

The Ultimate Tablet War - Changing The Landscape of Mobile Connectivity in India

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Abstract

Indian consumers are in need of more devices which will give them the freedom of mobility and ultimate connectivity. The interest towards desktops and laptops are gradually decreasing and everyone wants everything in their mobile handsets. Companies like HCL, Dell are thinking of reducing their resources towards Desktops and Laptops and concentrate on the new device which is called phablets. There has been a continuous change in the tablets since they first entered into the Indian market way back in 2010. That time it was considered as a product for the elite class- a luxury device. The Indian market presents a great opportunity for tablet manufacturing and marketing companies because of the country's younger demographics and their increasing preference for mobile internet access devices. The following research paper tries to understand the Indian tablet market and analyse various tablet players

and their strategies for getting a slice of Indian Tablet market share. The companies should look for giving choices in functionality, price and presenting a good device connected ecosystem supported by combination of size and other features to attract the Indian consumers.

Key Words: *Tablets, Apple, Nokia, Samsung, Situation Analysis (3C analysis), Perceptual Mapping, SWOT analysis*

Introduction

This Diwali, an Indian consumer planning to buy a tablet will definitely experience spoilt for choice because of the presence of too many brands of tablets in the Indian market and the mobile and computer giants like Apple, Samsung, and Nokia have introduced their new latest version of tablets this month. Indian companies like Micromax, Karbon are also in the race to get into the consideration set and purchase decision stages of Indian consumers. There has been a continuous change in the tablets since they first entered into the Indian market way back in 2010. That time it was considered as a product for the elite class- a luxury device. Everyone aspired to own an iPad and its monopoly frustrated the competition. In the years that followed, the Indian mobile market have seen the rise of Android as a stable smartphone as well as tablet OS. The good thing is that today, for a budget of Rs.20,000, one can get an tablet with impressive specifications, but build quality and performance capability as well.

Globally, Tablets have become popular consumer devices with the launch of Apple iPad in Q1 2010, followed by

a number of models by other OEMs. Global Shipments of tablets are expected to rise 53.4 percent to 184 million units in 2013 as per the Gartner report.

India has been the target market for almost all companies providing mobility and connectivity solutions. Indians now need improved technology, easy and fast networking, and light weight computing devices to satisfy their thirst for style, improved work experience and for learning. As per the CyberMedia Research(CMR) study, Indian tablet market size rose 107.4% y-o-y to over 11,50,000 tablets in the 2Q 2013. IDC (Internet Data Corporation) reports say that the overall tablet market in India has reached about 2.66 million units last year and is expected to reach around 6 million units in 2013. Indian consumers bought over 5 lakh tablets during the April - June quarter, up 673% from a year ago, according to latest data from market research firm CyberMedia Research. The Indian tablet market is expected to cross \$2 billion in revenues in 2013 as per TechSci Research report. There is a war happening in the minds of the customer to select which tablet –spoilt of choice and there is a war happening between various tablet manufacturers on how to impress the Indian customers. The research paper focuses on this war –The Ultimate Tablet War.

Literature Review

The tablet market has experienced rapid growth over the last 18 months. It has outpaced other device or media categories at a similar point in its lifecycle. Tablets offer consumers a more ubiquitous, personalized, intimate and interactive way to access content.

The Tablet PC market in India is one of the fastest growing markets around the globe. With its introduction in July 2010 in India, the market has witnessed huge growth in terms of demand, shipments and emergence of various players- national & international, in the industry.

The mature Indian consumers' increasing preference for Tablets and the younger demographics' desire to use mobile Web technologies could see the Tablet PC'S markets revenues soar. Multi usage, great user experience, rising of 3G penetration, enhanced reach and changing lifestyles of consumers in India will boost the demand for Tablet PCs in India.

Trends in the Industry

- Education Sector
- Low end Tablets
- Android OS
- Application Base

Globally about two out of every three products are destined to fail; furthermore, half of all global product launches will not sustain their year-one sales performance in the second year. (Nielsen, 2013). Research carried out by Nielsen in late 2012 pinpoints: "products driven by a true, vs. perceived, consumer need or desire will likely increase the transaction value and offer advantages over other products in the marketplace". In order to achieve an enduring success, companies must leverage and reinforce a unique competitive position and identity in the market, allowing no room for imitation (Balasubramanian, 2013).

Financial success often depends upon marketing ability; Finance, operations, accounting and other business function will not matter if there is not enough demand for products and services (Koler & Keller Lane, 2006). In layman's terms marketing could be simply defined, as "meeting needs profitably" (Philip Kotler, 2009).

The American Marketing Association offers the following formal definition: "Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large" ("Defination of Marketing - American Marketing Assoc.," 2013). Similarly, marketing planning is about determining marketing objectives, what a company wants to achieve and marketing strategies to help them achieve their goals (McDonald, 2008).

According to Porter, creating a competitive advantage can be directly attributed to the success of the strategy. He further argues that competitive advantage is obtained, when the value created to the buyers exceeds the firm's cost of creating it (Porter, 1985).

There has been much talk about digital marketing; however, it is challenge to properly define exactly what it is. Often the most cited definition across marketing literature as to the definition of digital marketing is by (Reitzin, 2007) in his marketing blog "mobile storm": "Digital Marketing is the practice of promoting products and services using database-driven online distribution channels

to reach consumers in a timely, relevant, persona, and the cost-effective way”.

The field of education has been affected by ICTs, which have undoubtedly affected teaching, learning and research (Esharenana E Adomi, n.d.) .ICTs have the potential to accelerate, enrich, and deepen skills, to motivate and engage students, to help relate school experience to work practices,create economic viability for tomorrow’s workers, as well as strengthening teaching and helping schools change (Esharenana E Adomi, n.d.).

(McKinsey & Co, 2012) discusses the advantages of BYOD policies and states that employees in emerging markets find their own IT devices vital to job productivity and Innovation.

(Duane Varan, 2013) explains a study on finding out the synergy effect of combining television sets, PCs, tablets and mobile phones to advertisement effectiveness. Tablets because of its wide screen and many other features provides a great space for advertisement. Perceptual maps are useful to determine the position of a brand which in turn signifies the POP (points of parity) and POD (Points of difference) between brands. The authors have tried to develop a perceptual map for the 3 tablet manufacturing companies-Nokia, Samsung and Apple from the consumer’s point of view. Perceptual maps are visual representations of consumer perceptions and preferences. They provide quantitative portrayals of market situations and the way

consumers view different products, services and brands along various dimensions. (Kotler 2014.).

‘The Use of Tablet PCs in Early Mathematics Education’ study was able to incorporate data on software components and integration of the tablet PC in the classroom, but because of logistical challenges was unable to orchestrate control groups and testing over such an extended period of time. Future studies should work with schools to plan curriculum around the tablet PC to ensure teachers are able to work the tablet PC as a normal part of their day. The increase in student performance and student perception while implied by the results of this study must also be validated by future studies. (Daniel Patty & Ananda Gunawardena)

Also the research paper is greatly influenced by the reports and analyses done by market research agencies, like IDC, articles published in magazines like Business world, Forbes, Digit etc., newspapers (Economic Times, Times of India, Business Standard etc.), websites of mobile device companies, social media etc. following three articles/books/literatures.

Objectives of the Research

The main objectives of the report is to study the tablet as a product, customer profiling of this device, analyse the tablet market in India, reasons for the rise in demand for this electronic device using various analyses like Situation analysis and SWOT analysis. The paper is focussing only on three main players in the market Apple, Samsung and the latest player joining in the competition- Nokia. Another

objective is to find out the new growth opportunities for tablets in India.

Methodology

The paper is based on the secondary data collected from various authentic sources. Methods used are Situation analysis to analyse the tablet market in India at present conditions, perceptual mapping to understand how consumers perceive the 3 tablet manufacturing companies in terms of price and features, SWOT analysis of 3 new models of Samsung, Apple and Nokia– Samsung Galaxy Note 10.1(2014 Edn), iPad air, Nokia Lumia 2520. Ansoff matrix model is used to understand the different strategies of these 3 companies.

What are Tablets?

Tablets are essentially flat touch screen devices like a slate lets you interact with digital content with your fingers unlike in traditional PC where you use keyboard and mouse. Recently hybrid tablets are also introduced in the market with detachable keyboards. They are portable and lightweight devices which enable the user to access email, surf web, play music, games etc.

Five Key Advantages of Tablets Over Traditional Computers are

1. Tablets turn on instantly i.e. little booting time- much like a cell phone.
2. Tablets generally have a great battery life- 10 to 12 hours

in some cases depending on number of programmes running

3. Tablets have intuitive Touch screen interface- can be used by a 10 year old and also a 90 year old
4. Provide the exciting world of Apps- Application download – very easy to download from the online stores through software in the tablet
5. Tablet is more conducive for some tasks like reading a e-book particularly intuitive when you have a 7-10" screen tablets

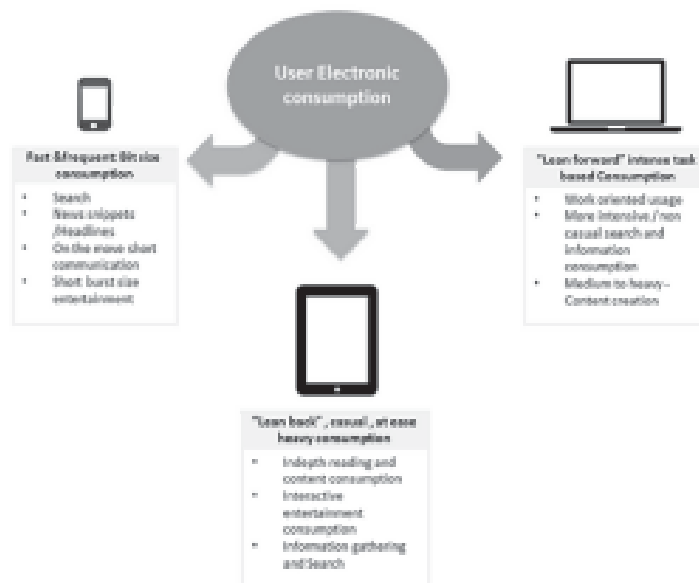


Figure 1: User electronic consumption for smartphone, laptops, tablets

(Source:<http://www.inmobi.com/inmobiblog/2013/07/04/from-smartphones-to-tablets-the-changing-landscape/>)

Differences Between a Smartphone and a Tablet

1. Screen Size: It's the key feature that separates smartphones and tablets. On an average ,tablets offer up to 4X more screen size than smartphones.
2. Processor and display Capabilities: Tablets are incorporated with much faster processors and high resolution display capabilities.
3. Smartphones offer options to call and SMS which is missing in tablets. A new era of Phablets (term coined by Forbes-combination of smartphones and tablets) have filled this void

Formulating Right Strategy

One aspect of strategic planning is the development of specific strategies for achieving company objectives. Organizations face a unique combination of internal and external factors, where the strategies developed by any one organization are unlikely to be entirely adaptable to any other organization. However, it is possible to distinguish recurring patterns in the strategies adopted by the organization and these recurring patterns are called generic strategies (Hollensen S, 2006).

One of many matrices that help to point out generic strategies is the Ansoff Matrix. Developed by Igor Ansoff, the Ansoff matrix helps business structure a strategy, by clearly categorizing four options for growth as shown in figure(3).



Figure 3 : Ansoff Matrix (Goldman & Cecile, 2006)

The Ansoff Matrix helps to categorize options but managers still need to know how these options affect cash and human resources since too little of either could starve a potential winning product of the resources it requires for successful growth. (Smith, 2011)

Situation Analysis of Tablet Market in India (3C Analysis)

Companies in the Indian Market

The Tablet PC market in India is one of the fastest growing markets around the globe. In India, Tablets were introduced in October 2010 with the launch of Samsung Galaxy Tab (7 inch) and Olive Pad VT100, both Android based devices.

Apple launched iPad 1 in India in January 2011. Reliance 3G Tab is the first tablet launched by a telecom carrier (Reliance), bundled with 3G services. There has been a changing shift in market share of the top 5 players in the Indian Tablet market. Indian companies like Gurgaon based Micromax , Karbon are posing stiff competition to MNCs.

Vendor	Share (%)	Rank
Samsung	21.2	1
Datawind*	12.5	2
Micromax	9.7	3
Top 3 Vendors	43.4	-
Top 5 Vendors	55.8	-
Top 13 Vendors (selling more than 20,000 units in the quarter)	80.6	-
* excludes Shipments for Aakash Tablets		
Source: CMR's India Quarterly Tablet PC Market Review, 2Q CY 2013, August 2013 release		

Figure 2 : India Tablets Market: Shipment Shares of Leading Brands and Rankings, 2Q CY 2013

As per the Cyber Media Research study, the top three vendors, led by Samsung, Datawind and Micromax, corner 43.4% market share. Though the Indian market had plethora of vendors, only 13 vendors shipped in significant volumes of more than 20,000 units during the period. Top five vendors have market share of 55.8% and top 13 players have a market share above 80%.

Almost 80 percent of the tablet models launched during the year 2013 were with both 3G and Wi-Fi connectivity,

leading to a growth of 103 percent in shipments of 3G tablets. Tablets with dual-SIM functionality arrived in the India market, thereby giving vendors an additional specification to differentiate their offerings.

Many start-ups developing Apps for tablets are rising in number and venture capitalists are interested to invest in this new opportunity.

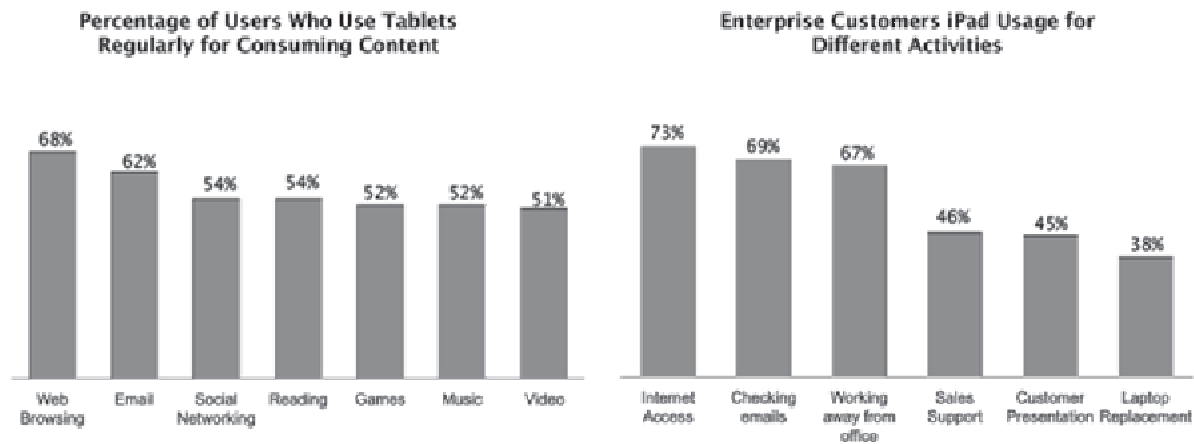
Customers of Tablets- Indian Scenario

Income: Tablets target customers in the middle class to upper income categories as there are models available in the market catering to the needs of each segment. Apple iPad , Samsung Galaxy range tablets are preferred by Upper segment (in terms of annual income) customers as these models are pretty expensive whereas Karbon ,Micromax are offering models which are affordable to the middle income range of customers.

Age: The age of customers' ranges from teenage girls and boys to old aged as these models are easy to operate. But reports say that students and business professionals use tablets to a higher degree.

Usage: Tablets are primarily being adopted for consuming content, while accessing internet and checking emails being the predominant activities both by retail and corporate consumers. Retail consumers also use tablets predominantly for multimedia consumption and gaming, enterprise consumers leverage the portability and the mobility of the device for remote access and client presentations.

Along with web browsing and email, media consumption (consumers) and presentations (enterprise customers) are the key tablet applications



Source: Convergence Catalyst Analysis: Morgan Stanley-Tablet Demand and Destruction Report-Feb 2011 Fig 3: Usage applications of Tablets by Indian Consumers

Causes for Increase in Demand for Tablets

An important factor for increase in 3G-enabled tablet shipments is the growing data consumption amongst telecom subscribers to access social media networks and IM accounts, play online games, keep up with corporate and personal mail or simply browse the web for information on the go. Another major factor is the rise in demand for tablets in education and enterprise sectors fuelled by State and Central Govt projects. Increase in the number of new vendors and launch of low cost models provide the customers a wide variety of options to choose. Multi usage, great user experience, rising of 3G penetration, enhanced reach and changing lifestyles of consumers in India can be considered as the main reasons for increase in demand for tablets in India.

Tablet Environment Analysis- Indian Market

Environmental Analysis

Political environment - stable and open, legislation regulating business, Information privacy

Economic environment - High income and high luxury consumption, fierce competition

Social environment- dense population, core cultural value.

Technological environment- Rapid change & technological competition, Provides new markets and new opportunities

Consumer Analysis

- a. High involvement purchasing
- b. Significant differences between brands
- c. Complex purchasing behaviour

Buyer Characteristics

- d. Culture factors – at least one electronic product should be there
- e. Social factors- influence of social media ,groups

Using position maps (as per Indian customers perception of a tablet) to analyse the competitive positioning of Samsung, Apple and Nokia Tablets

The authors have tried to develop a perceptual map to analyse the positioning of these three tablet players based on the consumer perceptions of these three companies' tablets.

Data Sources: The authors have inferred customer perceptions from various sources like

- Published information
- Reports from market research firms
- Hands on experience with the models and interrogation with tablet users.
- User reviews and comments in various social media, blogs

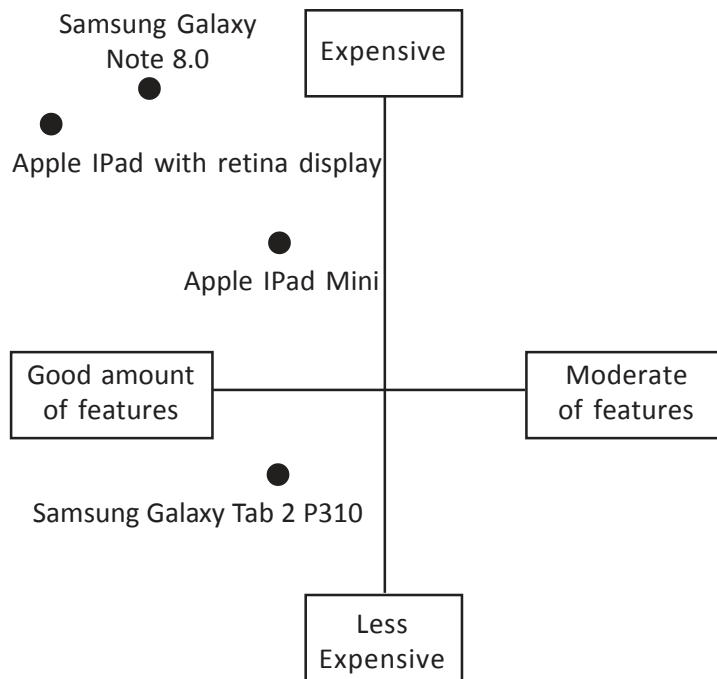


Figure 4: Positioning Map of Tablets: Price level Versus Features level (Only Samsung and Apple as Nokia introduced their model just now)

The positioning map shows that Samsung has tablet models in a range of prices and at the same time providing features befitting to various target consumer segments in the market justifying its No.1 position in the market share. Apple tablets are perceived as higher end tablets and perceived to have less features compared to Samsung at a given price as there are more apps for Samsung tablets compared to Apple and also features like Stylus pen is available in some Samsung models.

The New Tablet War in India




The tablet ecosystem in India fuelled up with the recent news about the launch of new models by Samsung (leading player in Indian market), Apple and Nokia (first entry in the Indian tablet market).

Existing Market	Penetration Strategy Samsung Galaxy Tab series Apple iPad series	Product Development Samsung Galaxy Note 10.1(2014 Edn) iPad Air, iPad 5, iPad Mini 2
New Market	Market Development	Diversification Nokia Lumia 2520

Figure 5: Marketing Strategies of Nokia, Samsung and Apple in Indian tablet market 2013- Ansoff Model-Product mix

Ansoff matrix explains about the different strategies adopted by the companies in the market place. We can see that Samsung, the market leader in the Indian tablet market, continues to launch new products in the same market (market development) so that it can attract new

customers and new segments. Samsung Galaxy Note 10.1(2014 Edn.) is primarily suited to high paying customers and want to compete with iPad brand. But Samsung has models in the mid Rs.20,000 –Rs.40,000 range for the existing market(mass market comprising of price sensitive, high value seeking customers).Apple is also doing the same strategy and new product launches are there in the blood of this company. Nokia is the new player and followed a diversification strategy by launching it first tablet (Nokia Lumia 2520) in the market (New Market- New Product strategy).

TITANS OF TABLETS			
	Nokia Lumia 2520	iPad Air	Samsung Galaxy Note 10.1 (2014)
Screen	10.1 inches, IPS LCD	9.7 inches, LED-backlit IPS LCD	10.1 inches, Super clear LCD
Resolution	1080 x 1920 pixels	1536 x 2048 pixels	2560 x 1600 pixels
Dimensions (LxWxD)	267 x 168 x 8.9 mm	240 x 169.5 x 7.5 mm	243.1 x 171.4 x 7.9 mm
Operating system	Windows RT 8.1	iOS 7	Android Jelly Bean v4.3
Processor	Qualcomm Snapdragon 800, Quad-core 2.2 GHz	Apple A7, Dual-core 1.3 GHz	Qualcomm Snapdragon 800, Octa-core (1.9 and 1.3 GHz)
RAM	2 GB	1 GB	3 GB
Storage	32 GB	16/32/64/128 GB	16/32/64 GB
Primary Camera	6.7 MP, Carl Zeiss optics, 1/3.4" sensor size	5 MP	8 MP
Secondary Camera	2 MP	1.2 MP	2 MP
Price (India)	To be announced	To be announced	Rs.49990

(Source: “Tablet war heats up as Apple unveils new iPads”, Business Line, 23rd October 2013)

SWOT Analysis of the New Tablets from the 3 Major Players

	Samsung Galaxy Note 10.1(2014)	iPad Air	Nokia Lumia 2520
Strength	<ol style="list-style-type: none"> 1. Hardware integration with many open source OS and software 2. Backed by popular Android Jelly Bean OS 3. Model from incumbent market leader-fan following 4. Faster Processor compared with other models. 5. largest memory capacity. 6. Best in display features and camera 8MP. 7. Strong support from parent company and its ability to market the brand. 8. Strong distribution network in India. 	<ol style="list-style-type: none"> 1. Customer loyalty combined with expanding closed ecosystem 2. Apple is a leading innovator in mobile device technology- Style symbol 3. Brand reputation 4. Strong marketing and advertising teams 5. Biggest storage facility option available 128GB 6. Faster Wi-Fi Performance using MIMO technology 7. Faster Apple A7 processor with desktop architecture (as good as desktops) 8. Thinner and lighter 	<ol style="list-style-type: none"> 1. New model in the Windows operating system 2. Brand loyalty high in emerging countries 3. Known for durability and reliability 4. P r o c e s s o r comparable and slightly faster than Samsung Galaxy Note 10.1(2014) 5. Hybrid Tablet- detachable keyboard present 6. Office productivity tools available 7. Good camera 8. Strong distribution support

	9. Tie up with finance and telecom companies. 10. Stylus pen available		
Weakness	1. Office productivity tools not present. 2. Perceived to be higher priced compared to features available.	1. Office productivity tools not great 2. Distribution/availability not high compared to other players	1. New to the market 2. Windows OS still to get acceptance from consumers 3. Nokia - Microsoft alliance brand image
Opportunities	Opportunity to tap the \$2 billion dollar Indian Tablet market .These three models attract the premium high paying consumers which constitutes more than 50% of the total market size		
Threats	Tablet sales have been affected by Phablets available in the market. Phablets are smartphones with screen size that ranges from 5-8 inches and are designed to combine the functions of a phone and tablet. Latest Indian Govt. requirement of BIS certification for imported electronic items can pose difficulties to these foreign tablet manufacturing players		

Inference: As a new player Nokia has to use powerful efficient marketing strategies to push their new tablet model. Samsung Galaxy Note 10.1(2014) found to be more attractive compared to other models and will be a hit among the larger mass of consumer segments given their strong presence and availability in the Indian market. iPad Air will be welcomed by the consumers who want a high quality, light weight stylish tablet brand.

Samsung – Following its Mission and Objectives

The company strategy of Samsung reveals that this company is there to fight a good battle with anyone in the market. Its key objectives as a company are to be innovative and create reliable, superior, quality high tech products in order to better the global society (About Samsung, 1995-2010). Another one of the company's objectives is clearly stated in their vision, "Inspire the world, Create the future." With objectives like these and the track record that Samsung has overall, this would cause you to wonder why they are performing as well as you would expect in the tablet division.



Why Sales of Tablets will Grow in Future?

- Public sector (Govt.) projects mainly in the educational sector
- LTE(long term connectivity) ready devices may be announced in the market by few tablet makers
- BYOD(Bring your own device) to add to tablet usage in enterprises
- Three price ranges to get crystallised in the market: Rs.5000-10000, Rs,15000-20,000 and over Rs.35,000
- Enterprises to adopt tablet readily as they move towards mobility
- 3G and 4G tablets with larger screen sizes to attract customers
- Windows 8 based tablets uptake will rise

Conclusion

It is no doubt that the tablet market in India will be booming for a period of time and the market will be filled with more tablet models from foreign and domestic players. It is high time that there is a chance of consolidation happening in this market due to Govt. regulations (BIS certifications), huge investment required to maintain the market share, price customisation to attract the Indian markets which is unlike to happen in foreign markets, latest RBI rule preventing the retailers and banks to serve 0% interest loans to consumers which will affect the sales of expensive electronic devices like tablets. As per the IDC report a new round of device cannibalisation is

also expected to kick in with large-screen (5-plus inch) smartphones called Phablets beginning to impact the smaller (7-8 inch) tablet market. But at the end of the day the consumers will be the true beneficiaries of this war among the companies and Indian consumers will be able to enjoy a true mobile connectivity ecosystem with all its advantages resulting in greater value.

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