Annexure on GDPR
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Glossary of terminologies used

- **AIU (Active Internet User):** Those who have accessed the internet in the last one month
- **N-AIU (Non-Active Internet User):** Those who have not accessed the internet in the last one month
- **Entertainment:** Those who are either an Online Video Viewer (accessed video content through VOD or Social Media or WhatsApp or through other online sources in the last one year) or Online Music Listener (downloaded Music or purchased Music or accessed Music through either Amazon Music or Gaana or Wynk or Saavn or Google Music or any other online portal in the last one year) or Online Gamer (played games online on Laptop, Desktop, Tablet, Smartphone, Gaming Console in the last one year)
- **Communication:** Those who have done text/voice/video chat or used email, video conferencing, etc. using an online website or app in the last one year
- **Social Media:** Those who have accessed content on social media website or platform (can be browse/upload content or update status, etc.) in the last one year
- **Net Commerce:** Those who have accessed E-Commerce related activities (online shopping, online finance, online travel, etc) in the last one year
- **Online shopping:** Those who have done online shopping (through Amazon, Flipkart, etc.) in the last one year
- **OTT (Audio+ Video):** Those who have accessed video or music or podcast related content through any of the over-the-top media (Youtube, Hotstar, Prime Video, Gaana, etc) service providing apps or website in the last one year
- **Online Gaming:** Those who have played games online across any device in the last one year
- **Digital Payment:** Those who have used any digital instrument (i.e. Credit Card, Debit Card, Net banking, E-Wallet/UPI) in the last one year to make any offline or online payment
- **Digital Commerce:** Those who have accessed E-Commerce related activities (online shopping, online finance, online travel, etc) in the last one year
- **Online Learning:** Those who have accessed online learning resources or attended school, college, tuition, coaching or skill enhancement classes online through school/college platforms or other online websites/apps
Glossary of terminologies used

— **Town Class Definitions:**
  — Top 4: Top 4 Metros (Delhi, Mumbai, Chennai, Kolkata)
  — Next 5: Next 5 Metros (Surat, Bangalore, Ahmedabad, Hyderabad, Pune)
  — Small Metros: Other Metros with population more than 1 MN
  — Non Metros: 0.5 to 1 MN
  — Small Towns: <0.5 MN

— **Village Class Definitions:**
  — VC 1 - Villages with population greater than 1000 individuals
  — VC 2 - Villages with population less than or equal to 1000 individuals
Top Stories
56% of new internet users in India will be from **Rural** by 2025

Base: ICUBE 2025 All India Population, 900 Million
New Internet Users: Profile by Gender
57% of new internet users are **Female** in 2022

Base: ICUBE 2022, Active Internet Users, 759 Million, Urban India 360 Million, Rural India 399 Million
For the first time, proportion of Non Active Internet users is a minority

714 M
48% of All India Population

*Non Active Internet users are people who have not accessed internet in the last one month. This includes both dormant and non users of internet*
Device of choice for internet access is diversifying with access through devices other than Mobile and PC taking off

Other Devices include Tablet, Streaming Device, Smart Speaker, Smart TV etc.

- **8%**: Internet access through other devices in 2021
- **13%**: Internet access through other devices in 2022

Source: Kantar ICUBE 2022, All India (Urban + Rural)
Digital Payment Users in 2022.
Witnessed 13% user growth in last 1 year

338 Million

Digital Payment users hail from Rural India

36%
DID YOU KNOW?

Rural has more Social Media users than Urban

Source: Rural ICUBE 2022
Social networking platforms are gaining acceptance in the E-commerce world.

Indians are shopping online through Social Commerce. An increase of 51% in one year.

Source: Kantar ICUBE 2022, All India (Urban + Rural)
2 Active Internet Users
Active Internet Users: All India

Internet adoption rate steadies in post pandemic period, albeit at a much lower rate compared to earlier trend.

Base: Kantar ICUBE 2022, All India Population, 1473 Million

Numbers in bracket indicate internet penetration
Active Internet Users: Urban and Rural

Rural India continues to drive internet adoption in the country, surpassing Urban India and still growing at double the rate.

**URBAN**

<table>
<thead>
<tr>
<th>Year</th>
<th>AIU</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>280</td>
<td>12%</td>
</tr>
<tr>
<td>2019</td>
<td>309</td>
<td>11%</td>
</tr>
<tr>
<td>2020</td>
<td>323</td>
<td>4%</td>
</tr>
<tr>
<td>2021</td>
<td>341</td>
<td>5%</td>
</tr>
<tr>
<td>2022</td>
<td>360</td>
<td>6%</td>
</tr>
</tbody>
</table>

**RURAL**

<table>
<thead>
<tr>
<th>Year</th>
<th>AIU</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>182</td>
<td>(20%)</td>
</tr>
<tr>
<td>2019</td>
<td>264</td>
<td>45%</td>
</tr>
<tr>
<td>2020</td>
<td>299</td>
<td>13%</td>
</tr>
<tr>
<td>2021</td>
<td>351</td>
<td>18%</td>
</tr>
<tr>
<td>2022</td>
<td>399</td>
<td>14%</td>
</tr>
</tbody>
</table>

Base: ICUBE 2022 All India Population, 1473 Million, Urban India 506 Million, Rural India 968 Million
3
Profile of Active Internet Users
Active Internet Users: Profile by Town Class/Village Class

Internet penetration is more widespread in Urban India with top 9 cities accounting for only 33%, while larger villages account for 82% concentration in Rural India.
Active Internet Users: Profile by Gender

Males dominate the Internet Users across Urban and Rural.

ALL INDIA
- Gender
  - Male: 54%
  - Female: 46%

URBAN
- Gender
  - Male: 54%
  - Female: 46%

RURAL
- Gender
  - Male: 54%
  - Female: 46%

Base: ICUBE 2022, Active Internet Users, 759 Million, Urban India 360 Million, Rural India 399 Million
AIU Penetration

Goa and Maharashtra are the top penetrated states in India whereas Jharkhand and UP are the least penetrated states.

Top 3 States
- Goa (70%)
- Maharashtra (67%)
- Kerala (65%)

Bottom 3 States
- Jharkhand (41%)
- Uttar Pradesh (38%)
- Bihar (32%)
4
Internet Usage Behaviour (AIU)
Device of Accessing Internet

Usage of mobile phone for accessing internet stays universal. 13% of users are using devices other than Mobile and PC (Smart TV, Tablets, Streaming Device, Smart Speakers, etc.) to access internet.

* Tablet, Streaming Device, Smart Speaker, Smart TV etc.

Base: ICUBE 2022, Active Internet Users, 759 Million
**Device of Accessing Internet**

Usage of mobile phone for accessing internet stays Universal across Urban and Rural India; Usage of other devices is double for urban users as compared to rural.

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Urban Percentage</th>
<th>Rural Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Phones</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>PC</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Others</td>
<td>18%</td>
<td>9%</td>
</tr>
</tbody>
</table>

* Tablet, Streaming Device, Smart Speaker, Smart TV etc.
Frequency of Internet – Usage and Duration

9 out of 10 Active Internet Users access internet every day. On an average, they spend nearly 2 hours surfing the internet daily.

![Average Duration](image)

![Frequency of Usage](image)

Base: ICUBE 2022, Active Internet Users, 759 Million
9 out of 10 Active Internet Users access internet daily in Urban as well as Rural India. Proportion of Daily Users and Duration of Access is slightly higher in Rural, as compared to Urban India.
5
Key activities done on Internet
What are Active Internet Users doing on Internet?

Entertainment, Communication and Social Media are the top most activities done online.

- **85%** Entertainment, **77%** Communication, **70%** Social Media, **52%** Net Commerce, **34%** Online Shopping

**Net Commerce** are internet users who have done any online transactions (bill payment, food ordering, online shopping, cab booking, travel ticket booking, etc.) in the last 1 year.

**Online Shopping** is a subset of Net Commerce users and are the group of people who have shopped online in the last 1 year.

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Base: ICUBE 2022, Active Internet Users, 759 Million

Numbers on top of bars indicate penetration

Numbers inside bars indicate growth since 2021
What are Active Internet Users doing on Internet?

Entertainment, Communication and Social media are the top activities which are done in both Urban and Rural India.

<table>
<thead>
<tr>
<th></th>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>86%</td>
<td>85%</td>
</tr>
<tr>
<td>Communication</td>
<td>80%</td>
<td>74%</td>
</tr>
<tr>
<td>Social Media</td>
<td>73%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Base: ICUBE 2022, Active Internet Users, 759 Million, Urban India 360 Million, Rural India 399 Million
Communication: Text and Email vs. Voice and Video

Communication using Text and Email is higher in India as compared to communication using Voice and Video.

<table>
<thead>
<tr>
<th></th>
<th>Communication</th>
<th>Text and Email</th>
<th>Voice and Video</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban + Rural</td>
<td>77%</td>
<td>74%</td>
<td>63%</td>
</tr>
<tr>
<td>Urban</td>
<td>80%</td>
<td>77%</td>
<td>75%</td>
</tr>
<tr>
<td>Rural</td>
<td>74%</td>
<td>72%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Base: ICUBE 2022, Active Internet Users, 759 Million, Urban India 360 Million, Rural India 399 Million
6 Additional activities done on Internet
Additional Activities Done on Internet

Penetration of Online gaming, Digital Commerce, Digital Payments and Online Learning is higher in Urban as compared to Rural India.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Urban + Rural</th>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTT (Audio + Video)</td>
<td>88%</td>
<td>91%</td>
<td>85%</td>
</tr>
<tr>
<td>Online Gaming</td>
<td>40%</td>
<td>46%</td>
<td>35%</td>
</tr>
<tr>
<td>Net Commerce</td>
<td>52%</td>
<td>67%</td>
<td>38%</td>
</tr>
<tr>
<td>Digital Payment</td>
<td>45%</td>
<td>61%</td>
<td>30%</td>
</tr>
<tr>
<td>Online Learning</td>
<td>6%</td>
<td>9%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: ICUBE 2022, Active Internet Users, 759 Million, Urban India 360 Million, Rural India 399 Million
OTT (Video + Audio): Profile by Town Class/Village Class

OTT users are more in Rural India; In Urban India, 2 out of 5 OTT users belong to Small Towns.

ALL INDIA

Urbanization

URBAN

Town Class

RURAL

Village Class

Base: ICUBE 2022, OTT Users, All India 668 Million, Urban India 327 Million, Rural India 341 Million
OTT (Video + Audio): Profile by Gender

Across Urban and Rural India, the majority population using OTT platforms is Male.

Base: ICUBE 2022, OTT Users, All India 668 Million, Urban India 327 Million, Rural India 341 Million
Online Gaming Users: Profile by Town Class/Village Class

6 out 10 Online Gamers are Urban India; 2 out of 5 Urban Gamers belongs to Top 9 cities.

ALL INDIA

Urbanization

60% Urban
40% Rural

URBAN

Town Class

24% Top 4
10% Small Metros
8% Towns 2-5L
16% Towns <2L
27% Next 5
15% Non Metros

RURAL

Village Class

82% VC 1
18% VC 2

Base: ICUBE 2022, Online Gaming Users, All India 350 Million, Urban India 209 Million, Rural India 141 Million
Online Gaming Users: Profile by Gender

Across India, Online Gaming is skewed towards Males.
Digital Payment: Profile by Town Class/Village Class

6 out of 10 Digital Payment Users in India belong to Urban. In Urban India, 6 out of 10 Digital Payment Users belong to Top tier and Mid tier cities.

ALL INDIA

Urbanization

Urban: 64%
Rural: 36%

URBAN

Town Class

Top 4: 24%
Next 5: 15%
Small Metros: 8%
Towns 2-5L: 11%
Towns <2L: 19%

RURAL

Village Class

VC 1: 18%
VC 2: 82%

Base: ICUBE 2022, Digital Payment Users, All India 340 Million, Urban India 218 Million, Rural India 122 Million
Digital Payment: Profile by Gender

6 out 10 Digital Payment Users are Male across India. It has the same trend across Urban and Rural.

ALL INDIA

URBAN

RURAL

Base: ICUBE 2022, Digital Payment Users, All India 340 Million, Urban India 218 Million, Rural India 122 Million
Net Commerce: Profile by Town Class/Village Class

3 out of 5 Net Commerce Users in India belong to Urban; Among Urban India, 6 out of 10 Net Commerce Users belong to Cities with more than 10 lakh population.

ALL INDIA

Urbanization

URBAN

Town Class

RURAL

Village Class

Base: ICUBE 2022 Net Commerce Users, All India 394 Million, Urban India 241 Million, Rural India 153 Million
Net Commerce: Profile by Gender

6 out of 10 Net Commerce Users in India are Male, with a similar profile seen in both Urban and Rural India.

ALL INDIA

Gender

Male 56%
Female 42%

URBAN

Gender

Male 57%
Female 43%

RURAL

Gender

Male 55%
Female 45%
Online Learning: Profile by Town Class/Village Class

7 out of 10 Online Learning Users in India belong to Urban; Among Urban India, around half of the Online Learning population belongs to Top 9 cities.

7 out of 10 Online Learning Users in India belong to Urban; Among Urban India, around half of the Online Learning population belongs to Top 9 cities.
Online Learning: Profile by Gender

Online Learning has helped bridge the Gender gap in supplementary education with an almost equal representation of Males and Females specially in Rural.

ALL INDIA

URBAN

RURAL

Base: ICUBE 2022, Online Learning Users, All India 45 Million, Urban India 31 Million, Rural India 14 Million
7
Non-Active Internet Users
Non-Active Internet Users

Around half of the population still doesn’t use Internet in India. The non-users are slowly reducing, but there are still a lot of opportunities for companies to tap into.

<table>
<thead>
<tr>
<th>Year</th>
<th>Non-Active Internet Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>812 M</td>
</tr>
<tr>
<td></td>
<td>57%</td>
</tr>
<tr>
<td>2021</td>
<td>762 M</td>
</tr>
<tr>
<td></td>
<td>52%</td>
</tr>
<tr>
<td>2022</td>
<td>714 M</td>
</tr>
<tr>
<td></td>
<td>48%</td>
</tr>
</tbody>
</table>

Base: Kantar ICUBE 2022, All India Population, 1473 Million
Non-Active Internet Users

6 out 10 people in Rural India are Non Active Internet Users this population is high in Rural area because of digital divide.

Non-Active Internet Users Penetration

- **29%** Urban India
- **59%** Rural India

Base: ICUBE 2022 All India Population, 1473 Million, Urban India 506 Million, Rural India 968 Million
## Reasons for Not Accessing Internet

Not owning an Internet connection at home, and not being aware of the benefits of the Internet make up the top barriers to Internet adoption in India.

<table>
<thead>
<tr>
<th>Reason</th>
<th>All India</th>
<th>All Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not own Internet connection at my home</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Not aware of the benefits of the internet</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Not interested in accessing Internet</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Too difficult to understand and use</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Cannot afford Internet Connection/ Expensive for me</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Internet is very confusing to me</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Not allowed to access the Internet</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Do not own devices (like computer, mobile, etc.) at home</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Too time consuming/ Don’t have enough time</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Nothing interesting for me is available on internet</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: Kantar ICUBE 2022, Non-Active Internet Users, All India, 681 Million
### Reasons for Not Accessing Internet

No interest in Internet is the topmost reason for not accessing in Urban while not having Internet connection is the topmost reason in Rural India.

#### Urban

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not interested in accessing Internet</td>
<td>23%</td>
</tr>
<tr>
<td>Too difficult for me to understand and use</td>
<td>21%</td>
</tr>
<tr>
<td>Not aware of the benefits of the internet</td>
<td>21%</td>
</tr>
<tr>
<td>Do not own Internet connection at my home</td>
<td>21%</td>
</tr>
<tr>
<td>Not allowed to access the Internet</td>
<td>17%</td>
</tr>
<tr>
<td>Internet is very confusing to me</td>
<td>17%</td>
</tr>
<tr>
<td>Too time consuming/ Don’t have enough time</td>
<td>17%</td>
</tr>
<tr>
<td>Can’t afford Internet Connection</td>
<td>16%</td>
</tr>
<tr>
<td>Do not own devices (like computer, mobile, etc.) at home</td>
<td>13%</td>
</tr>
<tr>
<td>Nothing interesting for me is available on internet</td>
<td>12%</td>
</tr>
</tbody>
</table>

#### Rural

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not own Internet connection at my home</td>
<td>28%</td>
</tr>
<tr>
<td>Not aware of the benefits of the internet</td>
<td>26%</td>
</tr>
<tr>
<td>Not interested in accessing Internet</td>
<td>25%</td>
</tr>
<tr>
<td>Too difficult to understand and use</td>
<td>23%</td>
</tr>
<tr>
<td>Cannot afford Internet Connection/ Expensive for me</td>
<td>21%</td>
</tr>
<tr>
<td>Internet is very confusing to me</td>
<td>18%</td>
</tr>
<tr>
<td>Do not own devices (like computer, mobile, etc.) at home</td>
<td>18%</td>
</tr>
<tr>
<td>Not allowed to access the Internet</td>
<td>17%</td>
</tr>
<tr>
<td>Too time consuming/ Don’t have enough time</td>
<td>15%</td>
</tr>
<tr>
<td>Nothing interesting for me is available on internet</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: Kantar ICUBE 2022, Non-Active Internet Users, Urban India 137 Million, Rural India 544 Million
8
Annexure
ICUBE™ 2022: Measuring internet usage in the digital first world

Asia’s largest authoritative resource for digital marketing and planning decisions for the last 25 years

Comprehensive view: Digital Consumer
(Internet behavior across devices i.e. PC, Mobile etc.)

Extensive Coverage and Representative Sample
(Urban/Rural; All India, State, City Level Estimations)

Highlights Emerging/ Future Trends
(Highlights current and futures trends across different digital platforms)

86,000+ Individuals

<table>
<thead>
<tr>
<th>Urban</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>60,000+</td>
<td>26,000+</td>
</tr>
</tbody>
</table>

(Urban - 60,000+ (Spread across 390+ cities across different TCs)
Rural - 26,000+ (Spread across 350+ districts, 1000+ villages across different VCLs)

- Covers all States and UTs of India (barring Lakshwadeep)
- Covers all cities with 2 Lakh + population
- Covers all the districts in non-Himalayan states
- Covers half of the districts in Himalayan states
- Fieldwork Period: May - August 2022

What ICUBE™ provides?

<table>
<thead>
<tr>
<th>Basic Measures</th>
<th>Metrics to decide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size and Reach</td>
<td>Communication planning</td>
</tr>
<tr>
<td>Purpose</td>
<td>Designing products and services</td>
</tr>
<tr>
<td>Profile and Usage</td>
<td></td>
</tr>
</tbody>
</table>

Fieldwork Period: May - August 2022
Research Methodology

**METHODOLOGY:**

- **Listing Interview:** To measure the penetration of digital (Internet on PC, Mobile, Laptop, Netbook/Tablet) usage

- **Main Interview:** To gauge the detailed usage of specific segments: Net Commerce, Mobile Internet, Online Entertainment, Social Media etc.

- **Average LOI:** ~30 Mins

**SAMPLE SELECTION AND DATA COLLECTION:**

- Selection of cities and sample arrived basis the population and geographical spread from Census 2011

- Face-to-Face (CAPI) survey among Households in Urban/Rural cities/villages using **Multistage Systematic Random Sampling** Approach

*Interviews will be conducted in regional languages (10 different languages), wherever required as per the convenience of the respondents. Kantar will use Kantar trained freelance interviewers for conducting the interview.*
About IAMAI

Established in 2004, the Internet & Mobile Association of India (IAMAI) is a not-for-profit industry body and the country’s only organisation representing the digital services industry with over 400 Indian and multinational corporations as its members, which include established companies in diverse sectors of the digital ecosystem as well as start-ups. Its mandate is to expand and enhance the online and mobile value-added services sectors. It is dedicated to presenting a unified voice of the businesses it represents to the government, investors, consumers, and other stakeholders. IAMAI represents varied sectors, such as digital advertising, digital entertainment, traveltech, online gaming, digital payments, fintech, digital commerce, edtech, healthtech, agritech, and logistics tech to name a few.

Contact: Gaurav Chopra, Senior Vice President, IAMAI gaurav@iamai.in

About Kantar

Kantar is the world’s leading marketing data and analytics company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining the deep expertise of our people, our data resources and benchmarks and our innovative analytics and technology, we help our clients understand people and inspire growth.

For more information please visit
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KANTAR