# TABLE OF CONTENTS

Executive Summary .................................................. 03

1. Internet in India: The Overall Numbers ....................... 05

2. Mobile Internet in India ............................................ 06

3. Internet growth across Urban Cities and Town class .......... 07

4. Internet Usage by Gender .......................................... 08

5. Usage of Internet in India ........................................... 09
   a) Growth in the Internet Usage ................................... 09
   b) Purpose of Accessing Internet .................................. 10
   c) Frequency of Internet Access in Urban India ............... 11
   d) Points of Internet Access: Urban India ...................... 12
   e) Device used for Internet Access: Urban India .............. 13
   f) Community Service Centres (CSCs) ......................... 15

6. Behavior of Internet non-users .................................... 16

Annexure: Study Methodology, Demographic Segments and Sampling Procedures ................. 18
EXECUTIVE SUMMARY

The ‘Internet in India 2015’ report by IAMAI and IMRB International indicates that the Internet usage in India has gone up considerably. Following are the details.

- As on October 2015, the number of Internet users who have accessed the Internet in the last one month is 317 Mn. This has gone up by 49% from last year and is expected to reach 426 Mn by June 2016.
- There are 209 Mn Monthly Internet users in Urban India as on October 2015, witnessing the growth of 38% over the past 1 year.
- Significantly, Internet Users in Rural India increased by a huge 77% to reach 108 Mn as on October 2015. This figure is expected to reach 117 Mn by December 2015 and 147 Mn by June 2016.
- The mobile is the main driver of internet in Rural India. The Mobile Active Internet Users have surged to 80 Mn by October 2015 growing at close to 99% over last year. The Mobile Internet Users are expected to reach the user base of 87 Mn by December 2015 and 109 Mn by June 2016.
- There are 71% male Internet users and 29% female Internet users in India. The ratio of male to female in Urban India is 62:38 and that in Rural India is 88:12.
- The female Internet users are growing at a rate of 46% YoY compared to 50% for males.

INDIAN POPULATION 2015

<table>
<thead>
<tr>
<th></th>
<th>URBAN</th>
<th>RURAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>414 Mn</td>
<td>922 Mn</td>
</tr>
<tr>
<td>Ever Internet Users</td>
<td>246 Mn</td>
<td>28%</td>
</tr>
<tr>
<td>Growth in ever internet user (Oct 2014 to Oct 2015)</td>
<td></td>
<td>129 Mn 28%</td>
</tr>
<tr>
<td>Monthly Active Internet Users</td>
<td>209 Mn 38%</td>
<td>108 Mn 77%</td>
</tr>
<tr>
<td>Growth in ever internet user (Oct 2014 to Oct 2015)</td>
<td></td>
<td>80 Mn 99%</td>
</tr>
<tr>
<td>Mobile Internet Users</td>
<td>197 Mn 65%</td>
<td></td>
</tr>
<tr>
<td>Growth in ever internet user (Oct 2014 to Oct 2015)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: IMRB I-Cube 2015, All India Estimates, October 2015, Census 2011
Key highlights on Urban Segment:

- College going students account for the largest set of Monthly Active Users. Proportion of College Going Students to the total Monthly Active User base is 32% followed by Young Men.
- Preferred devices to access the Internet have witnessed a change with more and more users active through mobile devices.
- Online Communication over the Internet continues to be the primary purpose of accessing the Internet. Other activities, in which close to three quarters of the population, engages in is Social Networking and Entertainment.
- Nearly 70% of the Internet users access Internet on a daily basis. This daily user base has gone up by 75% from 2013.
- Internet users of Top 8 Metros account for 31% of the total size. Mumbai hosts the largest base of Monthly Active users, with Small metros witnessing 60% jump in its total size with Surat as the city with highest Internet Ownership.

Key highlights on Rural Segment:

- 42% of rural population which is in 18-30 years age group constitutes to 76% of the rural internet users.
- Contribution of internet users less than 18 years has grown from 5% in 2014 to 11% in 2015.
- Mobile phones have risen to 60% share of main access point of internet access in 2015 from 38% in 2014.
- The usage of Common service centers have reduced as main points of access among rural internet users: Last year’s 26% share has depleted to 6%
- Online communication has reduced as a usage among the rural internet users giving space to entertainment and social networking leading the usage categories.
- Gaming through social networking sites have picked up thick and fast with 36% of the user base, up from 21% in the last year.
- On the entertainment side, 80% users consume Multimedia content, up 33% from last year. Mobile VAS downloads have also increased by the tune of 30% compared to last year.
1. INTERNET IN INDIA: THE OVERALL NUMBERS

As on October 2015, India had 317 Mn internet users who are accessing the Internet at least once a month. The total number of internet users has grown at a rate of 49% over last year. It is estimated that by June 2016, this figure will cross the 400 Mn mark to reach 426 Mn. The gap between the Ever Internet Users (users claiming to access the Internet at least once in their lives) and the Monthly Active Users (once a month users) has been diminishing over the years.

![Internet Users Graph]

The penetration of Internet users in Urban India is at 51% with 48% penetration for Mobile Internet users. This has gone up from 29% last year.

![Penetration in Rural and Urban India]

As on October 2015, out of the 922Mn Indian rural population, 108Mn (12%) are Monthly Active Internet Users. In Urban India, the number of Daily Active Internet users has grown by a rate of 56% over last year. As on October 2015, there are close to 69% users accessing the Internet daily.

Major driver for such a noticeable increase in the internet users is the outburst of smartphone users in rural India. The penetration of mobile internet users is currently 9%. Compare to 4% last year, the mobile penetration has grown more than 2X. To tap such a huge rural base of potential mobile internet users the digital has to be the core of any company’s strategy. The data usage is poised to increase to an unprecedented level and the digitally enabled sectors are up for and steep growth in the coming 5 years.
2. MOBILE INTERNET IN INDIA

Mobile Internet has made its way into the lives of the Internet users in a big way. As on October 2015, Mobile Internet had a penetration of 21% in India with 276 Mn users. These Mobile Internet users are the ones who are accessing the Internet on their Mobile phones at least once a month.

In Urban India, Mobile Internet user base has grown at a rate of 65% over last year to reach 197 Mn in October 2015. The Mobile Internet Users have surged to 80 Mn by October 2015 growing at 99% over last year. The user base of Mobile Internet users in Rural India is expected to reach 87 Mn by December 2015 and 109 Mn by June 2016.
3. INTERNET GROWTH ACROSS URBAN CITIES AND TOWN CLASS

Penetration of Internet users is the highest in Mumbai followed by Delhi among the Top 8 Metros. The Top 8 Metros constitute of 31% of the total Internet user base and this has gone up by 50% over last year. Since last year, the smaller metros have seen a growth of 60% in the Monthly Active user base. The Non-Metros have been growing at a rate of 47% followed by Small Towns.

**INTERNET USERS – TOWN CLASS AND SELECTED CITIES**

<table>
<thead>
<tr>
<th>Monthly Active Users 209 Mn</th>
<th>October 2015</th>
<th>Monthly Active Users Small Metros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mumbai</td>
<td>15.9</td>
<td>36%</td>
</tr>
<tr>
<td>Delhi</td>
<td>12.2</td>
<td>45%</td>
</tr>
<tr>
<td>Kolkata</td>
<td>6.4</td>
<td>38%</td>
</tr>
<tr>
<td>Chennai</td>
<td>5.3</td>
<td>28%</td>
</tr>
<tr>
<td>Hyderabad</td>
<td>5.3</td>
<td>43%</td>
</tr>
<tr>
<td>Bangalore</td>
<td>6.4</td>
<td>67%</td>
</tr>
<tr>
<td>Ahmedabad</td>
<td>6.7</td>
<td>94%</td>
</tr>
<tr>
<td>Pune</td>
<td>6.4</td>
<td>96%</td>
</tr>
<tr>
<td>Small Metros</td>
<td>43.5</td>
<td>60%</td>
</tr>
<tr>
<td>Non-Metros</td>
<td>21.4</td>
<td>47%</td>
</tr>
<tr>
<td>Small Towns</td>
<td>23.4</td>
<td>36%</td>
</tr>
<tr>
<td>Town &lt;2 lakhs population</td>
<td>56.1</td>
<td>46%</td>
</tr>
<tr>
<td>Jaipur</td>
<td>2.54</td>
<td>73%</td>
</tr>
<tr>
<td>Surat</td>
<td>4.96</td>
<td>86%</td>
</tr>
<tr>
<td>Lucknow</td>
<td>2.63</td>
<td>81%</td>
</tr>
<tr>
<td>Coimbatore</td>
<td>1.47</td>
<td>34%</td>
</tr>
<tr>
<td>Nagpur</td>
<td>1.92</td>
<td>76%</td>
</tr>
<tr>
<td>Vadodara</td>
<td>1.63</td>
<td>77%</td>
</tr>
<tr>
<td>Ludhiana</td>
<td>1.31</td>
<td>47%</td>
</tr>
<tr>
<td>Indore</td>
<td>1.49</td>
<td>67%</td>
</tr>
<tr>
<td>Vishakhapatnam</td>
<td>1.13</td>
<td>57%</td>
</tr>
<tr>
<td>Kochin</td>
<td>0.94</td>
<td>45%</td>
</tr>
<tr>
<td>Patna</td>
<td>1.13</td>
<td>36%</td>
</tr>
<tr>
<td>Guwahati</td>
<td>0.72</td>
<td>53%</td>
</tr>
</tbody>
</table>

Source: IMRB I-Cube 2015, All India Estimates, October 2015
4. INTERNET USAGE BY GENDER

There are 71% male and 29% female Internet users in India. This proportion has not changed since last year. The Internet usage among males has been growing at a rate of 50% while it is growing at 46% for female users.

In Urban India, the ratio between male to female Internet users is 62:38. This ratio was 64:36 in October 2014. Internet users among Urban females are growing at a rate of 43% compared to 34% among males.

Among the Rural Internet users, the ratio between male to female Internet users is 88:12. The proportion of Internet users by gender in Rural India has not seen much change over last year. The Internet users among Rural females are growing at 61% and 79% among males.

75% of the rural internet users belong to the age group of 18-30 years. Another 11% are in the age group of <18 years, while 8% belong to 31-45 years age group.

32% of the Monthly Active Users are College Going Students followed by 26% being Young Men. 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.

Among female Internet users, the highest growth has been among the Non-Working women. This segment has growth by 97% over last year. This is followed by School going girls (36% growth) and College going girls (26% growth).
5. USAGE OF INTERNET IN INDIA

a) Growth in the Internet Usage

In Urban India, the Monthly Active User base has grown by 38% from October 2014 to reach 209 Mn by October 2015. It is expected to grow significantly at 51% to reach user base of 279 Mn by June 2016.

In Urban India, out of all the Internet non-users surveyed in the 35 cities as part of this study, 11.4 Mn Non-Users are willing to access the Internet in the next one year and over 2/3rd of them intend to do so through mobile phones.

In Rural India, the Monthly Active users have grown at the rate of 77% between October 2014 and October 2015 to reach 108Mn. The high growth of mobile ownership in rural India leads to the growth of Mobile Internet users reaching 80Mn at the rate of 99%. The numbers is expected to reach 87Mn by December 2015 and 109Mn by June 2016.
b) Purpose of Accessing Internet

Of all the Monthly Active Users surveyed, it has emerged that for 71% of the respondents, the prime uses of Internet are online communication, social networking and entertainment in that order.

With the emergence of online shopping websites and applications, 24% of the Urban Internet Users are accessing the Internet for purchasing products online. 23% of the users access the Internet for booking tickets online.

Among the Rural Monthly Active Users, Entertainment is observed to be the most common purpose while accessing the Internet with 44% of the users accessing the Internet for Entertainment reasons. This is followed by Communication (37%) & Social networking (33%). The heavy usage of Online Entertainment and lower usage of Communication and Social Networking can be attributed to the fact the users are not online in real-time. Rather they have the tendency to turning on their internet connection, use it and then turn it off once done. The lack of real-time connectivity is attributed to the fact that the power is not available throughout to keep charging frequently and also the affordability of the data plans is still on the lower side.

This should change with the more telecom operators getting into mode to offer cheap data services with a much wider geographical reach. The online ticketing has emerged with 14% of the rural customers engaging into the same. Online shopping, currently being used by 5% of the users shall grow thick and fast in the coming couple of years once the user acquires the knowledge of how to accomplish daily tasks with ease through online channel. The determined approach of the Indian and multinational companies to cater to the wide consumer base of rural India will drive it to the next level.
c) 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 October 2015, 69% of Internet Users are using Internet on a daily basis. The Daily user base has gone up by 60% from last year.

A 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. 75% of the Working Women who are Monthly Active Users access Internet daily.

37% of the male internet users are daily users whereas only 23% of the female internet users are accessing internet daily. 75% of internet users among both genders access internet at least once a week.
d) Points of Internet Access: Urban India

The primary point of access for most of the Internet User is their home. 89% of the Monthly Active Users access the Internet at their home followed by office. Of these, 80% of the users who access the Internet at their home indicate that it is their main place or point of Access.

Access to internet from friends/relatives premises has also emerged as a leading place of access.

65% of the Monthly Active Users whose main place of access is at office use Internet for email communications.

Mobile devices are increasingly becoming the point of Internet access of choice for the majority of the Monthly Active Users as these help them stay connected always. With the flexibility and mobility offered, it will not be long before they become the most used device for accessing the Internet.
e) Device used for Internet Access: Urban India

Most significant development in the device used for accessing internet has been that 94% of the Internet Users are accessing internet Mobile phones followed by Desktops / Laptops (64%). Among those who are accessing Internet through Mobile Phones, 90% consider the mobile phones as their Primary device for accessing the Internet. The dependency on Desktops / Laptops is decreasing over the years as the number of people using them as main points of Internet access is reducing.

![Device Used for Accessing Internet](chart.png)

**90% of users who access internet through mobile consider them as primary devices for assessing internet**

Source: IMRB I-Cube 2015, 209 Mn Internet Users in Urban India, October 2015

Mobile phones are the most common device to access the Internet among Non-Working Women. 77% of these users consider this as the primary device for accessing the Internet. Mobile phones have replaced Desktop and Laptop as the primary devices for accessing the Internet across demographics. Going forward, the usage of Desktops / Laptops will go down further with the most accessed purposes viz. Online Communication, Social Networking and Online Entertainment will be fulfilled using Mobile Phones. The Desktops / Laptops will be used mostly for Office and School work.

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. Fall in the rates for internet access due to cut throat competition among Mobile service providers has also contributed to significant increase in mobile phone as preferred device for internet access.
Among the Rural Internet users, 60% mainly access the Internet using their mobile phones, 23% access through the device installed in their home i.e. either a desktop PC or a laptop while only 6% of the people access the internet through the Community Service Centers (CSCs) facilitated by the government. The use of the CSCs has fallen sharply from last year when it was the main point of accessing internet for 26% of the Rural Internet users.
The utilization of CSCs has reduced at an overall level compared to last year due to the preference of smartphone as the mode of accessing internet. The main activities accomplished through CSCs are education related, accessing government and commercial services. The telecom services through CSCs have increased 3X over the last one year.

80% of the users are satisfied by the services provided at the CSCs. Also, the average amount paid by the users at the CSCs has reduced from INR 14 in 2014 to INR 12.8 this year.
6. BEHAVIOR OF INTERNET NON-USERS

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 a PC at their household followed by 21% who have time to access the internet.

Nearly 22% 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, 19% of the users are still unaware of Internet and 10% feel the need to use PC.

- **Opinions & Beliefs:**
  - No need for internet: 22%
  - Internet is for young people: 14%
  - Internet is not a good medium: 10%

- **Lack of Means:**
  - Don’t own PC: 29%
  - No time to access internet: 21%
  - Don’t own internet connection: 18%
  - Cannot afford internet connection: 17%

- **Lack of Knowledge:**
  - Unaware of internet: 19%
  - Need to learn the PC: 10%

**INTENTION TO ACCESS INTERNET**

- No: 46%
- Yes: 21%
- Can’t Say: 33%

**DEVICES WILLING TO USE FOR ACCESSING INTERNET**

- 67%
- 36%
- 19%
- 4%
Out of all the Internet non-users surveyed in the 35 cities as part of this study, 21% Non-Users are willing to access the Internet in the next one year. Social networking and Entertainment will be the most common usage intention for accessing the Internet followed by Entertainment.

Of the Internet non-users who are intending to access the Internet in the next 12 months, a whopping 67% are willing to access the Internet on their mobile phones followed by 36% of intenders willing to access on a Desktop. Thus, the mobile phone has become a device of choice for a new Internet user. In fact, most of the users are starting their Internet journeys on a mobile phone.

In Rural India, 76% of the non-users of internet are unaware of the internet. Hence the awareness about the internet in the rural segment will boost the growth of Internet adoption in India.

26% of the non-users in Rural India still foresee that there is no need for accessing the Internet. 38% people are not able to access internet as they do not have the PC at home.
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 has laid down the universe of the Ever Used and Monthly Active Users in the country.

Census of India 2011 indicates that there are 35 Cities with more than 1 million populations 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:

<table>
<thead>
<tr>
<th>CITIES BY STRATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 4 Metros</td>
</tr>
<tr>
<td>Delhi, Mumbai, Chennai &amp; Kolkata</td>
</tr>
<tr>
<td>Other 4 Metros</td>
</tr>
<tr>
<td>Bangalore, Hyderabad, Ahmadabad &amp; Pune</td>
</tr>
<tr>
<td>Small Metro (More than 1 Million Pop.)</td>
</tr>
<tr>
<td>Coimbatore, Jaipur, Lucknow, Ludhiana, Visakhapatnam, Patna, Guwahati, Kochi, Vadodara, Indore, Surat, Nagpur</td>
</tr>
<tr>
<td>Non Metro (Between 0.5 to 1 Million Pop.)</td>
</tr>
<tr>
<td>Aurangabad, Belgaum, Aligarh, Bhubaneswar, Raipur</td>
</tr>
<tr>
<td>Small Town (Less than 0.5 Million Pop.)</td>
</tr>
<tr>
<td>Alappuzha (Aleppo), Ujjain, Berhampur, Azizabad, Pan pat, Ranaghat, Baleshwar, Philibit, Amreli, Chickmagalur</td>
</tr>
</tbody>
</table>

DEMOGRAPHIC SEGMENTS

Below are the Demographic segments covered in this research:

<table>
<thead>
<tr>
<th>DEMOGRAPHIC SEGMENTS</th>
<th>DEFINITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>School-Going Kids</td>
<td>Kids below 18 years of age who are attending or completed school education and not attending college</td>
</tr>
<tr>
<td>College Going Students</td>
<td>Students above the age of 16 years studying in college or university</td>
</tr>
<tr>
<td>Young Men</td>
<td>Working men aged between 19-35 years</td>
</tr>
<tr>
<td>Older Men</td>
<td>Men above 35 years of age who might be working or not working</td>
</tr>
<tr>
<td>Working Women</td>
<td>Working women aged more than 19 years</td>
</tr>
<tr>
<td>Non-Working Women</td>
<td>Non-Working women aged more than 19 years</td>
</tr>
</tbody>
</table>
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 a Monthly Active User. These Monthly Active 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.

<table>
<thead>
<tr>
<th>Factors</th>
<th>Uttar Pradesh</th>
<th>Maharashtra</th>
<th>Andhra Pradesh</th>
<th>Orissa</th>
<th>Assam</th>
<th>Tamil Nadu</th>
<th>Rajasthan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Literacy Level</td>
<td>Low</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td>Per Capita Income</td>
<td>Low</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>Medium</td>
<td>Low</td>
</tr>
<tr>
<td>Disadvantaged Groups</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>Urban Population</td>
<td>Medium</td>
<td>High</td>
<td>Medium</td>
<td>Low</td>
<td>Low</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Geographical Region</td>
<td>North</td>
<td>West</td>
<td>South</td>
<td>East</td>
<td>North-East</td>
<td>South</td>
<td>North</td>
</tr>
</tbody>
</table>
Tamil Nadu & Maharashtra has the highest literacy level among the higher population states. Similarly, Andhra Pradesh & UP has 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 eleven 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.

Eleven 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 nearly 200 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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ABOUT IMRB INTERNATIONAL AND IAMAI

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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