

JuxtConsult India Online 2008

India Online is the annual syndicated research on Internet usage in India from JuxtConsult. The research offers insightful, comprehensive and up to date understanding of net usage behavior and online preferences of regular internet users. India Online 2008 understands online Indians as consumers and not just faceless net users.

Key findings:

It has been a year of healthy growth in the Indian online space.

- All internet users at 49 million – 40 million urban, 9 million rural
- 33% growth in all urban users over last year
- 35 million 'regular' users – 30 million urban, 5 million rural
- 19% growth in regular urban users over last year
- 25 million 'daily' users

* 'Regular' internet users (internationally accepted definition) = internet users who use the internet 'at least once a month'

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	2005	2006	2007	2008
Estimated Internet user-ship				
Urban - Internet using individuals (regular)	17.63 mn	21.95 mn	25.17 mn	30.03 mn
Urban - Internet using individuals (occasional)	5.20 mn	1.65 mn ¹	5.15 mn	10.31 mn
Urban - Internet using individuals (total)	22.83 mn	23.60 mn	30.32 mn	40.34 mn
Rural - Internet using individuals (regular)				5.06 mn
Rural - Internet using individuals (occasional)				4.00 mn
Rural - Internet using individuals (total)				9.06 mn
All India - Internet using individuals (regular)				35.09 mn
All India - Internet using individuals (occasional)				14.31 mn
All India - Internet using individuals (total)				49.40 mn
Growth				
Internet using urban individuals (regular)	-	25%	15%	19%
Internet using urban individuals (occasional)	-	-68%	212%	100%
Total internet using urban individuals	-	3%	28%	33%
Penetration				
All Urban Internet Users as % of urban Indian population	7%	7%	9%	12%
All Rural Internet Users as % of rural Indian population				1.2%
All India Internet Users as % of total Indian population				4.5%

¹ May have been under-estimated because of relatively less deeper coverage of SEC 'D' and 'E' in the land survey

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Growth has been both in class and mass of online users in India. 77% of all online users belong to the 19 to 35 age group category, 70% of the total users belong to the SEC A, B and C towns, 51% users are salaried employees, 63% users own an automobile and English is the most preferred language of reading for only 28% of Internet users (indicates the potential for vernacular language content).

Household Assets	% Internet Users Owning
Color TV	90%
Mobile Phone	87%
Bank Account	84%
Computer/Laptop	72%
Fridge	68%
Life Insurance	53%
2-Wheeler	46%
Credit Card	31%
Air Conditioner	19%
4-Wheeler	17%
Invested in Shares	11%

The internet dominates users' daily lives

- Home is the 'most preferred place of access' for 41% of users.
- 9 out of 10 regular users access the internet from home (and office) daily
- Relatively more of them spend 2 hours or more daily on internet from home than on other mediums.
 - Spend 2 hrs. or more on Internet 36% on weekdays
 - Spend 2 hrs. or more watching TV 14%
 - Spend 2 hrs. or more on reading Newspaper 2%
 - Spend 2 hrs. or more listen to Radio 10%
- 81% 'interact' using the social media platforms (all social media platform put together - chatting, social/professional networking, interact on communities, read/comment/write blogs etc.).

The top ten online activities undertaken by net users are:

Top 10 Online Activities	% Undertaking
Emailing	91%
Job search	72%
Instant messaging / chatting	70%
Check news	63%

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Check sports	57%
Download music / movies	54%
Check cricket score	50%
Dating/Friendship	50%
Matrimonial search	49%
English info search engine	49%

On an average a net user undertakes over 15 activities online and 7 of the top 10 online activities fall in the 'personal life' domain.

Users of 'vernacular language' websites are up to 34% from last year's 12%, (although 28% prefer English as the language of reading online, only 34% users are visiting vernacular websites regularly, indicating the lack of content online)

1 in 3 online shopper 'buys' online!

- 80% of all regular online Indians 'shop' online. They either search or buy online.
- 23% have actually bought online in last 6 months - 8 million active online buyers
- 92% of all online buyers (23% of internet users) have bought a travel product online, 51% have bought a non-travel product online
- 80% of travel product buyers have bought train tickets, 52% has bought air tickets in last six months
- Books, Clothes and CD/DVDs are the most bought non-travel products online (Mobiles and Computer Products most searched)

Google leads in both 'mind' share and 'user' share!

Website	% Recall Top of Mind	% Use it the Most
Google	36.6%	28.4%
Yahoo	31.5%	27.6%
Rediff	7.4%	8.6%
Orkut	5.6%	8.1%
Gmail	5.5%	8.6%
Indiatimes	1.7%	1.2%
Hotmail	1.1%	1.0%
Moneycontrol	0.8%	0.8%
Naukri	0.7%	0.4%
Sify	0.6%	0.7%

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Most Used Websites for Specific Online Activities

Vertical	Top Website	% Use Most	Vertical	Top Website	% Use Most
Emailing	Yahoo	51%	Matrimony	Bharatmatrimony	36%
Instant Messaging	Yahoo	53%	Friendship/Dating	Orkut	54%
Job Search	Naukri	42%	Share Pictures	Orkut	38%
Online News	Yahoo	16%	Social Networking	Orkut	66%
Info Search – English	Google	81%	Professional Networking	Orkut	44%
Info Search – Local language	Google	65%	Video Sharing	Youtube	43%
Online Travel	Yatra	18%	Sports	Cricinfo	19%
Games	Zapak	32%	Astrology	Yahoo	25%
Online Shopping (non-travel)	Ebay	33%	Cinema	Yahoo	14%
Real Estate	Google	23%	Music	Raaga	17%
Financial News/Info	Moneycontrol	18%	Online learning/education	Google	32%
Online Share Trading	ICICIdirect	31%	Buy/rent movie CD	Rediff	19%
Net Telephony	Yahoo	25%	Mobile Content	Yahoo	12%

Methodology of India Online 2008:

- A ‘land survey’ was conducted in March 2008 to estimate and profile the internet users.
- The survey sampled over 12,500 households in 40 cities of all population sizes, and over 4,000 households in 160 villages across the country, covering all socio-economic strata
- The internet usage dynamics, behavior and website preferences were captured through a large scale ‘online survey’ with over 15,000 internet users in April 2008
- The online survey was conducted using Google (keyword) Search Ads and JuxtConsult’s own Internet User Panel (www.getcounted.net)
- The online survey data made ‘representative’ of the entire online population (urban and rural), by using appropriate demographic ‘weights’ derived from the land survey and using authentic Govt. of India population statistics