

INTERNET IN INDIA 2014



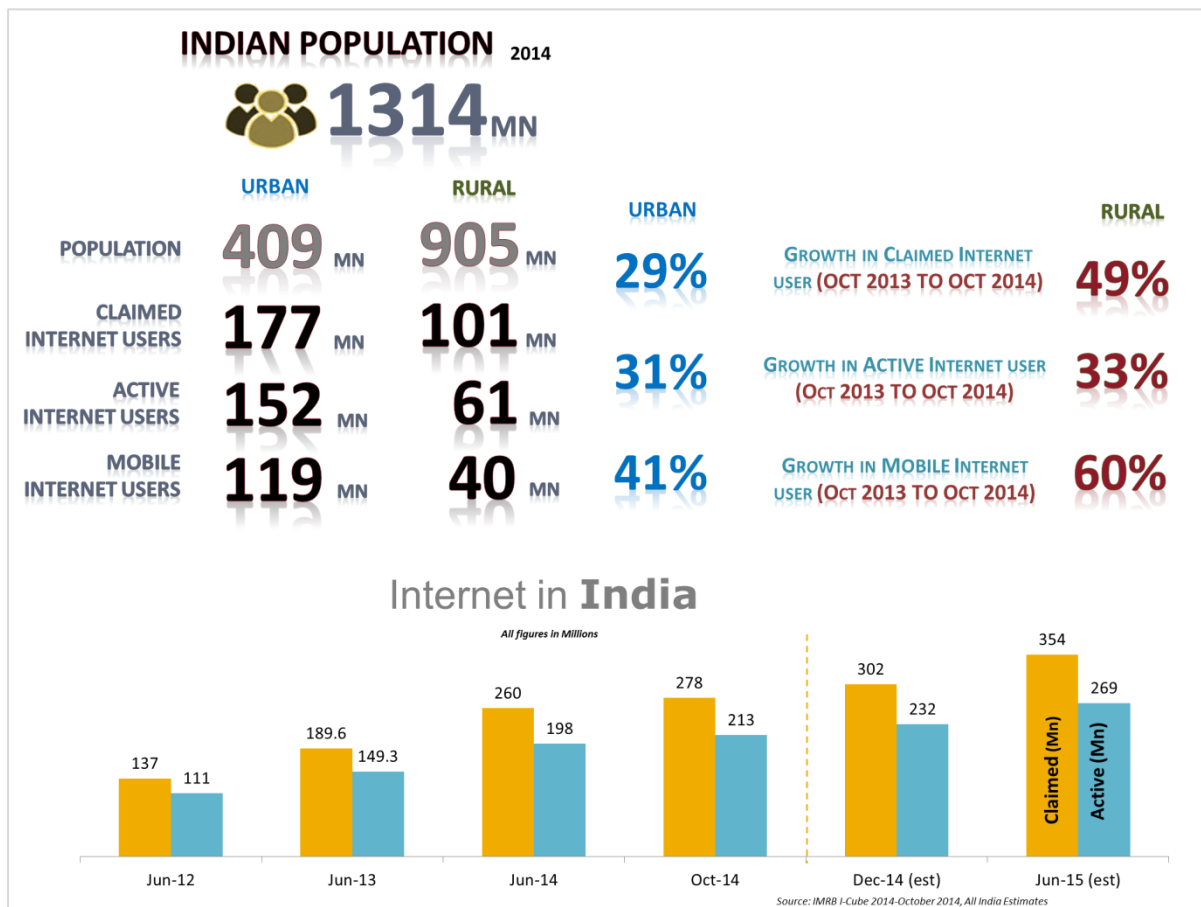
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Executive Summary

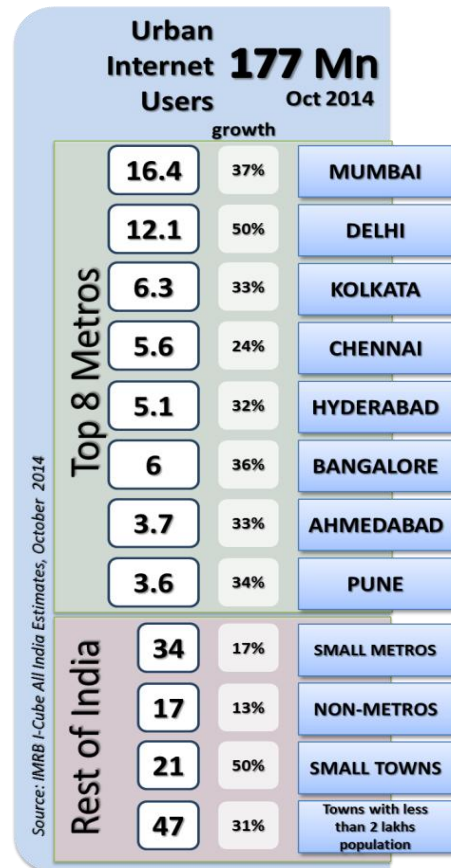
The latest research on 'Internet in India 2014', jointly conducted by IAMAI and IMRB International, finds that Internet usage in India has gone up by 32% from October 2013 to October 2014. Following are the details.

- As of October 2014, there were **278 Mn** Claimed Internet Users and is expected to reach **302 Mn** by **December 2014**.
- The number of Active Internet users was **213 Mn** as of **October 2014**, and is expected to reach **232 Mn** by **December 2014** and **269 Mn** by **June 2015**.
- Claimed Internet Users in urban cities has grown by **29%** from **October 2013** to reach **177 Mn** in **October 2014**. It is expected to reach **190 Mn** by **December 2014** and **216 Mn** by **June 2015**.
- As of October 2014, there were **152 Mn** Active Internet Users in Urban India, registering an increase of **31%** from October 2013.
- Compared to last year, Claimed Internet Users have increase by **39%** in rural India to reach **101 Mn** in **October 2014**. It is expected to reach **112 Mn** by **December 2014** and **138 Mn** by **June 2015**.
- Also there were **61 Mn** Active Internet Users in Rural India as of October 2014, increasing by **33%** from **October 2013**. It is estimated to reach **69 Mn** by **December 2014** and **81 Mn** by **June 2015**.



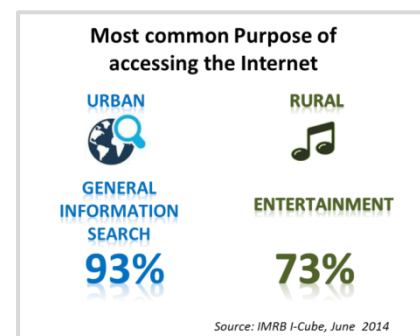
Key highlights on Urban Segment -

- The most encouraging aspect is that **Computer Literacy** in Urban India has grown by **44%** in the last one year. As of October 2014, there are **279 Mn** PC Literates in Urban India.
 - The primary reasons could be that institutions of all nature (schools, corporates or others) have included computers as part of their daily routine.
- Like last year, College going students account for the largest set of Active Internet Users. Proportion of College Going Students to the total Active Internet User base is **30%**. Overall growth of female users across demographic groups has increased by 30% from last year, which is higher than the growth among males.
- We are also witnessing a change in the devices used to access the Internet with more and more users active through mobile devices.
 - A striking point to note here is that in smaller towns the preferred device happens to be mobile devices. It is only in larger metros and higher SEC do we see an almost an equal dependence on computers as well as mobile devices.
- 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 two-thirds access the Internet for the sake of **Entertainment**.
- Nearly **60%** of the Internet users access Internet on a daily basis. This daily user base has gone up by **51%** from 2013.
- Internet users of **Top 4 Metros** account for 23% of the total size. Although Mumbai has the largest base of Claimed Internet users, Delhi has shown a significant 50% increase in the Internet user base from October 2014. Small metros constitute 19% of the total size and Surat is the city with highest Internet penetration.
- In 35 Cities, only **4.3%** of the Active Internet users access Internet in Local languages. **49%** of them access Internet in Hindi.



Key highlights on Rural Segment -

- Approximately **65%** of Active Internet users are observed to be accessing Internet **at least once a week**.
- Nearly 75%** Active internet users access Internet through Mobile Phones.



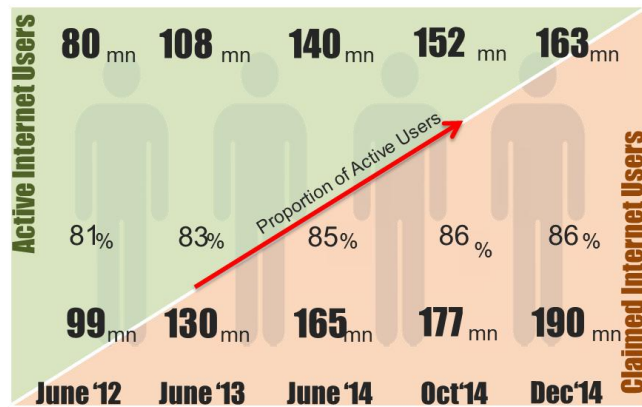
- **Entertainment** is observed to be the main purpose of accessing the Internet. Majority of the users like access Music, Videos, Photos and Movies for Entertainment. Whereas, Online Transaction is still an area about which the population needs to be educated since only **17%** are seen **conducting online transactions**.
- **49%** access the Internet in Community service centers/ Cyber cafes/ Public Internet Access spots followed by 48% accessing Internet through Mobile.
- 85% of the Active Internet users in 7 states under consideration access Internet in English. Hindi is the main language of accessing Internet among 21% of the Active Internet users.
- Primary reason for not accessing the Internet is lack of awareness among the non-users located in rural villages.

Key highlights on Mobile Internet usage

- Mobile Internet has garnered a substantial base among the Internet Users. As of **October 2014**, there are **159 Mn** Mobile Internet users and it is expected to grow to **173 Mn** by **December 2014**.
- In **Urban India**, there are **101 Mn** Mobile Internet users as of October 2014 having grown by **56%** from October 2013 and it is estimated to reach **128 Mn** by December 2014.
- **Rural India** has a base of **40 Mn** Mobile Internet users in October 2014 and is expected to reach **45 Mn** by **December 2014**.

1. Internet in India

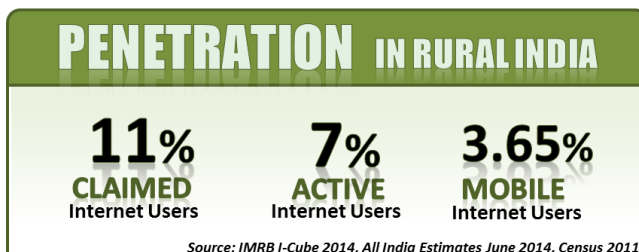
Urban India, as of October 2014, had 280 Mn people who claim that they know how to use a computer. Out of this, 177 Mn claim that they have used Internet at least once in past. From the set of Claimed Internet Users, 86% are Active Internet users who have used the Internet at least once in the past one month. The ratio of Active Internet Users to Claimed Internet user has been growing significantly in the past few years.



Source: I-Cube All India Urban Estimates, October 2014

As of October 2014, there were 137.2 Mn Computer literates in Rural India. Of these users, 101 Mn users were Claimed Internet users who have used Internet at least once in their lives. 61 Mn users are Active Internet Users who access Internet at least once a month.

With Rural India's rapid adoption of the mobile phone technology it is very clear that rural segment has been very open to this wireless technology wave. Mobile phone companies and telecom operators are observed putting in efforts to interpret this fast emerging market, in order to monetize this growth. With mobile phones becoming cheaper & data/voice plans available at affordable rates, the penetration of mobile devices in Rural India is increasing tremendously.



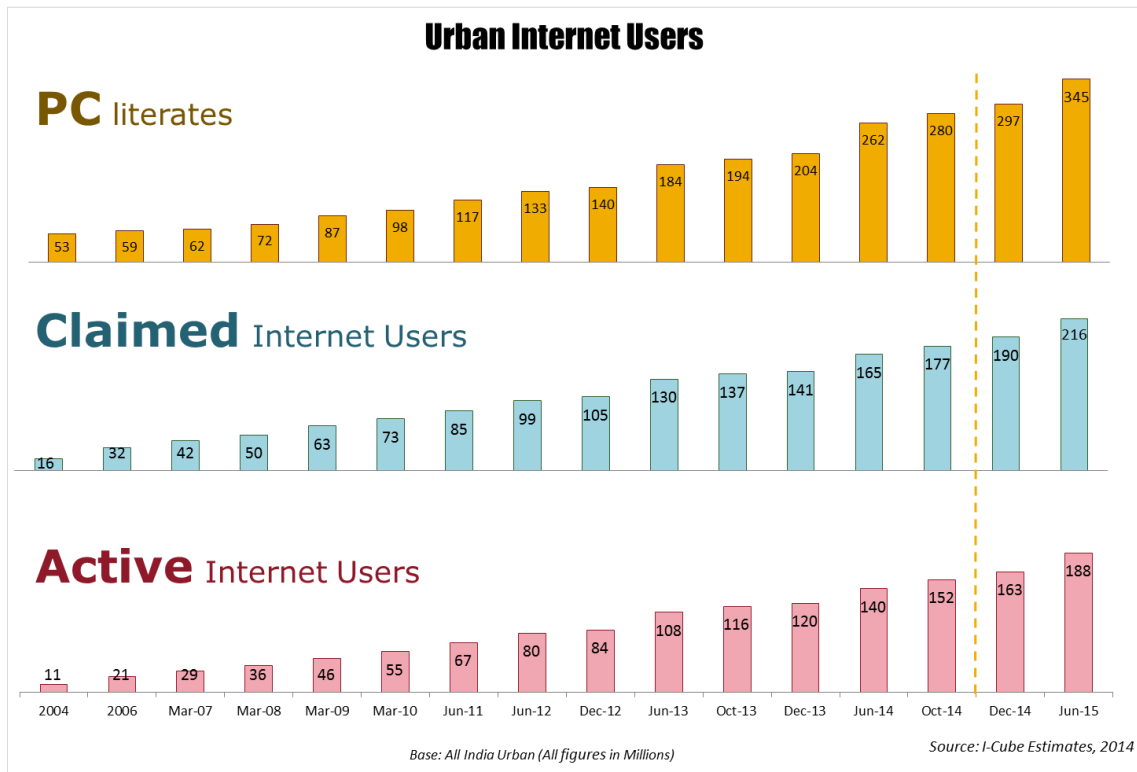
The penetration of claimed Internet users in rural India is 11% in October 2014. Thanks to the fast emerging communication category, the penetration of Active Internet users has grown from 3.7% in 2012 to 4.6% in 2013 and then to 7% in 2014. This translates into majority of rural families owning at least one

Internet enabled mobile phone.

Mobile usage and hence, mobile Internet usage observed huge jump from the 2012 penetration levels. Compared to the 21 Mn Active Mobile Internet Users in 2013, the user base has grown by 25%, indicating a substantial growth in the mobile Internet user penetration levels.

a. Growth in the Internet Usage

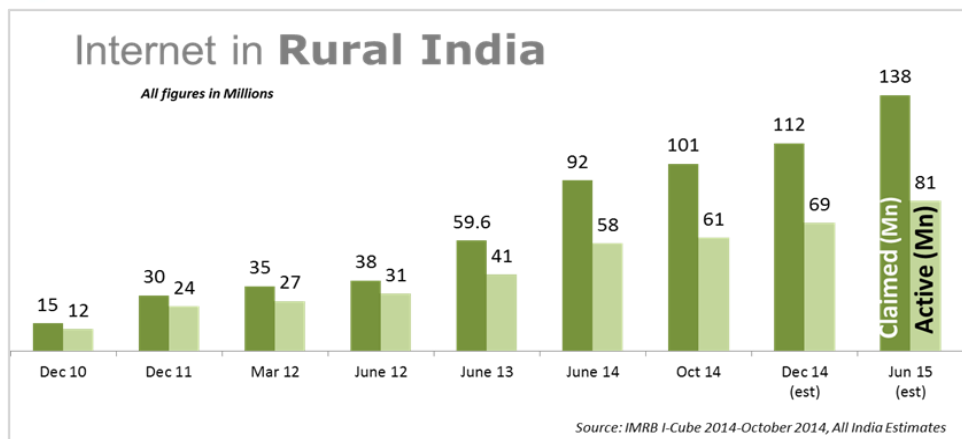
We have witnessed a huge leap in PC Literacy in both Urban and Rural India the reasons of which can be attributed to the increased impetus on computer education in schools, colleges and offices.



In Urban India, around one out of every two individuals is computer literate. As of October 2014, there were 177 Mn Claimed Internet Users and this figure should touch 190 Mn by December 2014. The Active Internet User base has grown by 31% from Oct 2013 to reach 152 Mn by October 2014. It is expected to grow at 7% to reach user base of 163 Mn by December 2014.

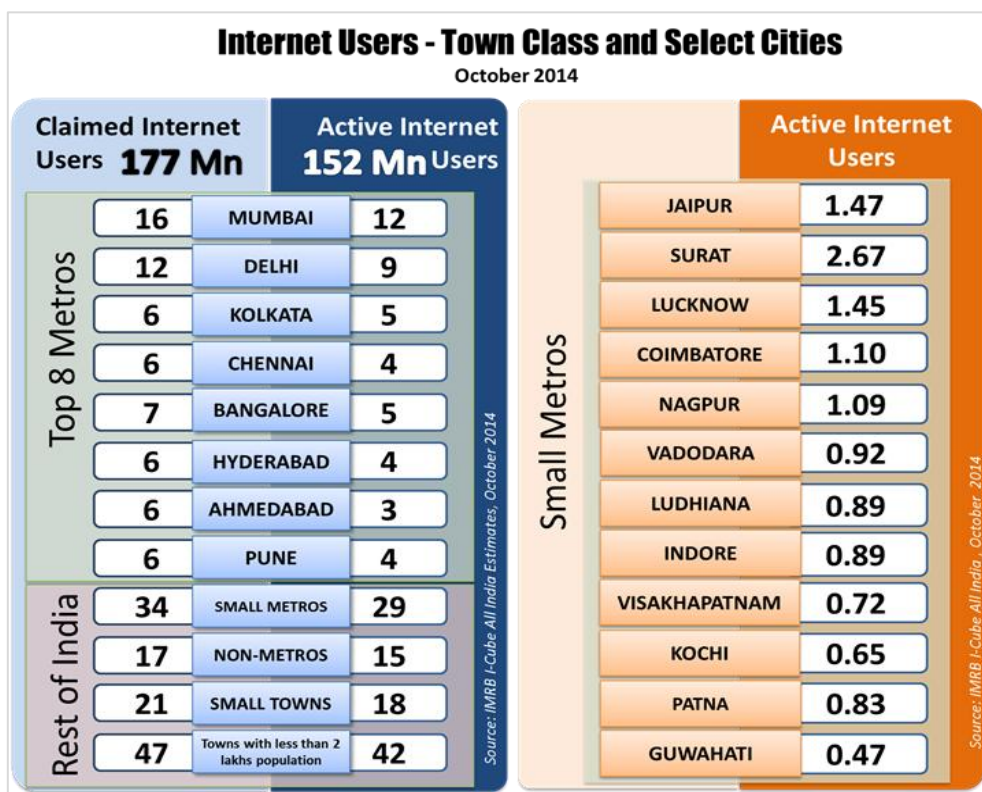
In Urban India, out of all the Internet non-users surveyed in the 35 cities as part of this study, 47% Non-Users are willing to access the Internet in the next one year and the majority of them intend to do so through Desktop PCs or Laptops.

Rural India has shown 49 % growth in the claimed Internet user base from October 2013. By October 2014 the Claimed Internet user base had reached 101 Mn and it is expected to reach 112 Mn by Dec 2014 and 138 Mn by June 2015. From October 2013, Active Internet user base in Rural has grown by 33% to reach 61 Mn by October 2014. With usage of Mobile phones to access Internet and increasing number of Community Service Centers (CSCs), the Active Internet User base is expected to grow to reach 69 Mn by Dec'14 and 81 Mn by June 2015.



2. Internet users across Urban Cities and Town class

Penetration of Claimed Internet Users is highest in Mumbai at 16 Mn followed by Delhi among Top 8 metros. However, Claimed Internet Users in Delhi have gone up by 50% which is the highest among Top 8 metros. Overall the top 4 metros have a 20% penetration of Active Internet Users.

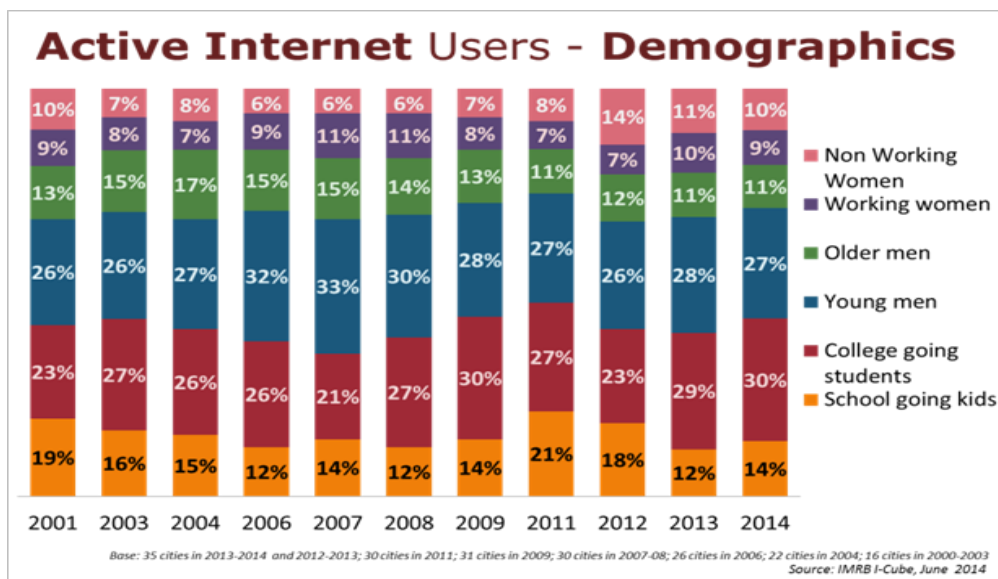


3. Demographics

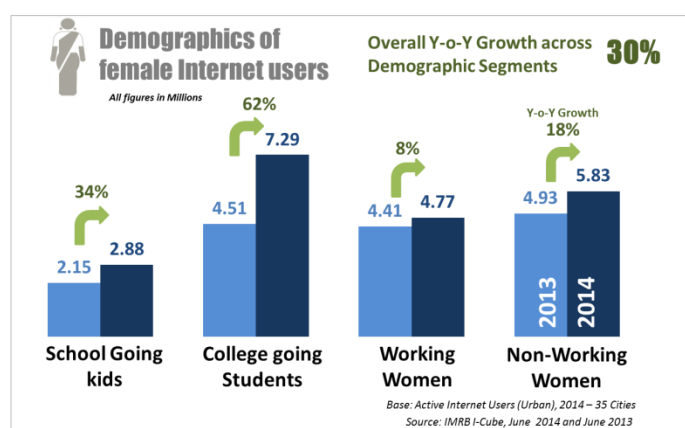
30% of the Active Internet Users are College Going Students. The overall base of this segment has grown by 33%. There are various factors which have been instrumental in sustaining this pattern and ensuring a significant growth in the user base. The major ones are the increase in mass media exposure, penetration of Smartphones/Handheld devices and also the rising number of social networking apps targeting the youth.

College Going Students
Active internet usage **30%**

Base: Active Internet Users (Urban), 2014 – 35 Cities
Source: IMRB I-Cube, June 2014



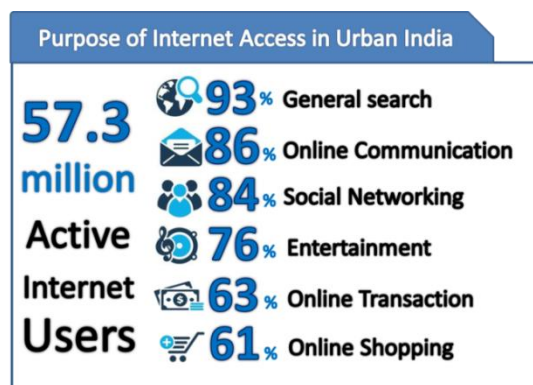
There has been a higher growth among females than males in this round of I-Cube survey (June 2014). As per the findings from the 35 cities where the survey was conducted, the number of females in Active Internet users has increased by 30% to reach nearly 21 Mn. This growth is slightly lower among males, which has shown a 25% growth and has reached 36.6 Mn as of June 2014. Internet users among college going girls have increased by 62% to reach 7.29 Mn. The segment of school going girls has also depicted a growth of 34% in these cities. Internet users among non-working women have grown by 18% to reach 5.8 Mn. However, the growth is lower among working women when compared to other demographic groups.



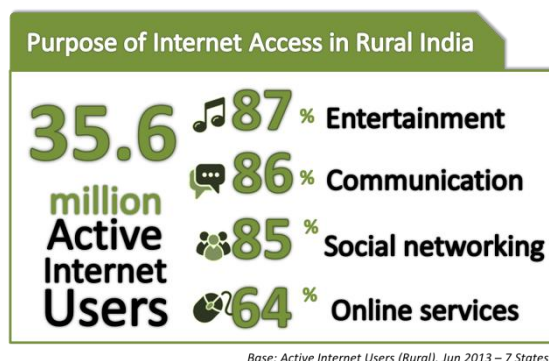
4. Purposes of accessing Internet

Of all the Active Internet Users surveyed, it has emerged that for close to 93% of the respondents, the prime use of Internet is General Information search followed by Online Communication accessed by 86% of the Active Internet users.

84% of the Active Internet Users access Social Networking sites. With the introduction of online shopping websites and applications, 61% of the Active Internet Users are accessing the Internet for purchasing products online. 63% of the users access the Internet for Online transactions which primarily involve online banking, payment of utility bills etc.



Among the Rural Active Internet User, Entertainment is observed to be the most common purpose in accessing the Internet and 83% of them have accessed the content related to entertainment. Music is the most accessed content followed by Photos and Videos. Downloads of various Mobile Value Added Services is also as a source of entertainment. More users are accessing the entertainment contents through their Mobile phones than Desktop PCs or Laptops.



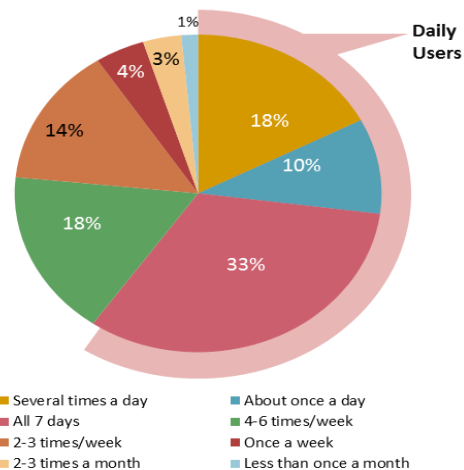
Online Communication and Social Networking are observed to be the second most accessed purpose of accessing the Internet for Rural India. Within the Online Communication category, E-mail continues to be the most common reason for using the Internet which is accessed by 76% of the Active Internet users. Compared to last year, the usage of Social Networking is observed to be higher in 2014. Majority are using Social networking through Desktops and Laptops while usage through Mobile applications is also growing year on year. 64% of the users are accessing Online Services. Also usage of this category of purpose is more through Mobile Phones than Desktop PC/Laptops. Searching for Information, Online News and Online Job sites are more commonly and frequently accessed over other services. Access of Internet to shop Online or Making transactions may be lesser than the previously mentioned services among Active Internet Users; these services possess greater potential of growth among the users.

5. Frequency of Internet Access in Urban India

Urban India has witnessed a huge growth in the number of people accessing Internet on a daily basis. As of June 2014, **61% of the Active Internet Users (31.5 Mn Internet users in 35 urban cities) were using Internet on a daily basis. This Daily user base has gone up by 51% from June 2013.**

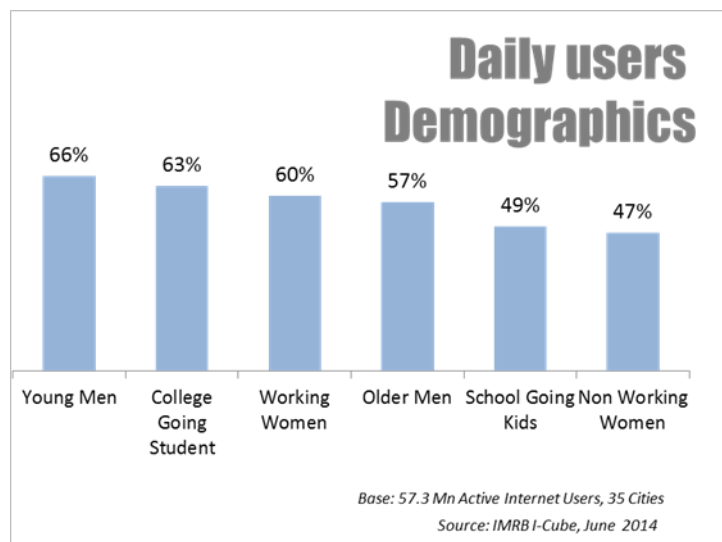
A remarkable point to note is that this high frequency usage is not restricted to only the youth and the College going students; this habit of accessing the Internet daily can be seen among other demographic segments as well including Older Men and Non-Working Women. **60% of the Working Women who are Active Internet users access Internet daily.**

Frequency of Access



Base: 52.5 Mn Active Internet Users, 35 Cities
Source: IMRB I-Cube, June 2014

Daily users Demographics



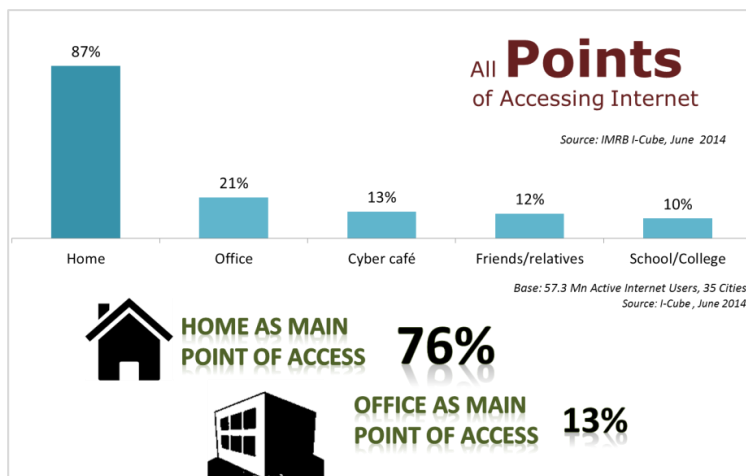
Base: 57.3 Mn Active Internet Users, 35 Cities
Source: IMRB I-Cube, June 2014

6. Points of Internet Access

The primary point of access for most of the Active Internet User is their home. 87% of the Active Internet Users access the Internet at their Home followed by Office. Of these, 76% of the users who access the Internet at their home indicate that it is their main place or point of Access.

Apart from communication, entertainment and relaxation is the major purpose for accessing the Internet at home.

All Points of Accessing Internet



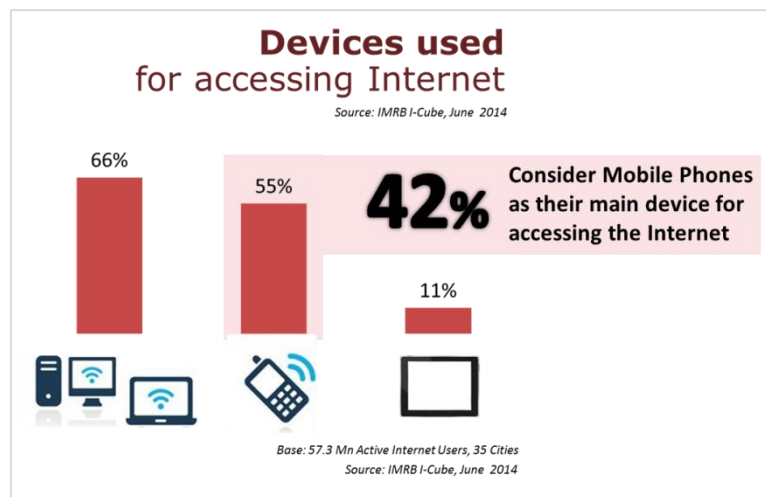
Base: 57.3 Mn Active Internet Users, 35 Cities
Source: I-Cube, June 2014

21% are using Internet at their office where the primary function is the Official Communications. 89% of the Active Internet users whose main place of access is at Office use Internet for email communications.

Laptops and mobile devices 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 always. 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.

7. Device used for Internet Access in Urban India

66% of the Active Internet Users are accessing internet through Desktop PCs or Laptops followed by Mobile Phones (55%). Among those who are accessing Internet through Mobile Phones, 42% consider the mobile phones as their Primary device for accessing the Internet.



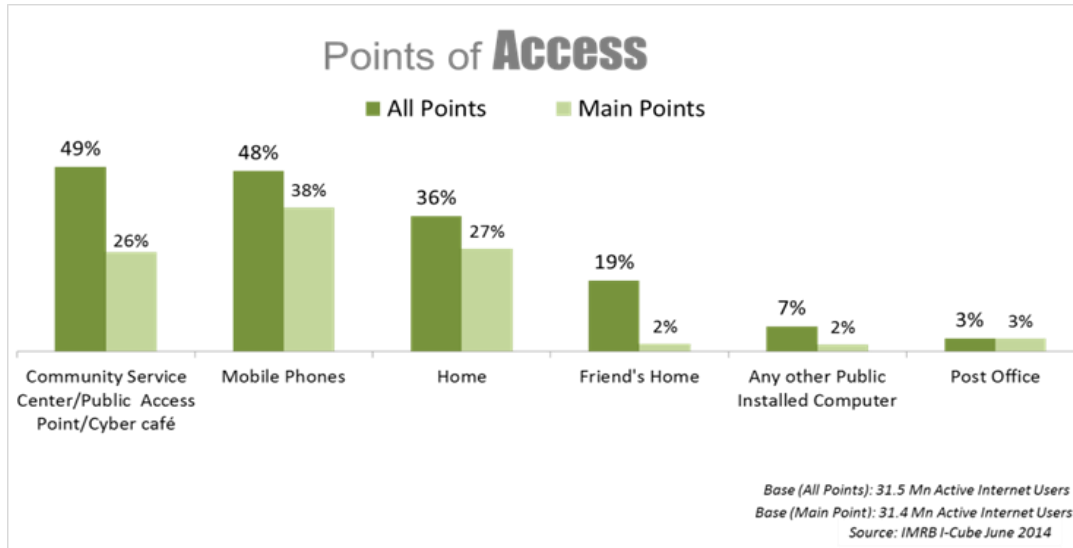
Devices usage pattern across demographic segments draws following Insights –

- Mobile phones are the most common device to access the Internet among Non-Working Women. 51% of these users consider this as the primary device for accessing the Internet.
- 18% of the Working women accesses Internet through Tablet PC. 16% of Active Internet Users of this segment use Tablet PC as the primary device for accessing Internet.
- Desktop and Laptop are the primary devices for accessing the Internet among College going students, Young and older men and School going kids.

Different mobile handset manufacturers have focused on introducing low priced handsets and tablets compatible to access the Internet. More and more companies are getting into this segment and this has resulted in competition primarily basis the retail price and features 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.

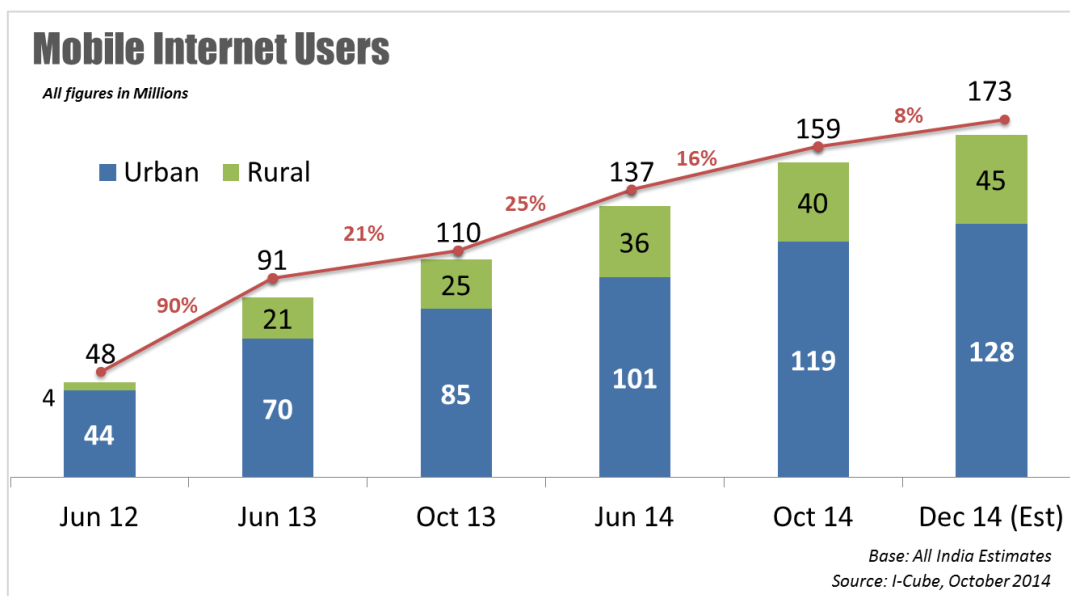
In Rural India, nearly 50% of the Active Internet population access Internet using mobile phones, Community Service Centers (CSC) and Cyber Cafes. 38% of the Active Internet Users use Mobile phone as the main access Point.

This is mainly because of the lack of 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.



8. Mobile Internet

Mobile Internet has made its way into the lives of the Internet users in a big way. Mobile Internet, as of October 2014, had a penetration of 29% in Urban India. For many, Mobile Internet connection has become the most common way of accessing Internet. According to the numbers estimated for December 2014, there will be 173 Mn Mobile Internet users in India.



Mobile phones are also enablers of Internet among Rural population. There are 40 Mn Active Mobile Internet Users in Rural India in October 2014. There has been a growth of 60% in the user base from October 2013. It is estimated that there will be 45 Mn by December 2014.

The availability of value-for-money Internet plans is one of the reasons instrumental for this exponential rise in numbers. Also, with a slew of mobile phone companies offering handsets at low 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.

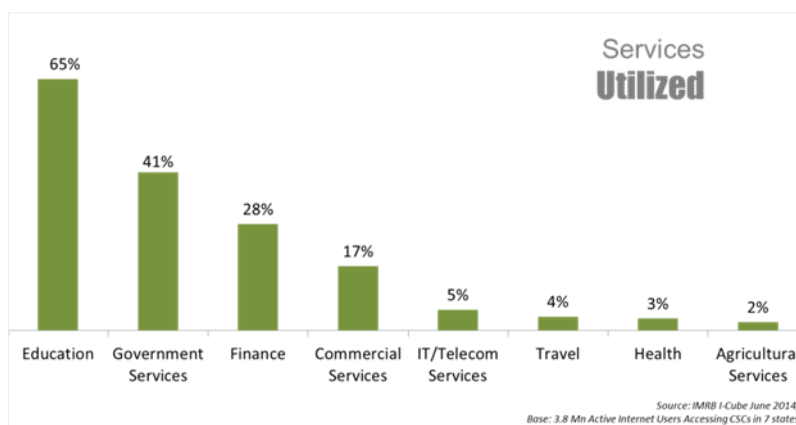
9. Community Service Centres

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 (CSC)/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. 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.

52% have used facilities at a CSC. Education is the most common forms of service they have opted for. 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.



Satisfaction with Community Service Centers

Satisfied
with service obtained from
CSC

83%

Source: IMRB I-Cube, June 2014

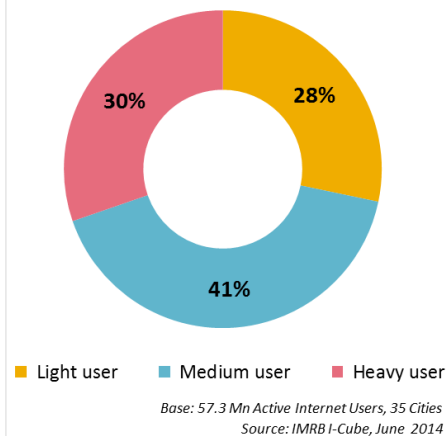
Most CSC users are largely satisfied with the services they avail with over a third of them using CSC for Government Services and Education.

10. Heaviness of Internet Access

Increase in the frequency of access Internet is coupled with the increase in the duration of access. Last year nearly 55% of the Active internet users were accessing the Internet somewhere between 7-32 hours a week while this year approximately 41% Active Internet Users access the Internet for 10-44 hours a week. Average Daily usage has gone up by 10% from 2013 to reach 226 minutes in 2014. This is a clear indication that the dependence on Internet (work related as well as personal) has gone up.

People are spending more time on the Internet than ever before. Based on the heaviness of accessing the Internet the users can be classified as Light, Medium and Heavy users. Light users can be classified as those who are accessing Internet for less than 10 hours a day, Medium users accesses Internet for 10 to 44 hours a week and Heavy users access Internet for more than 44 hours a week. Close to 30% of the users access Internet for more than 44 hrs. 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.

Heaviness of Access



Daily Minutes of Internet Usage

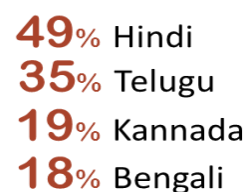


11. Language of Internet access in Urban India

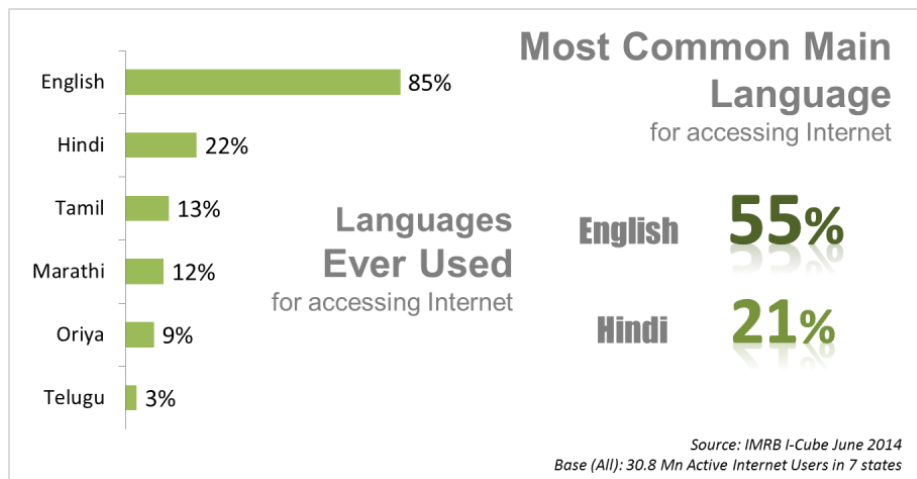
In urban India, the Internet is mainly accessed in English. The main reason can be stated as the most of the contents are available in English. Apart from English, 4.3% Active Internet users access contents in Local Languages in 35 cities. Hindi is the most common language of accessing contents followed by Telugu.

Languages Used

Base: 2.4 Mn Users who accessed Internet in Local Language



In 7 states taken into consideration for I Cube 2014 Rural, 85% of the Active Internet Users are accessing Internet 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. A significant portion of the Active Internet users in Rural are not so comfortable accessing this medium in English and this is holding them back from using Internet fully for other purposes than online entertainment.



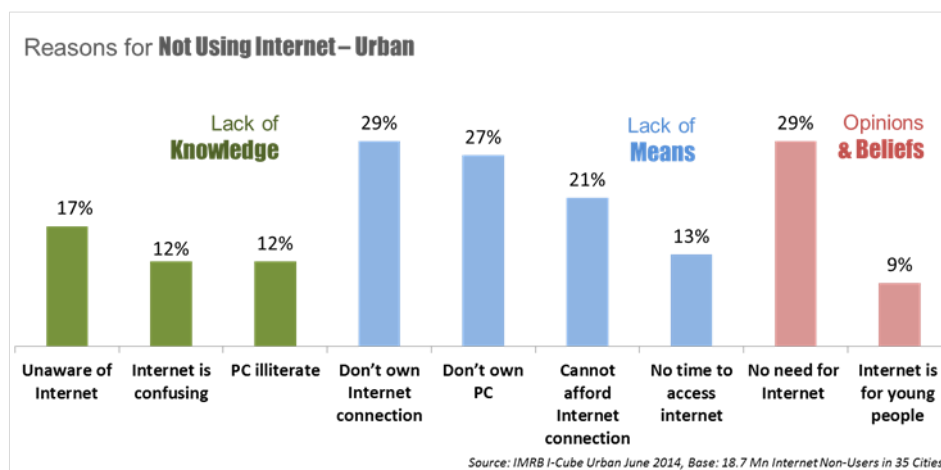
Nearly 45% people prefer accessing Internet only in Local languages out of which 21% are accessing contents in Hindi. With more content becoming available in the local languages, more users will start using the Internet.

12. Behavior of Internet non-users – Urban and Rural India

Among the non-users of Internet, the reasons behind not accessing Internet services can be grouped into following categories:

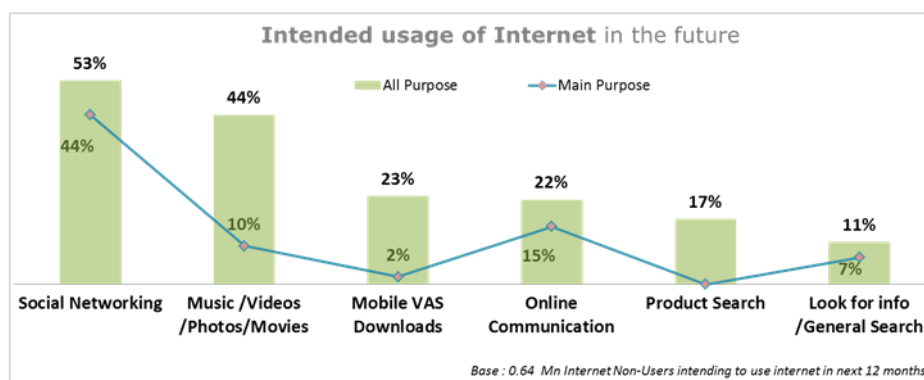
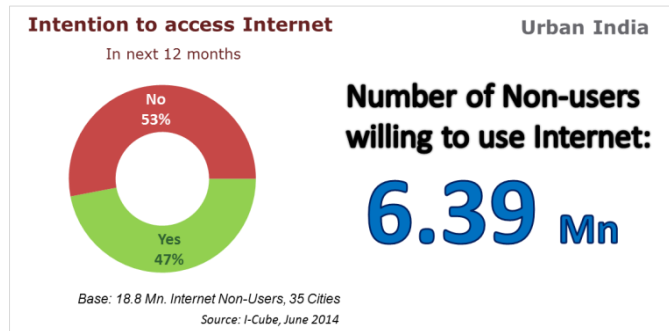
- Lack of Knowledge of Internet
- Lack of Means (or infrastructure)
- Beliefs (the Opinions held by the non-users)

“Lack of means” is the main category of reasons for not using Internet among the non-users in Urban India. 29% of the non-users of Internet in Urban India do not own an Internet connection at their household followed by 27% who do not own a PC in their Household.



Nearly 30% believe that they do not require Internet which is also pulling down the usage of Internet among the Urban Crowd. Although there has been a significant growth in the user base across 35 urban cities in India, 17% of the users are still unaware of Internet and 125 are still unaware of PC.

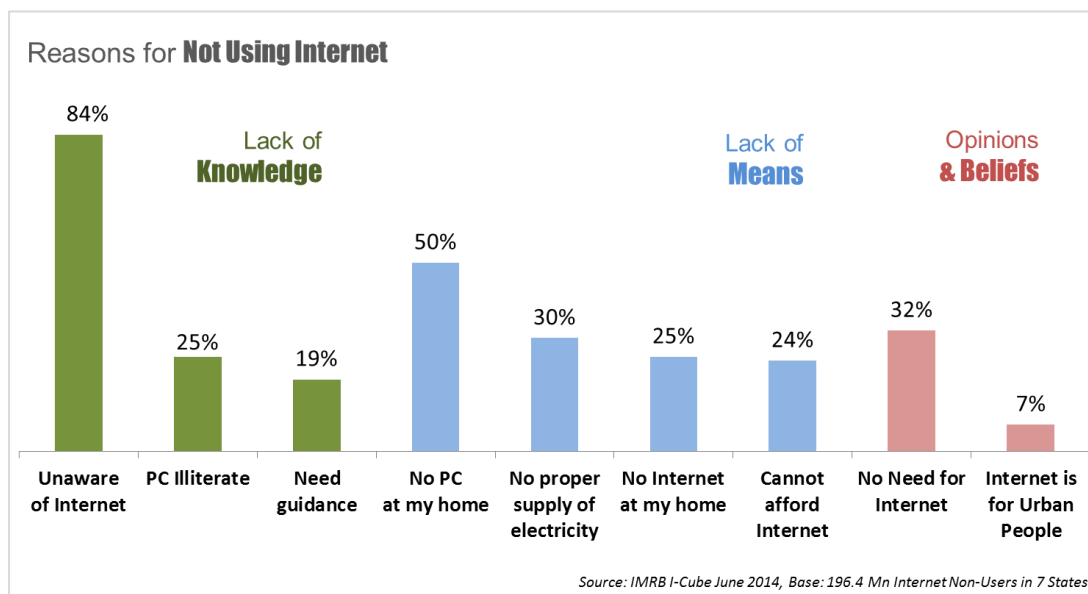
As we have discussed earlier also, out of all the Internet non-users surveyed in the 35 cities as part of this study, 47% Non-Users are willing to access the Internet in the next one year and the majority of them intend to do so through Desktop PCs or Laptops. 34% of the Intenders are willing to access Internet through Mobile Phones. Social networking will be the most common and main usage intension for accessing the Internet followed by Entertainment.



In Rural India, Internet unawareness continues to be the primary reason why people do not access Internet in Rural India. 84% are affected by the same. Also, nearly one-third cited the inability to operate a computer.

Lack of Infrastructure is the second most important factor for not using the Internet.

- Majority of the non-users claim that they do not have sufficient infrastructure i.e. a PC or an Internet connection at home.
- Like the last year, lack of electricity supply and power failure is one of the main reasons for not owning or accessing the Internet.



32% of the non-users in Rural India still foresee that there is no need for accessing the Internet. Also non-users of Internet belief that it is not a good medium and is a Luxury 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 harvest from accessing the Internet.

Annexure: Study Methodology, Demographic Segments and Sampling Procedures

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.

The survey was conducted in 35 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

Demographic Segments

Below are the Demographic segments covered in this research –

Demographic Segments	Definition
School-Going Kids	Kids below 18 years of age who are attending or completed school education and not attending college
College Going Students	Students above the age of 16 years studying in college or university
Young Men	Working men aged between 19-35 years
Older Men	Men above 35 years of age who might be working or not working
Working Women	Working women aged more than 19 years
Non-Working Women	Non-Working women aged more than 19 years

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.

Rural Segment

The syndicated research for the rural segment is based upon a primary research survey that interviewed about 5000 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 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 ten 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.

Ten 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 recognized charity in Maharashtra. With a membership of 160 plus Indian and MNC companies, and offices in Delhi, Mumbai and Bangalore, it is well placed to work towards charting a growth path for the digital industry in India.

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e-Tech 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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