

KANTAR

**Internet in India
2022**

ICUBE 2022

April 2023



[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

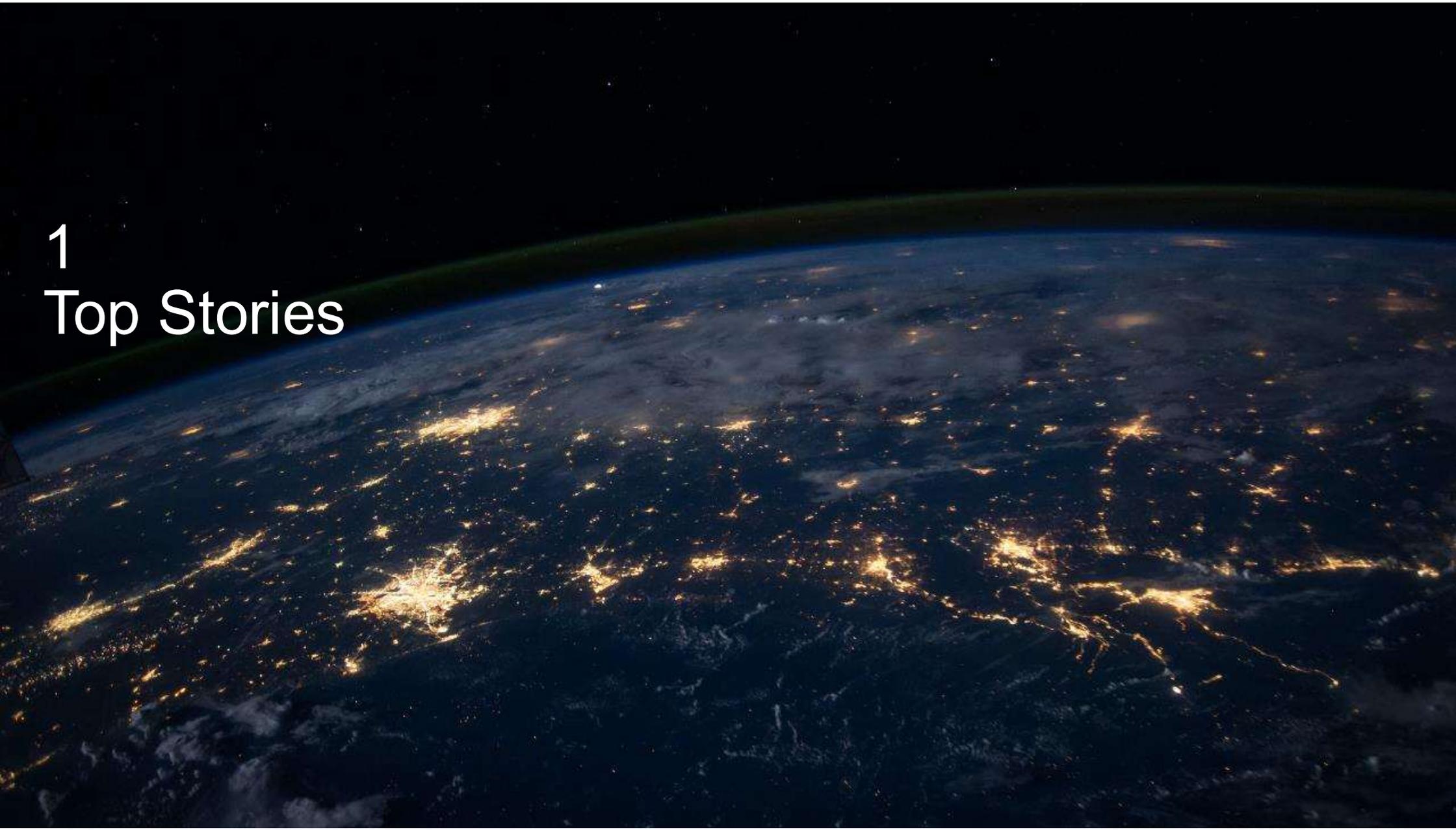
– Town Class Definitions:

- 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

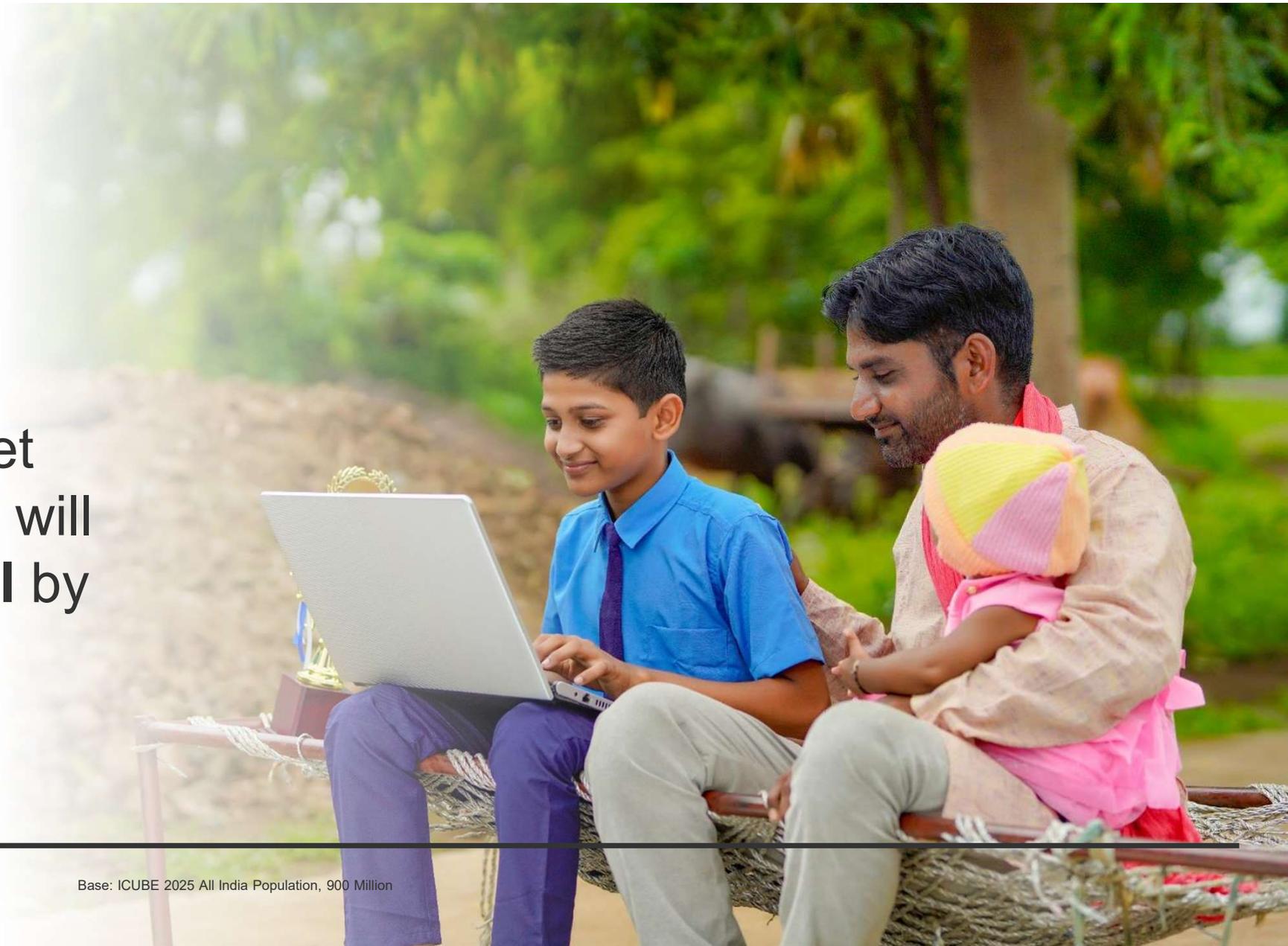
– Village Class Definitions:

- VC 1 - Villages with population greater than 1000 individuals
- VC 2 - Villages with population less than or equal to 1000 individuals

1 Top Stories



56%
of new internet
users in India will
be from **Rural** by
2025



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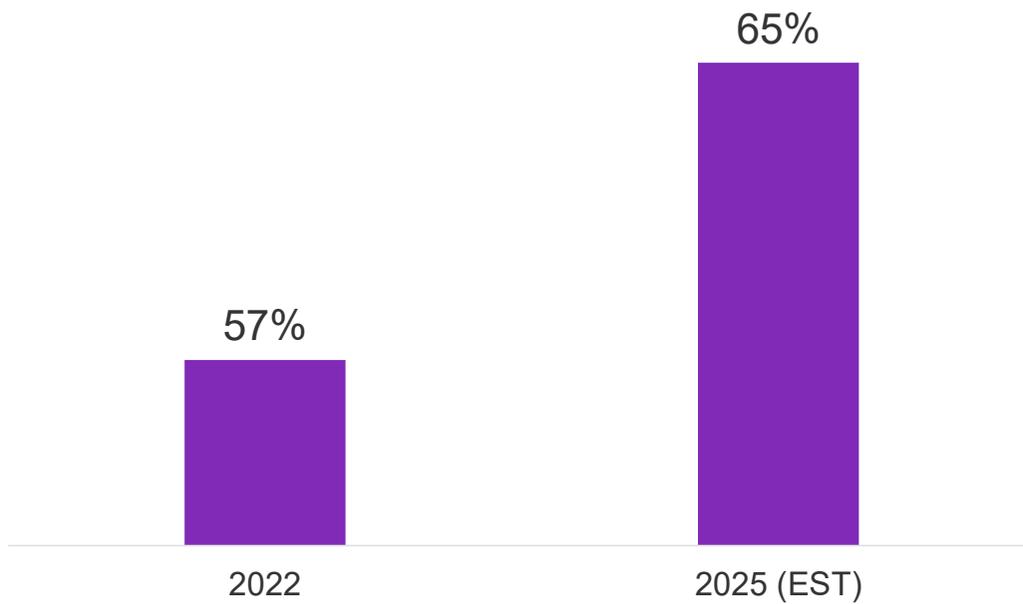


Base: ICUBE 2025 All India Population, 900 Million

New Internet Users: Profile by Gender

57% of new internet users are **Female** in 2022

Proportion of Female in New Internet Users



For the first time, proportion of Non Active Internet users is a minority

** 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*

714 M
48% of All India Population

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

338 Million

Digital Payment Users
in 2022.

Witnessed **13%** user
growth in last 1 year

36%

Digital Payment users hail
from **Rural** India

DID YOU KNOW?

**Rural has more
Social Media
users than Urban**

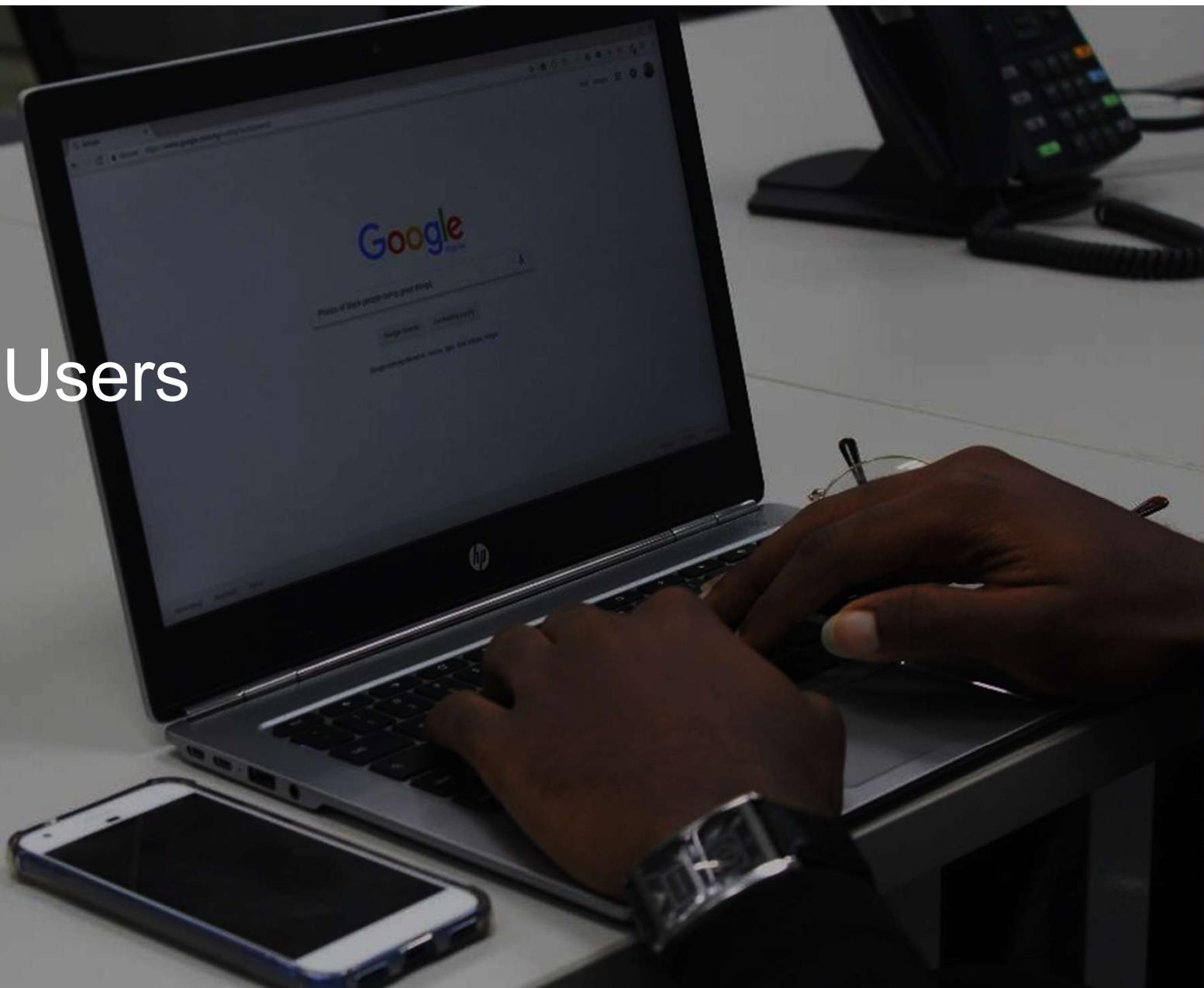


Social networking platforms are gaining acceptance in the E-commerce world.



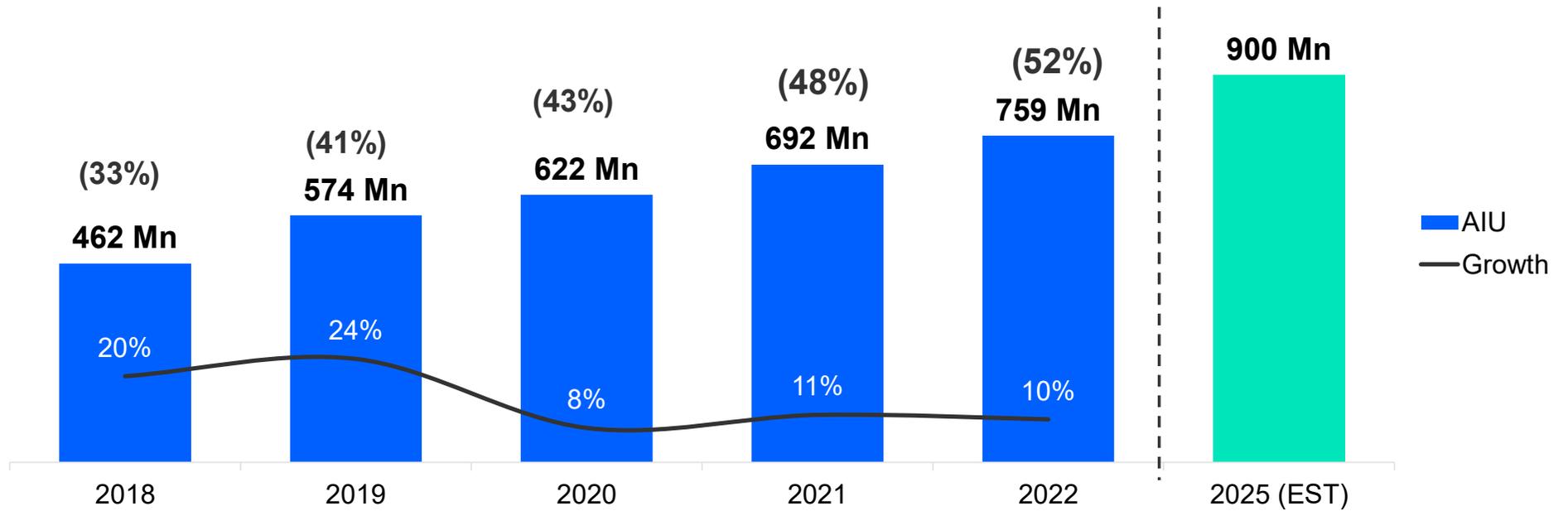
Indians are shopping online through Social Commerce. An increase of 51% in one year.

2 Active Internet Users



Active Internet Users: All India

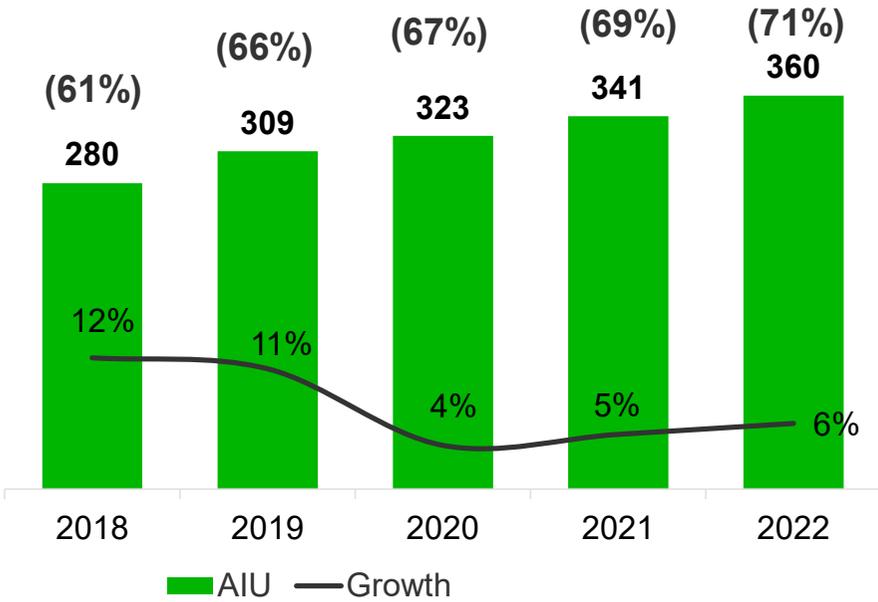
Internet adoption rate steadies in post pandemic period, albeit at a much lower rate compared to earlier trend.



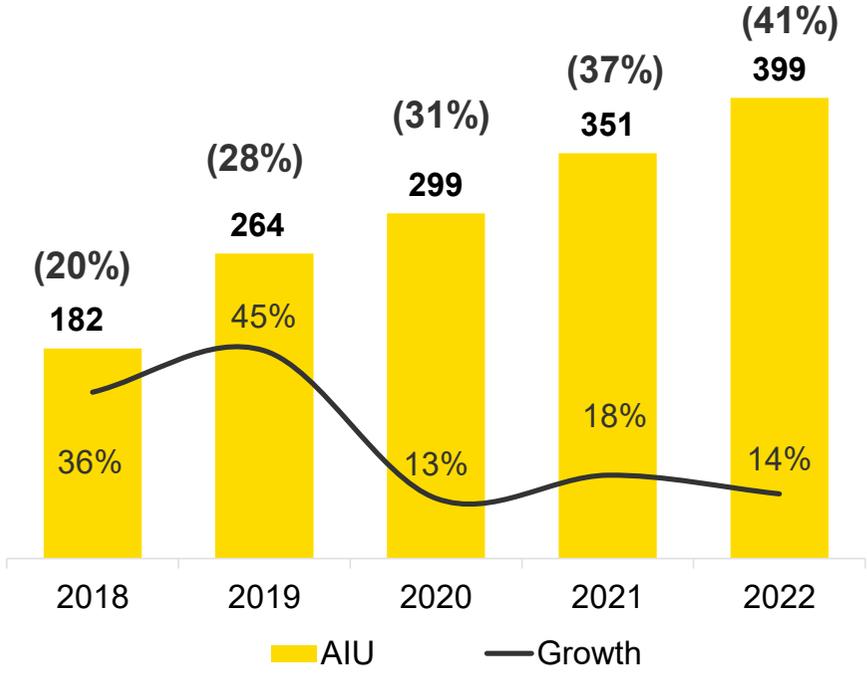
Active Internet Users: Urban and Rural

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

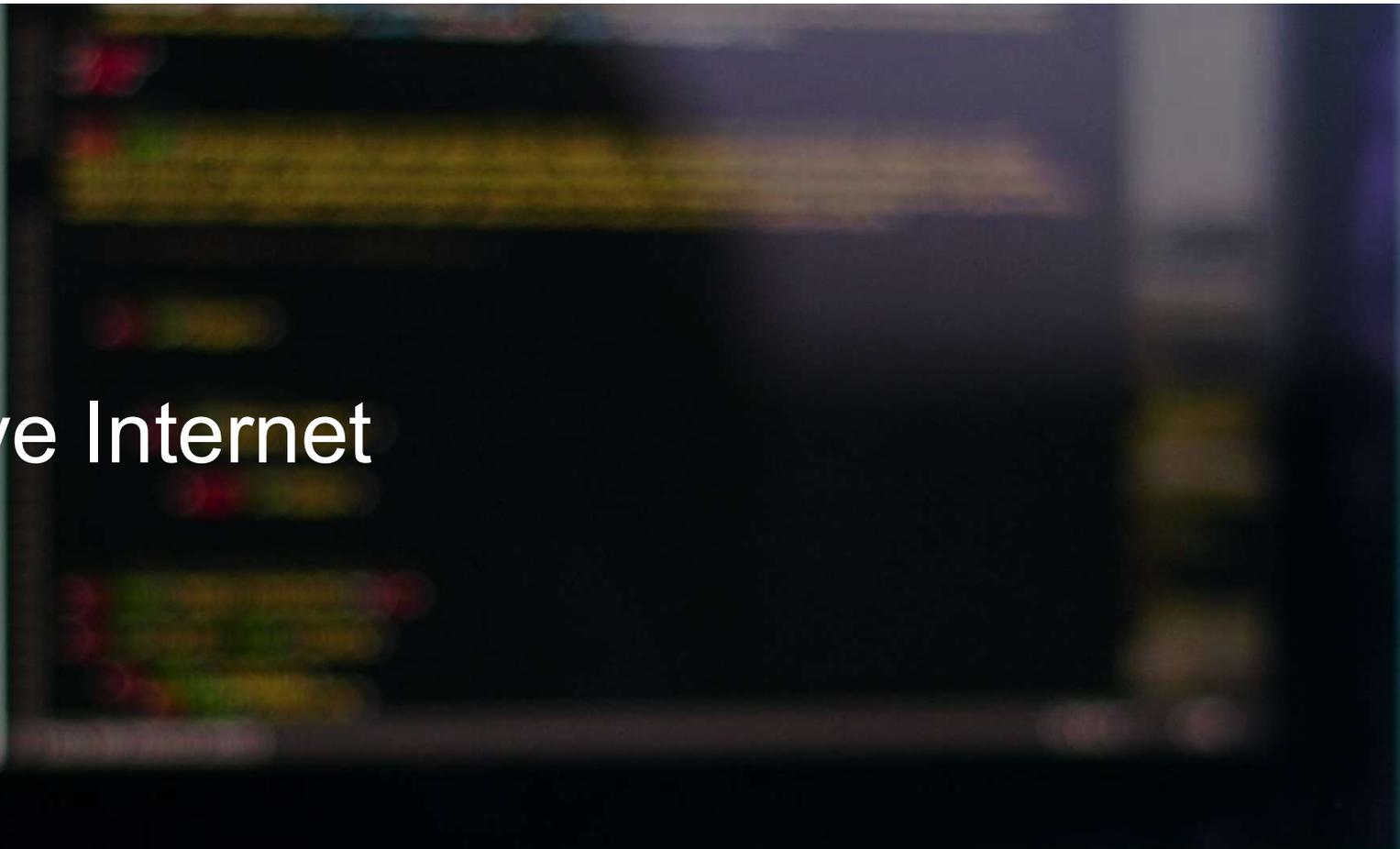
URBAN



RURAL



3 Profile of Active Internet Users

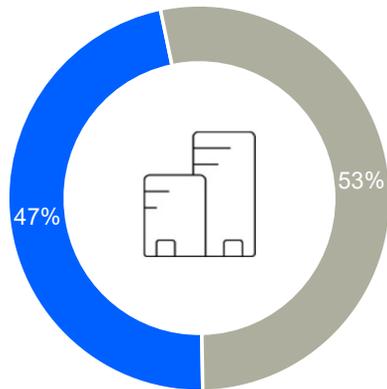


Active Internet Users: Profile by Town Class/Village Class

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.

ALL INDIA

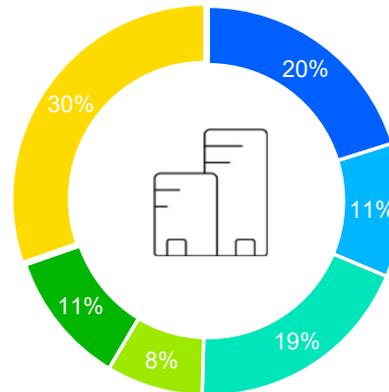
Urbanization



■ Urban ■ Rural

URBAN

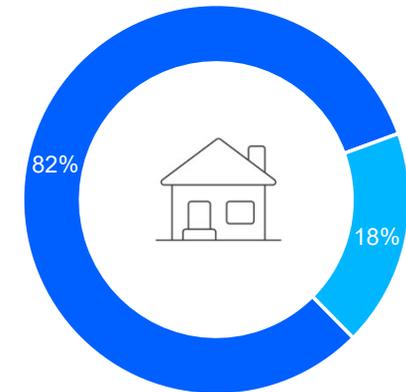
Town Class



■ Top 4 ■ Next 5
 ■ Small Metros ■ Non Metros
 ■ Small Towns 2-5L ■ Small Towns <2L

RURAL

Village Class



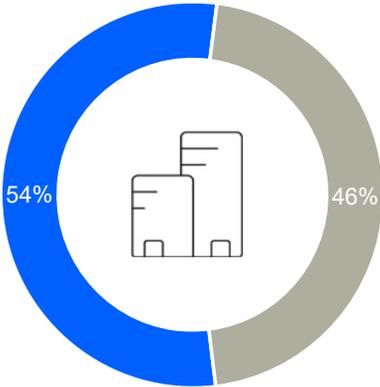
■ Villages with population > 1000
 ■ Villages with population < 1000

Active Internet Users: Profile by Gender

Males dominate the Internet Users across Urban and Rural.

ALL INDIA

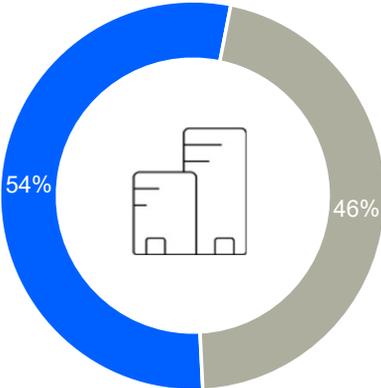
Gender



■ Male ■ Female

URBAN

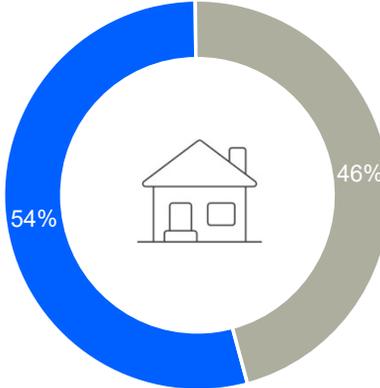
Gender



■ Male ■ Female

RURAL

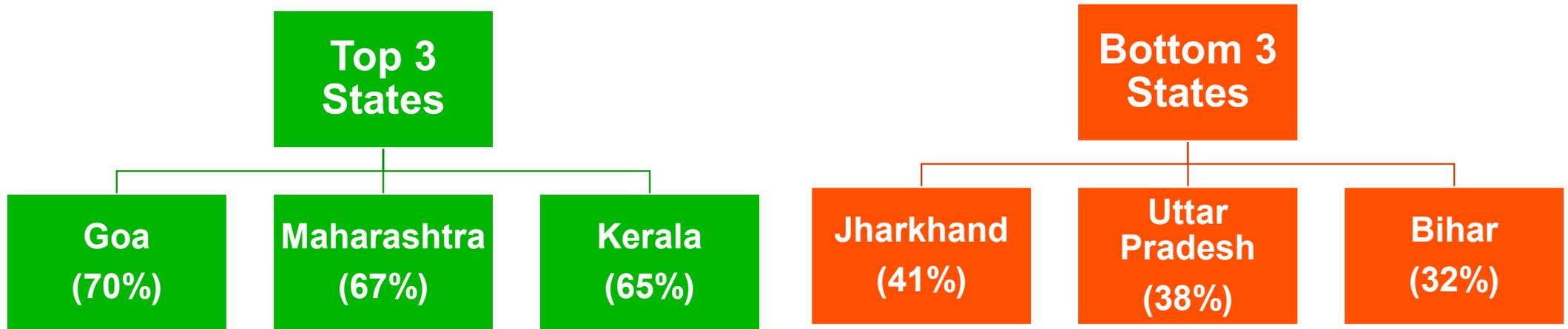
Gender



■ Male ■ Female

AIU Penetration

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

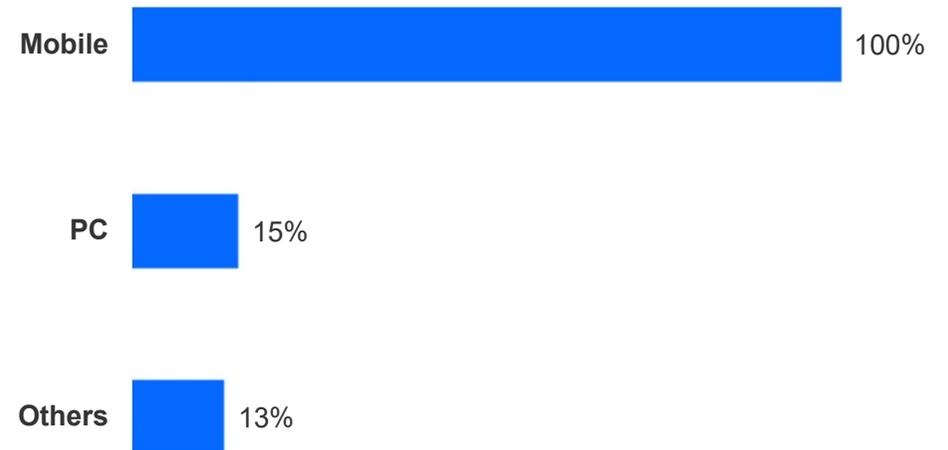


4 Internet Usage Behaviour (AIU)



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.

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



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100%

Mobile Phones

17%

PC

18%

Others

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



RURAL

100%

Mobile Phones

13%

PC

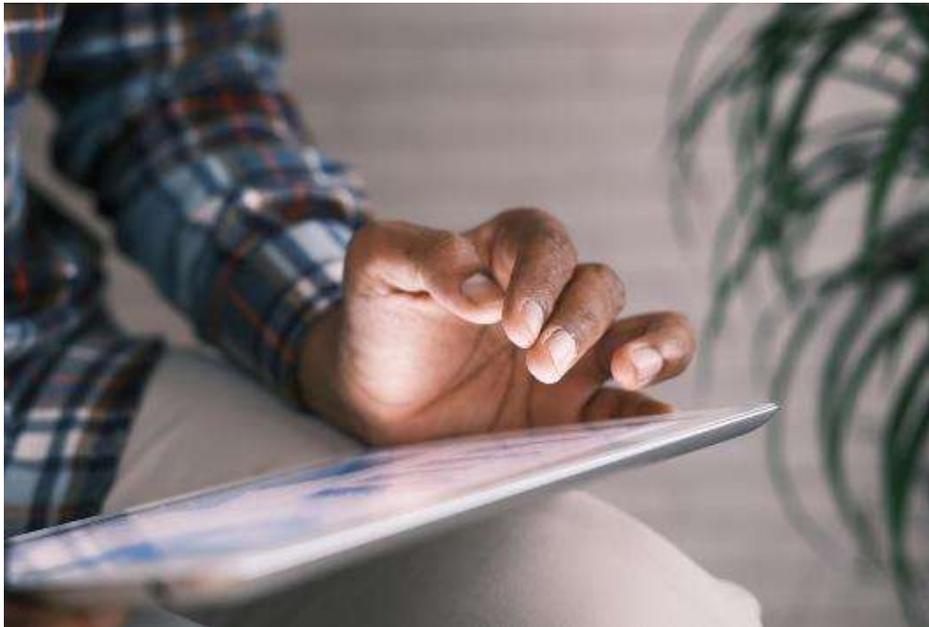
9%

Others

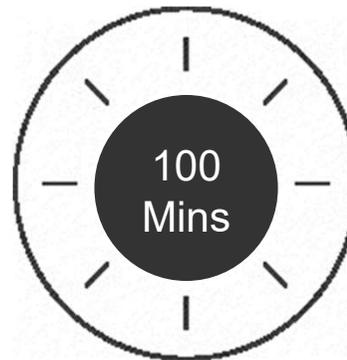
** Tablet, Streaming Device, Smart Speaker, Smart TV etc.*

Frequency of Internet – Usage and Duration

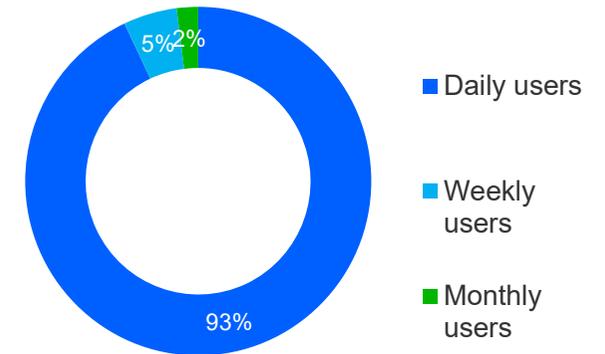
9 out of 10 Active Internet Users access internet every day. On an average, they spend nearly 2 hours surfing the internet daily.



Average Duration



Frequency of Usage

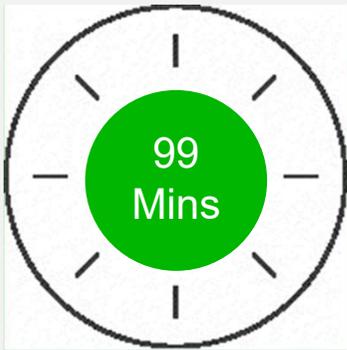


Frequency of Internet – Usage and Duration

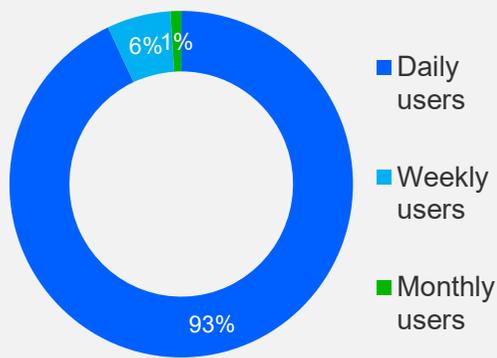
9 out of 10 Active Internet Users access internet daily in Urban as well as Rural India. Proportion of Daily Users and Duration of Access is slightly higher in Rural, as compared to Urban India.

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Average Duration

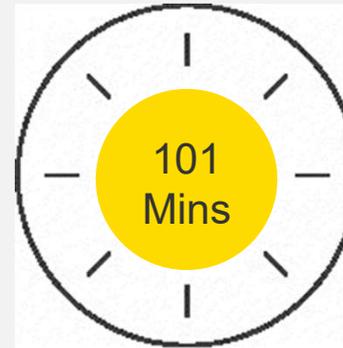


Frequency of Usage

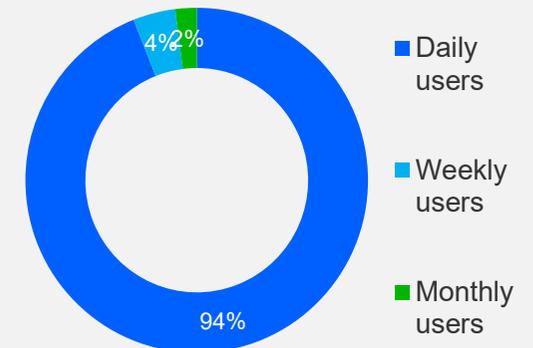


RURAL

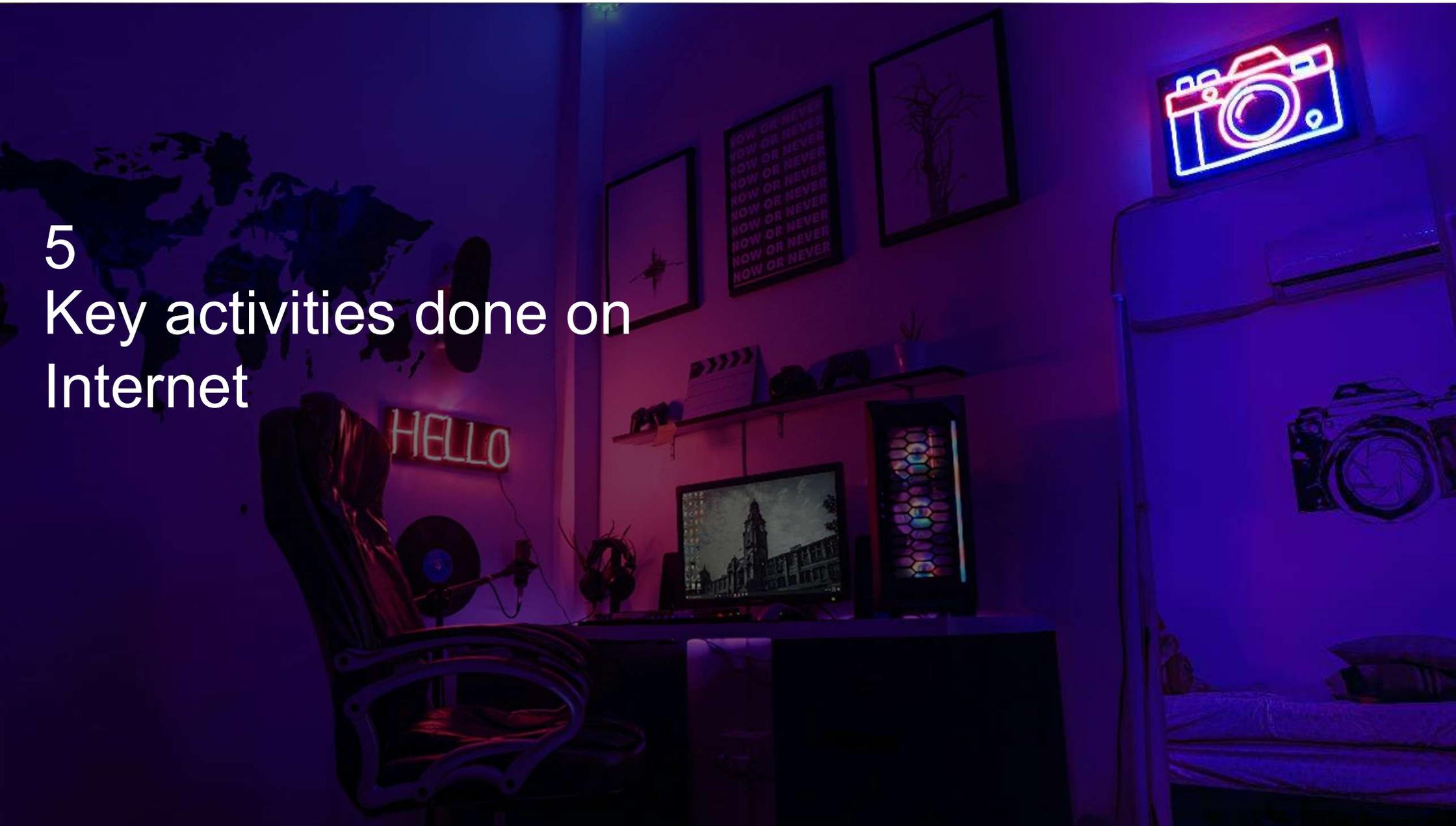
Average Duration



Frequency of Usage

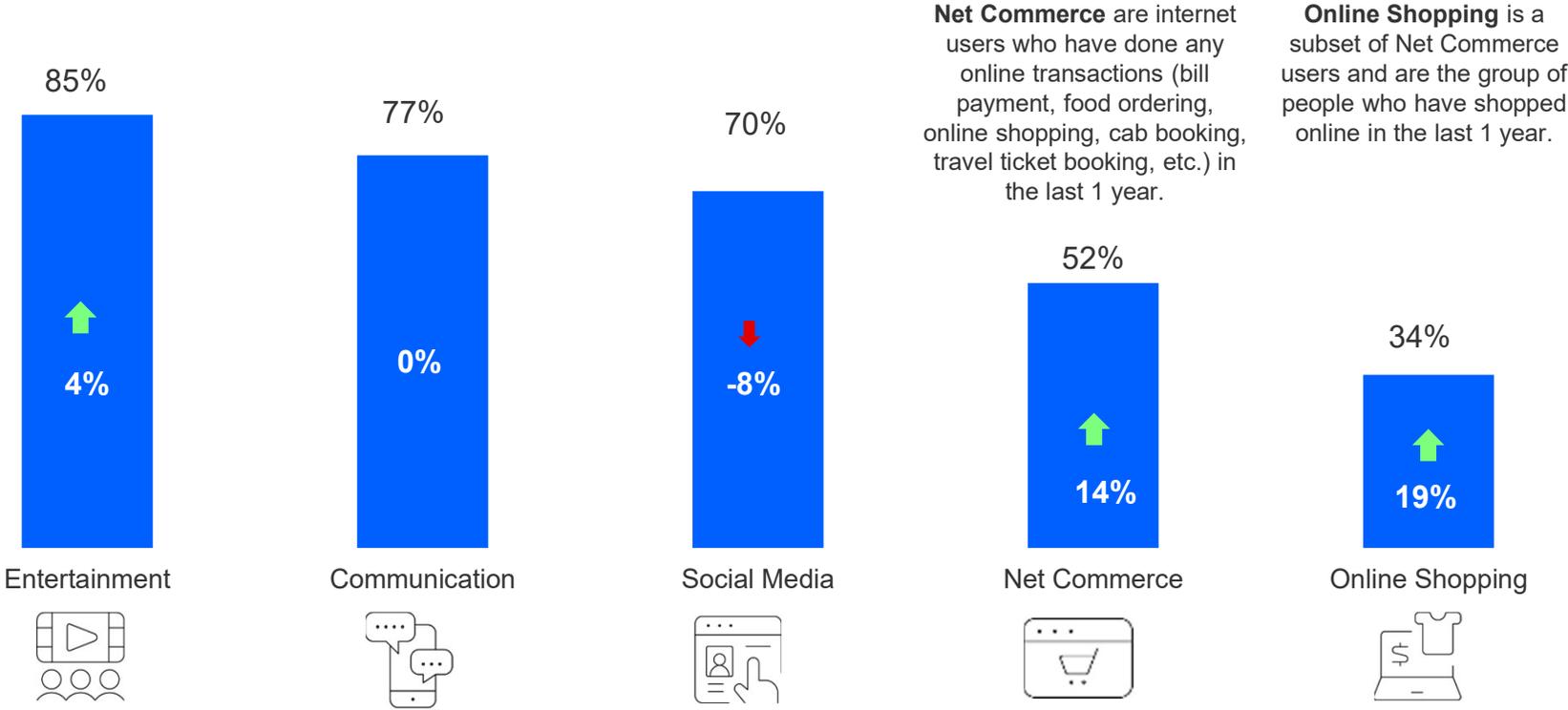


5
Key activities done on
Internet



What are Active Internet Users doing on Internet?

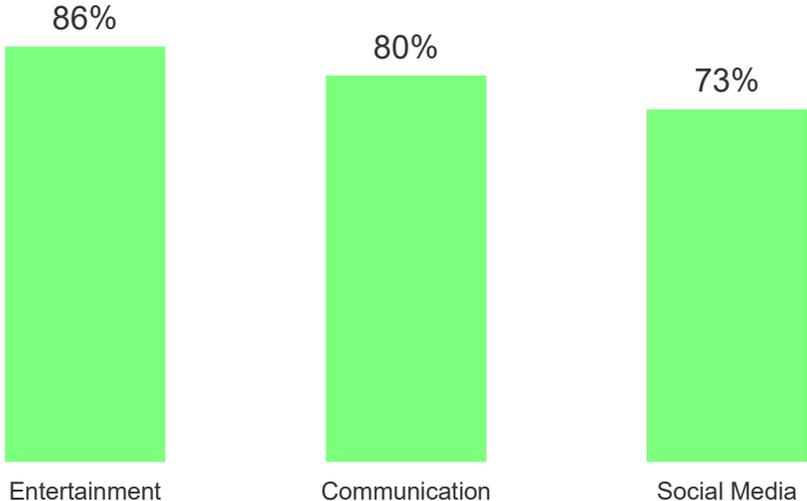
Entertainment, Communication and Social Media are the top most activities done online.



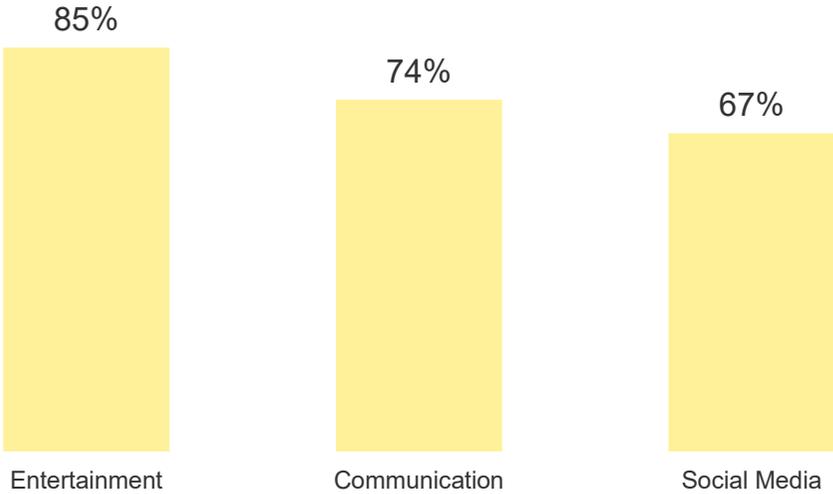
What are Active Internet Users doing on Internet?

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

URBAN

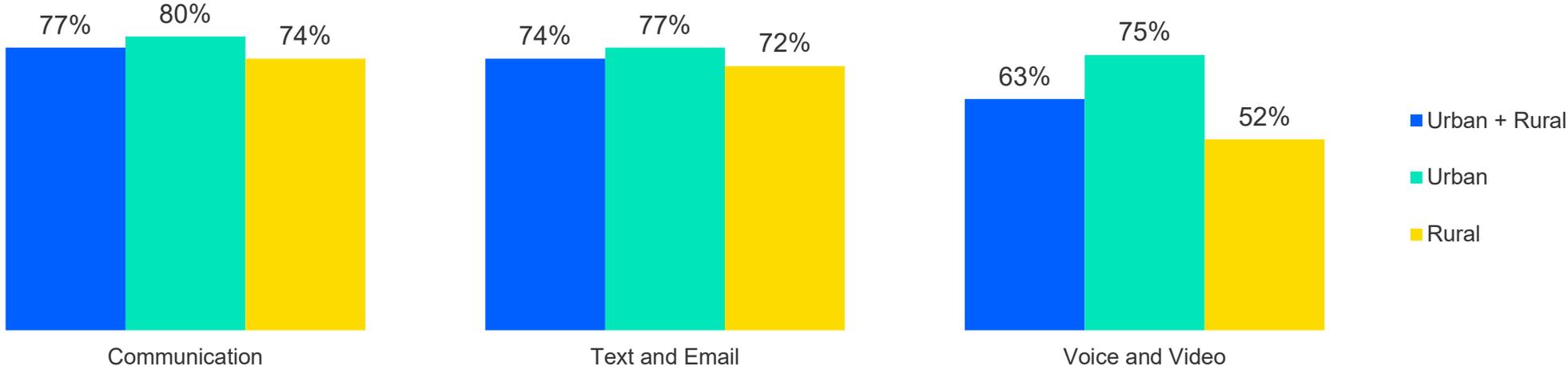


RURAL

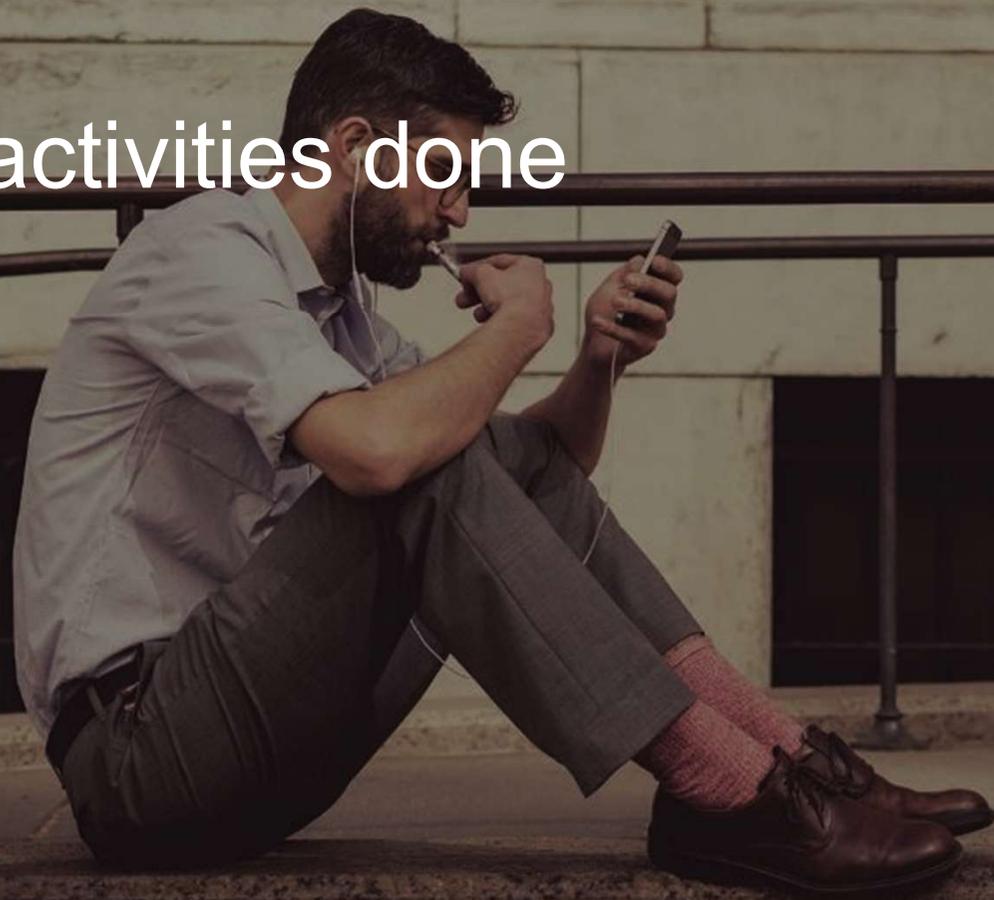


Communication: Text and Email vs. Voice and Video

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

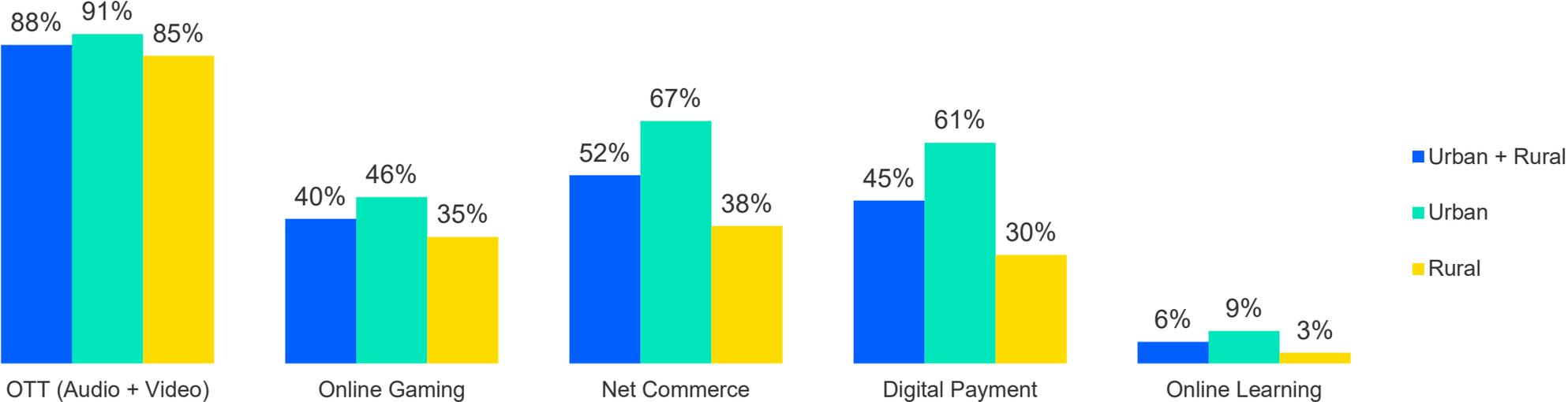


6
Additional activities done
on Internet



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.

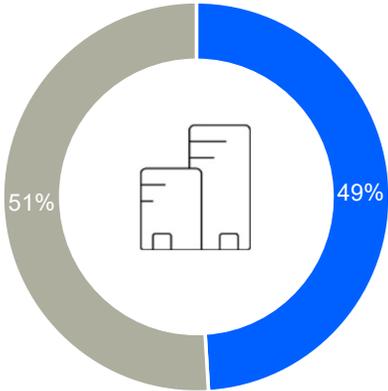


OTT (Video + Audio): Profile by Town Class/Village Class

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

ALL INDIA

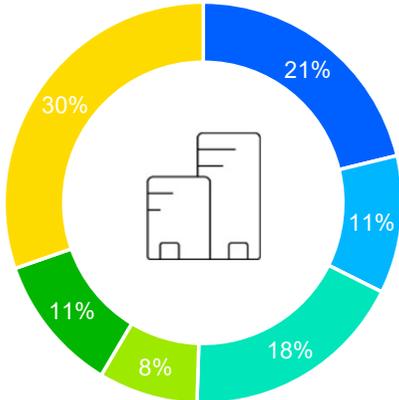
Urbanization



■ Urban ■ Rural

URBAN

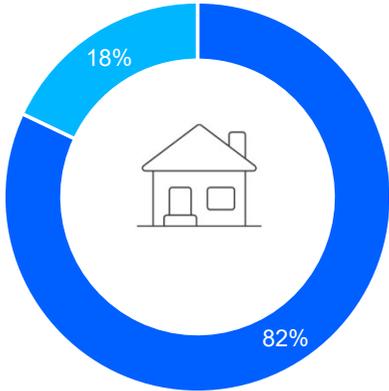
Town Class



■ Top 4 ■ Next 5
 ■ Small Metros ■ Non Metros
 ■ Towns 2-5L ■ Towns <2L

RURAL

Village Class



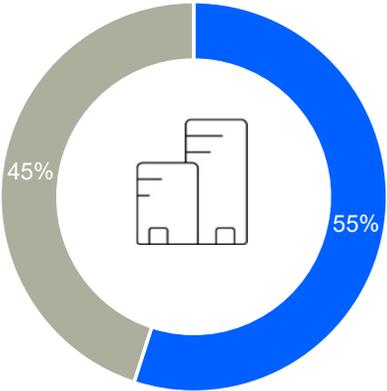
■ VC 1 ■ VC 2

OTT (Video + Audio): Profile by Gender

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

ALL INDIA

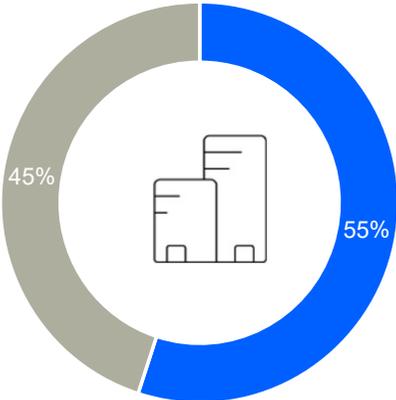
Gender



■ Male ■ Female

URBAN

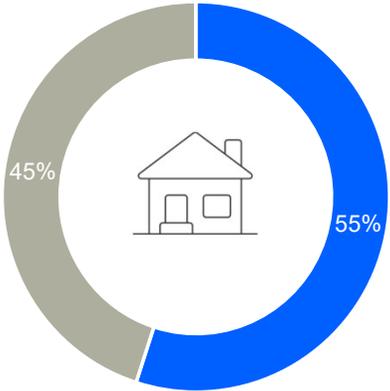
Gender



■ Male ■ Female

RURAL

Gender



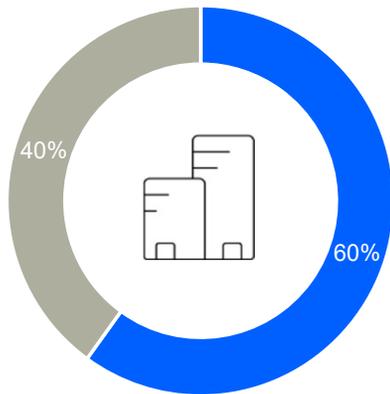
■ Male ■ Female

Online Gaming Users: Profile by Town Class/Village Class

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

ALL INDIA

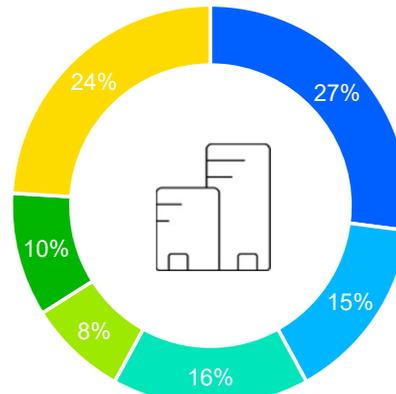
Urbanization



■ Urban ■ Rural

URBAN

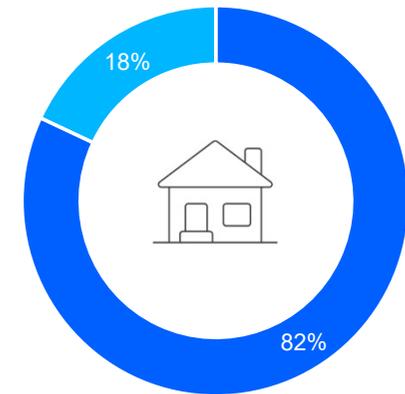
Town Class



■ Top 4 ■ Next 5
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RURAL

Village Class



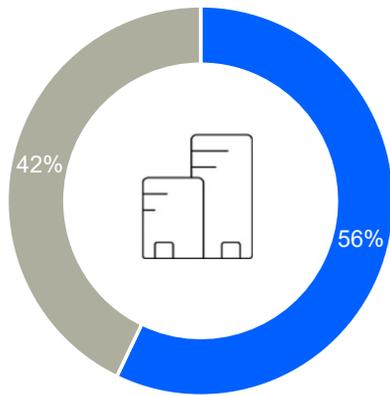
■ VC 1 ■ VC 2

Online Gaming Users: Profile by Gender

Across India, Online Gaming is skewed towards Males.

ALL INDIA

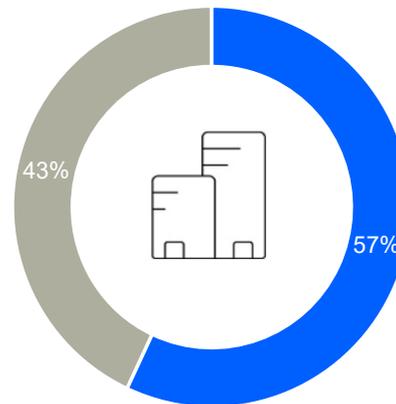
Gender



■ Male ■ Female

URBAN

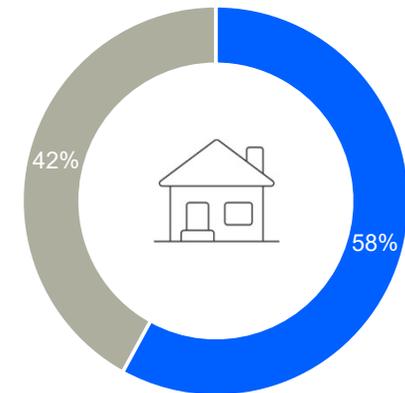
Gender



■ Male ■ Female

RURAL

Gender



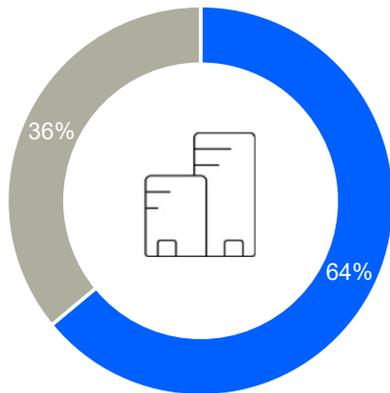
■ Male ■ Female

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

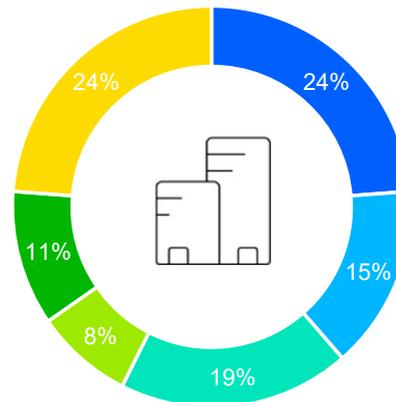
Urbanization



■ Urban ■ Rural

URBAN

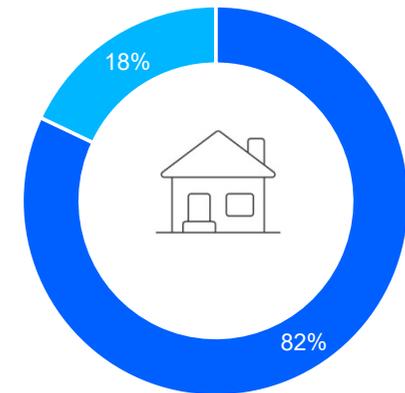
Town Class



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RURAL

Village Class



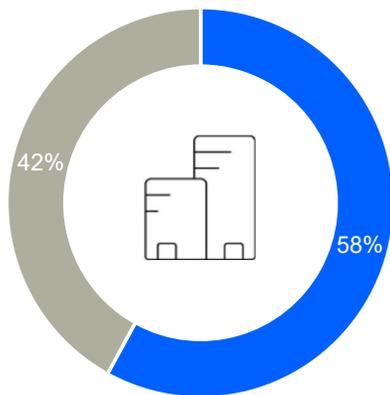
■ VC 1 ■ VC 2

Digital Payment: Profile by Gender

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

ALL INDIA

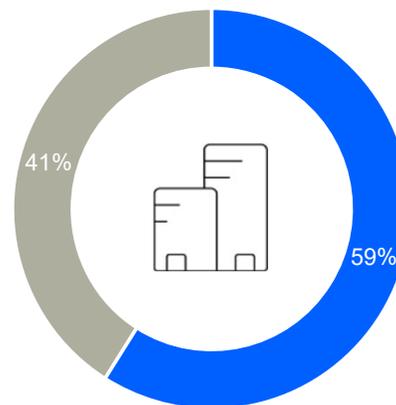
Gender



■ Male ■ Female

URBAN

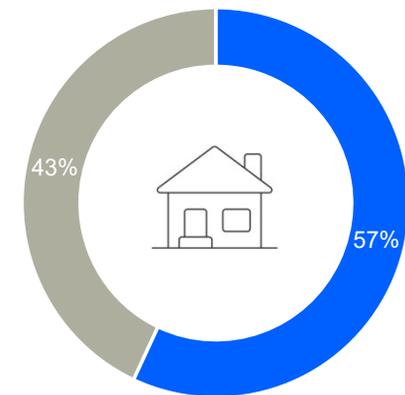
Gender



■ Male ■ Female

RURAL

Gender



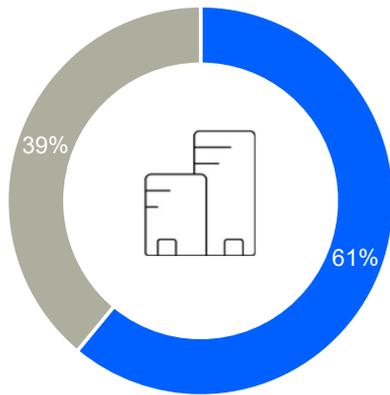
■ Male ■ Female

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

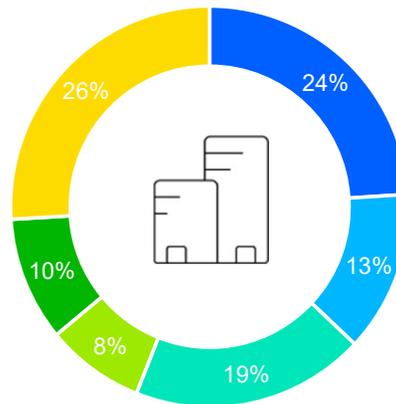
Urbanization



■ Urban ■ Rural

URBAN

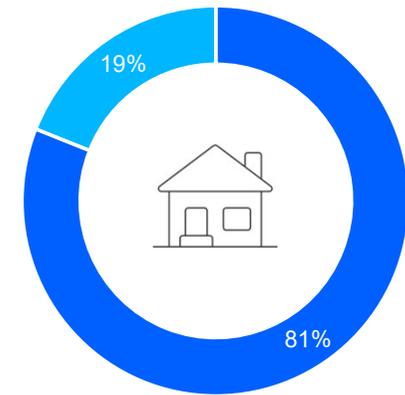
Town Class



■ Top 4 ■ Next 5
 ■ Small Metros ■ Non Metros
 ■ Towns 2-5L ■ Towns <2L

RURAL

Village Class



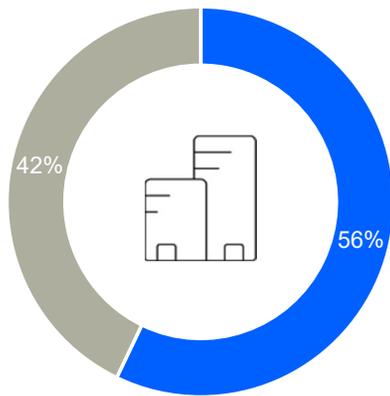
■ VC 1 ■ VC 2

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

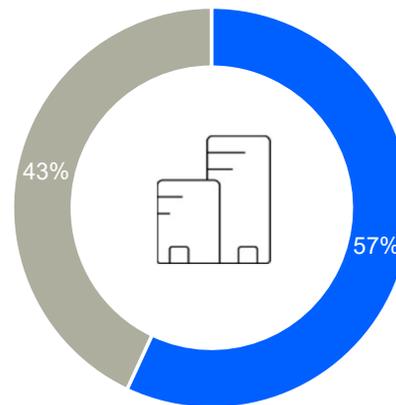
Gender



■ Male ■ Female

URBAN

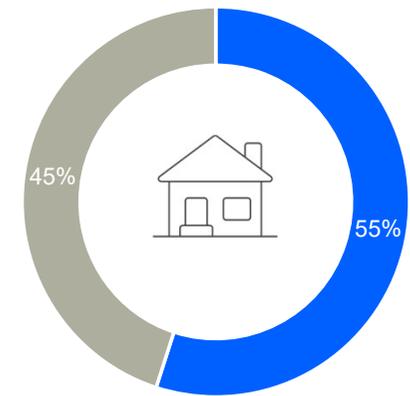
Gender



■ Male ■ Female

RURAL

Gender



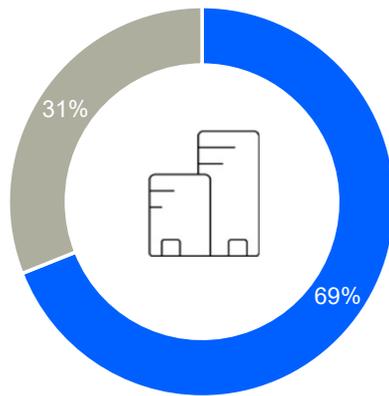
■ Male ■ Female

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.

ALL INDIA

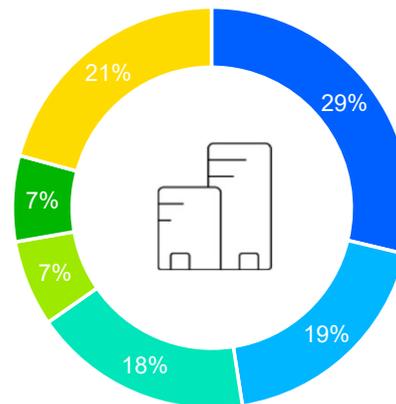
Urbanization



■ Urban ■ Rural

URBAN

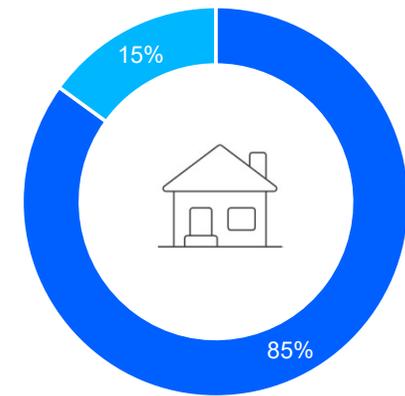
Town Class



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RURAL

Village Class



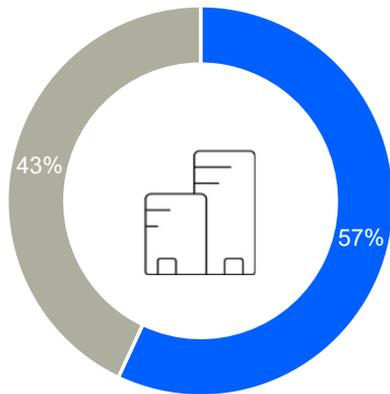
■ VC 1 ■ VC 2

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

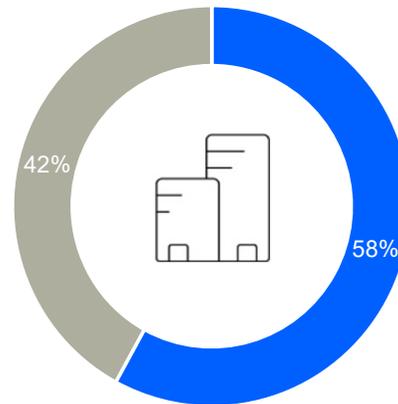
Gender



■ Male ■ Female

URBAN

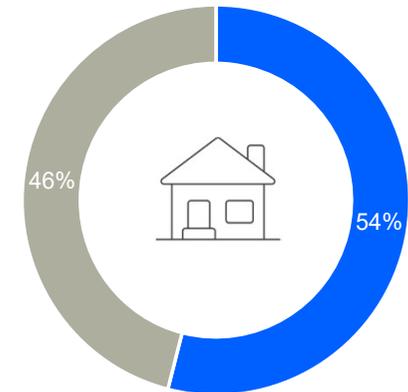
Gender



■ Male ■ Female

RURAL

Gender



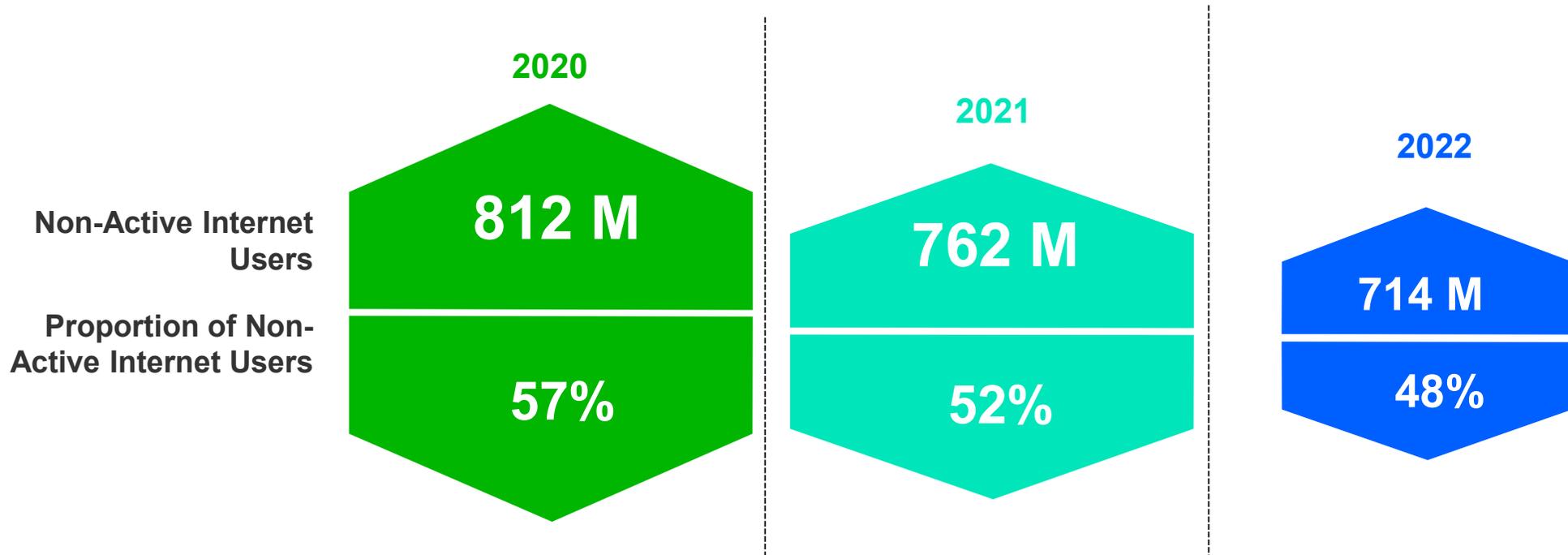
■ Male ■ Female



7
Non-Active Internet
Users

Non-Active Internet Users

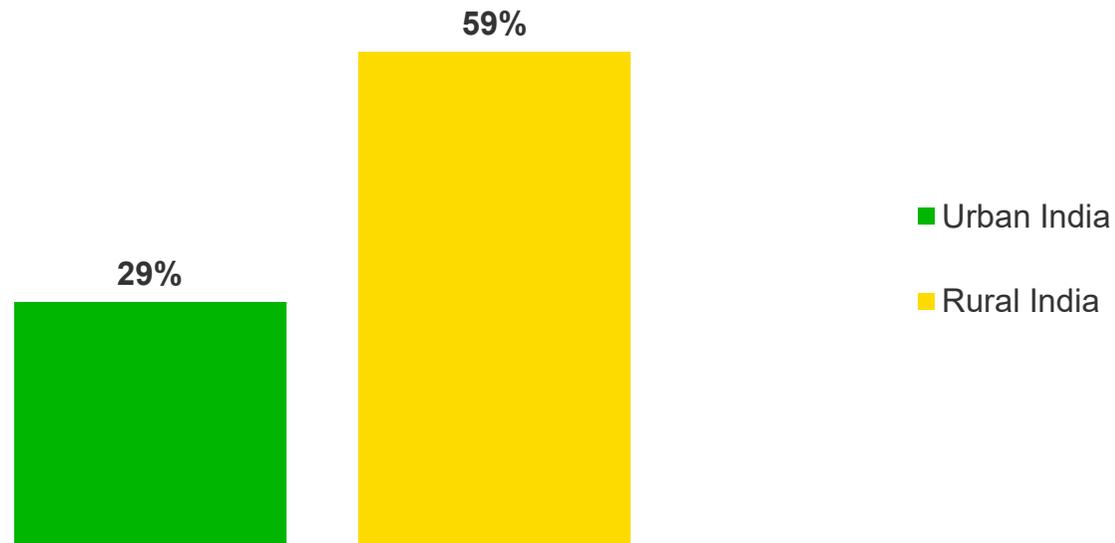
Around half of the population still doesn't use Internet in India. The non-users are slowly reducing, but there are still a lot of opportunities for companies to tap into.



Non-Active Internet Users

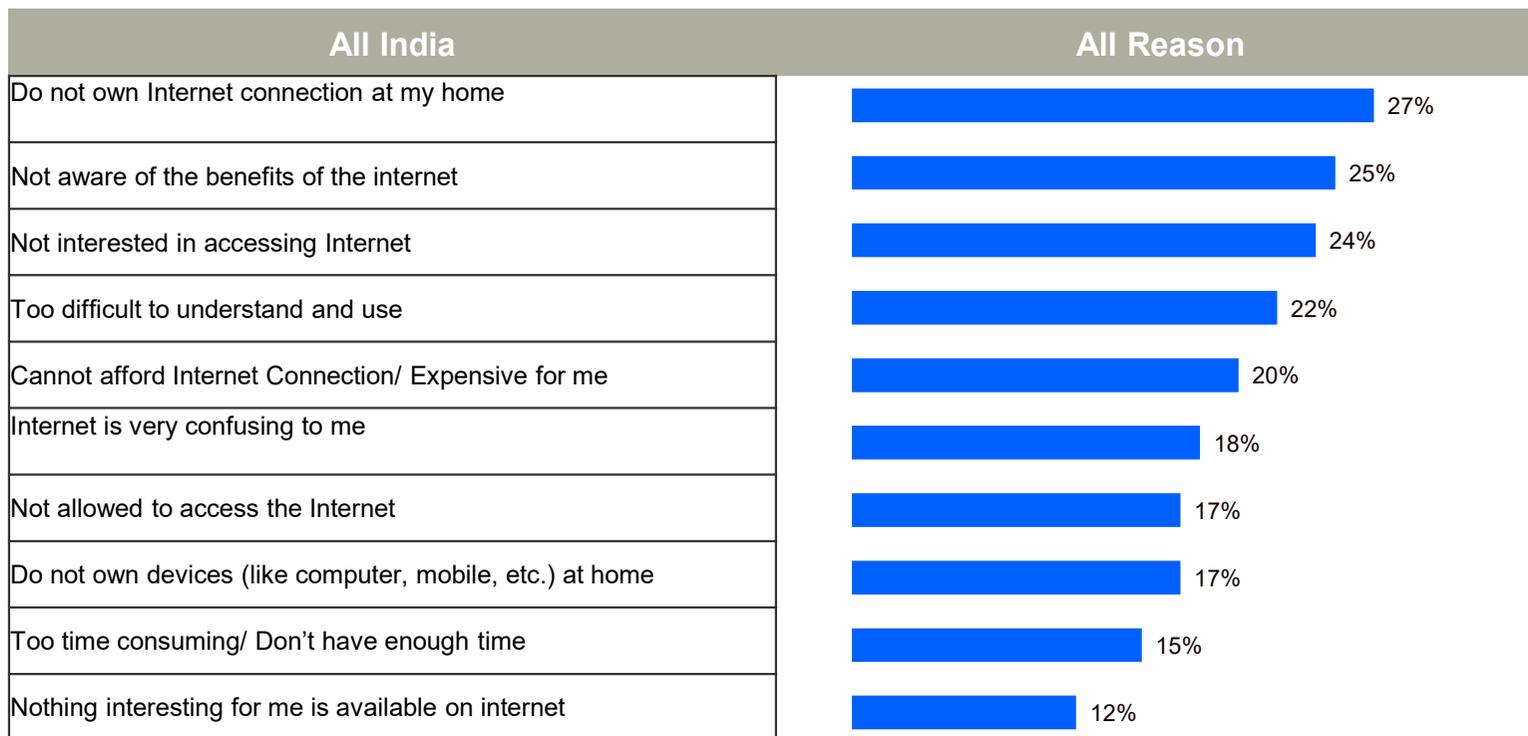
6 out of 10 people in Rural India are Non Active Internet Users this population is high in Rural area because of digital divide.

Non-Active Internet Users Penetration



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.



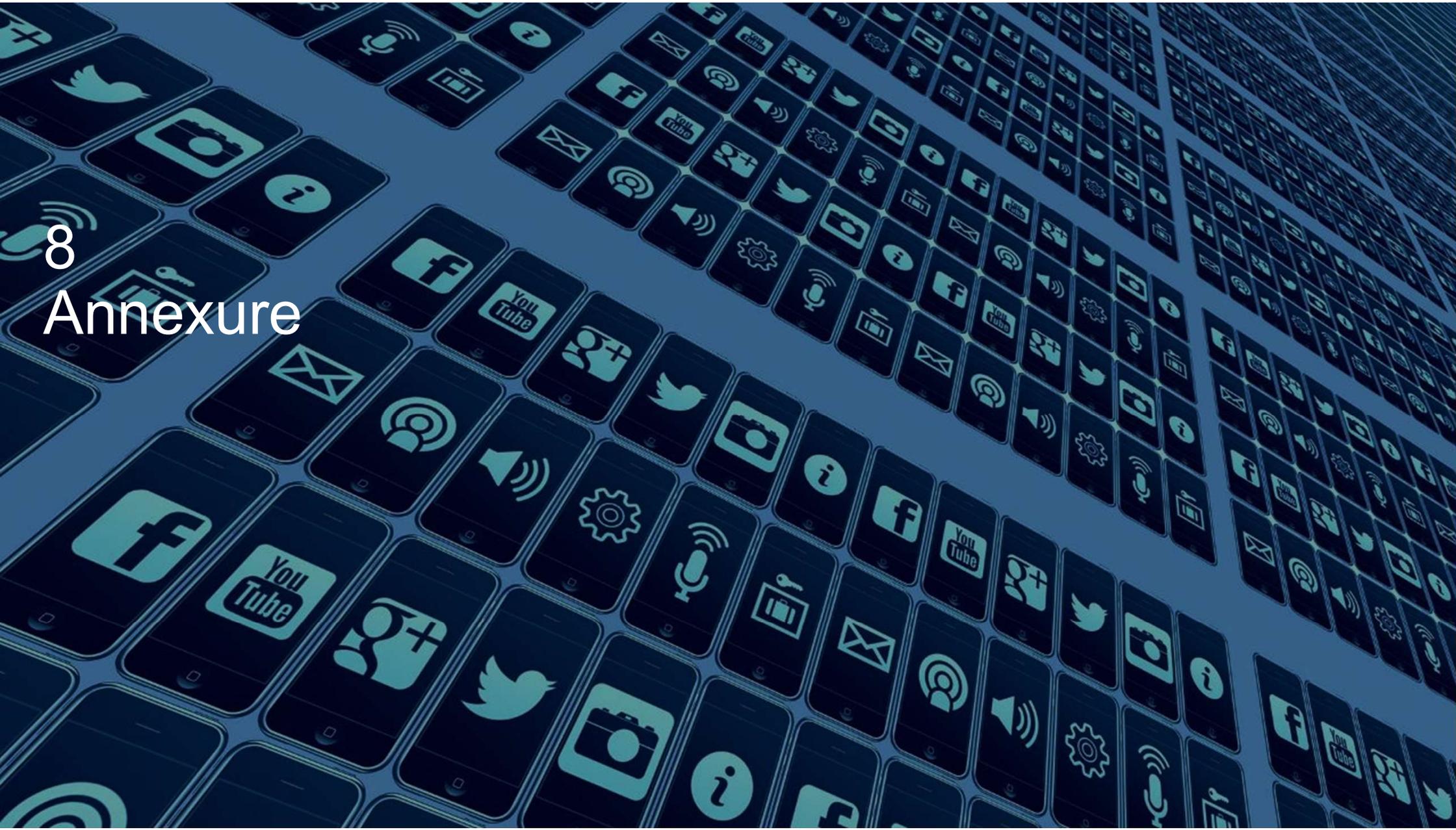
Reasons for Not Accessing Internet

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

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

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

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?

Basic Measures	Metrics to decide
- Size and Reach	- Communication planning
- Purpose	- Designing products and services
- Profile and Usage	

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



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 logisticstech to name a few.

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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
www.kantar.com

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