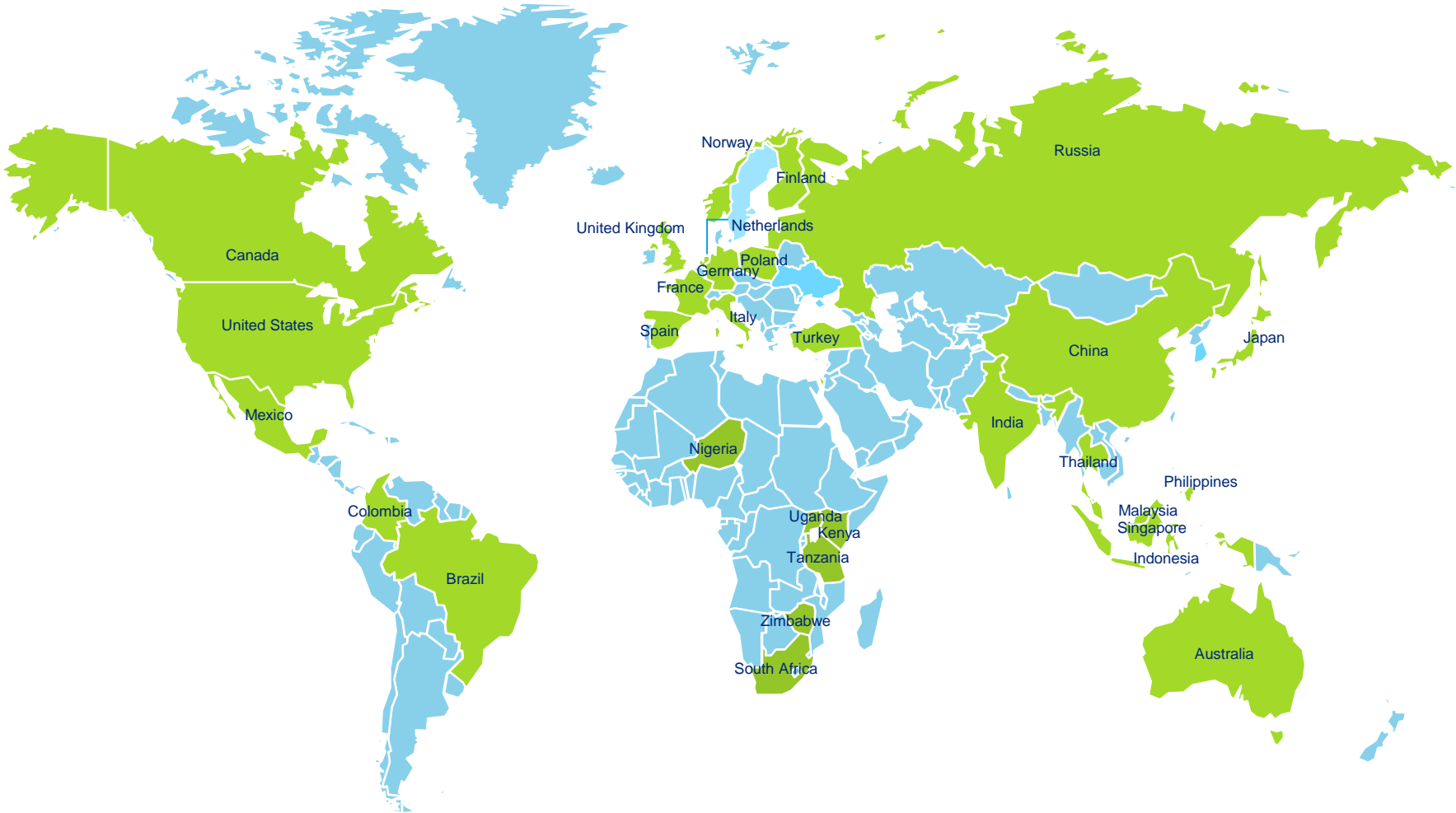


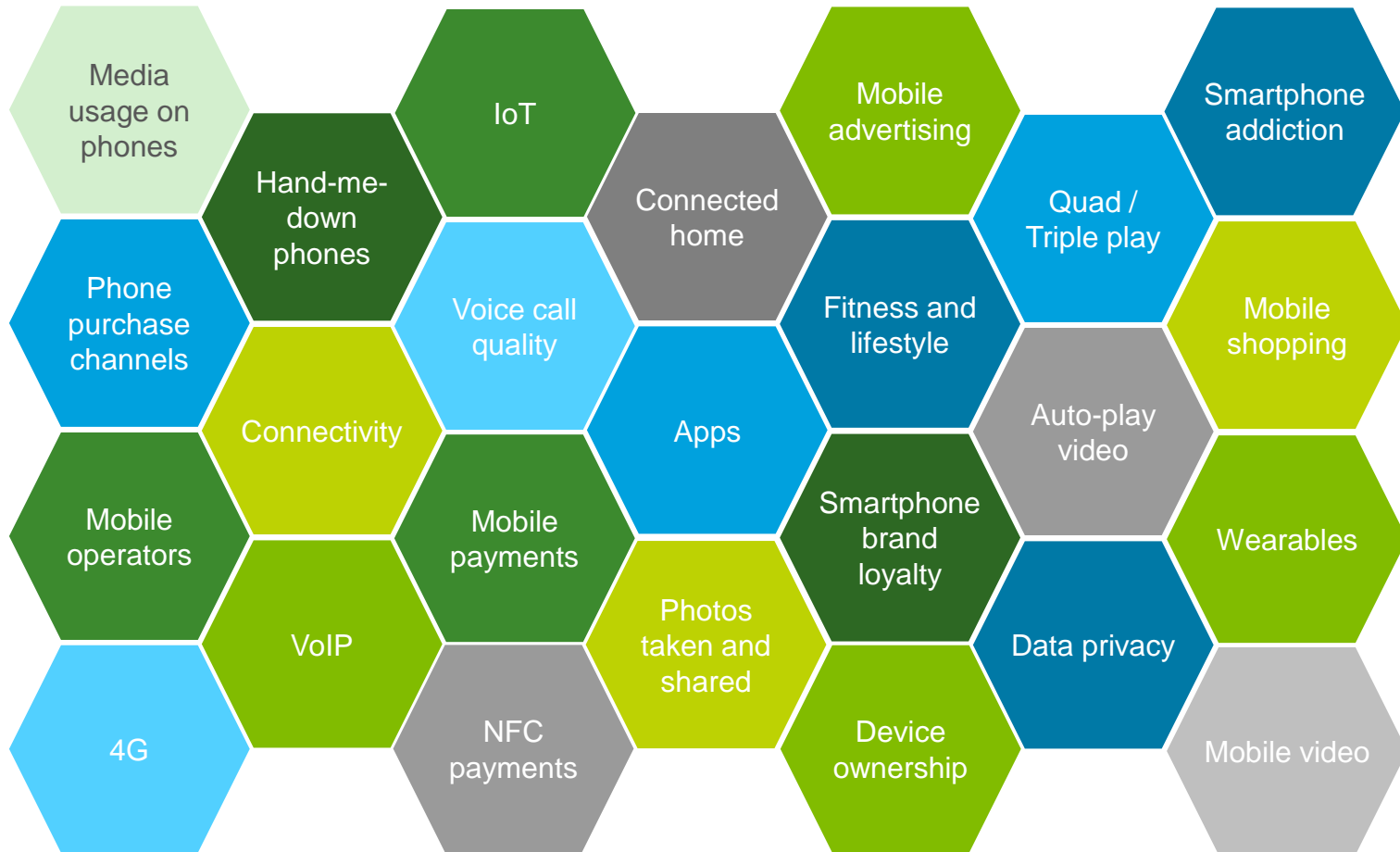
Deloitte Global Mobile
Consumer Survey
India data, 2015



Global Mobile Consumer Survey 2015: 6 continents, 31 countries, 49,500 respondents



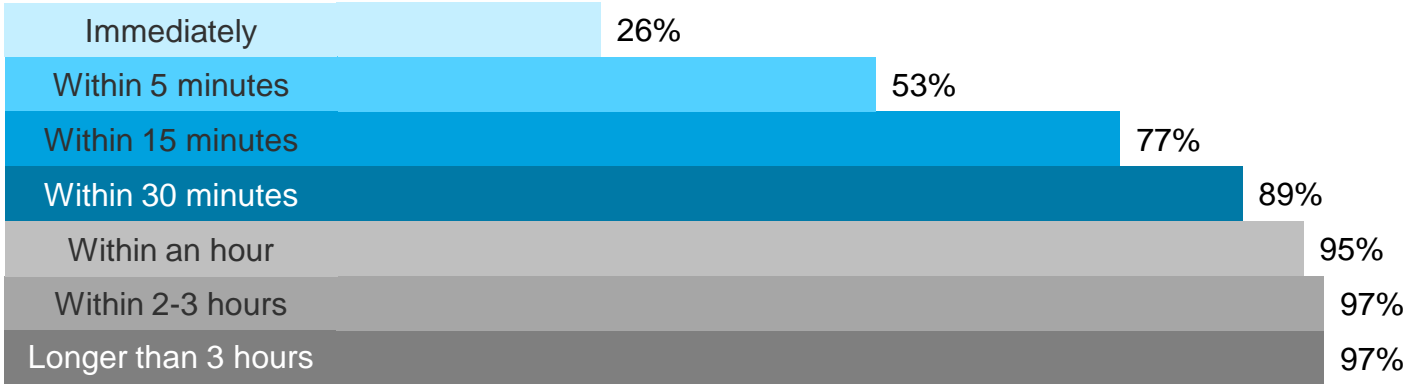
Topics covered in GMCS 2015



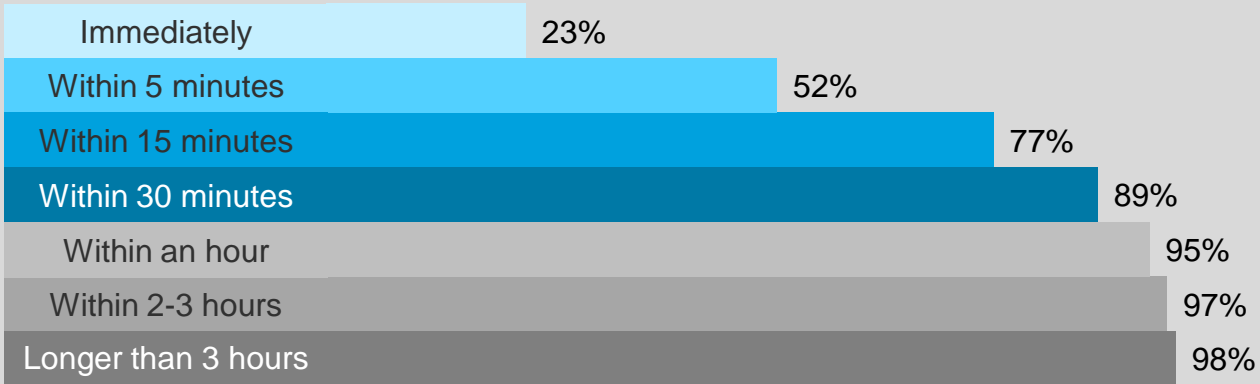
Smartphone addiction

For most smartphone owners, checking their phones is the first and last thing they do in a day

Q. Typically how long is the interval between you waking up and looking at your phone for the first time?



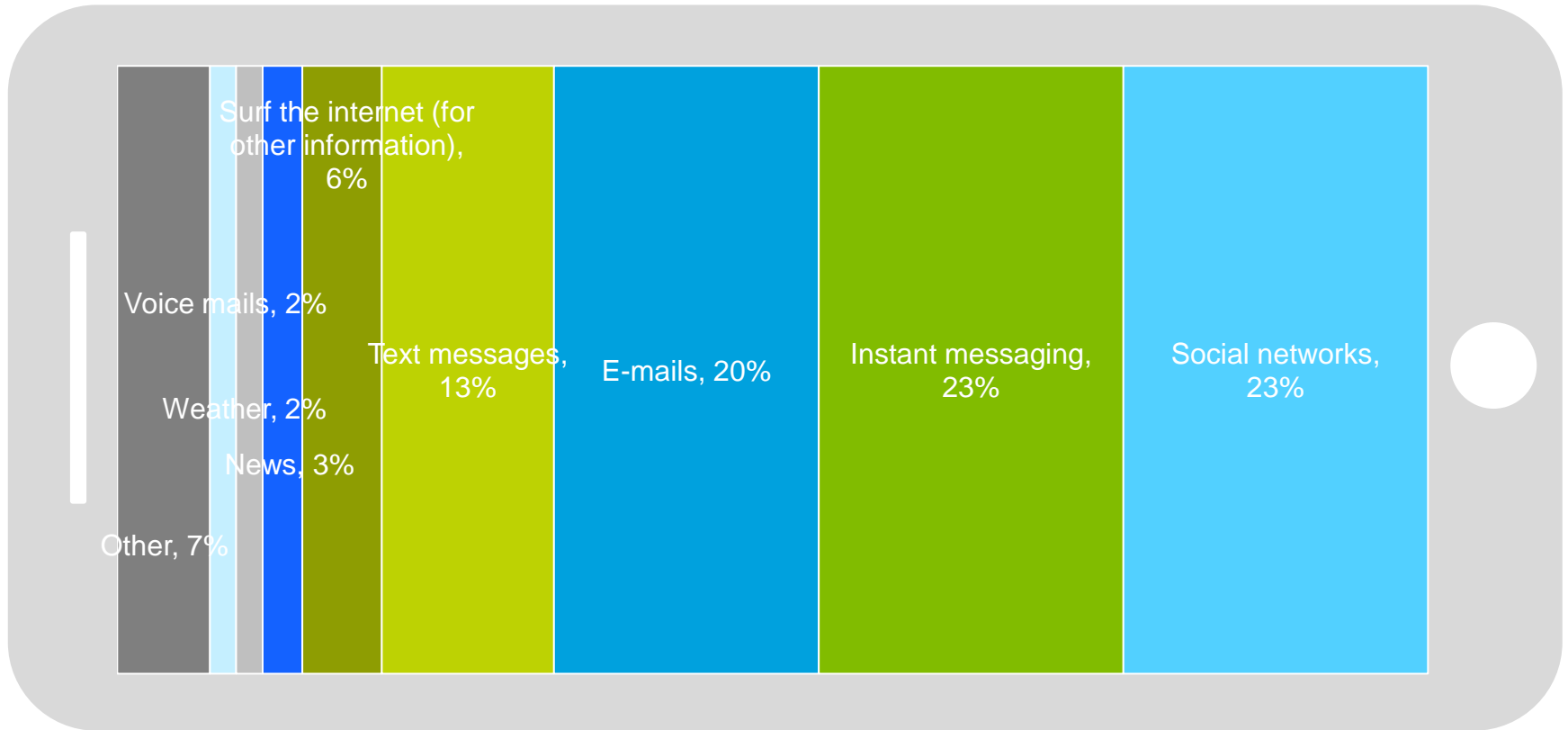
Q. At the end of the day, typically how long is the interval between you looking at your phone for the last time and preparing to sleep?



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
Base: All who have phone 1823

IMs and social networks are the first things consumers check on their smartphones in the morning

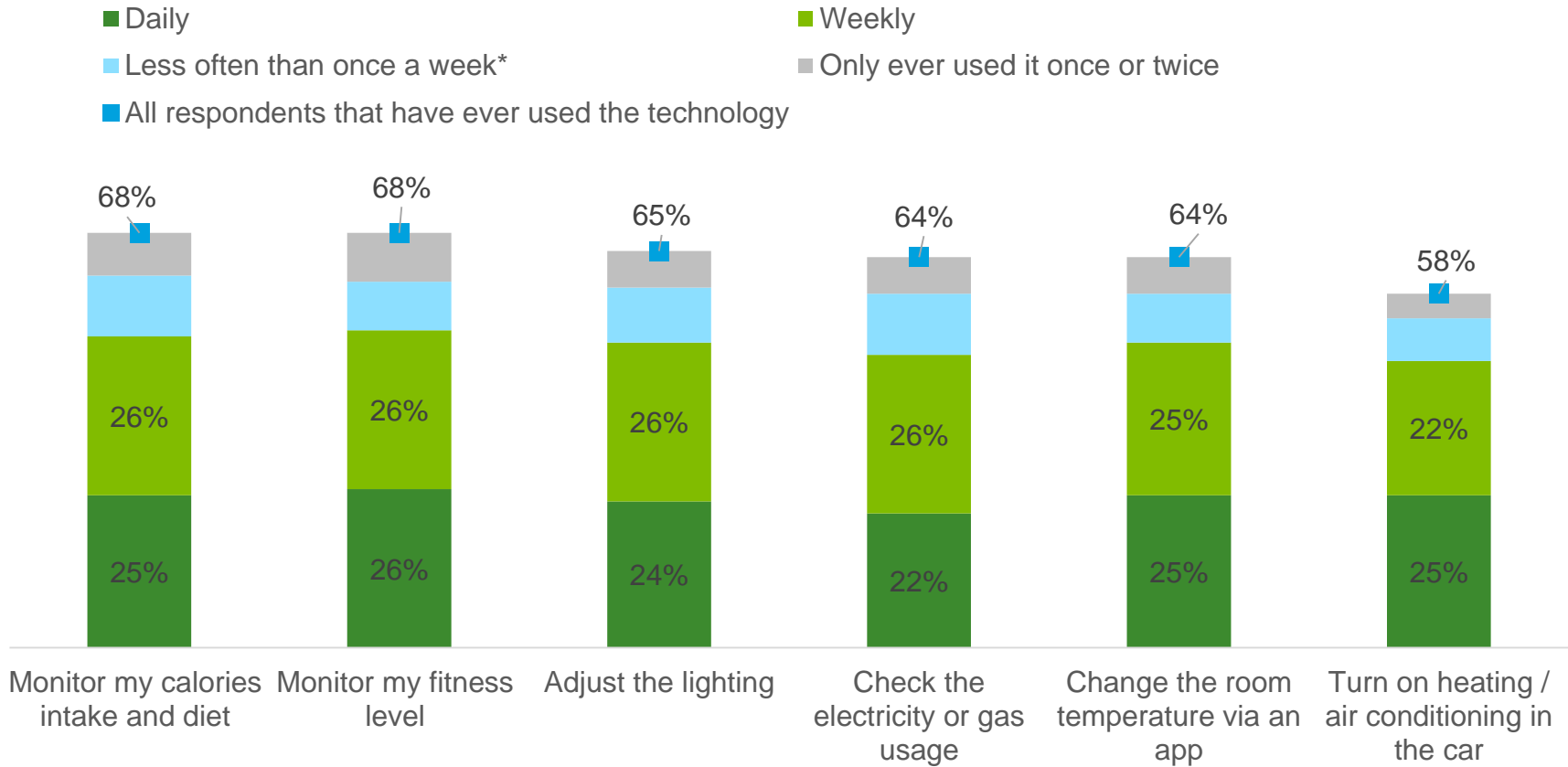
Q. Typically what is the first thing you access on your phone every day?



Increasing usage of smartphone to monitor other activities

Q. How frequently, if at all, do you do each of the following on your phone?

Smartphone owners who have done the activity more than once or twice



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015

Base: All smartphone owners 1729

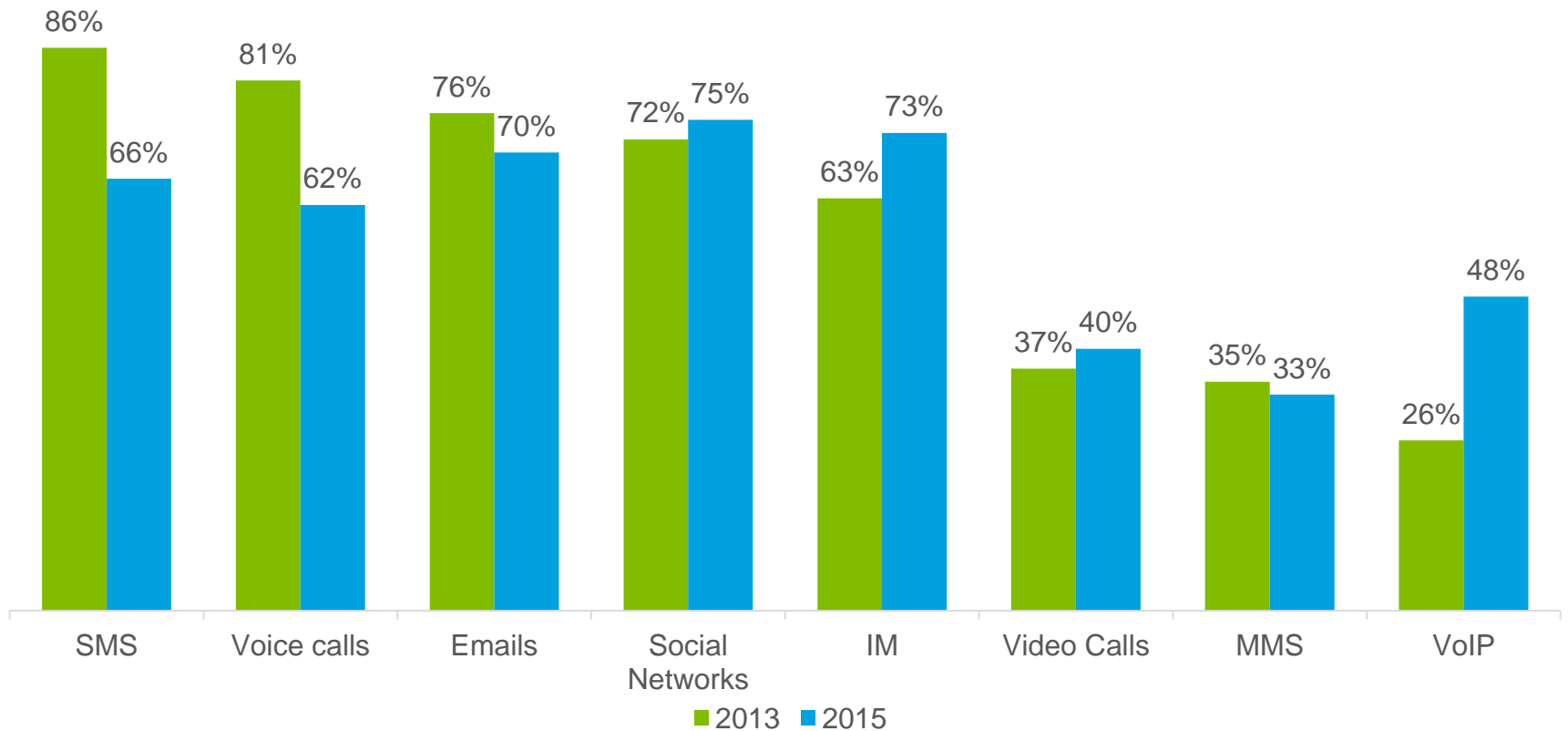
* Respondents that have only ever used the technology only or twice are included in the category of those that use it "Less often than once a week"

Deloitte Global Mobile Consumer Survey, 2015

Communication services

Mobile instant messaging (IM) and VoIP saw the highest growth in usage penetration; SMS and voice calls saw fast decline

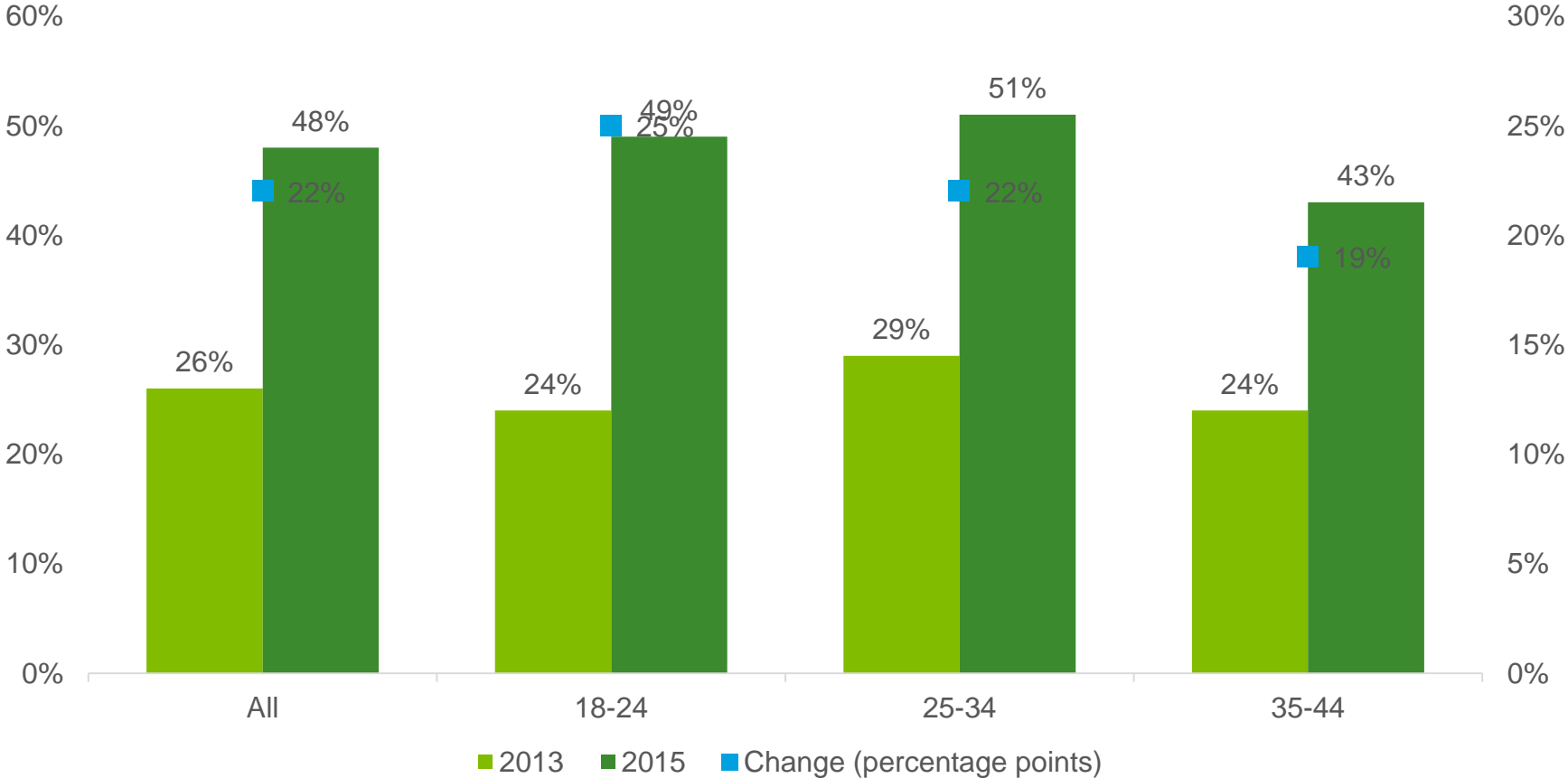
Q. In the last 7 days, in which, if any, of the following ways did you use your phone to communicate with others? (Smartphones)



Source: India edition, Deloitte Global Mobile Consumer Survey, May 2013, May - Jun 2015
Base: Smartphone owners: 2013: 1791, 2015: 1729

VoIP usage (typically via an app) has increased considerably amongst 18-34 year-olds. A significant rise in VoIP calls in last 2 years

Q. In the last 7 days, in which, if any, of the following ways did you use your smartphone to communicate with others? (VoIP)

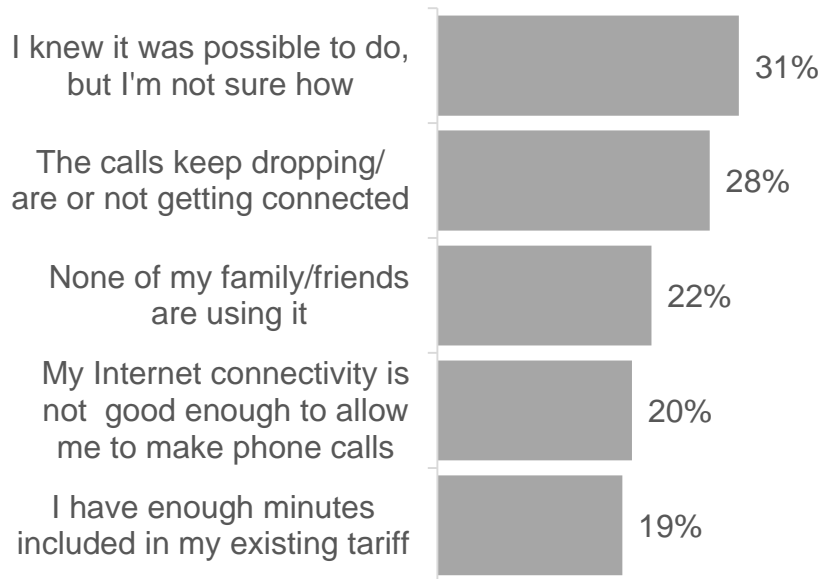


Source: India edition, Deloitte Global Mobile Consumer Survey, May 2013, May - Jun 2015
 Base: VoIP users Base 2013: 1791, 2015: 1729

Consumers prefer VoIP for cheaper/free international calls and because it allows them to make video calls

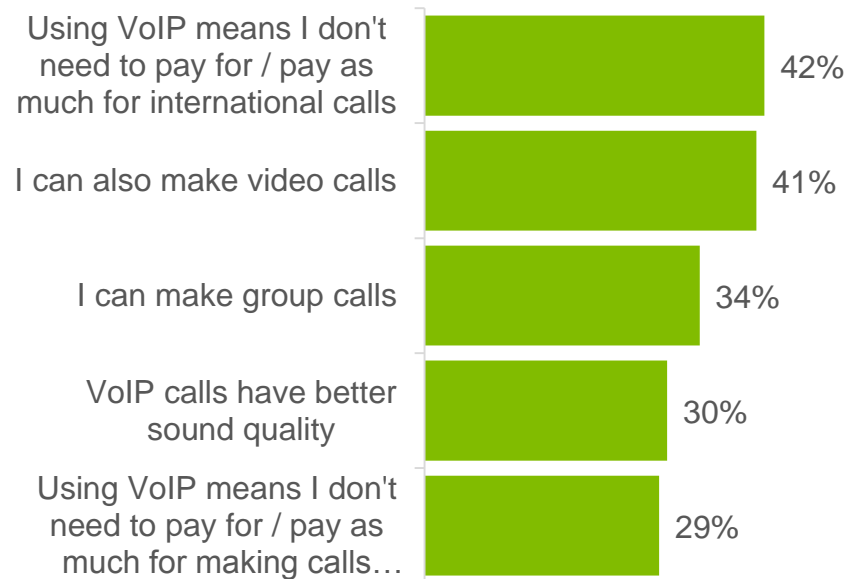
Q. You mentioned that you do not make Voice over Internet (VoIP) services on a weekly basis. Which, if any, of the following reasons best describe why (Top 5 reasons)?

 **52%**



Q. You mentioned that you make Voice over Internet (VoIP) services on a weekly basis. Which, if any, of the following reasons best describe why (Top 5 reasons)?

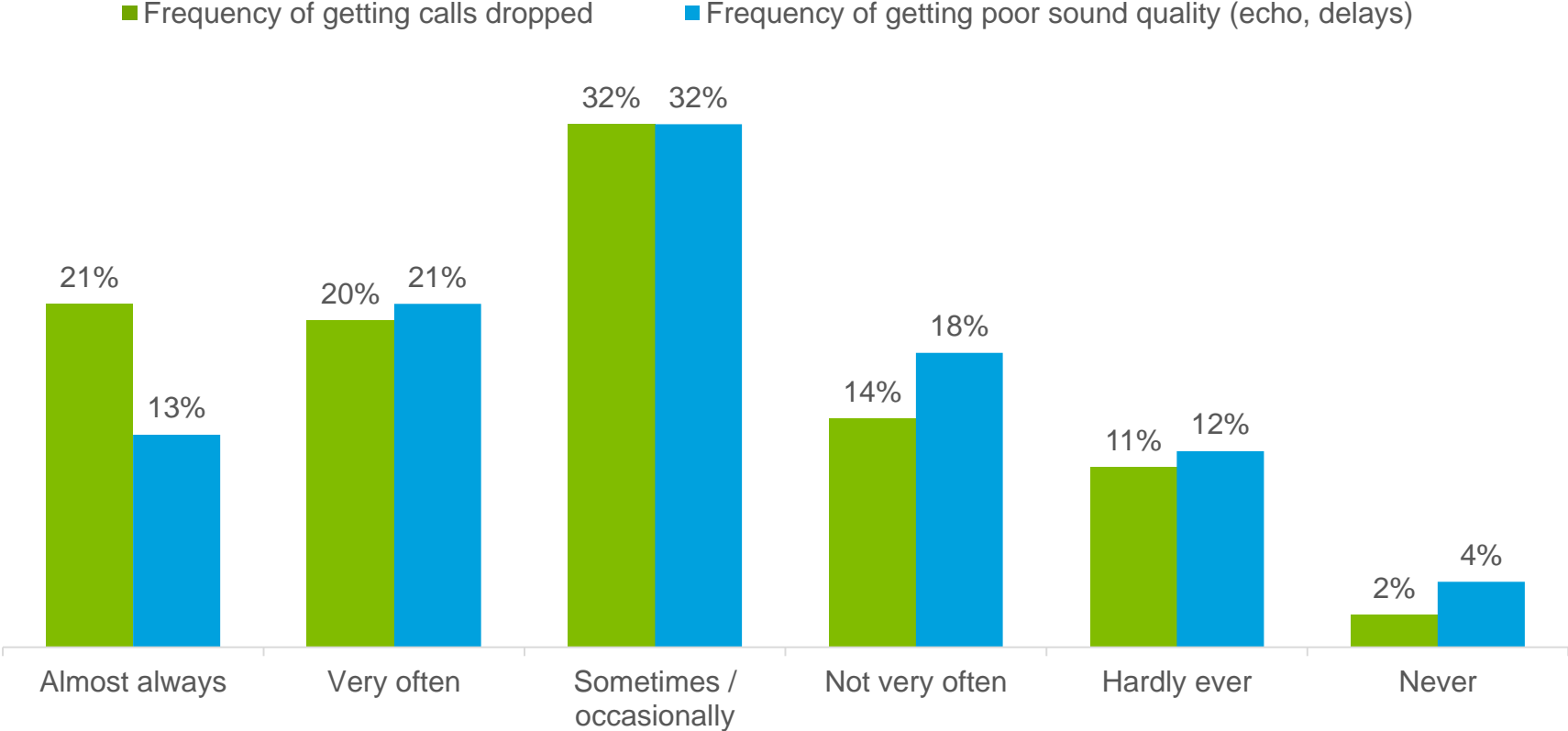
 **48%**



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
Base: Smartphone owners 1729

The majority of India consumers are generally unsatisfied with the quality of voice calls

Q. How often, if at all would you say that you experience poor sound quality when making a voice call?

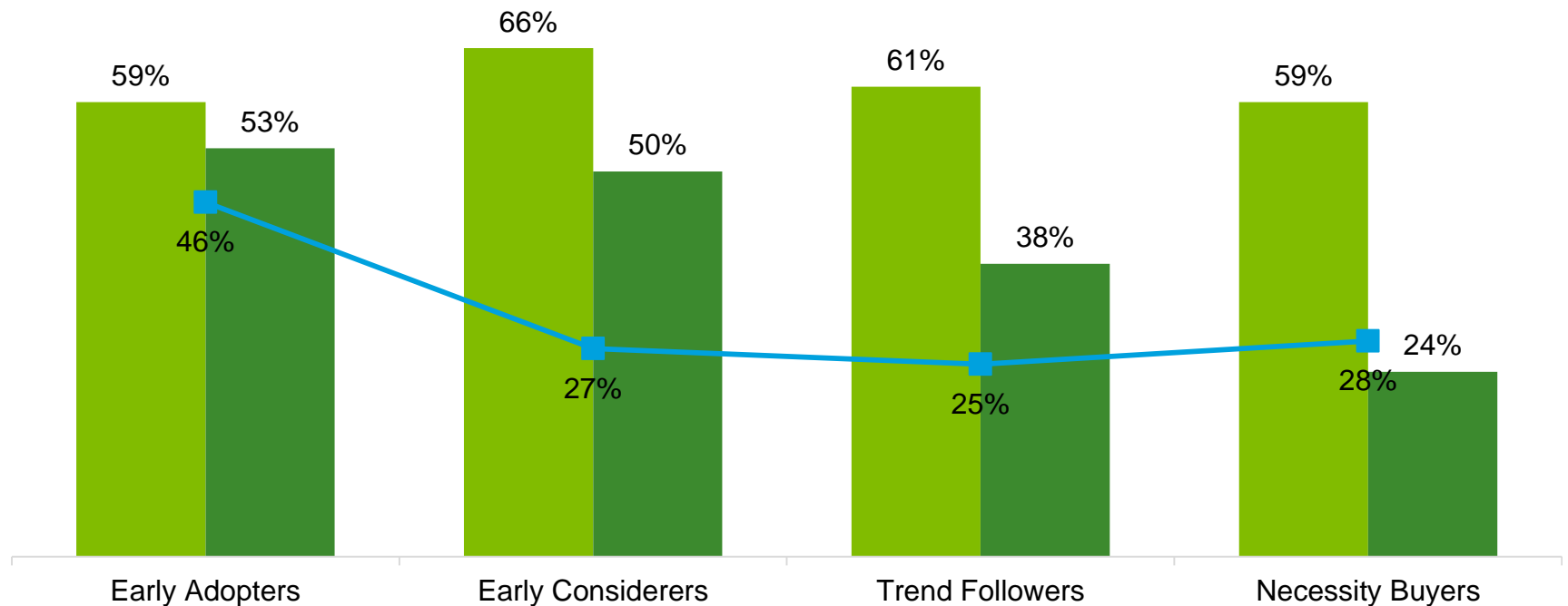


Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
Base: Smartphone owners that made a phone call in the last 7 days: 1077

Lower voice calls and higher VoIP usage among early adopters could be consequences of the “poor sound quality” for standard voice calls

Q. How often, if at all would you say that you experience poor sound quality when making a voice call?

■ Voice calls usage ■ VoIP usage —■ Those that get poor sound quality "Almost always" and "Very often"



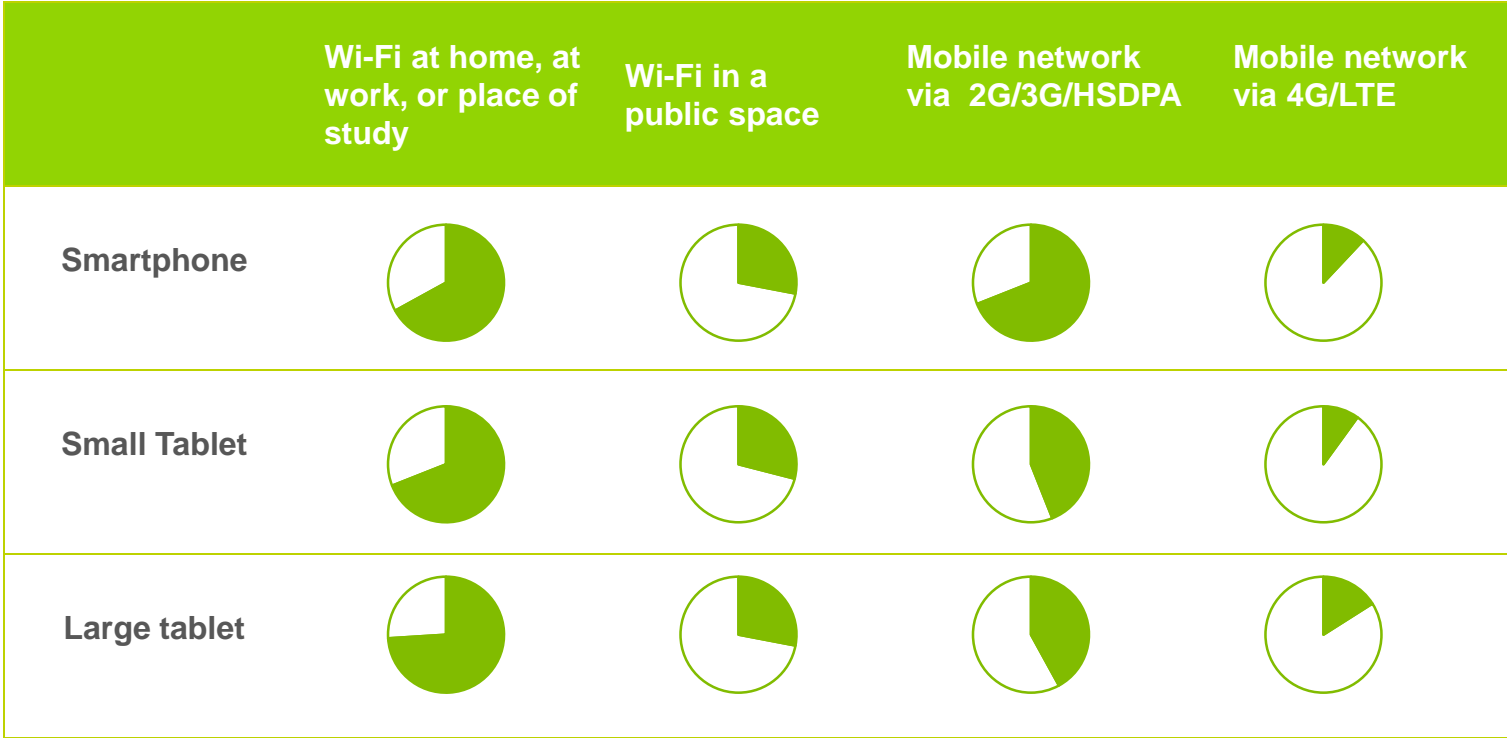
Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015

Base: Smartphone owners that made a phone call in the last 7 days: 1077

Connectivity

The majority of consumers are using Wi-Fi at home, at work, or place of study for accessing internet

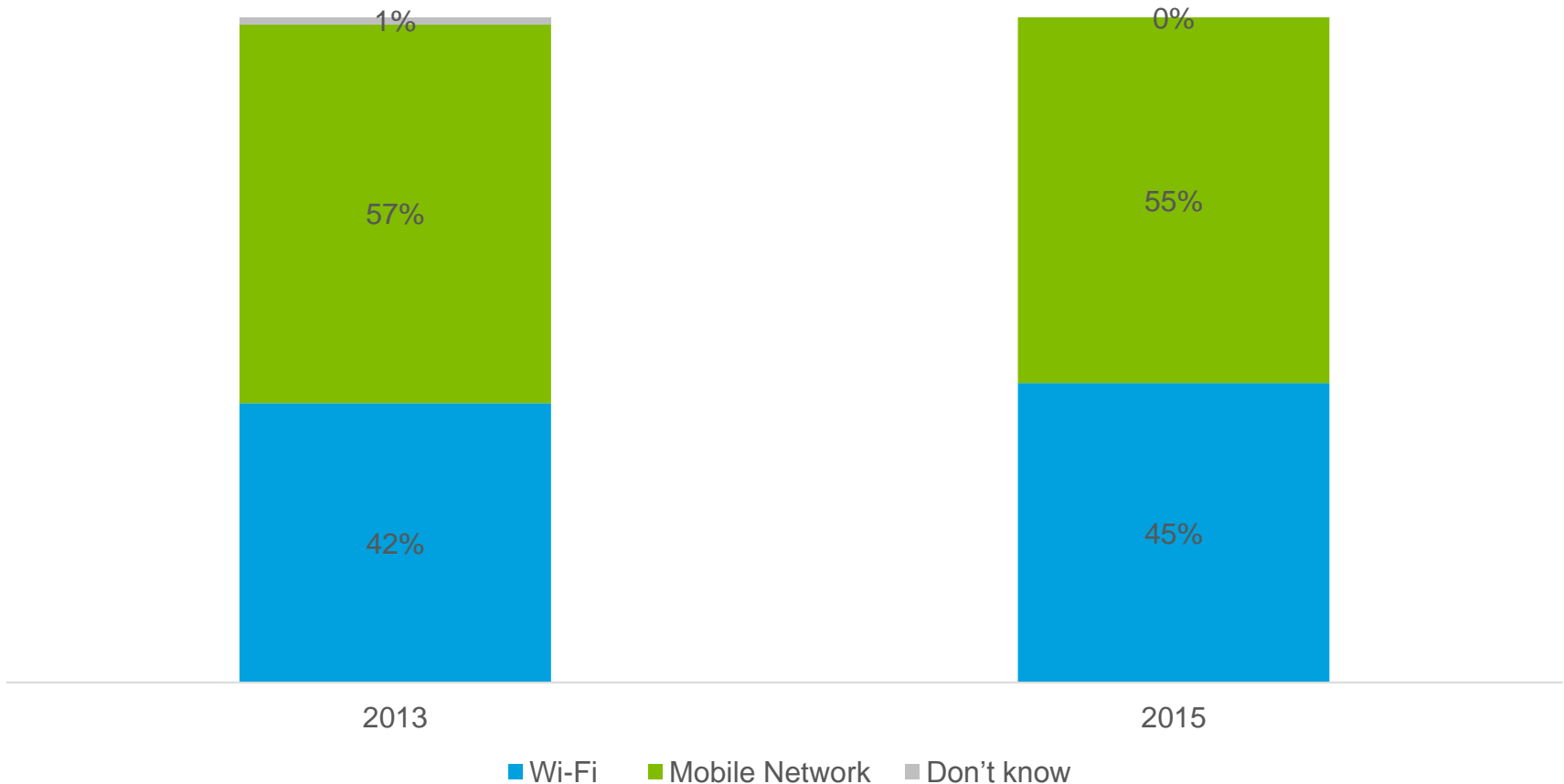
Q. How do you connect each of your device(s) to the Internet? Please select all that apply



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
 Base: Smartphone owners 1729, Small tablet owners: 708, Large tablet owners 388

Mobile network, as the most common way of connecting to the Internet, has remained almost same over years

Q. Thinking about how you connect your devices to the Internet, which, if any of the following, types of connectivity do you use most often? (Smartphones)

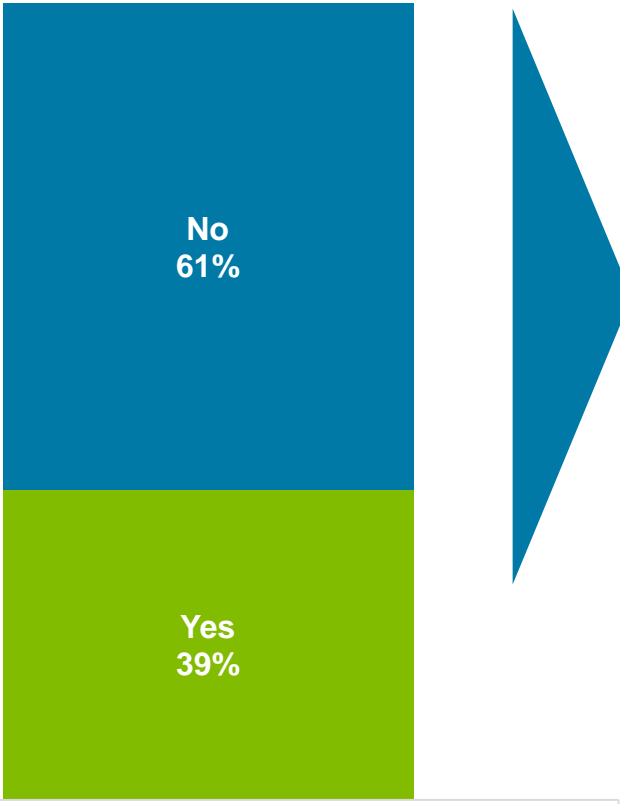


Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015

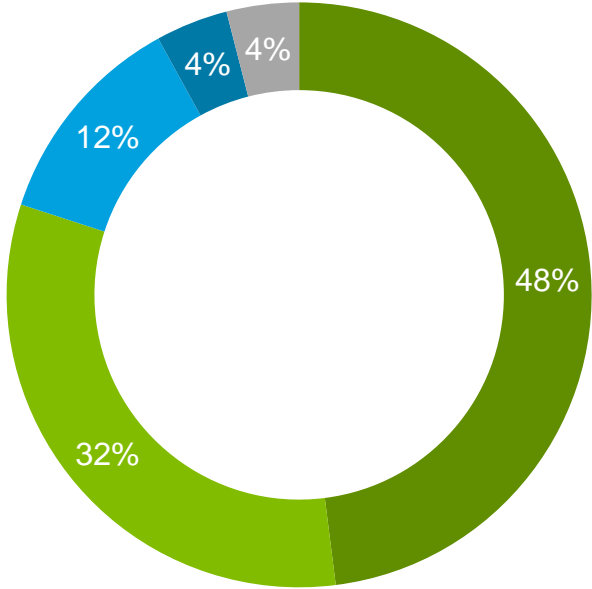
Base: All smartphone users who connect their devices to both Wi-Fi and mobile networks: 2015: 1715, 2013: 1088

More than a third of respondents that don't subscribe to 4G are likely to in the next 12 months

Q. Do you currently subscribe to a 4G/LTE network, whether you pay an additional cost for it or not?



Q. How likely are you to subscribe to 4G/LTE in the next 12 months?



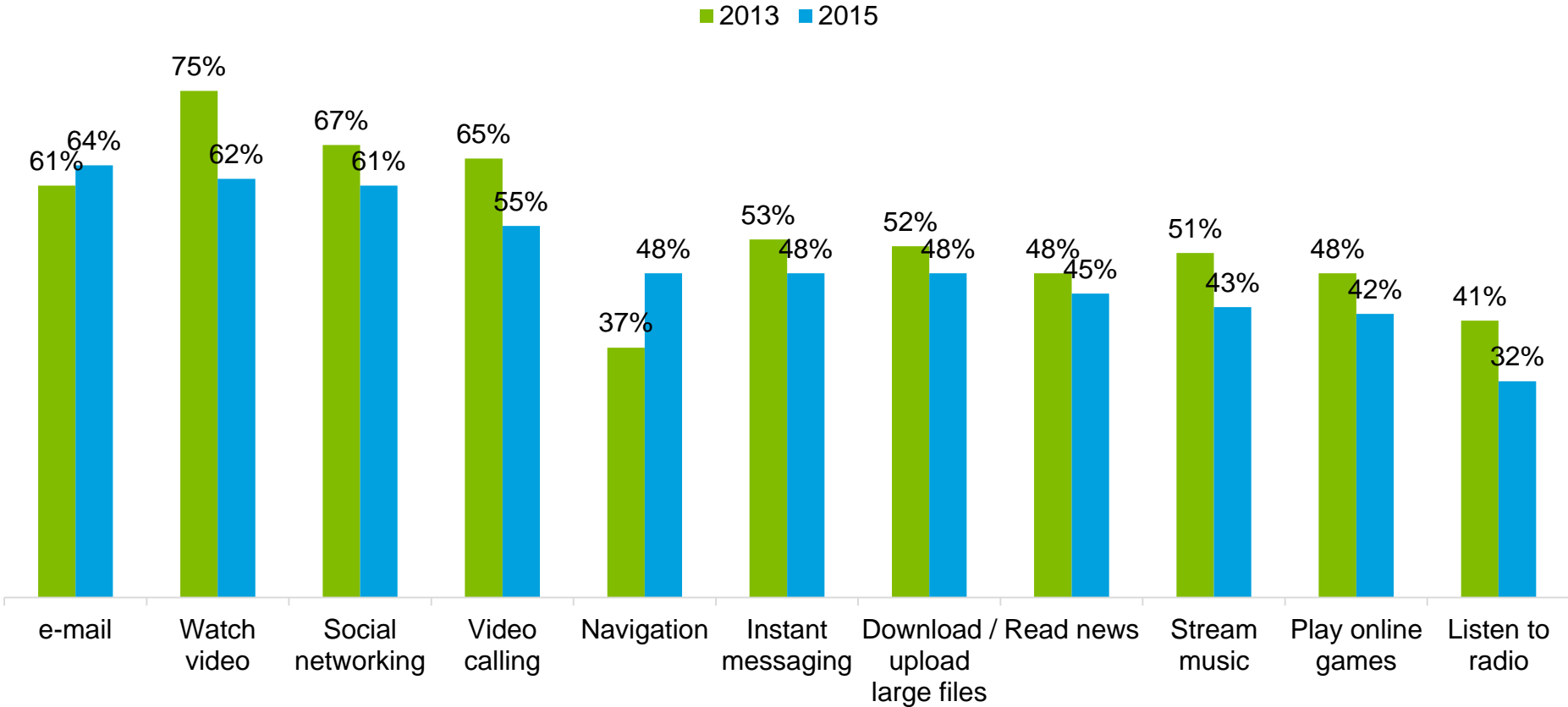
Very likely Fairly likely Not very likely
Not at all likely Don't know

2015

Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
Base: All phone owners: 1729, Those who do not subscribe to 4G: 1142

E-mail remains the “killer app” for 4G users; navigation is gaining significant momentum

Q. Since you started to subscribe to a 4G/LTE service, which, if any, of the following do you do more frequently through your mobile network?

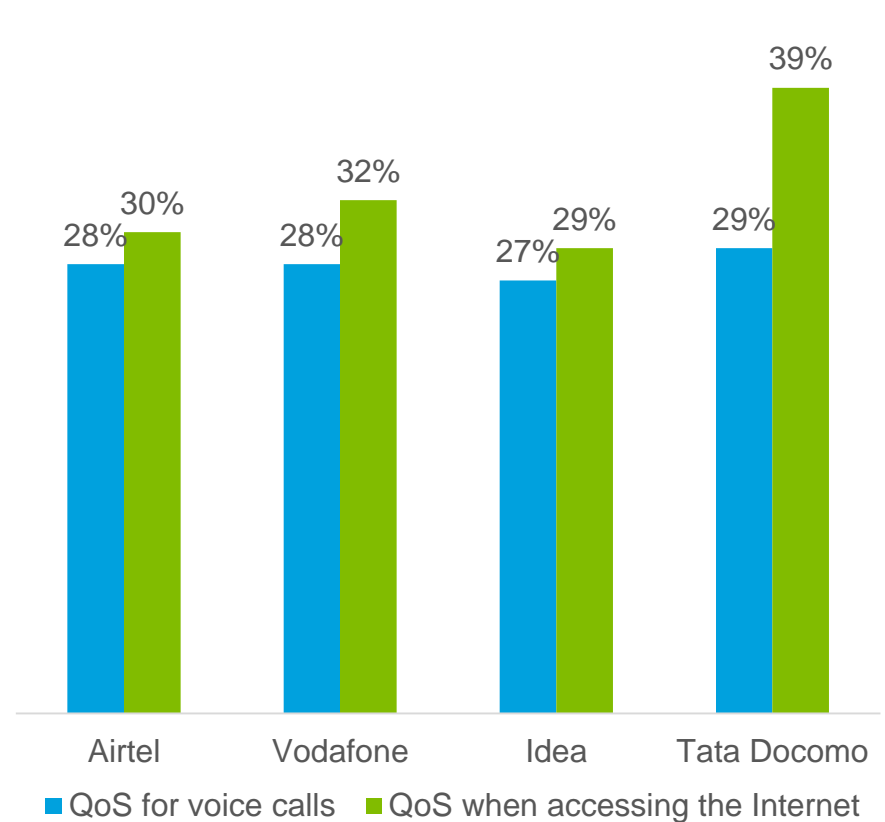
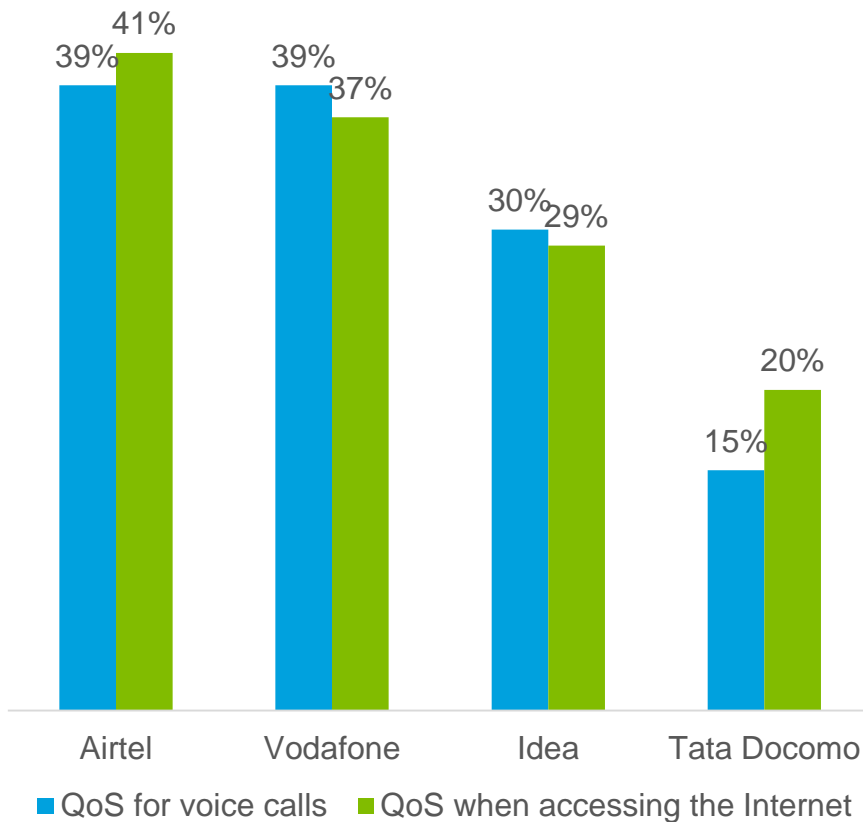


Source: India edition, Deloitte Global Mobile Consumer Survey, May 2013, May 2015
Base: 4G subscribers, 2013: 329, 2015: 587

The quality of network for Internet will be more important than the quality of network for voice calls

Q. Why did you choose your current mobile operator?

Q. If you were to change your operator in the future, which, if any, of the following are most likely to be beneficial to you?



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
 Base: All phone owners: 1729

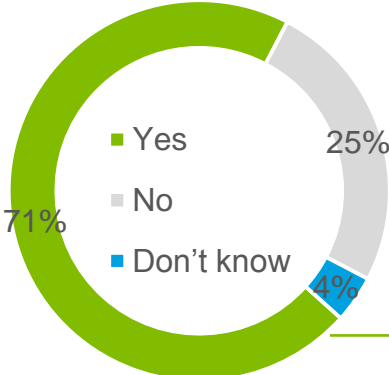
Mobile banking

Phone owners in India are highly interested in mobile money transfers and in-store payments

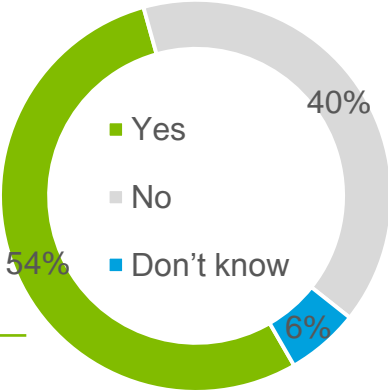
Q. If a solution whereby you would be able to pay in shops by using your mobile phone [...], would you use it?

Q. In general, would you like to be able to use your phone to transfer money to friends/family?

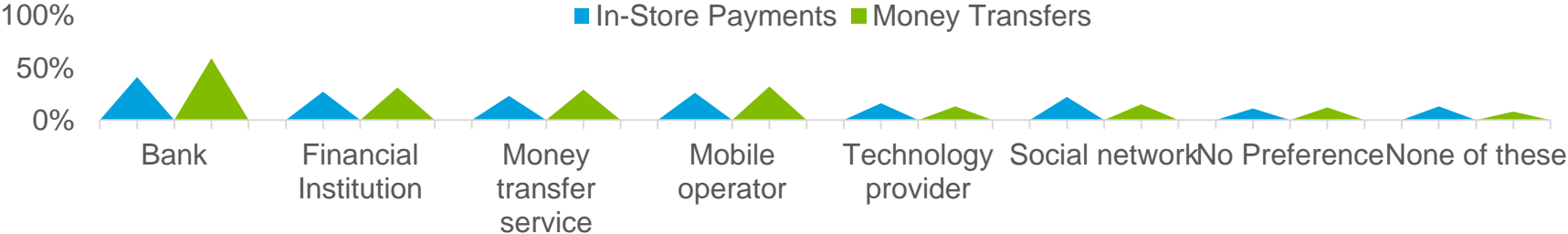
Interest in In-store mobile payments



Interest in mobile money transfers



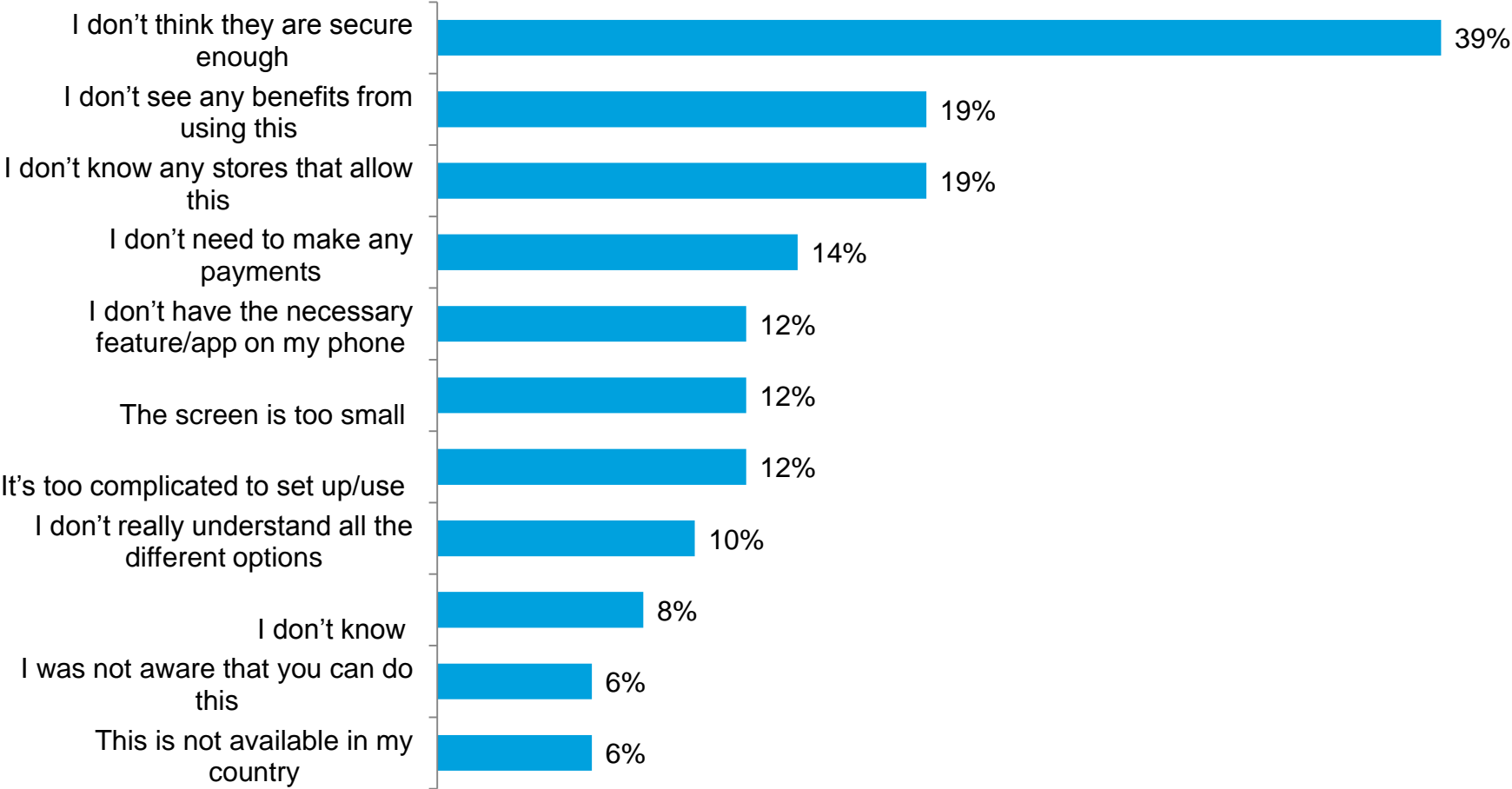
Preferred institutions for these transactions



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
 Base: Those that have never used their phones to: make in store payments 1272, transfer funds 413
 Base: Those who would like to: Make in-store payments 294, Transfer money 222

Fear about security and lack of understanding of potential benefits are key barriers for in-store payments uptake

Q. What are the main reasons why you don't use your phone to make payments in-store?

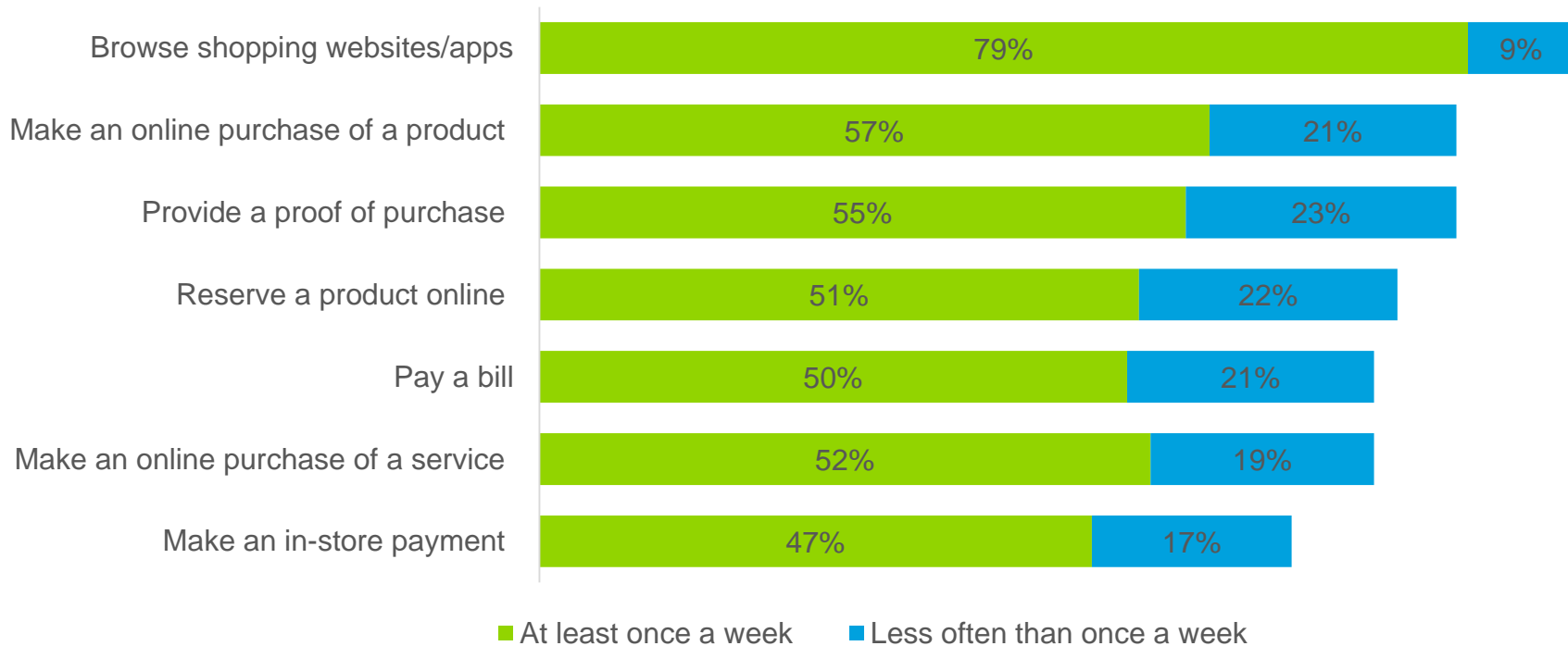


Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015
Base: Those that have never made an in-store payment: 412

Among all shopping related activities, browsing a shopping website/app is the most popular on smartphones

Q. How frequently, if at all, do you use your phone to do any of these?

Phone usage for shopping related activities



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015

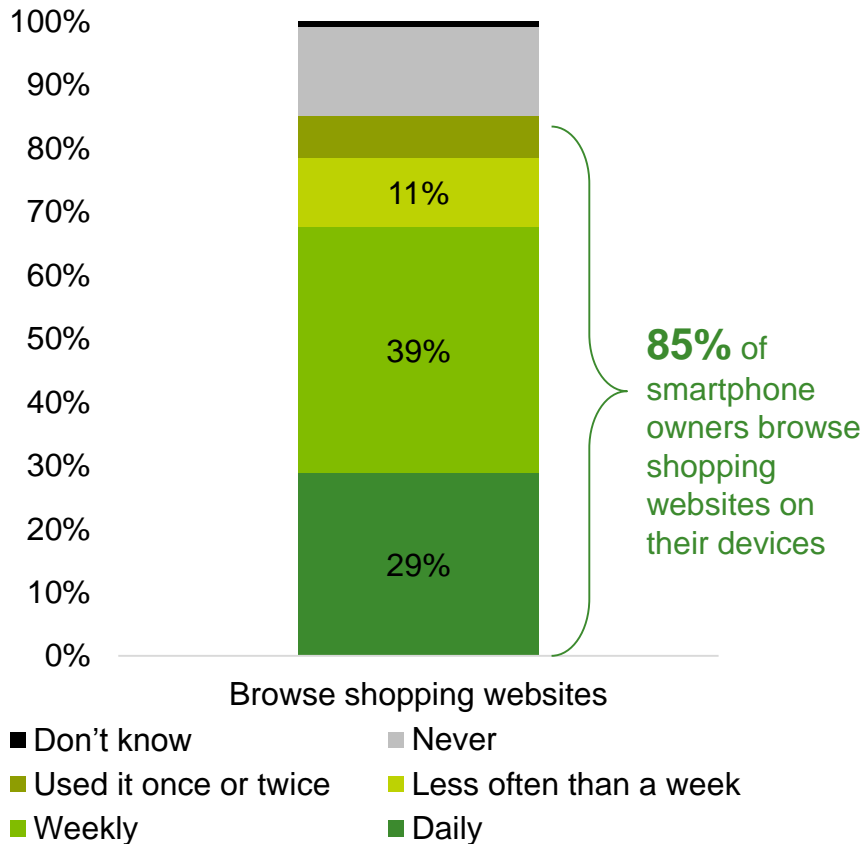
Base: All phone owners: 1729

Note: respondents that have only used their phone for any of these option "only once or twice" have not been included in this analysis

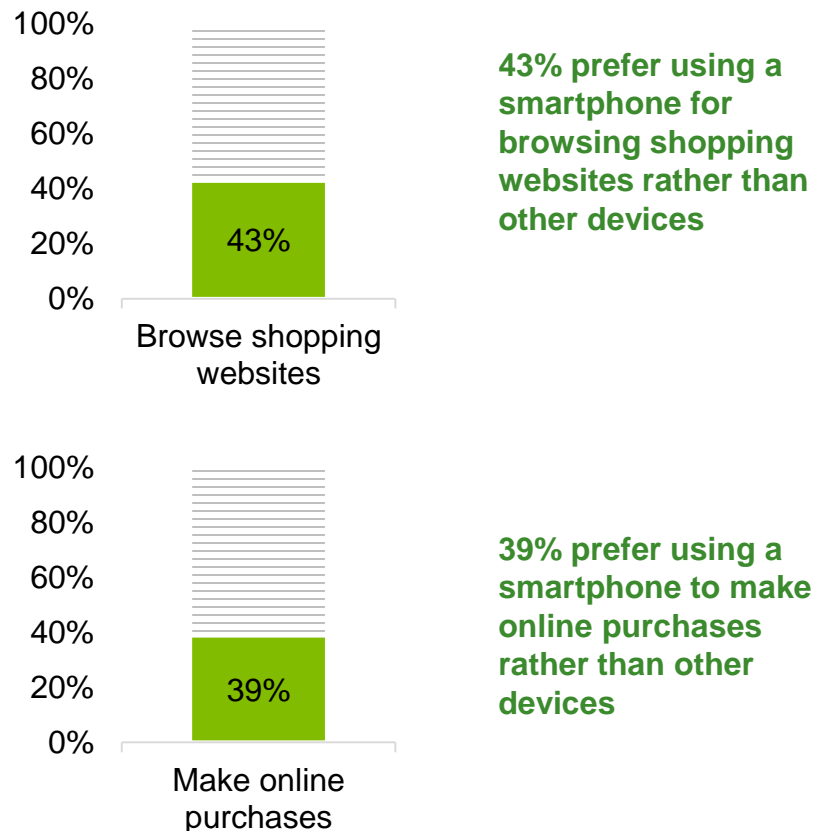
Deloitte Global Mobile Consumer Survey, 2015

While 85% of respondents use their smartphones for browsing shopping websites regularly, only 43% prefer to use their smartphone rather than any other devices

Q. How frequently, if at all, do you use your phone to do at least one of these things?



Q. For which, if any, of the following activities do you typically use your phone instead of other devices such as laptop, TV, tablet or gaming console?



Source: India edition, Deloitte Global Mobile Consumer Survey, May - Jun 2015

Base: All smartphone owners: 1729

Note: the graphs on the right are filtered on respondents that use their phones to browse shopping websites



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