INDIA DIGITAL FUTURE IN FOCUS 2013

Key Insights and Digital Trends Shaping the Indian Online Space

22 August 2013

Executive Summary

Media fragmentation is occurring at light speed in today's multi-platform environment, which features not only computers, but smartphones, tablets, gaming platforms and a seemingly ever-increasing number of emerging devices.

The strong swelling of mobile audiences, devices and consumption habits have shown us that consumers have become more platform agnostic in their digital media consumption and happily switch devices throughout the day and into the night to stay up to date on email, news, social media etc.

comScore has been preparing for a future scenario where most people will consume content on the go and PCs would no longer be the centre of the digital universe. This future is quickly becoming a reality.

The following report examines how the latest trends in web usage, online video, mobile and search, social and shopping are currently shaping the Indian digital marketplace and what that means for the coming year, as comScore helps bring the digital future in focus.

FOR FURTHER INFORMATION, PLEASE CONTACT:

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Key Takeaways

India is now the world's third largest internet population

Riding on a 31% year-on-year increase, India's online population grew to 73.9 million. With an extended online universe in excess of 145 million the market is at a tipping point for online businesses

Younger males and women aged 35-44 emerge as power users

Three-quarters of India's Online population is under 35. Males in the segment and women aged 35-44 are amongst the heaviest users

Online Retail is on the rise

Local While 60 percent of web users in India visit online retail sites, time spent on shopping sites still has huge growth potential. The space is dominated by local retailers led by Myntra, Flipkart and Jabong among others

Social networking still captures majority of screen time

Social Networks capture the largest percentage of consumers' time in the region. Facebook continues to be the number one social network with a 28% increase in traffic and a reach of 86%. LinkedIn emerges as number two, while Pinterest and Tumblr are the fastest growing networks.

Entertainment and online video continues to grow

The online video audience in India grew an astounding 27 percent in the past year, YouTube continues to be the top video property with more than 55% share. International publishers including Facebook, Yahoo and Dailymotion get a majority of the 54 million who watched videos. Local content is distributed mainly through the Youtube platform dominated by Bollywood.

Content

comSCORE.

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GLOBAL OVERVIEW
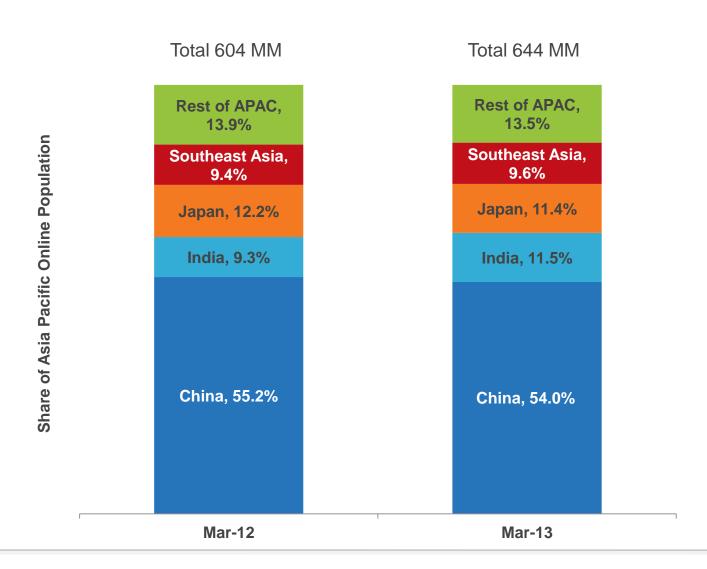
Distribution of Worldwide Internet Audience
The US is no Longer the Center of the Online Universe

34%
Outside US

87%
Outside US

66%

13%

1996

2012

Latin America 9%

Middle East - Africa 9%

North America 14%

Asia Pacific 41%

Europe 27%

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2012 to March 2013
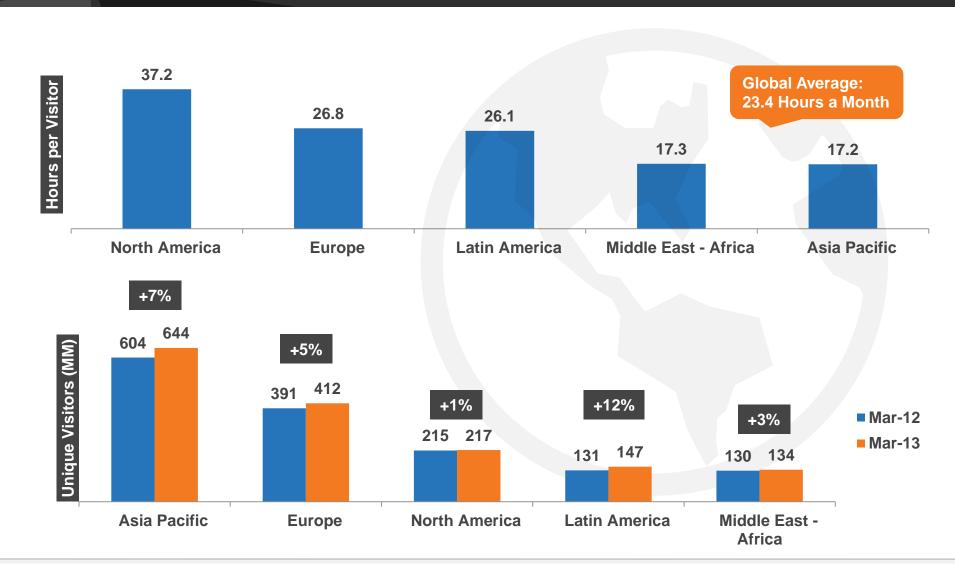
India's share in Asia Pacific Grows
Second Largest Online Population in the Region

Total 604 MM

Total 644 MM

Share of Asia Pacific Online Population

Mar-12

- Rest of APAC, 13.9%
- Southeast Asia, 9.4%
- Japan, 12.2%
- India, 9.3%
- China, 55.2%

Mar-13

- Rest of APAC, 13.5%
- Southeast Asia, 9.6%
- Japan, 11.4%
- India, 11.5%
- China, 54.0%

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2012 to March 2013

Time Spent and Growth Across Regions
US Users Spent Most Time, Whilst Asia Pacific Outgrows Rest of the World

Hours per Visitor

Region	Hours
North America	37.2
Europe	26.8
Latin America	26.1
Middle East - Africa	17.3
Asia Pacific	17.2

Global Average: 23.4 Hours a Month

Unique Visitors (MM)

Region	Mar-12	Mar-13	Growth
Asia Pacific	604	644	+7%
Europe	391	412	+5%
North America	215	217	+1%
Latin America	131	147	+12%
Middle East - Africa	130	134	+3%

■ Mar-12
■ Mar-13

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2012 to March 2013

INDIAN ONLINE LANDSCAPE

India is the World's Third Largest Internet Population
Overtakes Japan by Adding 17.6 Million Users in the Past Year
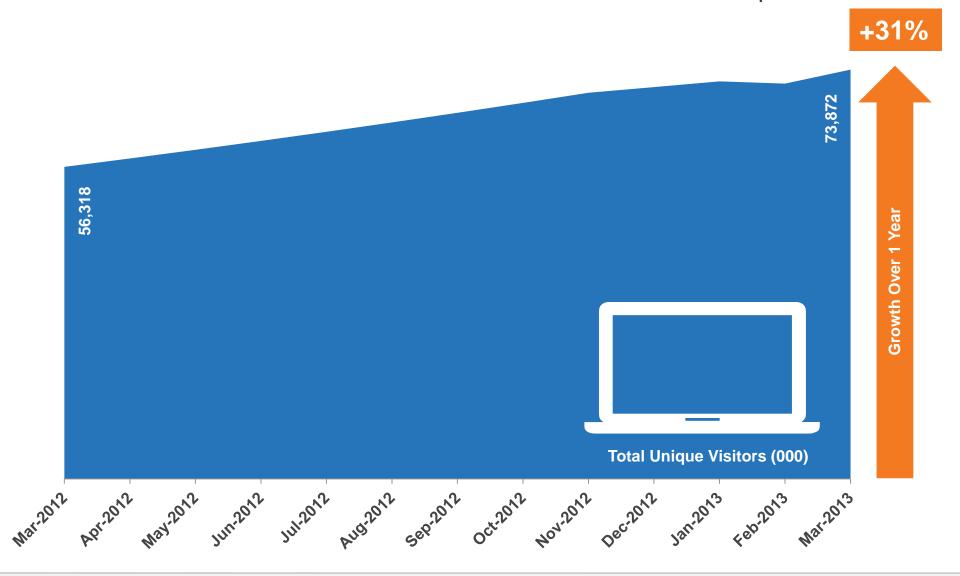
Total Unique Visitors (000)

With an extended online universe in excess of 145 million the market is at a tipping point for online businesses

India's Internet audience grew by 17.6 million users since March 2012, a year-over-year increase of 31%

348,177 · 191,374 · 73,872 · 73,640 · 62,617 · 62,122 · 52,701 · 43,021 · 39,147 · 28,929
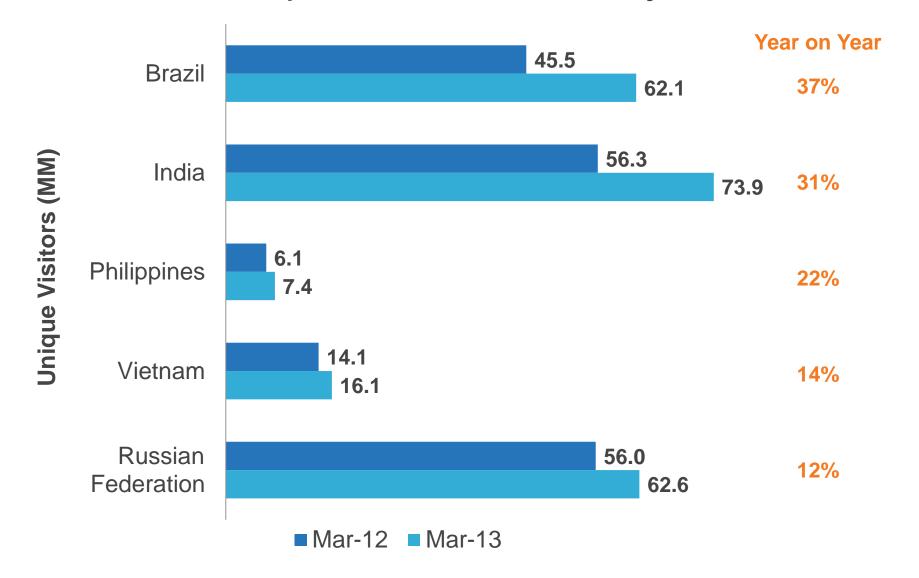
Indian Online Population grows steadily
73.9 Million Indians Surfed the Web via a Home or Work Computer

+31%

73,872

56,318

Growth Over 1 Year

Total Unique Visitors (000)

Mar-2012 Apr-2012 May-2012 Jun-2012 Jul-2012 Aug-2012 Sep-2012 Oct-2012 Nov-2012 Dec-2012 Jan-2013 Feb-2013 Mar-2013
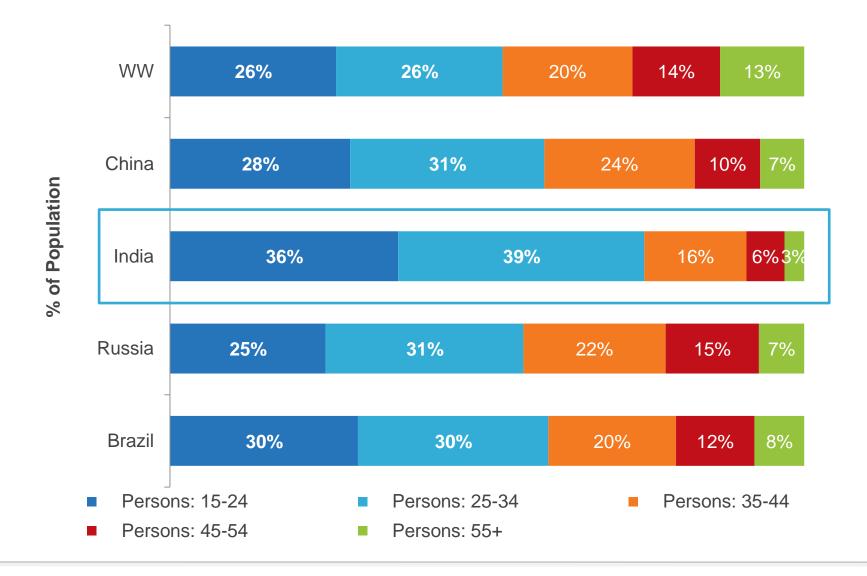
India's Y/Y Online Population Growth Second Only to Brazil's

Unique Visitors (MM)

Year on Year

Country	Mar-12	Mar-13	Y/Y
Brazil	45.5	62.1	37%
India	56.3	73.9	31%
Philippines	6.1	7.4	22%
Vietnam	14.1	16.1	14%
Russian Federation	56.0	62.6	12%

■ Mar-12 ■ Mar-13

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2012 and March 2013

India's Online Population Skews Significantly Younger Than Other BRIC Countries with 75% Under the Age of 35

% of Population

Country	15-24	25-34	35-44	45-54	55+
WW	26%	26%	20%	14%	13%
China	28%	31%	24%	10%	7%
India	36%	39%	16%	6%	3%
Russia	25%	31%	22%	15%	7%
Brazil	30%	30%	20%	12%	8%

- Persons: 15-24
- Persons: 25-34
- Persons: 35-44
- Persons: 45-54
- Persons: 55+

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013
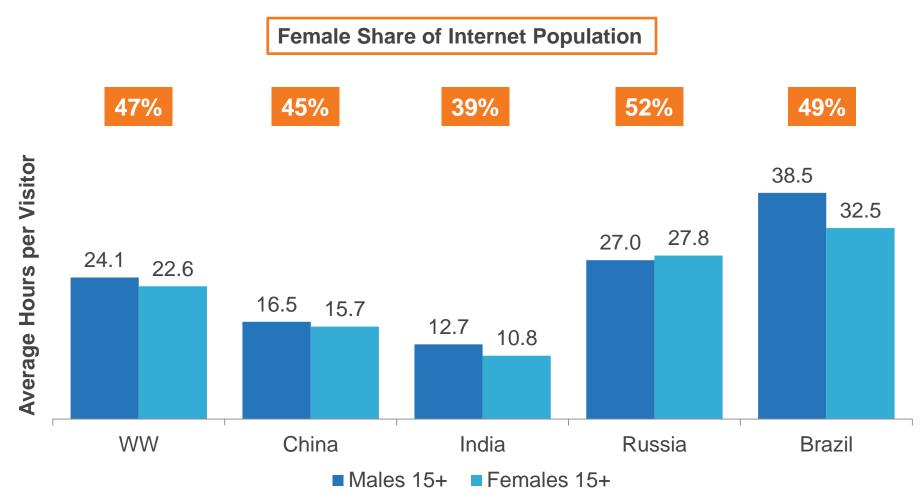
Females Comprise 39% of the Indian Internet Population
Women Also Spend Less Time Online than Men

Female Share of Internet Population

	WW	China	India	Russia	Brazil
Female Share	47%	45%	39%	52%	49%

Average Hours per Visitor

	WW	China	India	Russia	Brazil
Males 15+	24.1	16.5	12.7	27.0	38.5
Females 15+	22.6	15.7	10.8	27.8	32.5

■ Males 15+ ■ Females 15+

Internet Audience 15+ accessing Internet from a Home or Work PC
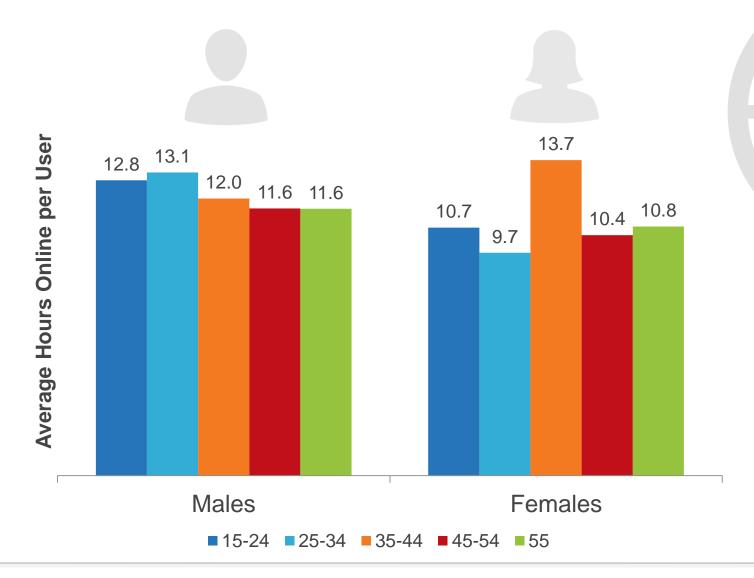Source: comScore Media Metrix, March 2013

Women 35-44 are Heaviest Internet Users Among Age/Gender Groups
Among Men, 25-34 year-olds are the Heaviest Internet Users

Average Hours Online per User

Males
- 15-24: 12.8
- 25-34: 13.1
- 35-44: 12.0
- 45-54: 11.6
- 55: 11.6

Females
- 15-24: 10.7
- 25-34: 9.7
- 35-44: 13.7
- 45-54: 10.4
- 55: 10.8

Legend: ■ 15-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55

Internet Audience 15+ accessing Internet from a Home or Work PC
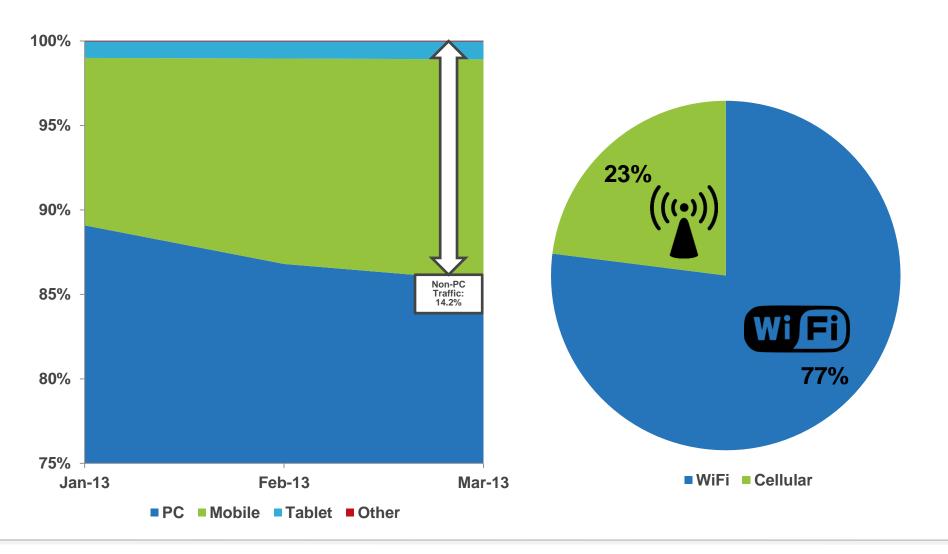Source: comScore Media Metrix, March 2013

INDIAN **MOBILE** LANDSCAPE
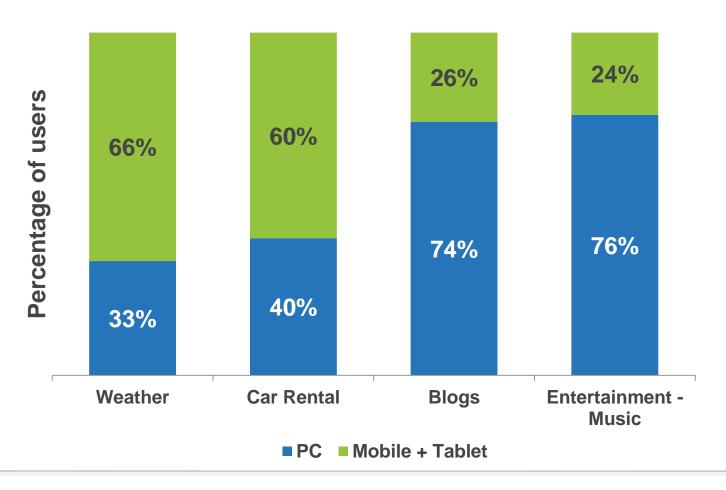
Non-PC traffic growth starting to accelerate in 2013
Mobile and Tablet shares grows to 14.2%

Non-PC Traffic: 14.2%

PC **Mobile** **Tablet** **Other**

23%

77%

WiFi **Cellular**

Mobiles and tablets preferred choice of access for many
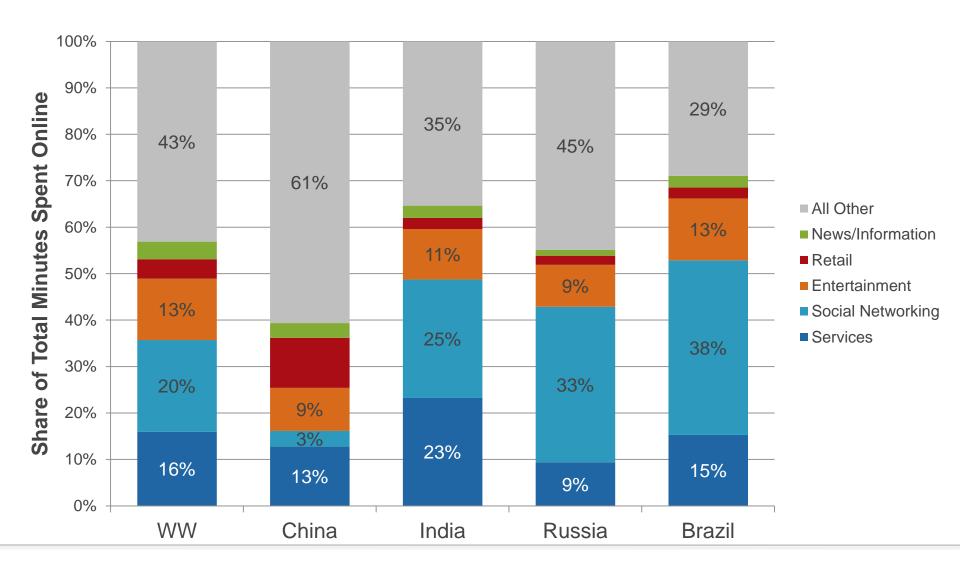Weather, Blogs and Music Increasingly Accessed "on the go"

Source: comScore Device Essentials July 2013
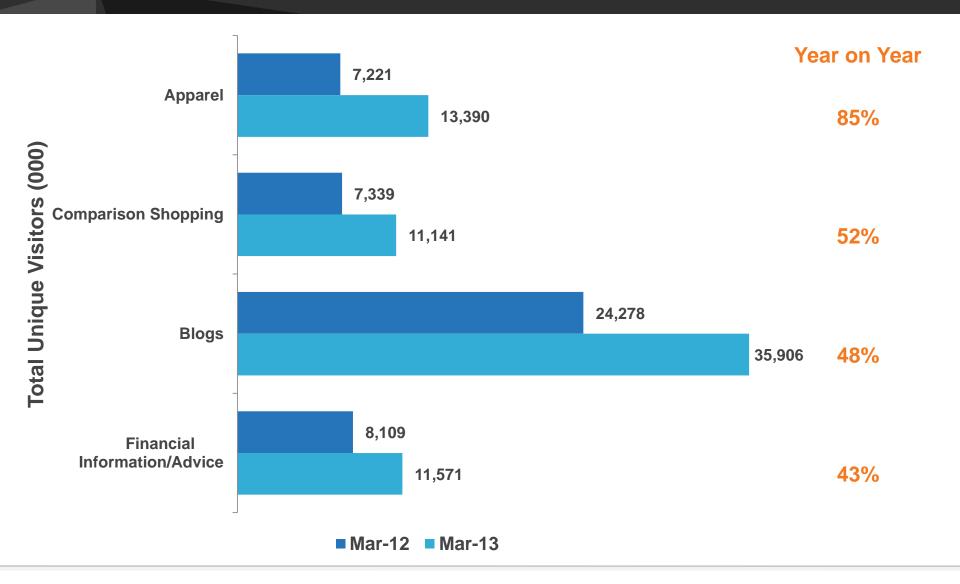
Social Networking Captures Large Share of PC Screen Time in India
Share of Time Spent on Services (Email, IM) Also Significant

Share of Total Minutes Spent Online

Legend:
- All Other
- News/Information
- Retail
- Entertainment
- Social Networking
- Services

WW
- All Other: 43%
- Entertainment: 13%
- Social Networking: 20%
- Services: 16%

China
- All Other: 61%
- Entertainment: 9%
- Social Networking: 3%
- Services: 13%

India
- All Other: 35%
- Entertainment: 11%
- Social Networking: 25%
- Services: 23%

Russia
- All Other: 45%
- Entertainment: 9%
- Social Networking: 33%
- Services: 9%

Brazil
- All Other: 29%
- Entertainment: 13%
- Social Networking: 38%
- Services: 15%

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

Fastest Growing Web Categories in India
Blogs Category Showed Phenomenal Growth, Adding 11.6m New Users

Total Unique Visitors (000)

Year on Year

Apparel
- 7,221
- 13,390
- **85%**

Comparison Shopping
- 7,339
- 11,141
- **52%**

Blogs
- 24,278
- 35,906
- **48%**

Financial Information/Advice
- 8,109
- 11,571
- **43%**

■ **Mar-12** ■ **Mar-13**

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2012 and March 2013

Top Web Properties - India

	Unique Visitors (000)	Minutes per Visitor
Google Sites	69,393	167.9
Facebook	59,662	217.7
Yahoo! Sites	38,909	72.1
Microsoft Sites	31,332	19.4
Wikimedia Foundation Sites	24,934	11.1
Times Internet Limited	23,968	17.5
BitTorrent Network	22,640	0.1
Network 18	18,549	25.7
Ask Network	16,187	4.0
Rediff.com India Ltd	13,897	35.2

Internet Audience 15+ accessing Internet from a Home or Work PC
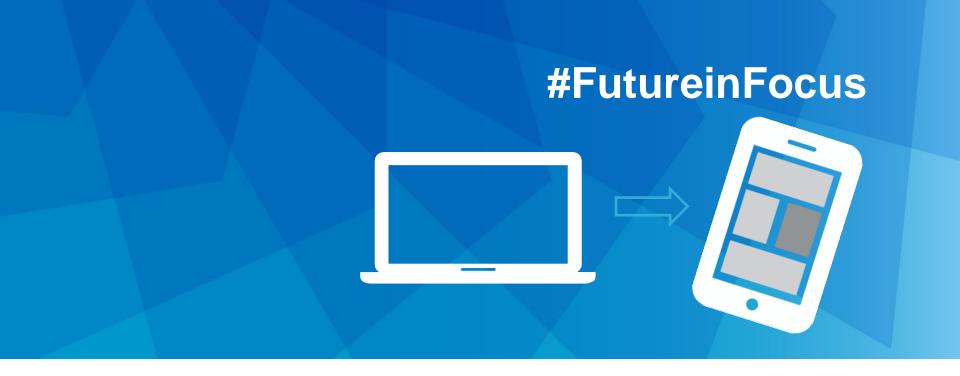Source: comScore Media Metrix, March 2013

SOCIAL NETWORKING

Social Networking Continues to Grow in India
Facebook Leads the Charge

86%

Indian Web Users Visit a Social Networking Site

217

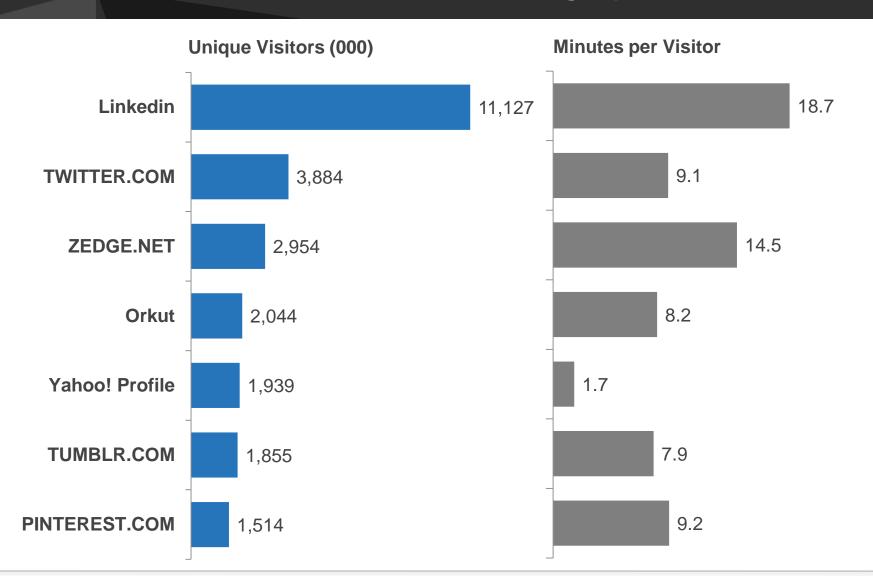**Minutes Are Spent on Facebook by an Average User**

28%

Increase in Facebook Visitors in the last 12 months
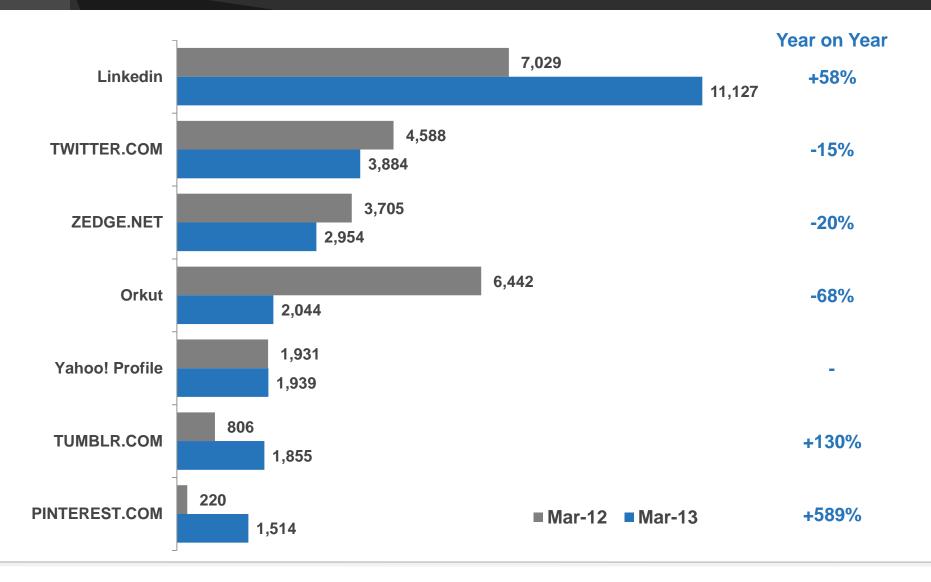
59,642,000

Users visited Facebook on their PC's

Business-Focused LinkedIn in #2 Spot
Twitter, Orkut, Tumblr and Pinterest among top 7

Unique Visitors (000)

Linkedin	11,127
TWITTER.COM	3,884
ZEDGE.NET	2,954
Orkut	2,044
Yahoo! Profile	1,939
TUMBLR.COM	1,855
PINTEREST.COM	1,514

Minutes per Visitor

Linkedin	18.7
TWITTER.COM	9.1
ZEDGE.NET	14.5
Orkut	8.2
Yahoo! Profile	1.7
TUMBLR.COM	7.9
PINTEREST.COM	9.2

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

Social – New Kids on the Block
Tumblr & Pinterest Emerge as the Fastest Growing Networks

Year on Year

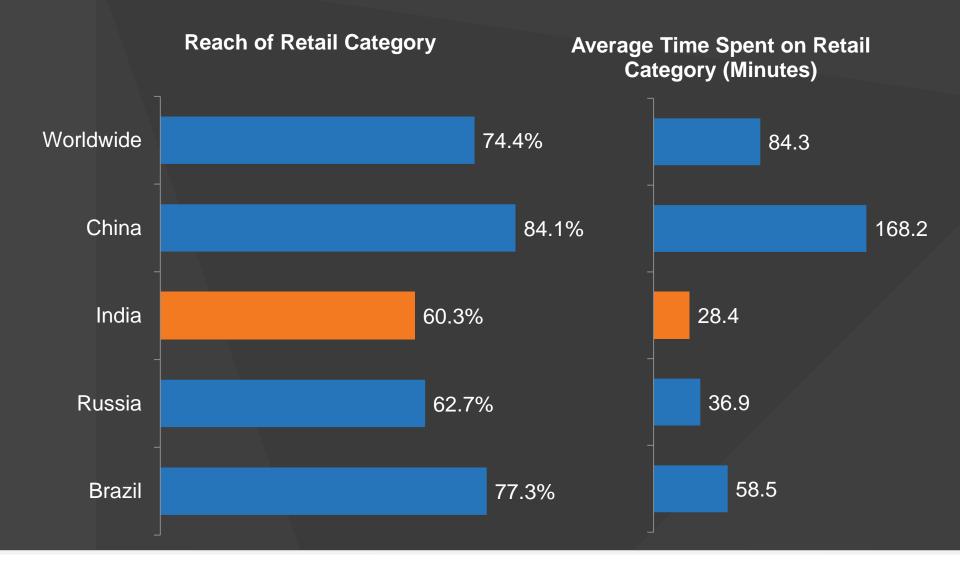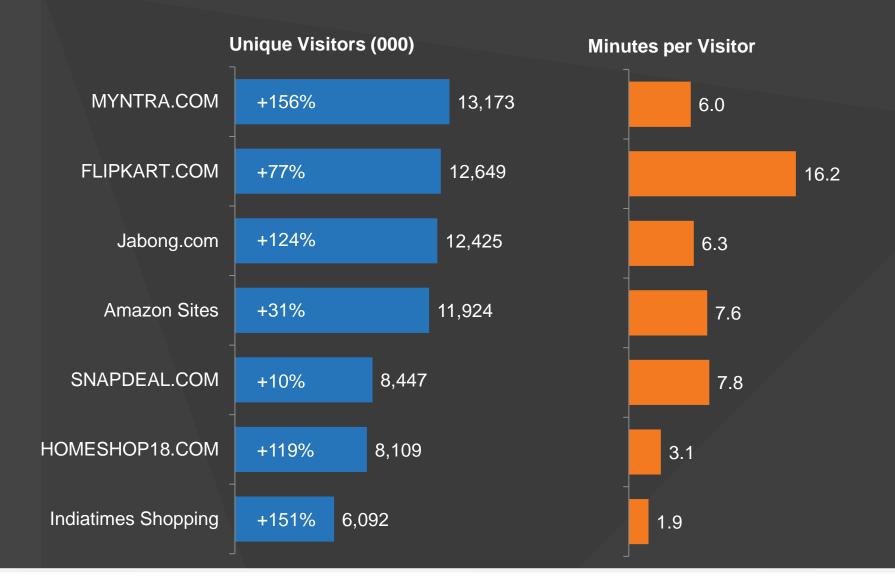| Network	Mar-12	Mar-13	Year on Year
Linkedin	7,029	11,127	+58%
TWITTER.COM	4,588	3,884	-15%
ZEDGE.NET	3,705	2,954	-20%
Orkut	6,442	2,044	-68%
Yahoo! Profile	1,931	1,939	-
TUMBLR.COM	806	1,855	+130%
PINTEREST.COM	220	1,514	+589%

■ Mar-12 ■ Mar-13

ONLINE RETAIL ON THE RISE

Online Retail Market in India is Underdeveloped vs. BRIC Peers
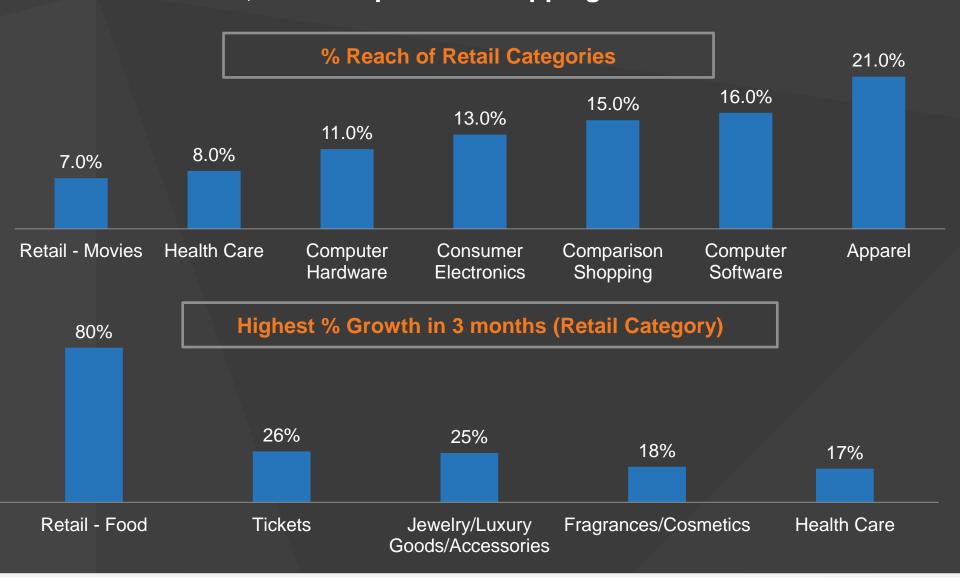## Significant opportunity to increase penetration and engagement

Reach of Retail Category

Country	Reach
Worldwide	74.4%
China	84.1%
India	60.3%
Russia	62.7%
Brazil	77.3%

Average Time Spent on Retail Category (Minutes)

Country	Minutes
Worldwide	84.3
China	168.2
India	28.4
Russia	36.9
Brazil	58.5

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, June 2013

Local Retailer Myntra Shows Highest Growth and Leads the Category
Highest Per-User Engagement is on Flipkart.com

Unique Visitors (000)

Minutes per Visitor

	Unique Visitors (000)	Minutes per Visitor
MYNTRA.COM	+156% — 13,173	6.0
FLIPKART.COM	+77% — 12,649	16.2
Jabong.com	+124% — 12,425	6.3
Amazon Sites	+31% — 11,924	7.6
SNAPDEAL.COM	+10% — 8,447	7.8
HOMESHOP18.COM	+119% — 8,109	3.1
Indiatimes Shopping	+151% — 6,092	1.9

Largest Retail Subcategories Include Apparel, Computer and Electronics Sites, and Comparison Shopping

% Reach of Retail Categories

Category	%
Retail - Movies	7.0%
Health Care	8.0%
Computer Hardware	11.0%
Consumer Electronics	13.0%
Comparison Shopping	15.0%
Computer Software	16.0%
Apparel	21.0%

Highest % Growth in 3 months (Retail Category)

Category	%
Retail - Food	80%
Tickets	26%
Jewelry/Luxury Goods/Accessories	25%
Fragrances/Cosmetics	18%
Health Care	17%

ENTERTAINMENT & ONLINE VIDEO

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Entertainment and Online Video Remain Popular
YouTube is the Number One Destination for Videos

74%
of Internet Users in India Visited an Entertainment Site

31.5
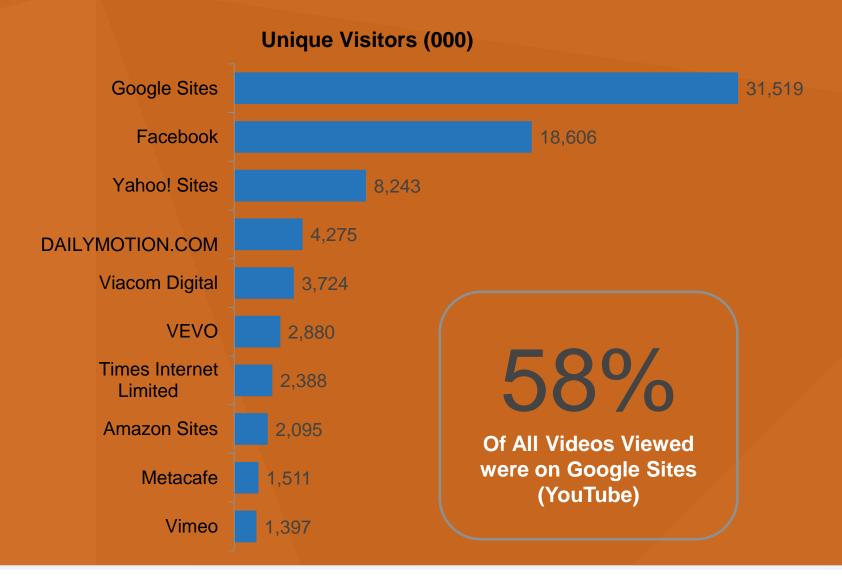Million Viewers Watched Videos on Google Sites (YouTube)

27%
Increase in the Indian Online Video Audience over a year
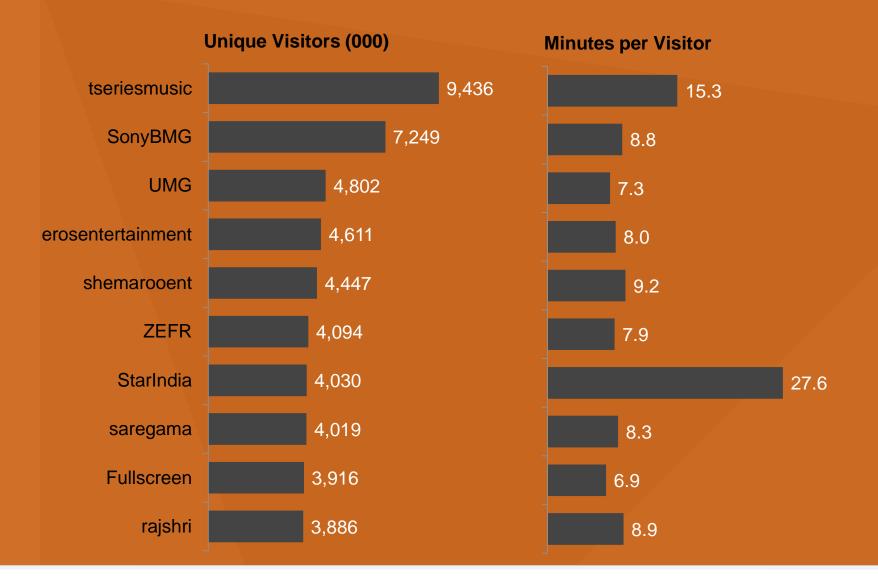
54,025,000
Watched an Online Video on their PC's

Facebook, Yahoo! And YouTube Lead
Times Internet Only Local Publisher in Top 10

Unique Visitors (000)

Site	Unique Visitors (000)
Google Sites	31,519
Facebook	18,606
Yahoo! Sites	8,243
DAILYMOTION.COM	4,275
Viacom Digital	3,724
VEVO	2,880
Times Internet Limited	2,388
Amazon Sites	2,095
Metacafe	1,511
Vimeo	1,397

58%
Of All Videos Viewed were on Google Sites (YouTube)

Tseries, Sony and UMG Top3 YouTube Partners
StarIndia Keeps Users Glued On Longer

	Unique Visitors (000)	Minutes per Visitor
tseriesmusic	9,436	15.3
SonyBMG	7,249	8.8
UMG	4,802	7.3
erosentertainment	4,611	8.0
shemarooent	4,447	9.2
ZEFR	4,094	7.9
StarIndia	4,030	27.6
saregama	4,019	8.3
Fullscreen	3,916	6.9
rajshri	3,886	8.9

comScore

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Video Metrix, March 2013

34
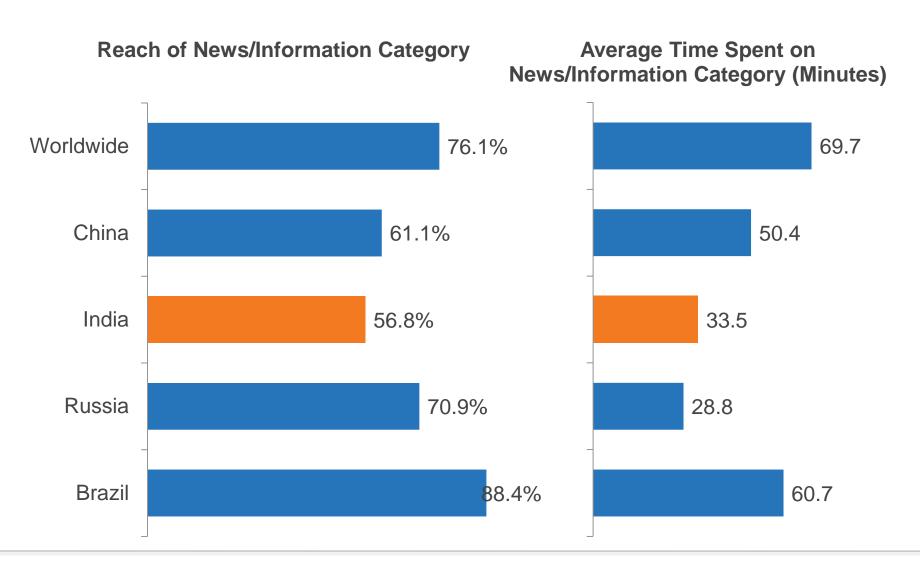
NEWS/INFORMATION
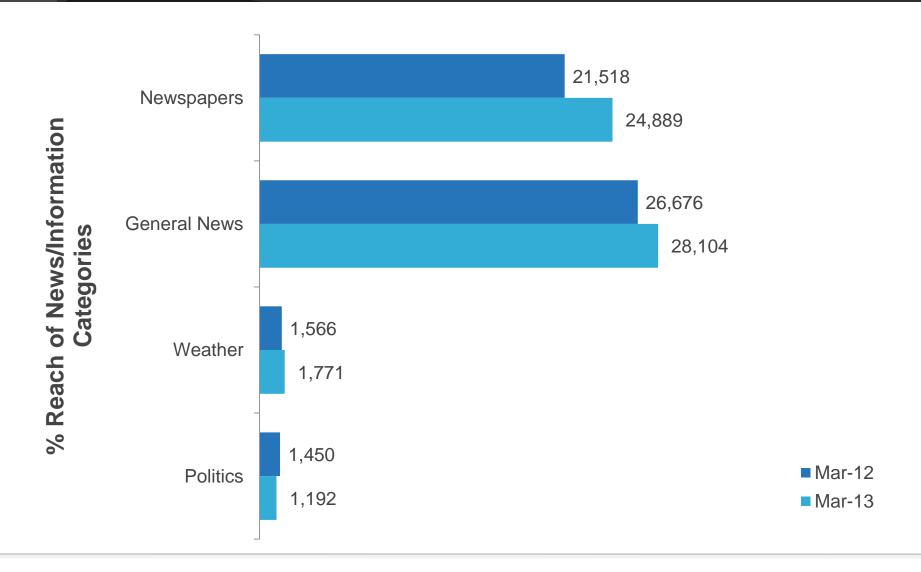
News/Information Market also Underdeveloped vs. BRIC Peers
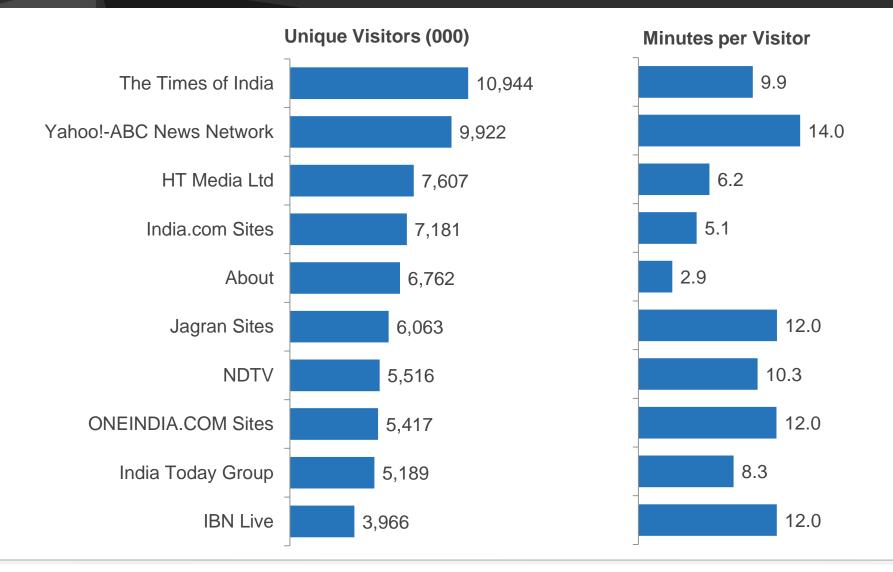## Average of 33.5 Minutes Spent on These Sites

Reach of News/Information Category

Country	Reach
Worldwide	76.1%
China	61.1%
India	56.8%
Russia	70.9%
Brazil	88.4%

Average Time Spent on News/Information Category (Minutes)

Country	Minutes
Worldwide	69.7
China	50.4
India	33.5
Russia	28.8
Brazil	60.7

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

Newspapers and General News Sites Garner the Most Attention

% Reach of News/Information Categories

Category	Mar-12	Mar-13
Newspapers	21,518	24,889
General News	26,676	28,104
Weather	1,566	1,771
Politics	1,450	1,192

■ Mar-12
■ Mar-13
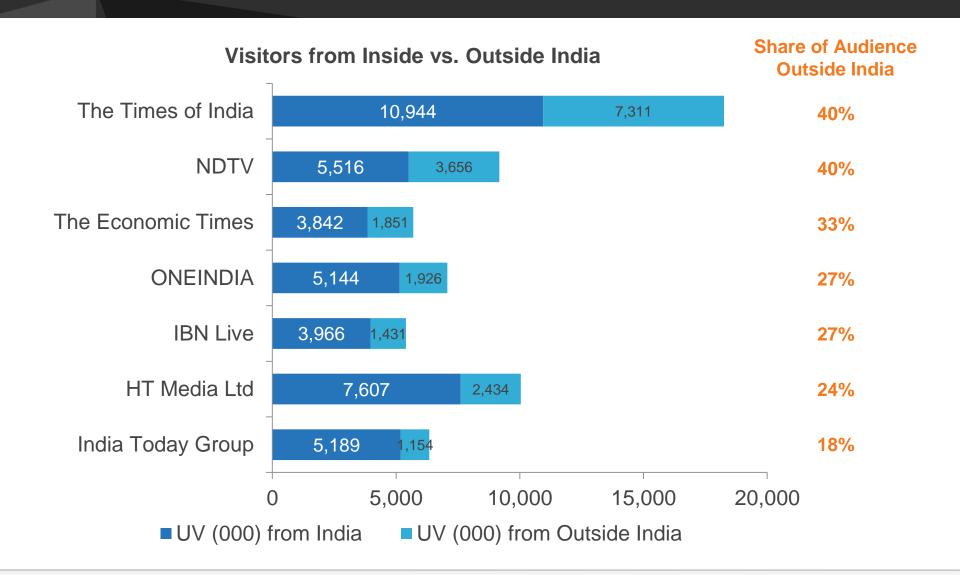
Web Users in India Source News from Local and International Sites Times of India Leads Visitors and Yahoo has Highest Engagement
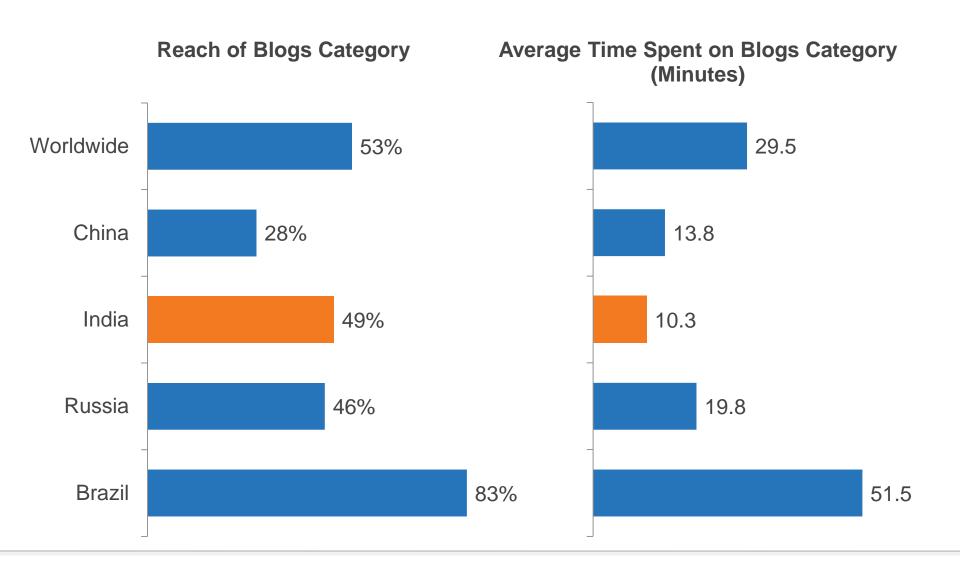
Unique Visitors (000)

Site	Unique Visitors (000)
The Times of India	10,944
Yahoo!-ABC News Network	9,922
HT Media Ltd	7,607
India.com Sites	7,181
About	6,762
Jagran Sites	6,063
NDTV	5,516
ONEINDIA.COM Sites	5,417
India Today Group	5,189
IBN Live	3,966

Minutes per Visitor

Minutes per Visitor
9.9
14.0
6.2
5.1
2.9
12.0
10.3
12.0
8.3
12.0

comScore.

Indian News Sites Attract Substantial Share of Visitors from Abroad

Visitors from Inside vs. Outside India

Site	UV (000) from India	UV (000) from Outside India	Share of Audience Outside India
The Times of India	10,944	7,311	40%
NDTV	5,516	3,656	40%
The Economic Times	3,842	1,851	33%
ONEINDIA	5,144	1,926	27%
IBN Live	3,966	1,431	27%
HT Media Ltd	7,607	2,434	24%
India Today Group	5,189	1,154	18%

■ UV (000) from India   ■ UV (000) from Outside India

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Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

Blogs Have Seen High Growth in India Over Past Year
Engagement Remains Low

Reach of Blogs Category

Worldwide	53%
China	28%
India	49%
Russia	46%
Brazil	83%

Average Time Spent on Blogs Category (Minutes)

Worldwide	29.5
China	13.8
India	10.3
Russia	19.8
Brazil	51.5
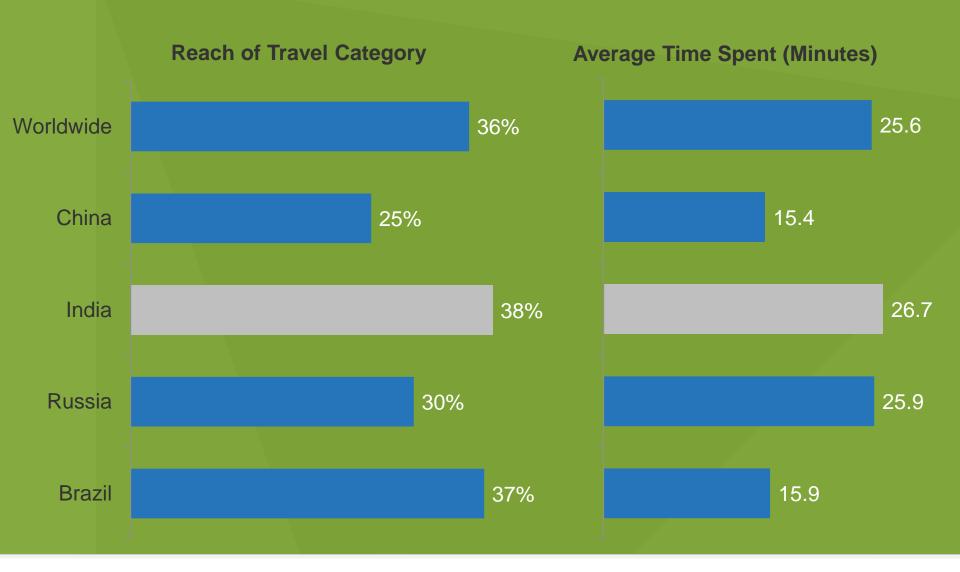
Travel Category Gets More Users
Time Spent on Travel Sites is Also Higher Than Others

Reach of Travel Category

Region	Reach
Worldwide	36%
China	25%
India	38%
Russia	30%
Brazil	37%

Average Time Spent (Minutes)

Region	Minutes
Worldwide	25.6
China	15.4
India	26.7
Russia	25.9
Brazil	15.9

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

Local Travel Sites Highly Popular
Highest Visiting and Per-User Engagement on Indian Rail sites

		Unique Visitors (000)	**Minutes per Visitor**
Year on on	+9%	Indian Railways — 13,675	25.5
	+40%	MakeMyTrip — 7,602	7.6
	-49%	Yatra Online — 3,352	3.8
	+22%	TripAdvisor Inc. — 3,176	5.5
Year Growth	-35%	CLEARTRIP.COM — 2,645	6.4
	+37%	INDIARAILINFO.COM — 2,495	25.2
	+125%	GOIBIBO.COM — 2,253	3.5
	+25%	REDBUS.IN — 1,620	6.5
	+102%	Holidayiq — 1,597	2.4
	+19%	MUSTSEEINDIA.COM — 1,584	3.4
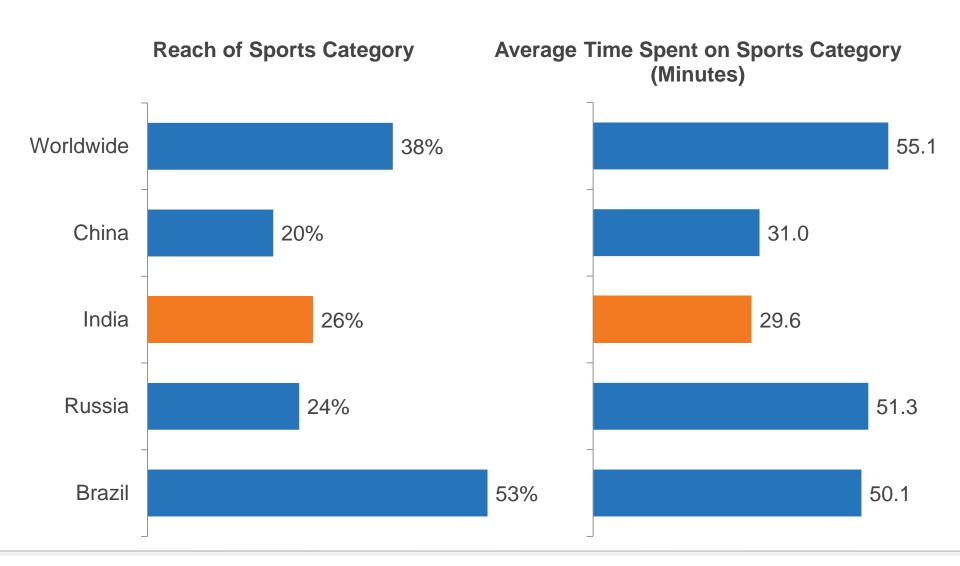
SPORTS
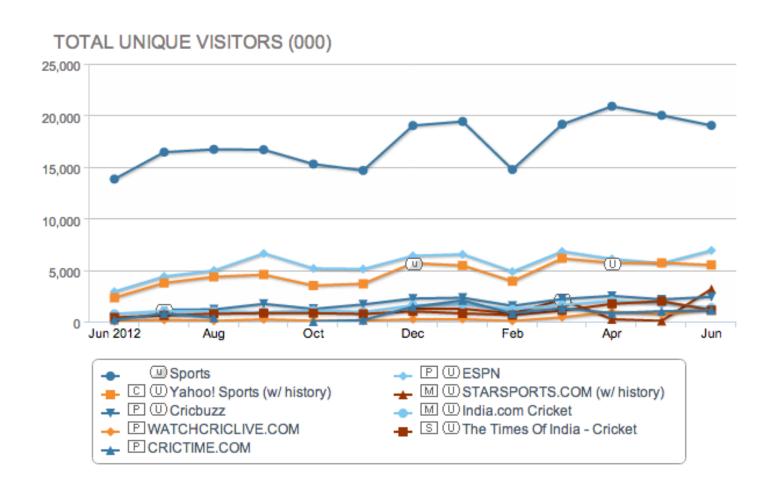
Sports Sites Reach a Quarter of the Indian Web Audience
Average Time Spent Still Below Global Averages

Reach of Sports Category

Country	Reach
Worldwide	38%
China	20%
India	26%
Russia	24%
Brazil	53%

Average Time Spent on Sports Category (Minutes)

Country	Minutes
Worldwide	55.1
China	31.0
India	29.6
Russia	51.3
Brazil	50.1
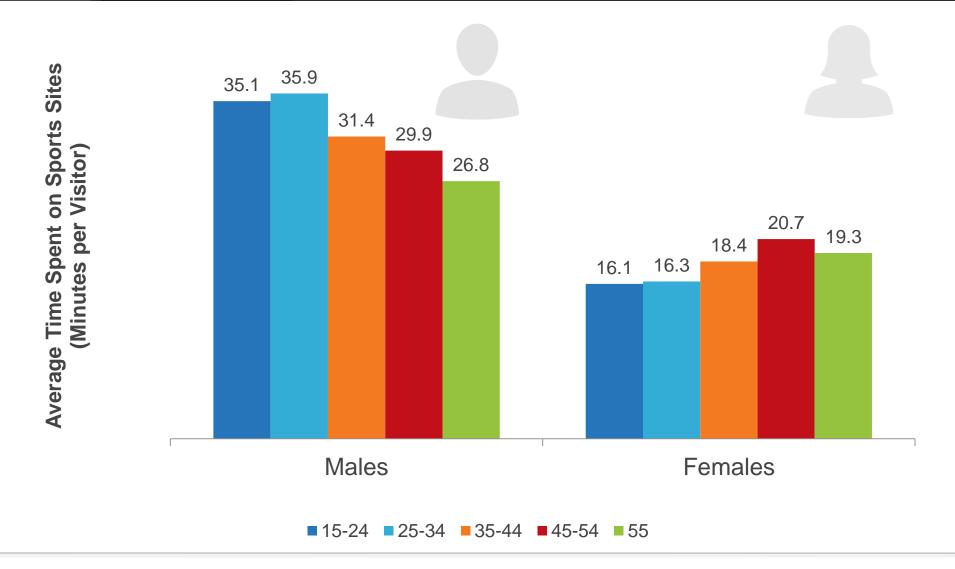
Cricket Heavily Drives Visiting to Sports Sites in India
ESPN is Top Site in the Category for Visiting and Consumption

TOTAL UNIQUE VISITORS (000)

Legend:
- Ⓤ Sports
- Ⓒ Ⓤ Yahoo! Sports (w/ history)
- Ⓟ Ⓤ Cricbuzz
- Ⓟ WATCHCRICLIVE.COM
- Ⓟ CRICTIME.COM
- Ⓟ Ⓤ ESPN
- Ⓜ Ⓤ STARSPORTS.COM (w/ history)
- Ⓜ Ⓤ India.com Cricket
- Ⓢ Ⓤ The Times Of India - Cricket

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, June'12 – June '13

Consumption on Sports Sites is Driven Heavily by Males
Among Females, 45-54 Year Olds Have Heaviest Usage in the Category

Average Time Spent on Sports Sites (Minutes per Visitor)

Males
- 35.1
- 35.9
- 31.4
- 29.9
- 26.8

Females
- 16.1
- 16.3
- 18.4
- 20.7
- 19.3

Legend: ■ 15-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55

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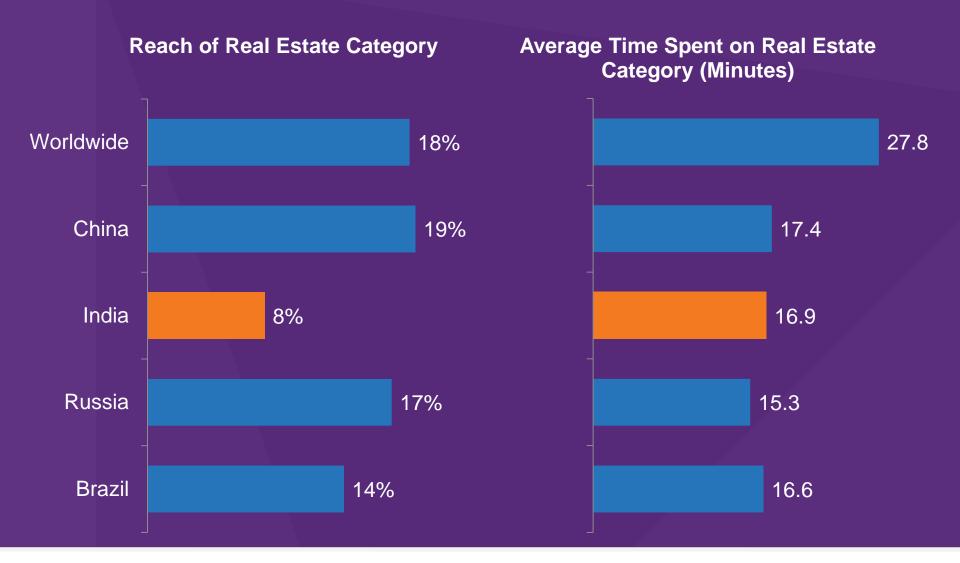
REAL ESTATE
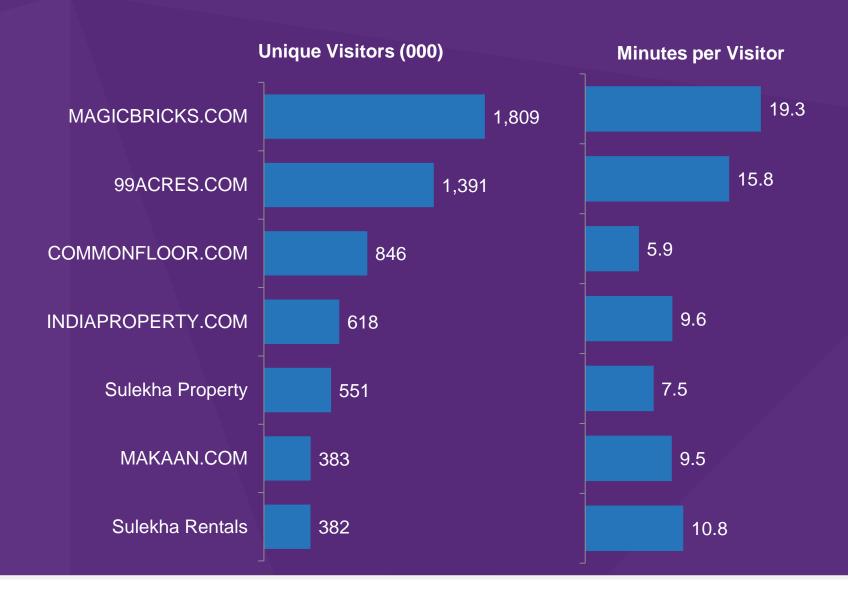
Visiting to Real Estate Sites Still Has Room For Growth
Average Time Spent is 16.9 Minutes per Visitor

Reach of Real Estate Category

Worldwide	18%
China	19%
India	8%
Russia	17%
Brazil	14%

Average Time Spent on Real Estate Category (Minutes)

Worldwide	27.8
China	17.4
India	16.9
Russia	15.3
Brazil	16.6

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Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

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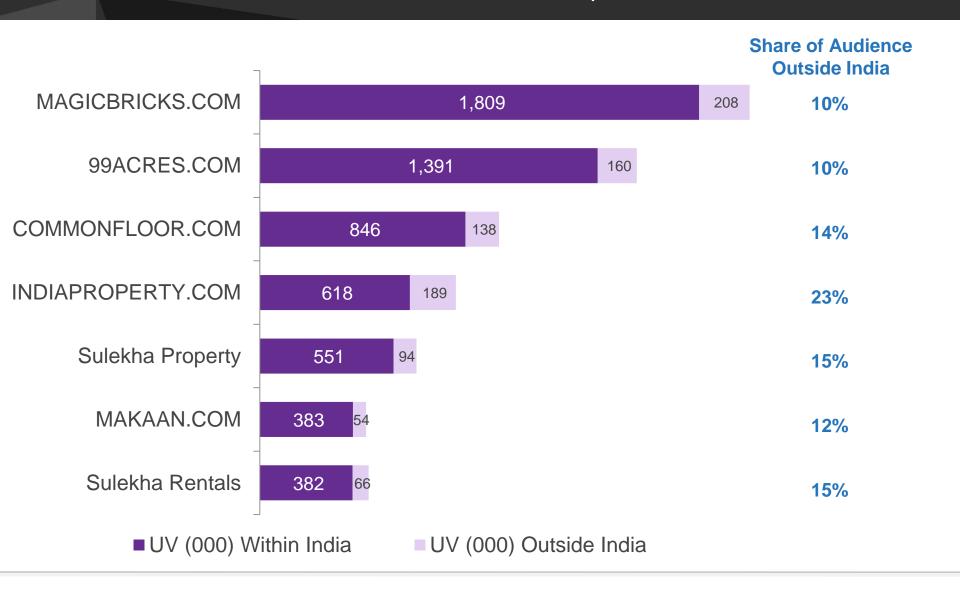
Top Indian Real Estate Sites

	Unique Visitors (000)	Minutes per Visitor
MAGICBRICKS.COM	1,809	19.3
99ACRES.COM	1,391	15.8
COMMONFLOOR.COM	846	5.9
INDIAPROPERTY.COM	618	9.6
Sulekha Property	551	7.5
MAKAAN.COM	383	9.5
Sulekha Rentals	382	10.8

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore Media Metrix, March 2013

Substantial Interest in Indian Real Estate Comes from Outside Country
Indicates Interest in Investment or Vacation Properties from Abroad

Share of Audience Outside India

Site	UV (000) Within India	UV (000) Outside India	Share of Audience Outside India
MAGICBRICKS.COM	1,809	208	10%
99ACRES.COM	1,391	160	10%
COMMONFLOOR.COM	846	138	14%
INDIAPROPERTY.COM	618	189	23%
Sulekha Property	551	94	15%
MAKAAN.COM	383	54	12%
Sulekha Rentals	382	66	15%

■ UV (000) Within India   ■ UV (000) Outside India
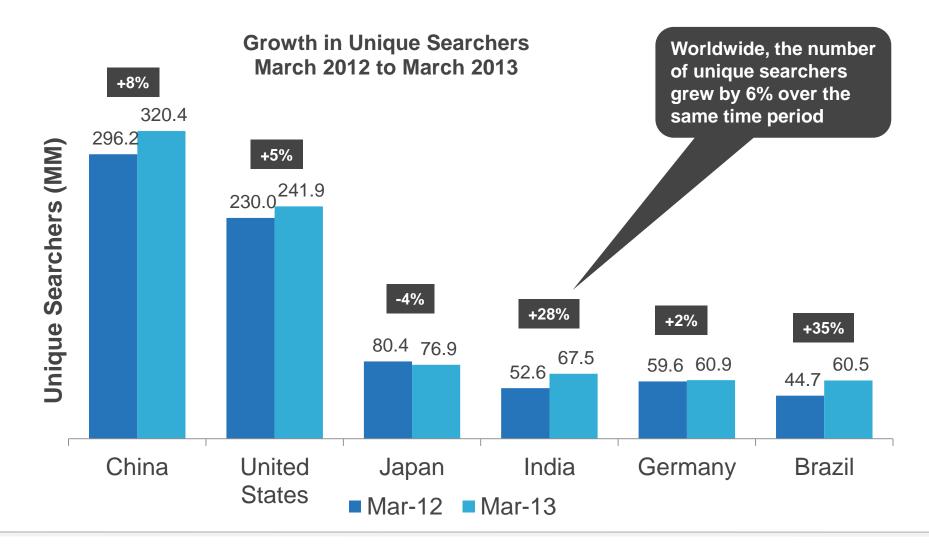
SEARCH
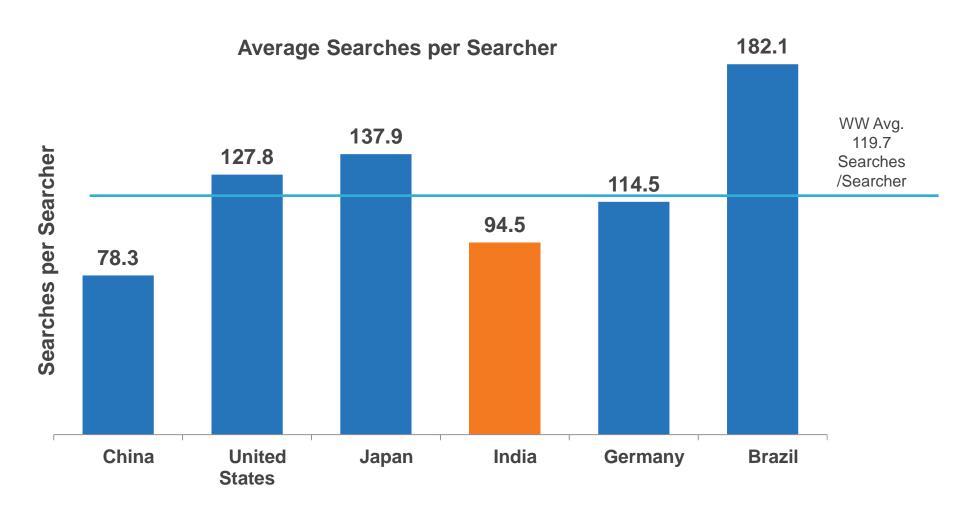
India Now The 4th Largest Audience of Searchers in the World
Unique Searchers in India Grew by 28%

Growth in Unique Searchers March 2012 to March 2013

Unique Searchers (MM)

Worldwide, the number of unique searchers grew by 6% over the same time period

China: +8% — 296.2, 320.4
United States: +5% — 230.0, 241.9
Japan: -4% — 80.4, 76.9
India: +28% — 52.6, 67.5
Germany: +2% — 59.6, 60.9
Brazil: +35% — 44.7, 60.5

■ Mar-12 ■ Mar-13

India's Low Search Rate per Searcher Indicates Market Upside
Average of 94.5 Searchers per Searcher is Well Below Global Average

Average Searches per Searcher

Searches per Searcher

China: 78.3
United States: 127.8
Japan: 137.9
India: 94.5
Germany: 114.5
Brazil: 182.1

WW Avg. 119.7 Searches /Searcher

Internet Audience 15+ accessing Internet from a Home or Work PC
Source: comScore qSearch, March 2013

comSCORE.

Google Accounts for Vast Majority of Searches in India
Average of 33.5 Minutes Spent on These Sites
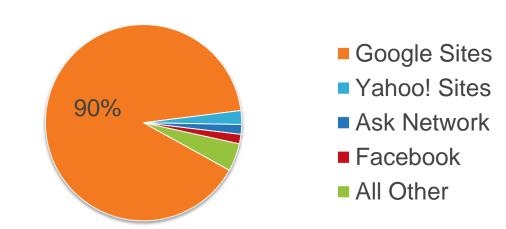
Key Search Statistics: India

67.5 million unique searchers

6.4 billion searches

7.6 billion search result pages

1.6 billion search visits

Composition of Internet Searches in India

90%

- Google Sites
- Yahoo! Sites
- Ask Network
- Facebook
- All Other
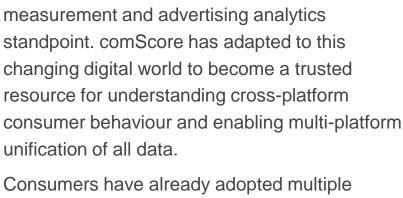
CONCLUSION

2013: Putting the Future in Focus

ADAPTABLE ANALYTICS REQUIRED

This past year saw digital media's continued rise in prominence as part of peoples' personal lives and in business environments. Consumers are quickly becoming platform agnostic in their digital media consumption and in today's world they can choose when and how they'd like to consume content. It might be that they started watching a film at home on their TV, continued watching it on their smartphone on the way to work, and finished watching it in bed at night on their tablet.

It's the pinnacle of convenience for consumers, but an utter headache from an audience measurement and advertising analytics standpoint. comScore has adapted to this changing digital world to become a trusted resource for understanding cross-platform consumer behaviour and enabling multi-platform unification of all data.

Consumers have already adopted multiple platforms and devices – now it's the businesses who need to follow if they desire a unified, platform-agnostic view of consumer behaviour.

2013: Putting the Future in Focus

MULTI-PLATFORM TAKES CENTER STAGE

With the platform shift in full swing, businesses will be challenged in the coming year to stay ahead of consumers' usage curve and deliver them with the content they want, when and where they want it. It will also be imperative to maintain revenue streams in the core digital channels while capturing market share and monetizing emerging channels. Doing so will require businesses to get even smarter in how they scale their content to other platforms by developing integration strategies that deliver unique offerings to advertisers.

Integration between delivery of content and the ability to deliver campaigns in a multi-platform fashion remains a challenge, but the companies who facilitate this form of platform agnostic strategy will enhance value to marketers, simplify campaign management for agencies and foster greater pricing equilibrium between their content channels. As the bridge between traditional and digital platforms, online video will play an important leading role in how these integration strategies materialize.

2013: Putting the Future in Focus

VALIDATION MATTERS

In the last quarter (Apr-Jun'13) more than 111 billion display ad impressions were delivered across India's websites. This number, set to go up by approximately 20% over a year, indicates an increasing level of comfort with a medium capable of delivering strong marketing ROI.

While delivering advertising at scale remains important, an increased premium on accountability and performance means advertisers may be sacrificing quantity for quality – whether that means leveraging more rich media, experimenting with larger ad units, or demanding ad viewability.

comScore's vCE benchmark study about viewable impressions over 1000's of campaigns, showed that an average of 54% ads were never actually seen by their target audiences. It is more important than ever for advertisers to evaluate campaign viewability to improve optimisation and maximise the return on their media spend.

Look for advertisers to demand more accountability and publishers to reconfigure site design and ad inventory to improve performance in the coming year.

Tweet-bits

- At 73.9 million India's is the 3rd Largest Online Population in the world, 2nd in Asia Pacific http://cmsc.re/hGKMc #FutureinFocus

- 31% year-on-year growth makes India the fastest growing online population in Asia Pacific, 2nd in the world behind Brazil http://cmsc.re/hGKMc #FutureinFocus

- Non-PC traffic in India zooms ahead, grows from 10.9% to 14.2% in 2013 http://cmsc.re/hGKMc #FutureinFocus

- 75% of the Indian online population is under 35 yrs old http://cmsc.re/hGKMc #FutureinFocus

- Women aged 35-44 are the heaviest internet users among all age/gender groups http://cmsc.re/hGKMc #FutureinFocus

- Indian blogging audience grew 48%, close to 36 million. 26% blog traffic from Mobile and Tablets http://cmsc.re/hGKMc #FutureinFocus

- 25% of PC screen time is spent on social, 86% Indian web users visit a social networking site http://cmsc.re/hGKMc #FutureinFocus

- On an average, 217 minutes are spent on Facebook every month by Indian users http://cmsc.re/hGKMc #FutureinFocus

- Myntra leads India's online retail category in terms of users, Flipkart gets highest per-user engagement http://cmsc.re/hGKMc #FutureinFocus

- 54,025,000 Indians watched online videos on their PC's; 27% increase over a year http://cmsc.re/hGKMc #FutureinFocus

#FutureinFocus

METHODOLOGY

Methodology and Definitions

This report utilises data from the comScore suite of products, including comScore MMX Multi-Platform (Beta), comScore qSearch, comScore Video Metrix, comScore MobiLens, and comScore Device Essentials.

comScore MMX

The comScore MMX suite of syndicated products sets the standard for digital audience measurement and media planning. Powered by Unified Digital Measurement™, the revolutionary measurement approach that bridges panel-based and website server-based metrics to account for 100 percent of a site's audience, MMX delivers the most accurate and comprehensive suite of audience metrics, providing valuable demographic measures, such as age, gender, household income and household size. MMX reports on more than 70,000 entities, with audience measurement for 43 individual countries and 6 global regions, as well as worldwide totals.

The comScore MMX product suite includes individual products utilised within this report including comScore MMX Multi-Platform (Beta), comScore qSearch, comScore Ad Metrix and comScore Video Metrix.

http://www.comscore.com/Products/Audience_Analytics/MMX

comSCORE.

ABOUT COMSCORE

comScore, Inc. (NASDAQ: SCOR) is a global leader in digital measurement and analytics, delivering insights on web, mobile and TV consumer behaviour that enable clients to maximise the value of their digital investments.

A preferred source of digital audience measurement, comScore offers a variety of on-demand software and custom services within its four analytics pillars: Audience Analytics, Advertising Analytics, Digital Business Analytics and Mobile Operator Analytics. By leveraging a world-class technology infrastructure, the comScore Census Network™ (CCN) captures trillions of digital interactions a month to power big data analytics on a global scale for its more than 2,000 clients, which include leading companies such as AOL, Baidu, BBC, Best Buy, Carat, Deutsche Bank, ESPN, France Telecom, Financial Times, Fox, LinkedIn, Microsoft, MediaCorp, Nestle, Starcom, Terra Networks, Universal McCann, Verizon, ViaMichelin and Yahoo!.

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