Social Media in India - 2013

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Executive Summary

Social Media in India continues to evolve as a mature digital medium. Besides connecting various people in a friendly setting, it is continuing to evolve as a core component of a digital advertiser’s budget.

As per IMRB International’s I-Cube 2013, the number of social media users in Urban India reached 78 Million (Mn) by June 2013. The report estimates that the number of social media users by October 2013 will be 86 Mn and by December 2013, will be 91 Mn, showing an overall growth of 17% since June 2013.

Facebook continues to lead the social media space with over 70 Mn social media users in Urban India, which is about 90% of the social media user base. Twitter, on the other hand continues to make a mark, enabling the common man to connect with vivid personalities from different strata of life i.e. from politics, sports, cinema, mainstream media and so on. Essentially, people are better able to share their viewpoints on platforms that are influencing various categories of Indian citizens. Therefore, social media is widely expected to create some favorable impact as far as upcoming Lok Sabha elections in India are concerned. While some of the individuals interviewed are very upbeat about the medium, others have maintained their reservations. The key concern has been in terms of social media influencing a wider spectrum of individuals, and therefore its ability to sway election results in anyway. Yet, there is consensus that social media is expected to mould sentiments to some extent.

Highlights from the I-Cube 2013 Social Media survey in the top 35 Indian Cities (by June 2013)

- The number of social media users in Urban India reached 78 Million (Mn) by June 2013 and are estimated to be 91 Million by December 2013.
- “Non-Working Women” is observed to be the next emerging demographic segment with nearly 10% (across various Townclasses) of them accessing social media, this finding is certainly worth noting
- Facebook is the leading website accessed by 96% of all social media users and it is most accessed to connect with friends, publishing / sharing content and searching contacts
- Sharing/Publishing Content & Joining Communities are the main motivators of accessing Twitter
- 19.8 Mn access Social media on their mobile phones
- Social Media is increasingly used by political institutions
  - 2-5% of Election budgets are estimated to be spent on social media initiatives
  - Small-scale campaign responsibilities are usually outsourced by the political parties, whereas, critical election campaigns are managed in-house by the party experts
3-4% vote swing is estimated to be achieved amongst the social media users in India.

The rise in the number of social networking users can be attributed to the rising Internet penetration due to increasing affordability of smart phones, feature phones as well as the cost effective Internet data plans that are available.

Overview of Social Media in India

Penetration of Social Networking (All India)

The current edition of the study provides social media usage & behaviour of individuals from Urban India. As per the findings, as of June 2013, 74% (or 78 Mn individuals) have accessed / used some form of social networking. They may have accessed social media using a personal computer (PC), laptop or even a mobile device, as the illustration suggests.

When considering the 35 cities in India, the proportion of social media users rises to (75%), and ranks only after Online Communication (89%).
Social networking through mobile phones is widely observed today. In the 35 Urban cities surveyed, there are 19.8 Mn users actively accessing Social Media on mobiles. With mobile penetrations reaching very high levels, and an increasing number of individuals owning feature-rich or even smartphones that allow Internet access, social networking is rapidly penetrating the India Internet user base across length and breadth of India. Affordable mobile Internet plans additionally serve to increase usage levels.

**Social Networking Profile Amongst TownClasses**

As per the findings of the survey, the highest proportion of social media usage in the Top 4 Metros & the Non Metros was observed among the demographic segment “Young Men” with 30% and 26% penetration levels respectively.

This is an interesting finding, indicating that younger women are increasingly hooked on to social media. Whereas, in the Other Metros & Small Metros, demographic segment “College Going Students” show the highest proportion of social media usage. Interestingly, “Working Women” demographic segment is observed having the lowest proportion of social media usage in Other, Small & Non-Metros whereas they show a moderate proportion of social media usage in the Top 4 Metros.
Social Media Usage Behaviour

Facebook on Top of the List

The top websites used by Social Media users are seen in the adjoining figure. Facebook is used by 96% of all Social Media users, whereas Google Plus, Orkut and Twitter take the next places interestingly.

Other sites such as Ibibo and LinkedIn constitute the other important social media sites in India.

Frequent Activities Done on Social Media Sites

Maintaining profiles, updating status and blogging, tweeting are some of the frequently done activities on social media sites.
Triggers for Using Top Social Media Sites

The triggers that activities done on top social media sites such as Facebook and Twitter have been showcased in the figures below.

As per I-Cube 2013 survey in 35 Cities, there were **13.4 Mn users who visited Twitter**. On further data investigation, it is observed that Sharing/Publishing Content and Joining Communities are the main motivators of accessing Twitter.

On the similar lines, out of a comparatively higher base of **32.4 Mn users who visited Facebook**, it was revealed that Facebook is not used as much for joining communities, which is done by only 14% individuals. Rather at present, it is most accessed to connect with friends, publishing / sharing content and searching contacts. Facebook is also proving an effective platform when comes to discussing various incidences/topics with others.

Interestingly, it has been observed that as compared to Facebook, Twitter works well for extrovert individuals who prefer sharing their opinions regarding issues on various communities. It is also seen as a mainstream platform for conversation and hence with the forthcoming elections it could act as an effective website for campaigning and opposition.
Social Media & Political Elections - The Equation

The moot question which has triggered various responses from stakeholders is “How is social media expected to influence upcoming Indian Lok Sabha elections in 2014”? While some were very upbeat about the media type, others are cautious in forming their opinion. Having said that, there was general consensus that social media is likely to assist or help a political campaign rather than do any harm. In a nutshell, social media is expected not only to get important communication across but also reach a wide spectrum of individuals belonging to various parts of India, and having differing demographic characteristics.

With rising Internet penetration in India, especially due to adoption through mobile phones, social media is likely to influence a sizeable number of Indian voters in some way or the other. Internet users are in turn likely to persuade other non-Internet users to align themselves to a particular political ideology. Therefore, the expected impact is also wide in terms of reach. Of course, in terms of the absolute impact, it is difficult to say with confidence, since it is the first occurrence when social media will be used actively for political gains.

Objectives of Social Media

Realizing the power of the medium, political parties consider social media to serve multiple objectives. The first and foremost objective is connecting directly with the Indian voter, in an interactive framework. The medium is considered the easiest and most cost effective manner that a party can propagate its message. Essentially, if the message strikes a chord with the individual, he or she is likely to share that message with his family, friends, colleagues and so on. A domino effect can be created with this medium. Digital media strategists are banking on such aspects to make an overall difference in terms of seats won or lost. According to IMRB estimates, investing in various social media initiatives could lead to a vote swing of around 3-4% among the social media users in the country.

The political party’s website acts as a central source of information. Social media helps draw traffic to the website, and thereby share information, content and viewpoints shared by the respective party. Moreover, reactions to proposed views and plans are conveniently sought through this medium. People can reach out to influential individuals such as politicians themselves, editors of large magazines or publications and so on.
Social Media – How is it all done?

So in the lead up to the elections, how is the social media strategy likely to be or change? For one, there will be various social media campaigns that will be planned just before the elections. The end objective of these campaigns will of course be to convert a competition voter to an own-party voter. At the same time, an own-party voter needs to be reassured by sending a consistent message right till the voting day to ensure that he or she stays a loyal supporter of the political party.

At the current moment, with elections a few months away, the main objective is engaging with voters and ensuring a trustworthy message gets across. It is also important to acknowledge the main concerns that voters have.

Early this year, few public figures had interacted with the public through multi-person video chat, Google Hangout. They had used this tech-savvy route to discuss various policy issues with the public, to answer public queries on budget, five year plan etc. where the main motive was to interact with the general public.

Political parties on their part, usually have an official social media page / account by which they communicate to the Indian netizen. Some parties also have accounts operated by senior party leaders. And the small scale activities/campaigns are usually outsourced to a small group of professionals whereas the larger campaign responsibilities are handled in-house by the experts. The content is moderated by various party volunteers operating the account, i.e. the party leaders and volunteers themselves are expected to be responsible and communicate something that is inline with the party’s overall communication strategy and ideology.

As part of the social media strategy, the central wing of the party usually shares their viewpoints on larger issues whereas the regional bodies can address and target local people by discussing local issues. The communication is such that people are naturally inclined to react to the content posted. This helps in building engagement with the relevant individuals. Also, as part of the digital strategy, there is reliance on various websites & mobile apps to meet the end goals.

Speaking about the spends, the political parties usually aim at spending not round the year but during the time of the elections. Most of them strategize to spend relatively higher amounts on campaigning with the elections approaching.
**Social Media Spends & Measuring ROI on Social Media**

Political institutions usually are seen spending around 2-5% of their huge election budgets on social media. On the other hand, the corporates have been spending nearly 13%\(^1\) of their digital advertising budget on social media in FY 2012-2013. This has increased since FY 2011-12 wherein the spends on social media contributed to 10% of their digital advertising budget.

In terms of measuring “ROI” i.e. return on investment, the easiest measurable attribute is the number of “Likes” on Facebook or the number of “Followers” on Twitter that the political party or individual has. This is an objective term that broadly indicates popularity of that individual or party, and can be tracked over a period of time. Besides this, the number of constructive discussions in various forums will eventually provide a sense of the engagement with various voters. A political party of course needs to definitely bear in mind the number of likes / followers or the number of discussions that its competition enjoys to know where it stands.

Of course, the main investment in digital and social media is that of time of party volunteers. Basis various interviews that were done as part of the report, absolute number is not the primary aspect for measuring ROI. However, changing people’s mindsets, increasing awareness and gaining broader acceptance are the important objectives that digital media is expected to help with.

**Effect of Mobile Apps on Political Elections**

In the mobile space, there are 19.8 Mn individuals in Urban India (35 Cities) who access Social Media on mobile phones. With the 2014 Lok Sabha Elections imminent, there is increasingly a fierce attempt of enticing the masses using the device with the highest penetration i.e. the mobile phone and its various applications. With a large number of Internet users actively using their mobile device for accessing the Internet on a daily basis, the political parties have realized that the efforts mainly lie in optimizing the power of the mobile medium and thus capture the mindshare and the votes of cyber citizens.

Increasing number of smartphone users who are reading political news on their phones, interacting with political apps and viewing mobile ads, marketers for all the political parties have pretty much realised that social media apps like WhatsApp, Facebook, Twitter among others could be the best outlets for the circulation of their party’s messages.

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\(^1\) IAMAI-IMRB Digital Advertising in India 2013 report
While Facebook, Twitter are important, YouTube also serves as another important platform that is core to the digital media strategy.

Speaking of the various mobile apps, **Whats App** has been one of the most popular communication apps used by Indians today. A large number of mobile users are increasingly using Facebook, which has an advantage of great overall reach. Since a while, political leaders and parties are observed to being active on their Twitter handles and Facebook fan pages with the main objective of enhancing the engagement with voters. The Bharatiya Janata Party (BJP), a couple of years ago launched a mobile phone app “BJP For India” in an attempt to maximize its voter (younger & tech-savvy potential voter) reach.

On the similar lines, it plans big to use mobile applications that will be available across various platforms aggressively with an intention of increasing the voter turnout. Such apps will continue exhibiting their importance in the run up to the elections. Political parties and their respective candidates have started using them rigorously considering it to be the most rapid and direct way of spreading their values and core messages. While most of the political parties would be focusing on campaigning using the traditional media like ‘text messaging’, when asked about the various instant messenger apps, the top few names mentioned by the parties were **Watsapp, Viber and WeChat**.

Even if mobile phone cannot replace any other media, it can be integrated with other media forms to achieve optimum results. One therefore cannot miss the fact that the social networking via mobiles is widely expected to play a key role and have some positive impact on the upcoming elections.
### Definition of I-Cube Demographic Segments

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<td><strong>School Going Kids</strong></td>
<td>Kids studying in school and above 8 years of age; they are in the age group of 8-17 years, although, a small portion could be over 18 years</td>
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<tr>
<td><strong>College Going Students</strong></td>
<td>Youths studying in college (graduate, post-graduate and doctoral); most students are in the age group of 18-25, although a small proportion will be below 18 and over 25 years</td>
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<tr>
<td><strong>Young Men</strong></td>
<td>Men in the age group of 21-35 years who are not school or college-going students; this segment includes all those who are employed as well as unemployed</td>
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<tr>
<td><strong>Non-Working Women</strong></td>
<td>Women in the age group of 25-38 years of age and are not working; this segment includes housewives as well as non-working young women who are not school or college going students</td>
</tr>
<tr>
<td><strong>Working Women</strong></td>
<td>Women in the age group of 21-58 years and employed outside home</td>
</tr>
<tr>
<td><strong>Older Men</strong></td>
<td>Men in the age group of 36-58 years employed or otherwise</td>
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About IMRB International and IAMAI

About IMRB International

eTech 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 nine 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.

Nine 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 130 plus Indian and MNC companies, and offices in Delhi and Mumbai, is well placed to work towards charting a growth path for the digital industry in India.

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