



Kantar IMRB & MMA Smartphone Usage and Behaviour Report [Overview] – India 2016-17

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Purpose of the report

MMA India seeks to provide regular insights on mobile usage in India. These insights will be published in a series of industry reports with the objective of: 1) Understanding the efficacy of Mobile as a marketing medium; 2) Enable all members of the ecosystem to stay updated with consumer mobile trends and media consumption habits; 3) Evaluate the role of mobile advertising as an influencer in the consumer path to purchase; 4) Provide access to global best practices and technologies in the space of mobile usage and measurement.

Research Objective

Kantar IMRB has been commissioned by MMA India to study the evolving nature of the smartphone consumer, by understanding their mobile usage and behaviour. The findings of this study were derived using a combination of Mobi Trak—our proprietary metering technology that measures smartphone usage behaviour—and face-to-face interviews to understand consumer profiles for smartphone users.

About Mobi Trak and I-Cube

Mobi Trak is Kantar IMRB's proprietary smartphone metering technology used to measure smartphone behaviour. The technology is deployed on a panel of 8000 smartphone users in Metros and non-Metros across India.

How it works

Mobi Trak passively monitors the following

- Incidence of app and web-data usage
- Identifies top apps/sites by category
- Investigates type and degree of usage across different markets, SECs etc.

Mobi Track – supports all versions of Android supported by the Google Play Store i.e. Android version 2.2 onwards to maintain representative coverage of the Android market. The only exception is to this is Android version 7 (Nougat) which has <1% market share in India. We will be updating our metering technology to support this version of Android in H1 of 2017.

Note: Mobi Track findings are projected to the mobile internet universe as defined by the I-Cube Study.

About I-Cube

Internet in India (I-Cube) is an annual syndicated conducted by Kantar IMRB and endorsed by the Internet and Mobile Association of India (IAMAI). It is widely considered to be the bible for understanding internet usage and penetration in India. The study is conducted face-to-face among urban and rural internet users India. I-Cube highlights the emerging and potential internet segments and offers future trends in the internet market.

Defining Smartphones

Kantar IMRB has considered various definitions to arrive at a suitable set of definitions for the study.

Smartphone: Gartner definition

<http://www.gartner.com/it-glossary/smartphone/>

A smartphone is a mobile communications device that uses an identifiable open OS. An open OS is supported by third-party applications written by a notable developer community. Third-party applications can be installed and removed, and they can be created for the device's OS and application programming interfaces (APIs). Alternatively, developers must be able to access APIs through a discrete layer such as Java. The OS must support a multitasking environment and user interface that can handle multiple applications simultaneously. For example, it can display e-mail while playing music.

comScore definition: Smartphone

A mobile phone which has either an iOS or Android operating system.

Additional definitions are provided in the [Annexure](#).

Kantar IMRB definitions:

Smartphone

Kantar IMRB's **smartphone measurement panel** is comprised exclusively of Android devices. For measuring usage behaviour, in the smartphone usage report, we have adapted the comScore definition i.e. We have consider any mobile phone with an Android OS as a smartphone.

iOS: [Wikipedia]

iOS (formerly iPhone OS) is a mobile operating system created and developed by Apple Inc. exclusively for its hardware. It is the operating system that presently powers many of the company's mobile devices, including the iPhone, iPad, and iPod touch. This definition has been considered for respondents to the iOS consumer survey.

Executive Summary



Addicted to the small screen

Smartphone users are spending more time on their phones than on any other media, including TV and Print.



Social Media & Messaging are NUMBER ONE!

Social media and messaging apps account for the highest reach among all categories. They also account for almost 50% of all time spent on smartphones.

The Rise of Online Shopping

**Online shopping apps have overtaken entertainment with
~15% HIGHER reach.**

**The gap between online shopping and social media apps
is closing too.**

Games. Games. Games.

Mobile gamers are highly engaged users, with Women spending up to 2X more time on games compared to Men.

Time spent on Mobile surpasses TV and Print!

3 hours daily
spent accessing smartphone



4 hours weekly
spent accessing TV



2 hours weekly
spent accessing Print



Change from 2015



55%



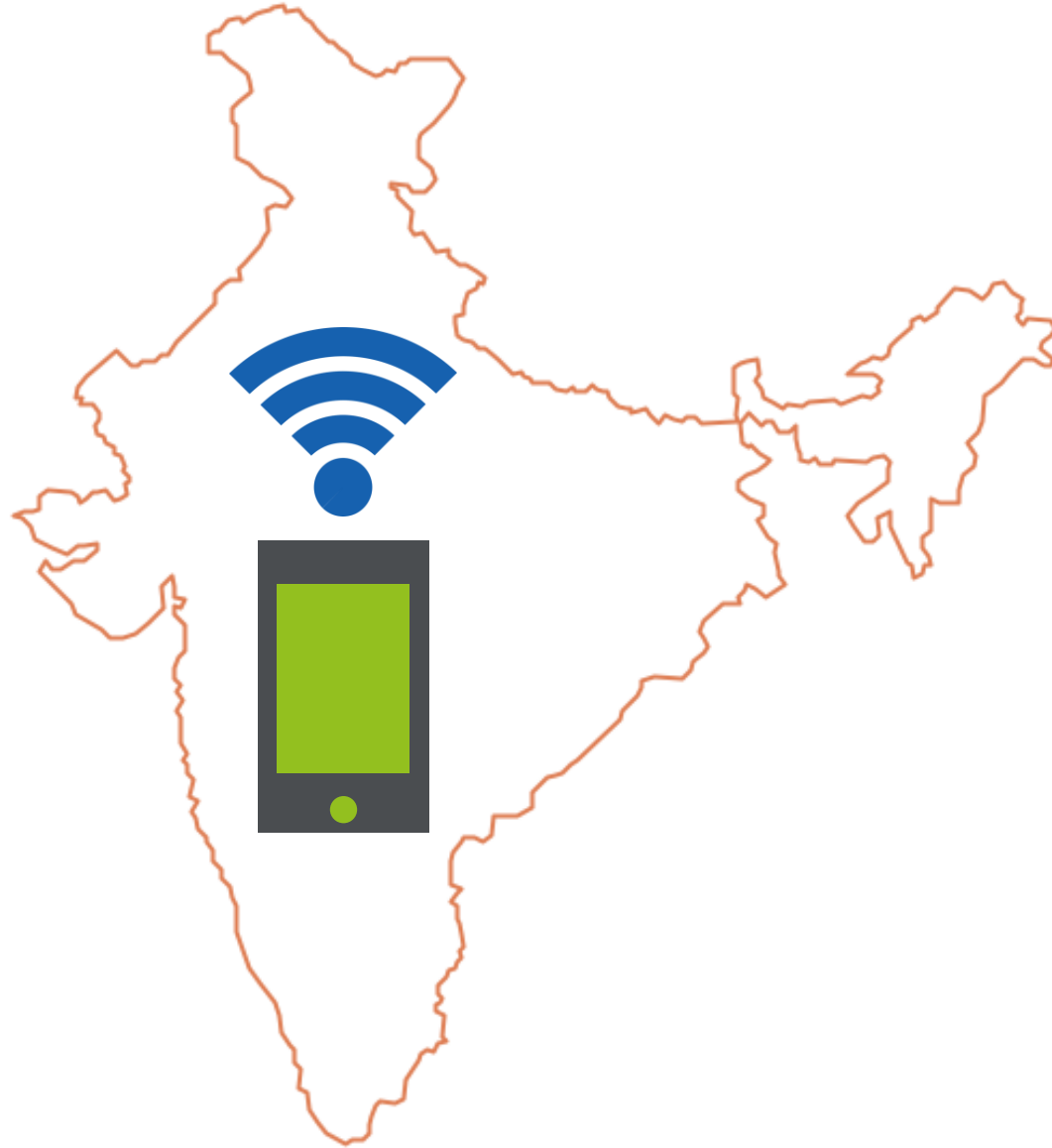
21%



3%

OVERVIEW

Mobile Internet in India



An average user spends approximately **3 hours daily** accessing the Internet on a smartphone.

262Mn

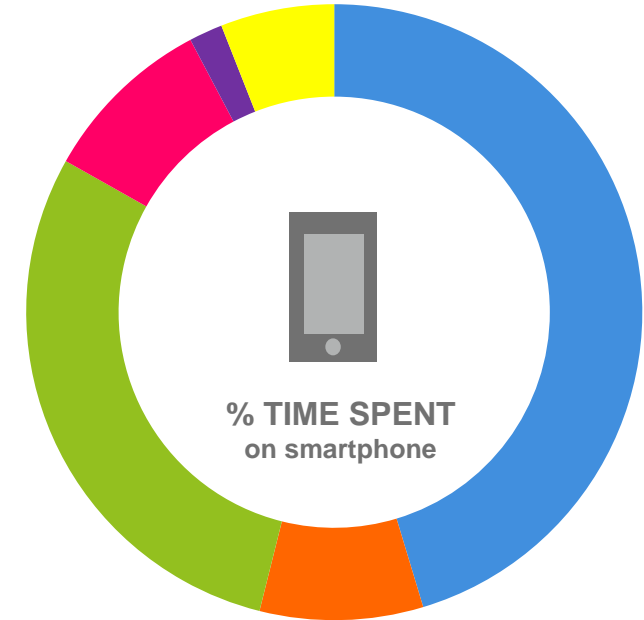
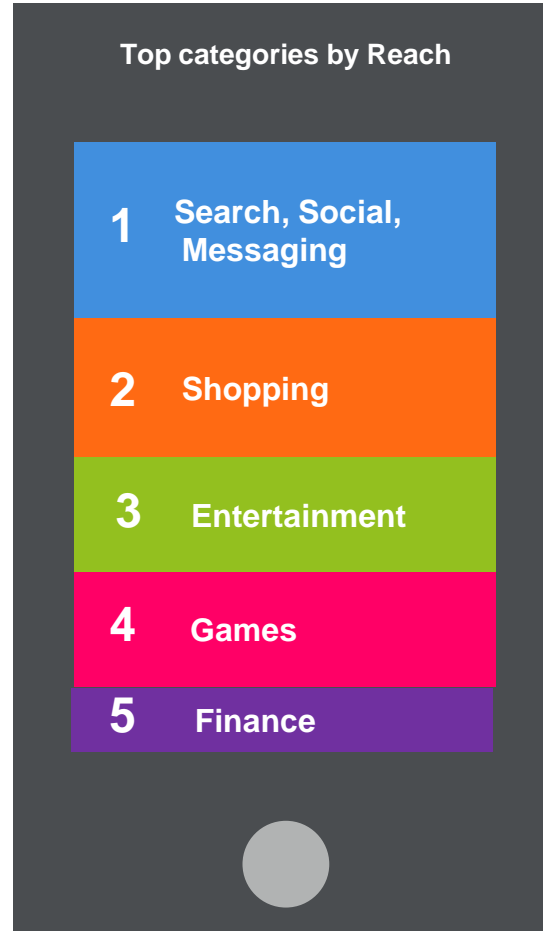
urban Indians
accessing the
Internet on mobile

2015: 209 million

178 min

spent accessing apps/m-
sites every day

2015: 110 minutes

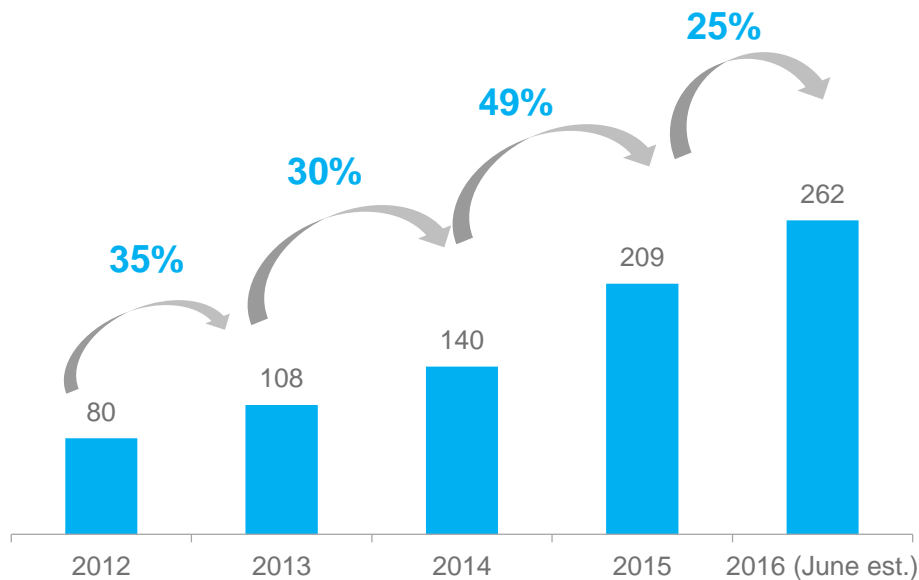


■ Search, Social, Messaging ■ Shopping
■ Entertainment ■ Games
■ Finance ■ Others

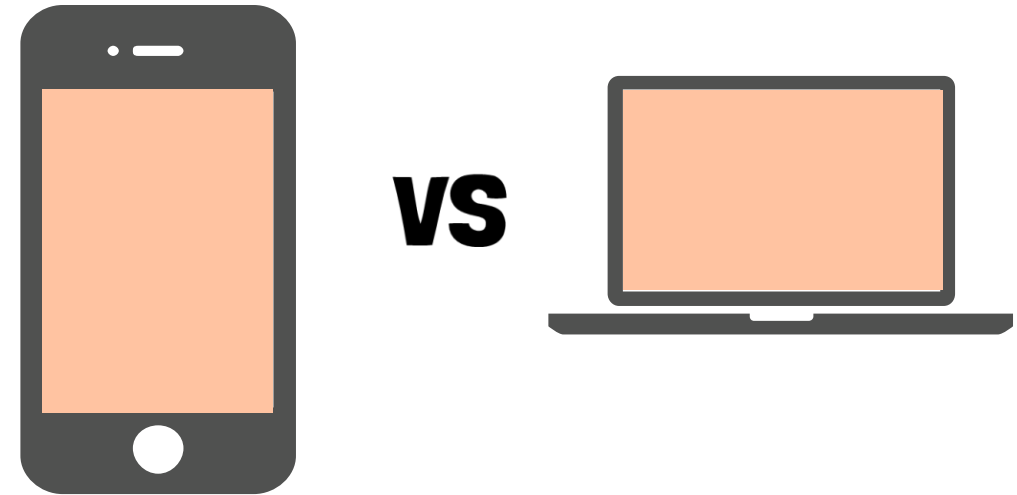
Others includes News, Sports, Career & Education, Beauty, Food & Drink, Health, Utility apps etc.

Following years of robust growth, Internet penetration continues to demonstrate strong growth in 2016, driven in large part by an increase in Mobile Internet usage.

Urban Active Internet Users
(Figures in Millions)



Active internet users spend
60% more time on mobile
compared to Desktop



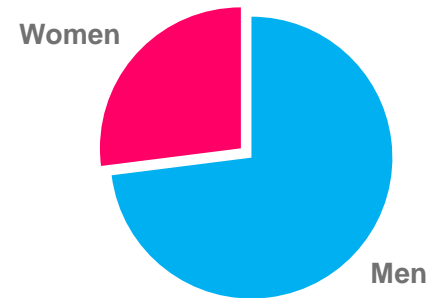
The Mobile Internet universe is dominated by Men, and non-metro residents. Women account for only one-third of the mobile Internet users in urban India.



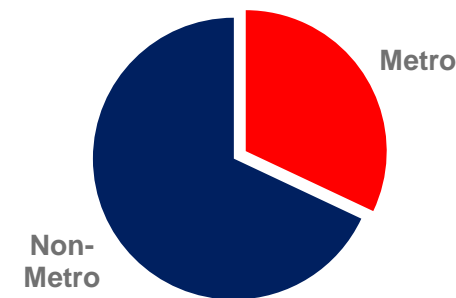
262 Million

Mobile Urban Active Internet Users

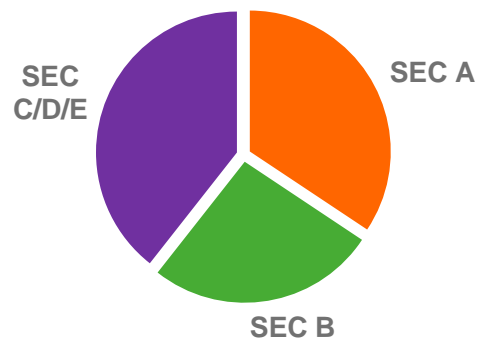
Gender



Town Class



SEC



Age





Category Overview

Search, Social, Messaging

This category has the highest reach among mobile internet consumers and is driven primarily by **WhatsApp, Facebook and web browsers.**

Women spend ~**80% more time** on Facebook than Men.



SHOPPING



Online shopping properties have gained significantly in terms of reach – surpassing entertainment apps in 2016

However engagement is relatively low compared to other categories, indicating that **window shopping/browsing for deals**, might be the default behaviour in this category.

ENTERTAINMENT

A person's hands are shown holding a smartphone horizontally, with the screen glowing white. The background is dark and out of focus, featuring warm, bokeh-style light spots, suggesting an indoor setting like a concert or a dimly lit room. The overall mood is focused and modern.

Entertainment apps are extremely popular with Native/stored content contributing to hugely to the time spent

Women spend 2x more time on YouTube compared to Men.

GAMES



Gaming remains **one of the most engaging categories** for smartphone users

Games with a **social** element (multi-player, social media updates etc.) tend to be **more popular**.

Women are highly engaged mobile gamers.

Spending as much as **2x time** on games compared to their male counterparts.

FINANCE



With increased internet connectivity, **financial transactions** and **related activities** online are **on the rise**

Users **aged 25 and above** are the **primary users**

Banking apps engaging users across **socio economic classes**

Annexure



About the Mobile Marketing Association (MMA)

The MMA is the world's leading global non-profit trade mobile marketing association comprised of more than 800 member companies, from nearly fifty countries around the world. Our members hail from every faction of the mobile marketing ecosystem including brand marketers, agencies, mobile technology platforms, media companies, operators and others. The MMA's mission is to accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement. Anchoring the MMA's mission are four core pillars; to cultivate inspiration by driving the innovation for the Chief Marketing Officer; to build the mobile marketing capabilities for the marketing organizations through fostering know how and confidence; to champion the effectiveness and impact of mobile through research providing tangible ROI measurement; and advocacy. Additionally, MMA industry-wide committees work collaboratively to develop and advocate global best practices and lead standards development.

Mobile Marketing is broadly defined as including advertising, apps, messaging, mCommerce and CRM on all mobile devices including smart phones and tablets. Members include, American Express, AdChina, Colgate - Palmolive, Dunkin' Brands, Facebook, Google, Group M, Hewlett Packard, Hilton Worldwide, Kellogg Co., L'Oréal, MasterCard, McDonalds, Microsoft, Mondelez International, Inc., Pandora Media, Procter & Gamble, R/GA, The Coca-Cola Company, The Weather Company, Unilever, Visa, Vodafone, Walmart, xAd, Zenith Optimedia and many more.

MMA India members include: PepsiCo India, Hotstar, OLX , United Spirits Limited , Autumn Worldwide , Hungama, GroupM, KANTAR IMRB, Kotak Group, Getit Infoservices, Nielsen , Hindustan Unilever, Culture Machine, Google, Godrej Group , Yu Televentures , Facebook, Paytm, Saavn

The MMA's global headquarters are located in New York with regional operations in Europe/Middle East/Africa (EMEA), Latin American (LATAM) and Asia Pacific (APAC). For more information about the MMA please visit: www.mmaglobal.com

About Kantar IMRB

Kantar IMRB is a pioneer of market research services in Asia. It partners its clients across the entire brand lifecycle through a unique mix of innovation and analytical thinking to design customised solutions that deliver maximum impact. By leveraging on its large array of syndicated services and specialist divisions, Kantar IMRB helps clients in crafting marketing and consumer strategies. With a multi-disciplinary and multi-cultural workforce, it is at the forefront of research and consulting services.

Kantar IMRB has been a leader in setting up industry measurements like for Television (Television Ratings Point), Household purchases of FMCG's (Kantar World Panel), Digital (I Cube), Online audiences (WAM) and Mobile usage (Mobi Track)

An eight-time recipient of "Agency of the Year", Kantar IMRB's footprint extends to 50 offices across 12 countries.

Visit: <http://mrbglobal.in/> for more information

About Kantar

Kantar is one of the world's leading data, insight and consultancy companies. Working together across the whole spectrum of research and consulting disciplines, its specialist brands employ 30,000 people, provide inspirational insights and business strategies for clients in 100 countries. Kantar is part of WPP and its services are employed by over half the Fortune 500.

Visit: <http://www.kantar.com> for more information

Category Definitions

- **Search, Social, Messaging**

Includes

1. Search engines/browsers like Google, Bing, Yahoo, UC Browser, etc.
2. Social networks like Facebook, Instagram, etc.
3. Messaging platforms like WhatsApp, Google Hangouts, Facebook Messenger, etc.

- **Shopping** - Refers to online shopping portals
- **Entertainment** - Refers to portals related to watching/streaming videos, listening to songs, image galleries, etc.
- **Gaming** - Refers to gaming websites/apps
- **Finance** - Refers to online banking, insurance, investment portals and mobile wallets

Smartphone definitions (1/2)

Gartner:

<http://www.gartner.com/it-glossary/smartphone/>

A mobile communications device that uses an identifiable open OS. An open OS is supported by third-party applications written by a notable developer community. Third-party applications can be installed and removed, and they can be created for the device's OS and application programming interfaces (APIs). Alternatively, developers must be able to access APIs through a discrete layer such as Java. The OS must support a multitasking environment and user interface that can handle multiple applications simultaneously. For example, it can display e-mail while playing music.

comScore:

Any mobile phone which has an Android or iOS operating system

Facebook:

<https://www.facebook.com/help/338285249567546>

Smartphones typically have large screens and have a lot of features found on computers. They allow people to send and receive emails, run apps and watch videos. Common smartphones include iPhones and those running the Android operating system.

Wikipedia:

<https://en.wikipedia.org/wiki/Smartphone>

A smartphone is a mobile phone with an advanced mobile operating system which combines features of a personal computer operating system with other features useful for mobile or handheld use. Smartphones, which are usually pocket-sized, typically combine the features of a cell phone, such as the ability to receive and make phone calls, with those of other popular digital mobile devices. Other features typically include a personal digital assistant (PDA) for making appointments in a calendar, media player, video games, GPS navigation unit, digital camera and digital video camera. Most smartphones can access the Internet and can run third-party software applications ("apps"). They typically have a colour touchscreen user interface that covers 70% or more of the front surface, with LCD, OLED, AMOLED, LED or similar screen.

Smartphone definitions (2/2)

GSM Arena:

<http://www.gsmarena.com/glossary.php3?term=smartphone>

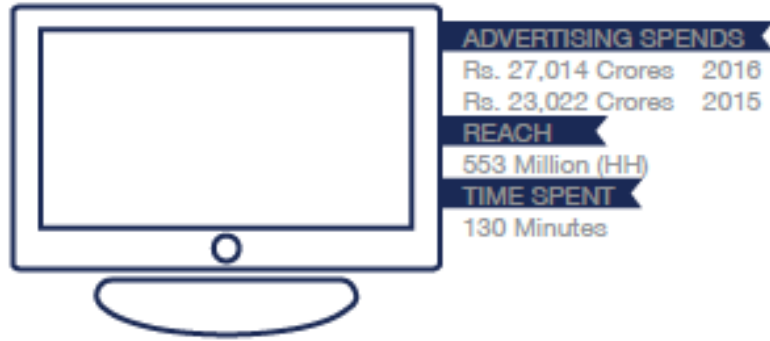
A smartphone is a term used to describe a category of mobile devices with computer-like functionality. These devices sport complete operating system and have a platform for application developers. Currently, the two major smartphone platforms in use are Android (by Google) and iOS (by Apple). An application written for a specific platform can usually work on any smartphone using the same platform. Applications for smartphones are also faster and better integrated with the phone's UI than Java applications. Smartphones have larger displays and faster processors than so-called feature phones or dumb phones.

Phone Scoop:

<http://www.phonescoop.com/glossary/term.php?gid=131v>

A category of mobile device that provides advanced capabilities beyond a typical mobile phone. Smartphones run complete operating system (OS) software that provides a standardized interface and platform for application developers. Compared to standard phones, smartphones usually have larger displays and more powerful processors. Applications written for a given smartphone platform can usually run on any smartphone with that platform, regardless of manufacturer. Compared to Java or BREW applications, native smartphone applications usually run faster and integrate more tightly with the phone's features and user interface.

A snapshot of mobile vis-à-vis other media



Get the complete report!

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