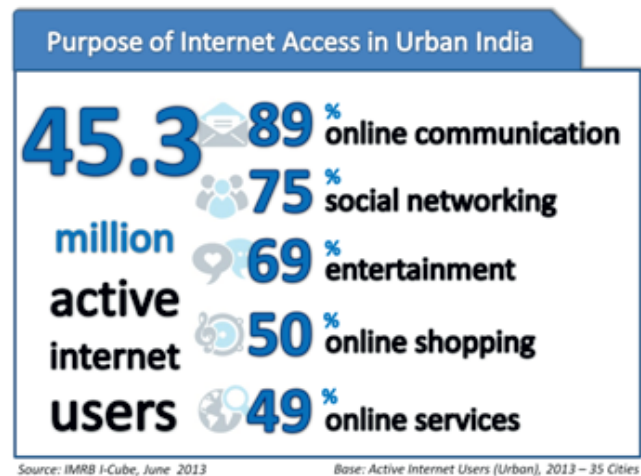
Active Internet Users



CHAPTER 2

Internet Usage in India

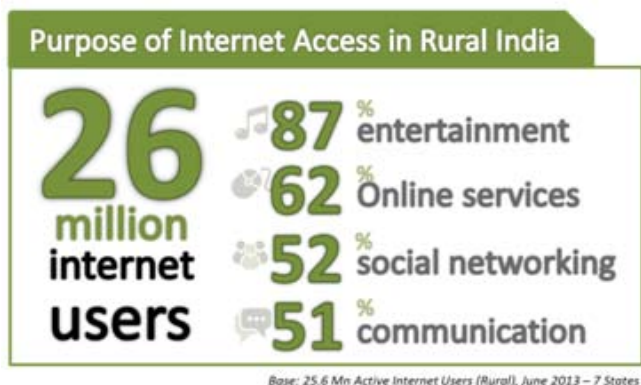
Of all the Active Internet Users surveyed, it has emerged that for close to 90% of the respondents the prime use of Internet is Online Communication and under this e-mail communication commands the lion's share of 78%. Social Networking continues to be the rage with 75% of the users engaging in it actively. 69% now use the Internet for Entertainment. Apart from listening to songs and watching videos online, sizeable numbers are downloading mobile VAS. Online shopping has also picked up in a big way. Every second active internet user claims to have bought something or the other over the Internet.



For the Rural Active Internet User, Entertainment is observed to be the main purpose of Internet access and a huge 84% of them have used it primarily for entertainment. Majority of the users like to access Music/ Videos/ Photos and Movies for Entertainment. This is followed by downloads of various Mobile Value Added Services as a source of entertainment.



Online Communication is observed to be the second most important purpose of accessing internet for Rural India. Within the Online Communication category, E-mail continues to be the most important reason for using the Internet with 43% using it. Number of users engaging in text chat has also gone up significantly compared to last year and is used by 22% of them.



Compared to last year, the awareness levels of Online Services and Social Networking is observed to be higher in 2013. The usage also subsequently has increased over 2012 with 62% and 52% of them having used Online Services and Social Networking respectively.



Further, over half of the rural population is observed accessing Internet for social networking purpose. Also, maintaining last year's trend, most of the users are seen availing online services related to job search on the Internet. This is followed by online news.

Although the awareness of e-commerce is moderate, we do not see much usage primarily because of lack of knowledge. Although a low overall share, Railway Ticket Booking is the most performed activity when it comes to Online Shopping which has also seen a significant growth over the last year.



Online Banking

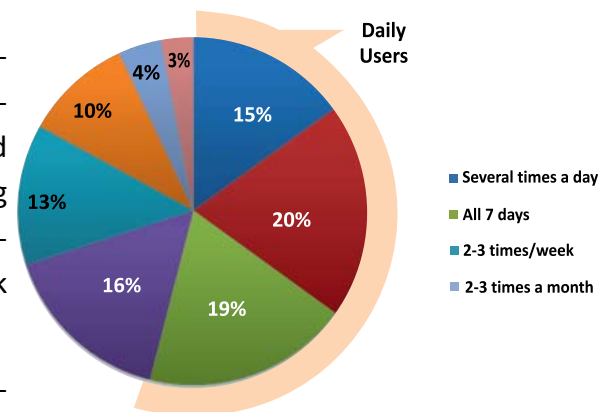
With a very low awareness level, Online Transaction is still an area about which the population needs to be educated. Thus, even though there is awareness, there is a pressing need to educate and inform the user of the benefits of the internet services to drive growth in internet usage.

2.1. Frequency of Internet Access in Urban

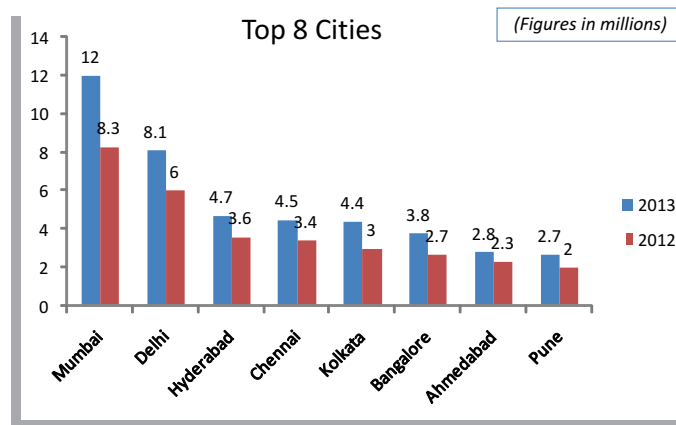
Source: IMRB I-Cube, June 2013 Urban India has witnessed a huge growth in the number of people accessing Internet on a daily basis. This number has crossed the 50% mark with more and more users accessing the internet at least once a day. The overall percentage of people accessing Internet at least once a week remains same as last year.

A remarkable point to note is that this high frequency usage is not restricted to only the youth and the

Frequency of Access



Base: 41.3 Mn Active Internet Users, 35 Cities



Working Men; this habit of accessing the Internet daily can be seen among other demographic segments as well including Older Men and Non-Working Women.

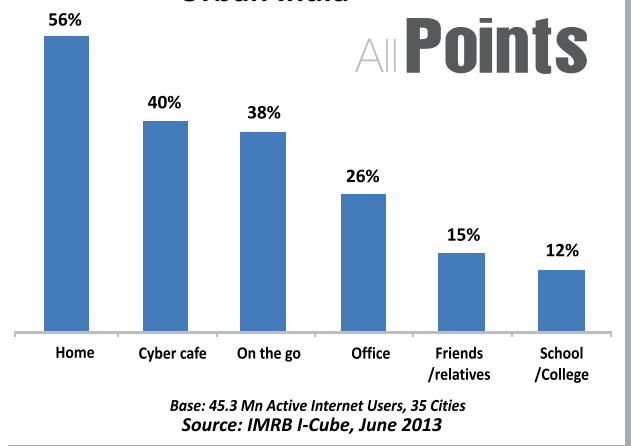
2.2. Points of Internet Access

Primary point of access for most is their home. The need to access the internet on the go has been growing rapidly. Laptops and mobile de-

vices viz. mobile phones and tablets are increasingly becoming the point of Internet access of choice for the majority of the Active internet users as these help them stay connected even while they are travelling or are away from home. With the flexibility and mobility offered by these devices, it will not be long before they become the most used device for accessing the Internet.

The college going students and the young men like to remain connected through their mobile devices. It is interesting to see the non-working women accessing the internet through the mobile devices.

Urban India



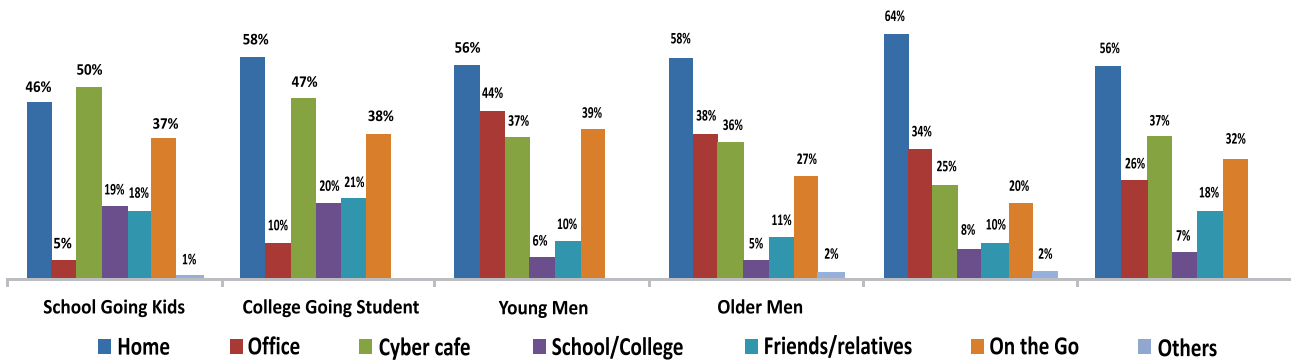
2.3. Device used for Internet Access

The Indian handset market is now flooded with low cost handsets and tablets which are capable of

Urban India

By Demographics

Base: 45.3 Mn Active Internet Users, 35 Cities



accessing Internet. More and more companies are getting into this segment and this has resulted in competition primarily basis the retail price of the device. Cut throat competition among Mobile service providers and internet service providers has also led to a fall in the Internet access rates. This synergistic combination has played a huge part in increasing the frequency of access.

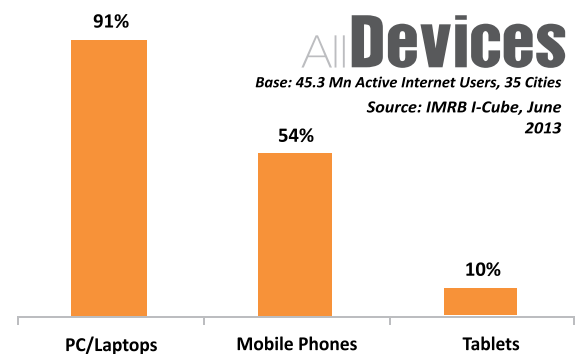
Mobile Internet has made its way into the lives of Active Internet Users in a big way. Mobile Internet,

as of June 2013, has a penetration of 65% among the 108 Mn Active Internet Users in Urban India.

Urban India

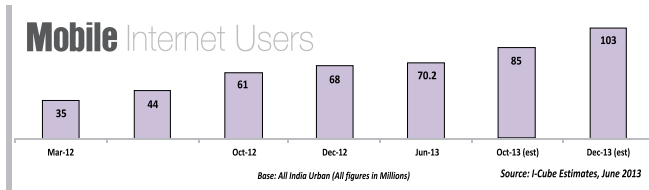
All Devices

Base: 45.3 Mn Active Internet Users, 35 Cities
Source: IMRB I-Cube, June 2013



Urban India

Mobile Internet Users



Going by the growth trend, it would not be long before Mobile Internet becomes the primary connection for accessing the Internet. According to the estimation, the number of mobile internet users for December 2013 will be 103 Mn, taking the mobile internet penetration among

Active Internet Users to 86%.

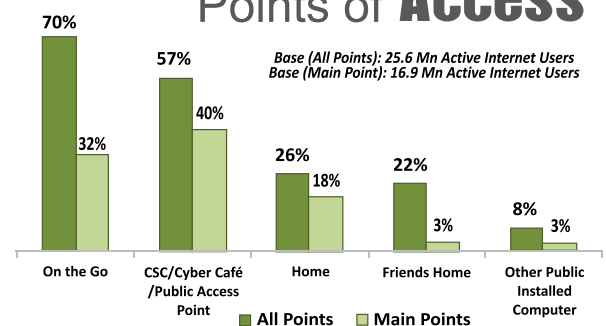
In Rural India, 70% of the active internet population access internet using mobile phones. The Community Service Centers and Cyber Cafes are the main point of access for 40% of them. This is mainly because of the availability of sufficient infrastructure. Internet access at homes has also increased considerably since last year. This clearly means a deeper penetration of PCs in the homes in Rural India.

But the real game changer in the Rural Internet space is Mobile Phones. These are truly the enablers of internet for Rural India. There are 21 Million active mobile internet users in Rural India

Rural India

Points of Access

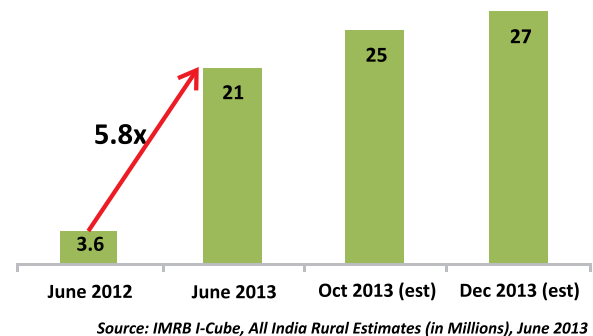
Base (All Points): 25.6 Mn Active Internet Users
Base (Main Point): 16.9 Mn Active Internet Users



Source: IMRB I-Cube Estimates, June 2013

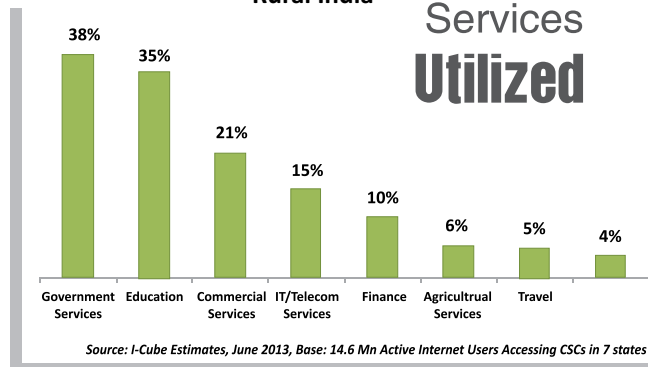
in June 2013. We witness a huge 5.3 times growth in 2013 over 2012 and nearly 47 times over 2010. It is estimated that there will be 25 Million active mobile internet users by October 2013 and 27 Million by December 2013. The availability of cheap calling rates is one of the reasons instrumental for this exponential rise in numbers. Also, with a slew of mobile phone companies offering handsets at throw-away prices, people are increasingly buying better cell phones that have an option for accessing the Internet. For most of the users, mobile phones have now become a gateway to their internet journey. We hope to see more vigorous growth in the coming years as the telecom infrastructure connects more and more villages in India.

Mobile Internet Users Rural India



Rural India

Services Utilized



2.4. Community Service Centers In Rural India

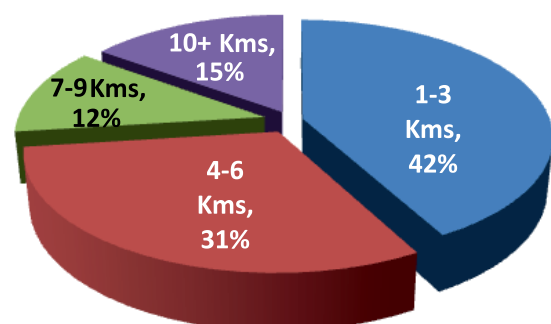
As a result of many initiatives taken by the Government and Private agencies to improve the Internet infrastructure in the villages, the Community Service Centers/Cyber Cafes have become one of the major point of Internet accesses in the villages.

Maturity of the government schemes such as

CSC Outreach programs is an encouraging measure which is sure to positively affect the Internet growth in Rural India. There has been a substantial 40% increase in the number of CSC's rolled out since May 2012. The roll out of Common Service Centers in Gujarat, Maharashtra, Uttar Pradesh, Bihar, Chhattisgarh, Madhya Pradesh West Bengal and other North Eastern states has been particularly high. Rural India Of the 41 Mn Active Internet Users (I-Cube June 2013), 35.6% have used facilities at a CSC. Most CSC users are largely satisfied with the services they avail with over a third of them using CSC for Government Services and Education. Majority of the users look for information regarding School / Universities and Exam Centres. Then, the users use the CSCs for Commercial Services and IT Services viz. bio data preparation, printing etc.

The reducing distance of CSCs is also a reason for the increase in the number of internet users. The average distance the user has to travel to get to the nearest CSCs has reduced as compared to 2012.

Proximity Rural India



Source: I-Cube June 2013,
Base: 42.5 Mn Users having access to CSCs in 7 States

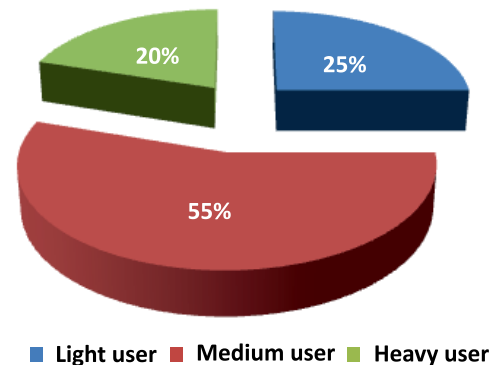
I-Cube 2013 survey in the 7 states reveals that there has been a notable increase in the CSC availability with over three quarter of them being within a radius 4-6 km from the village.

2.5. Heaviness of Internet Access

Increased frequency of usage isn't the only point of interest; the duration for which Internet is accessed has also risen. There has been a shift in the distribution pattern as well. Last year over 50% of the active internet users were accessing the Internet somewhere between 7-32 hours but now around 55% Active Internet Users access for 8-40 hours. This is a clear indication that the dependence on Internet (work related as well as personal) has gone up. Lot of effort is being put in to developing content which is both useful and engaging.

Urban India Heaviness of Access

Base: 43.6 Mn Active Internet Users, 35 States



Source: IMRB I-Cube, June 2013



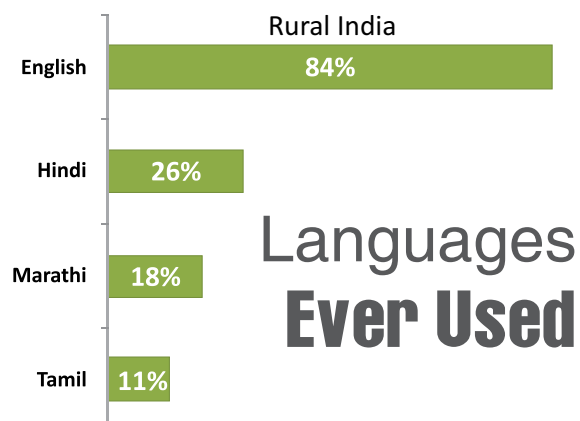
Urban India

Source: IMRB I-Cube, June 2013

People are spending more time on the Internet than ever before. On an average, people spend 204 minutes daily on the internet. This has grown by 19% over last year. The increased time is mostly spent on social networking and entertainment. With the rapid adoption of Mobile Internet, the time spent on the internet is slated to increase in the near future and will reach a time when users will be always connected and always online.

2.6. Language Of Internet Access In Rural India

Of the 7 states the survey was conducted in, English language was clearly the most accessed as majority of the content on the Internet is available in English. Apart from English, users also access the internet in other Indian languages. Currently, internet content is not widely available in regional Indian languages. This means that the user must have a general idea of English. The findings of the survey state that majority of the rural internet population is not so comfortable accessing this medium in English and this is holding them back from using internet fully for other purposes than online entertainment. Nearly 42% people prefer accessing Internet only in Local languages. With



Rural India Languages Ever Used

Source: IMRB I-Cube June 2013,
Base(All): 25.6 Mn Active Internet Users in 7 States

more content becoming available in the local languages, more users will start using the internet.

2.7. Behaviour Of Internet Non-users In Rural India

In the 7 states the survey was conducted in, there are 134.6 Mn Internet Non-Users as of June 2013. There are various reasons behind not using the internet services. The reasons can be based on the following factors:

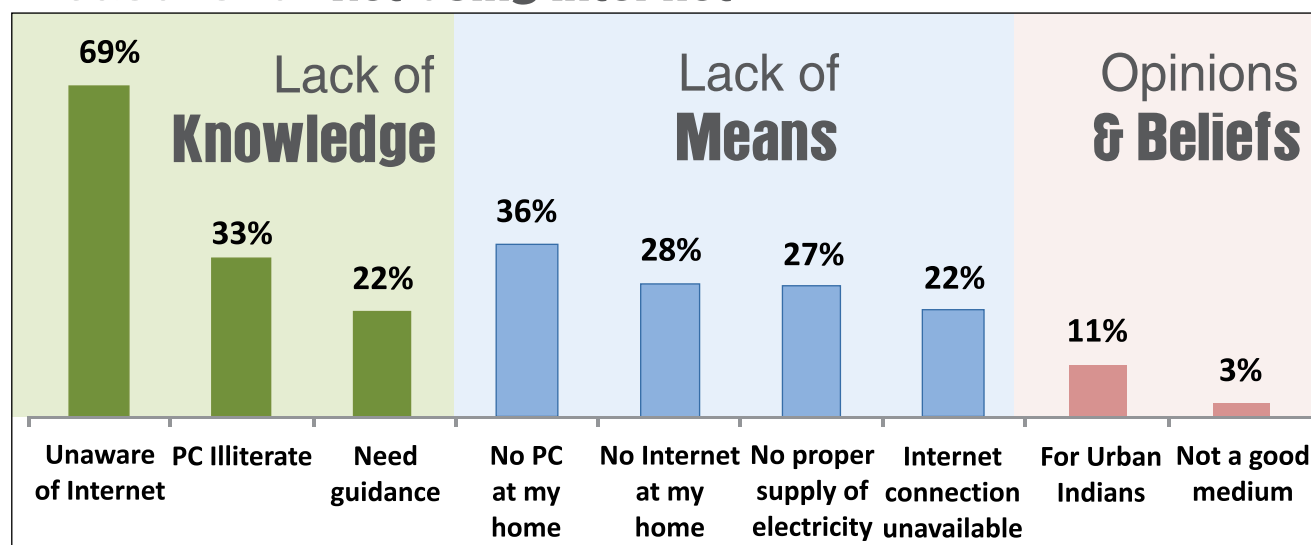
- Lack of Knowledge of Internet
- Lack of Means (or infrastructure)
- Beliefs (the Opinions held by the non-users)

Internet unawareness continues to be the primary reason why people do not access Internet in Rural India. 69% are affected by the same. Also, nearly one-third cited the inability to operate a computer.

The second most important reason people are unable to access Internet is because of Lack of Infrastructure. Majority of the non-users claim of not being able to access internet because they do not have sufficient infrastructure i.e a PC or an Internet connection at home. Like we had observed in the last year, Improper Electricity supply is this time around also observed to be a main reason people are unable to access internet for nearly one-third of the non-user population.

Lack of awareness and belief that there is no need for the Internet & it is not a good medium and that Internet is a phenomenon for Urban Indians are some of the main reasons for not accessing Internet. Thus measures need to be taken to educate and make the rural population aware of the paybacks they can reap from using Internet

Reasons for Not Using Internet



Source: IMRB I-Cube June 2013, Base: 134.6 Mn Internet Non-Users in 7 states

ANNEXURE

Study Methodology and Sampling Procedures

Urban Segment

Target Segments

For sampling purposes, we extensively used the previous rounds of the I-Cube reports that have laid down the universe of the Claimed and Active Internet Users in the country.

Census of India 2001 indicates that there are 35 Cities with more than 1 million population in India. In this round of survey, we have covered all the top 8 Metros as well as other 27 cities.

Below are the cities that have been covered in this research:

Cities by Strata	
Top 4 Metros	Delhi, Mumbai, Chennai & Kolkata
Other 4 Metros	Bangalore, Hyderabad, Ahmadabad & Pune
Small Metro (More than 1 Million Pop.)	Coimbatore, Jaipur, Lucknow, Ludhiana, Visakhapatnam, Patna, Guwahati, Kochi, Vadodara, Indore, Surat, Nagpur
Non Metro (Between 0.5 to 1 Million Pop.)	Aurangabad, Belgaum, Aligarh, Bhubaneswar, Raipur
Small Town (Less than 0.5 Million Pop.)	Alappuzha (Alleppey), Ujjain, Behrampur, Faizabad, Panipat, Ranaghat, Baleshwar, Philibit, Amreli, Chickmagalur

Sampling Procedures

Quota sampling procedure was followed to cover households belonging to SEC A, B, C, D and E category in each of the 35 cities short-listed.

Selection of households was made based on random starting addresses identified from electoral rolls

Care was taken to ensure even geographical spread in identifying the starting addresses across the cities selected

Based on this household survey, we managed to profile individuals in terms of age, gender, occupation, education, computer knowledge & Internet use

From all the individuals in household, we asked the question

- Whether they have used PC
- Whether they have used Internet ever (on a PC, mobile phone, tablet)
- Whether they have accessed Internet in last one month (on a PC, mobile phone, tablet)

We identified those saying “Yes” to all the above as an Active Internet User. These Active Internet Users were administered the detailed interviews for Internet Usage.

Sample size of Households and Individuals covered for profiling

Town Class	Cities	HHs	Individuals
Top 4 Metros	Mumbai	5,239	1,340
	Delhi	5,246	1,432
	Kolkata	4,216	1,124
	Chennai	3,940	1,092
Next 4 Metros	Bangalore	2,889	888
	Hyderabad	2,609	696
	Ahmadabad	2,694	760
	Pune	2,750	736
Small Metros	Coimbatore	1,772	527
	Jaipur	1,907	505
	Lucknow	2,101	503
	Ludhiana	2,169	520
	Visakhapatnam	1,735	500
	Patna	1,715	470
	Guwahati	1,662	502
	Kochi	1,675	468
	Vadodara	1,920	503
	Indore	2,092	502
	Surat	1,709	526
	Nagpur	1,757	435
Non Metros	Aurangabad	1,950	500
	Belgaum	1,817	449
	Aligarh	2,266	454
	Bhubaneswar	1,321	374
	Raipur	1,907	454
Small Towns	Alappuzha	1,370	395
	Ujjain	1,617	403
	Berhampur	1,506	388
	Faizabad	1,983	406
	Panipat	1,513	395
	Ranaghat	1,434	396
	Baleshwar	1,564	398
	Pilibhit	1,815	399
	Amreli	1,564	400
	Chickmagalur	1,408	393
Total		76,832	20,233

Rural Segment

The syndicated research for the rural segment is based upon a primary research survey that interviewed about 15000 people from various age groups, across SECs and genders from the states of Assam, Maharashtra, Orissa, Tamil Nadu, Andhra Pradesh, Rajasthan and Uttar Pradesh.

Selection of States

Population Levels - States were divided in terms of their population levels. For appropriate representation, we selected states having high and medium populations.

Literacy - Literacy rates were examined for all the states and compared against the population. The states were divided and selected as having high, medium or low literacy levels.

Per Capita Income - States were segregated as having high, medium and low per capita income with respect to the population of these states.

Disadvantaged Groups - States were then compared on the basis of population of disadvantaged groups and urban population.

Factors	Uttar Pradesh	Maharashtra	Andhra Pradesh	Orissa	Assam	Tamil Nadu	Rajasthan
Population	High	High	High	Medium	Medium	High	Medium
Literacy Level	Low	High	Low	Medium	Medium	High	Low
Per Capita Income	Low	High	Medium	Low	Low	Medium	Low
Disadvantaged Groups	Medium	Low	Low	High	Low	Medium	Medium
Urban Population	Medium	High	Medium	Low	Low	High	Medium
Geographical Region	North	West	South	East	North - East	South	North

Tamil Nadu & Maharashtra have the highest literacy level among the higher population states. Similarly, Andhra Pradesh & UP have the lowest level of literacy in the high population states. Orissa has the highest no. of people among the medium population states which belong to disadvantaged groups. Per capita income of Maharashtra is the highest among the highly populated states. Similarly, UP has the lowest per capita income level in the high population states. Assam & Orissa also have low per capita income levels among the medium populated states. Assam & Orissa have the lowest urban population among the medium populated states.

About IMRB International and IAMAI

e-Technology Group | IMRB (a specialist unit of IMRB International) is a research based consultancy offering insights into IT, Internet, Telecom & emerging technology space. Our continuous link with industry and a constant eye on the pulse of the consumer ensures that we can decode the movements of technology markets & consumers. To our clients we offer an understanding of the present market environment and a roadmap for the future.

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About Internet and Mobile Association of India (IAMAI)

The Internet and Mobile Association of India [IAMAI] is a young and vibrant association with ambitions of representing the entire gamut of digital businesses in India. It was established in 2004 by the leading online publishers, but in the last eight years has come to effectively address the challenges facing the digital and online industry including mobile content and services, online publishing, mobile advertising, online advertising, ecommerce and mobile & digital payments among others.

Eight years after its establishment, the association is still the only professional industry body representing the online and mobile VAS industry in India. The association is registered under the Societies Act and is a recognised charity in Maharashtra. With a membership of 125 Indian and MNC companies, and offices in Delhi and Mumbai, are well placed to work towards charting a growth path for the digital industry in India.

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