

Nielsen Featured Insights

Delivering consumer clarity

The Rise of Multi-SIM users: Customers shifting to dual SIM phones to have effective control over costs



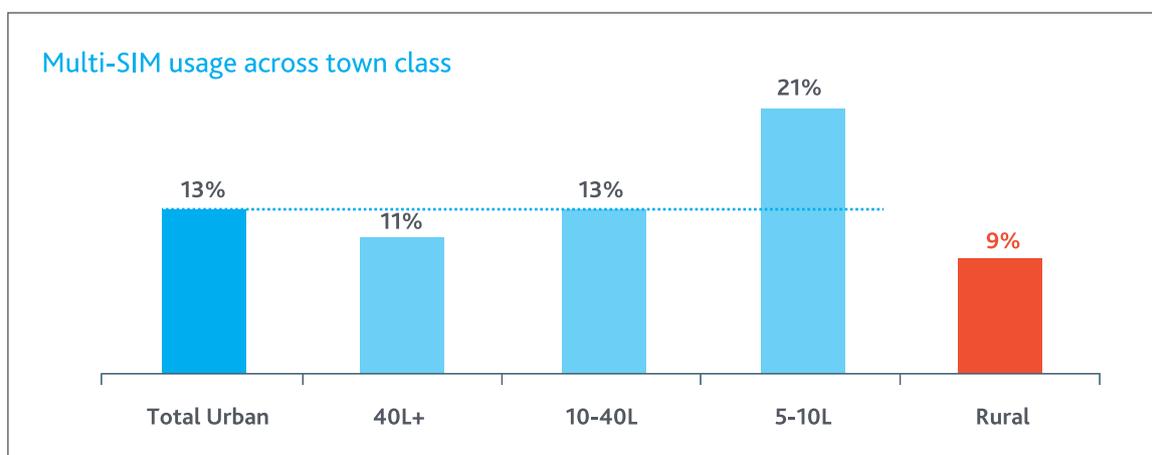
By: Farshad Family, Managing Director – Media, Nielsen India

- 71 million Unique Subscribers use multi-SIMs in India
- 4 out of every 5 Multi SIM card users own a Single handset
- Over 7 out of 10 multi-SIM card users* polled intend to acquire a dual SIM phone

71 million Unique Subscribers Use Multi-SIM cards

A new study into the usage and popularity of dual SIM handsets and multi-SIM cards has thrown up some interesting facts. The survey by Nielsen, a leading global provider of information and insights into what consumers watch and buy, reveals that 71 million subscribers use Multiple SIM cards across India. Moreover, among 14 percent of Multi-SIM card users who plan to buy a new handset, 75 percent intend to choose a dual SIM card handset.

The study found that overall, 13 percent of unique active mobile subscribers[^] use Multiple SIM cards. The reach peaks in towns with a population of five to ten lakh, where 21 percent of the populace use multi-SIMs. The corresponding figure in a town class with 40 lakh plus population is just 11 percent.



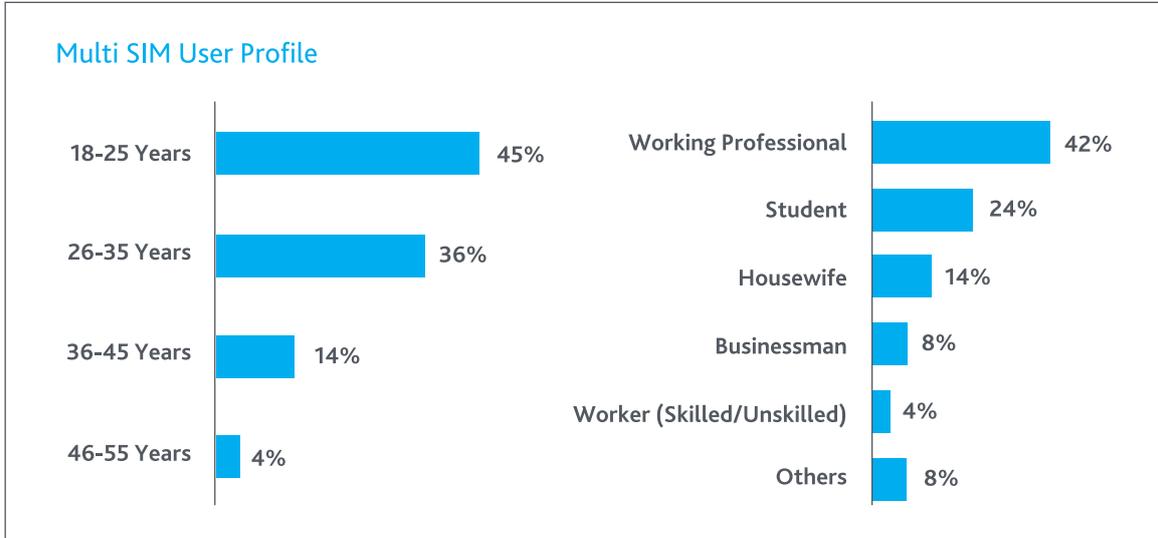
Source: Nielsen

* Among 14% of Multi-SIM card users who plan to purchase a new handset

[^]Made a call/recharged SIM at least once in last 90 days.

Youth: The Driving Force Behind Multi-SIM Usage

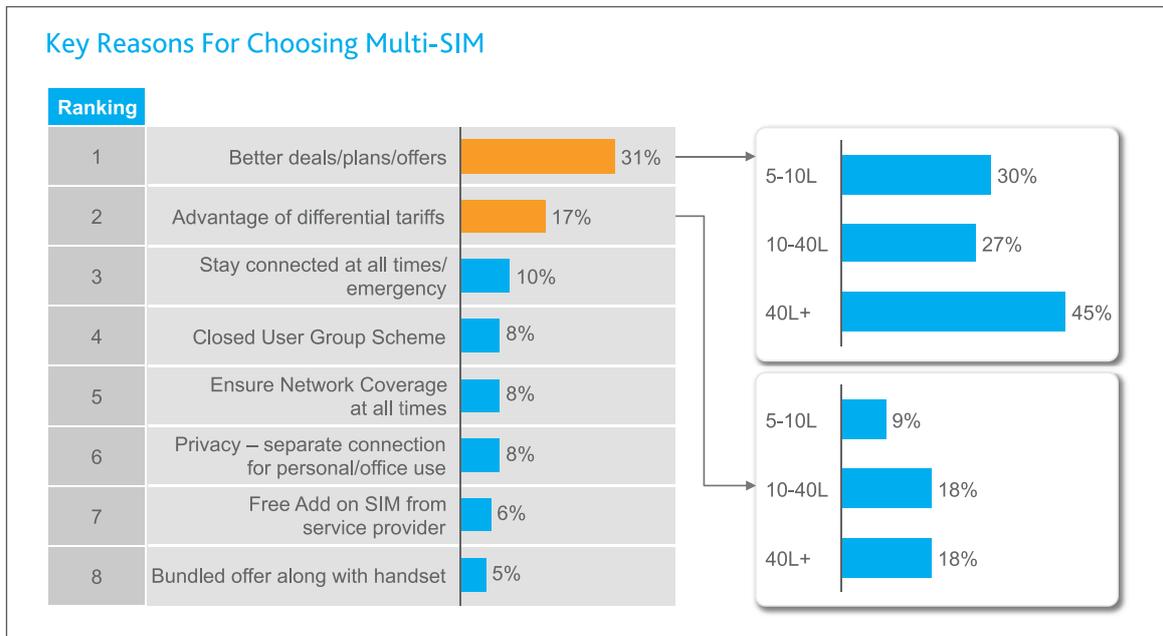
On taking a closer look at the demographics, Nielsen has found that Multiple SIM card users tend to be younger - largely students, newly employed and working professionals.



Source: Nielsen

Why Multi-SIMs?

What is it that makes dual SIM handsets and using multiple SIM cards attractive? The study found that consumers are mostly driven by a desire for optimizing tariffs and taking advantage of better and cheaper deals offered by operators.



Source: Nielsen



Consistency in Phone Bills

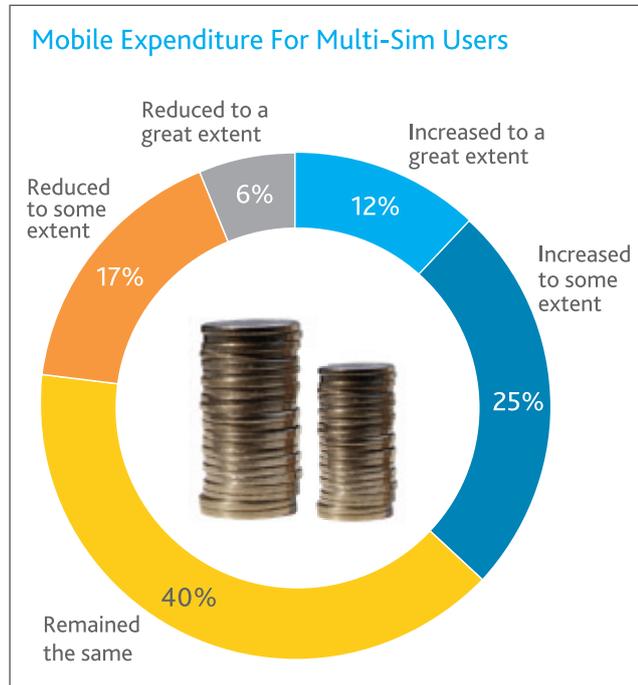
A key observation is that for most Multi-SIM card users, there hasn't been a significant increase in their monthly mobile expense despite maintaining two separate connections. For every 2 out of 5 multi-SIM users, expenses have remained consistent. Only 12 percent users have reported a substantial rise in costs.

Keeping a Tab on Costs

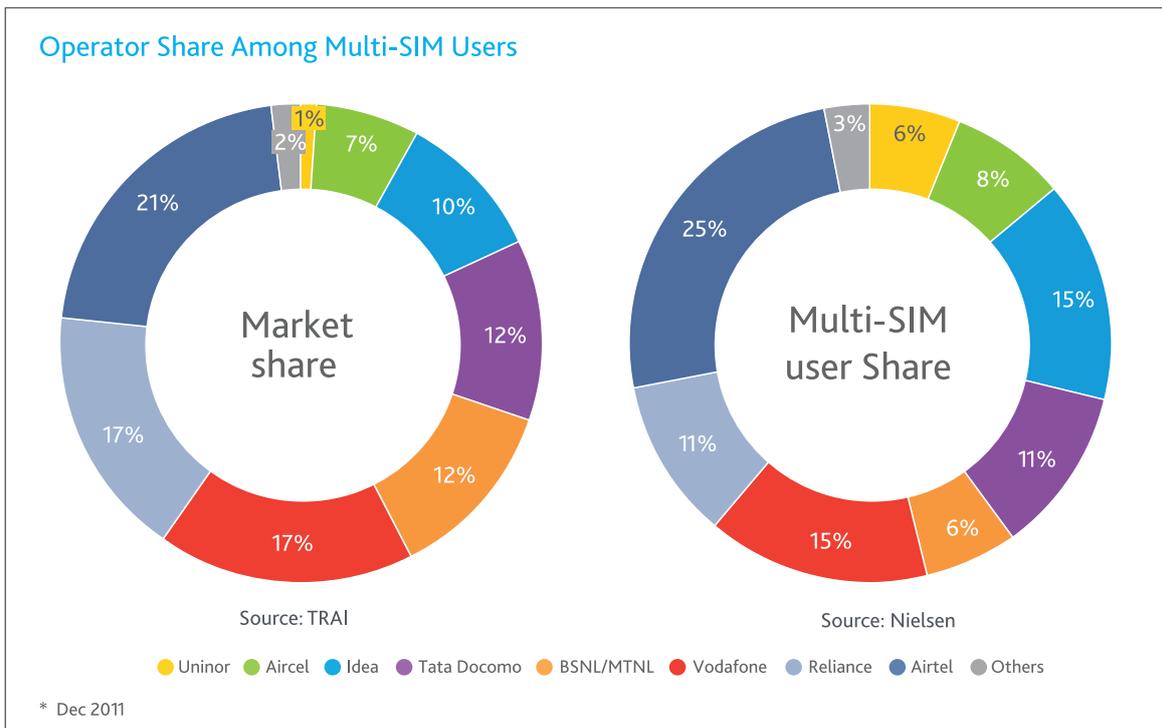
A typical user has two SIM cards, but from different operators. What is interesting here is that users prefer to keep both SIM cards as prepaid to have a better control on costs as well as to capitalize on monthly deals offered by operators.

Multi-SIMs: Smaller Players on the Uptick

The study revealed that smaller operators have a relatively higher share among Multi-SIM card users. While Uninor has just 1 percent market share among mobile users, it goes up to 6 percent when it comes to Multi-SIM user share. Similarly, Aircel's share too goes up a notch in the Multi-SIM card usage space.

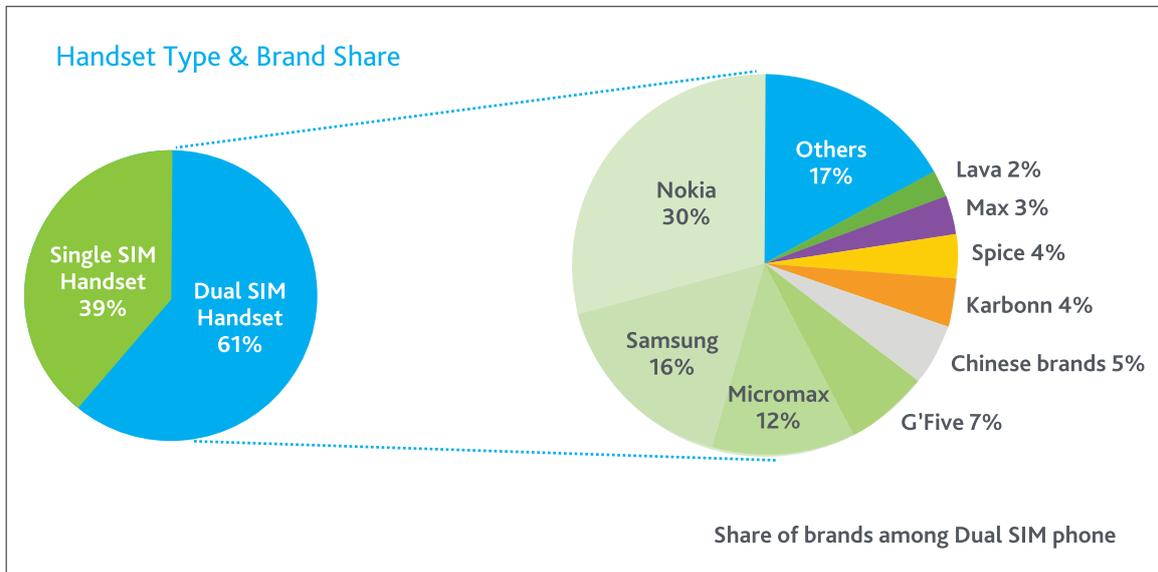


Source: Nielsen



Dual SIM Handsets Gaining Popularity

While several users chose to physically switch SIM cards in their phones, Dual SIM card handsets are gaining popularity. The Nielsen study has found that 61 percent of handsets used by multi-SIM owners are dual SIM. Nokia leads the pack with a 30 percent market share while Samsung is a distant second with 16 percent. In fact, the popularity of dual SIM handsets is set to surge as among 14 percent of Multi-SIM card users who plan to purchase a new handset, 75 percent intend to choose a dual SIM handset.



Source: Nielsen

About the Nielsen Study

The Nielsen study covers usage statistics of active multi-SIM card users in 18 Indian cities across population strata. Nearly 20,000 mobile users in the 18-55 age group were covered to arrive at these findings.

About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, visit www.nielsen.com

