

India's Mobile Internet Usage Reaches New Heights

Internet connectivity and mobile usage are booming across India—and that means big things for mobile marketers. Here are the latest trends and stats on how, when, where, and why (more and more) Indians go online.

Internet connectivity in India rockets to an all-time high

350,000,000 online¹

71% men vs. 29% women² | 66% urban vs. 34% rural²

245,000,000
Mobile data subscribers³

220,000,000
Smartphone users⁴

1 in 4

Mobile phone users have a smartphone⁵

Total monthly mobile data traffic (in PB)⁶



62% Annual growth mobile traffic

70% Increase in searches on smartphones from 2014-2015

50% of smartphones sold are under INR 6650 (100 USD)⁸

INR 160 Average Indian spend per month on mobile⁹

About 3.5L of milk in New Delhi

Smartphone search volume accounts for:⁷

50% of overall searches

60% of shopping searches

50% of travel searches

Online video sparks increased mobile usage

5 Billion Average number of videos Indians consume in a month⁹

5-10 mins Median length of videos watched on mobile¹²

213 hours of mobile video will be watched per second by the end of 2016¹⁰

55% of YouTube watchtime is on mobile¹¹

88% Growth in video traffic on mobile from 2014 to 2015¹¹

Mobile data in India is used for:¹³

45% video

55% everything else

WHO

40% of YouTube users are women¹⁴

Women smartphone users spend **50% more** time on video streaming apps than men¹⁵

WHAT

Five different native independent YouTube creators have hit

1 MILLION subscribers¹¹

New online video genres are gaining traction:

50% MOVIES

48% COMEDY

40% GAMING¹²

WHERE

People watch mobile videos:¹⁶

Away from home **43%**

In bed **40%**

On their commutes **25%**

While eating dinner **23%**

While shopping **20%**

WHEN

Mobile video consumption peaks:¹²

12-4PM **8-10PM**

As connectivity spreads, new types of users emerge

31-40 YEAR-OLD

mobile data users **DOUBLED** in number in 2015.¹⁷

WOMEN

are driving **e-commerce growth** in non-metro areas.¹⁸

TIER 2 AND TIER 3 CITIES

50% of country's total queries⁷

90% of incremental Google search growth in 2015⁷

Growth spurred by:¹⁷

- video content
- e-commerce
- entertainment

LOWER INCOME, LESS EDUCATED

mobile data users grew:¹⁷

33% > **50%**

2013 **2015**

6 market challenges to overcome

LACK OF LOCAL CONTENT

Only 0.1% of the world's websites are in Hindi¹⁹ vs 425M people who speak the language.²⁰

SLOW LOAD TIME

7.3 seconds average slower than all surveyed nations including Indonesia, Sri Lanka, and Chile.²¹

SLOW CONNECTION

8X slower than South Korea

5X slower than Singapore

4X slower than Taiwan

2X slower than Mexico²¹

AFFORDABILITY

88% of smartphone owners who don't use mobile broadband think it's too expensive.¹⁷

VALUE PERCEPTION

48% of mobile internet users don't see a difference between 2G or 3G, so they aren't willing to pay more for 3G.¹⁷

3G NETWORK ISSUES

33% of towers are 3G capable (vs. 70% in other parts of the world).²²

The next frontier: WiFi and 4G

WiFi

Public WiFi hotspots²³

2015 **60,400**

Estimated in 2020 **4,200,000**

Average connection speed in 2015²³



4G

4G smartphones made up more than

HALF of the market in Q4 2015²⁴

Increasing native content will help encourage 4G consumption

4G search queries grew by

500% in 2015²⁴

4G connections generate

14.5X the traffic vs. non-4G connections²⁵

Google is working on connecting 100 railway stations with free WiFi by the end of 2016.²⁶

Sources: 1. Projection basis from TRAI "The Indian Telecom Services Performance Indicators July-September 2015" and IAMAI Icube 2015. 2. IAMAI Icube 2015. 3. Operator Financial Reports, December 2015-March 2016. 4. Cisco, Industry Estimates, IDC Shipments Data, 2015. 5. IDC Shipments Data, 2015; Operator Reports, 2015. 6. Cisco, Virtual Networking Index, 2014-2015 and Nokia Networks mBit Index, 2016. 7. Google internal data, 2014-15. 8. IDC Shipments Data, 2015. 9. GroupM, "India Digital Playbook" 2014. 10. Cisco VNI, project basis on video payload and growth rates, 2015. 11. YouTube internal data, 2015. 12. Google Consumer Barometer survey, base: internet users (accessing via computer, tablet or smartphone), watched online video in the past week, answering based on a recent online video session, 2014-2015. 13. Cisco VNI, "Mobile Video in India: On a fast and furious growth spree", 2015. 14. dna India, "60 million in India online; 24 million log in daily; Google" 2013. 15. Nielson, "What Women Want (On Their Smartphones)", India, August 2015. 16. Ericsson Mobile Consumer Lab, "Perception Shapes Smartphone Behavior" 2014. 17. Ericsson Consumer Lab, "The Changing Mobile Broadband Landscape in India", 2014. 18. Google/Forrester, "eCommerce Research", 2014. 19. GSMA Intelligence, "Local World: Content for the Next Wave of Growth", September 2014. 20. BBC, "A Guide to Hindi", 2014. 21. Alkamal, "State of Internet Report", Q3 2015. 22. GSMA Intelligence, Operator reports, 2015. 23. Cisco, "Virtual Networking Index (VNI)", 2015. 24. Google internal data, 2015. 25. Cisco, "Visual Networking Index: Global Mobile Data Traffic Forecast Update" 2013-2018. 26. Google blog, "Bringing the Internet to more Indians", September 2015.