KANTAR

INTERNET IN
INDIA 2024

Contents

Internet in India:
Setting the Context

Numbers in parenthesis denote internet users' penetration on population

Chart data — AIU (All India) / AIU (Urban India) / AIU (Rural India), millions:

Year	AIU (All India)	AIU (Urban India)	AIU (Rural India)	Penetration
2019	574 Mn	309 Mn	264 Mn	(41%)
2020	622 Mn	323 Mn	299 Mn	(43%)
2021	692 Mn	341 Mn	351 Mn	(48%)
2022	759 Mn	360 Mn	399 Mn	(52%)
2023	821 Mn	378 Mn	442 Mn	(55%)
2024	886 Mn	397 Mn	488 Mn	(58%)
2025	900 Mn+			

Legend: ■ AIU (All India) ■ *AIU (Urban India)* ■ *AIU (Rural India)*
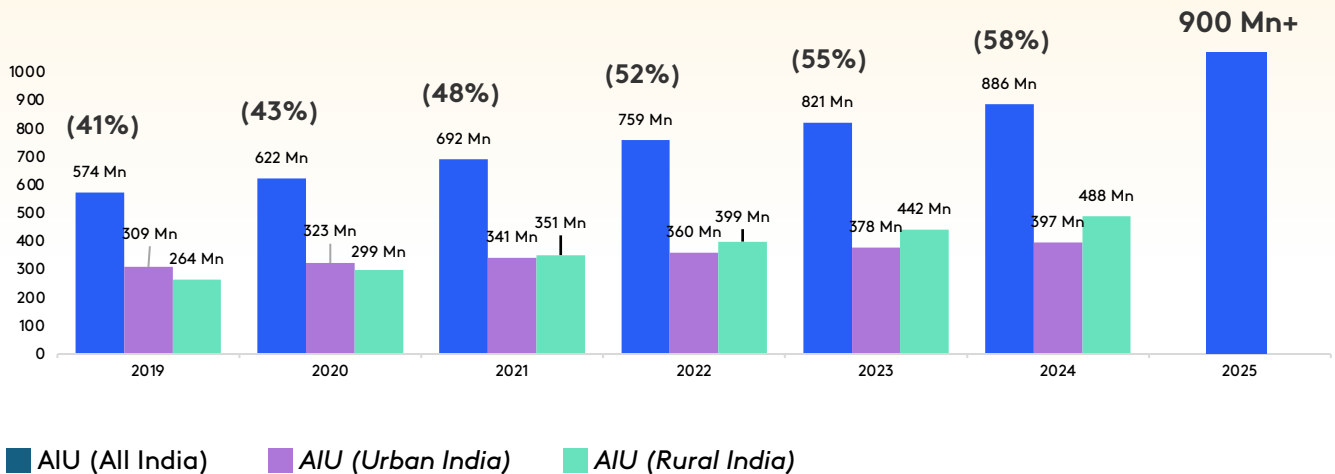
India to cross **900 Mn+** internet users by 2025, **with more internet users coming from Rural India**

Base: ICUBE 2024 All India Population, 1516 Million

Internet users are spending on an average **90 mins** daily on accessing internet. **Urban** users are spending relatively higher time as compared to **rural**.
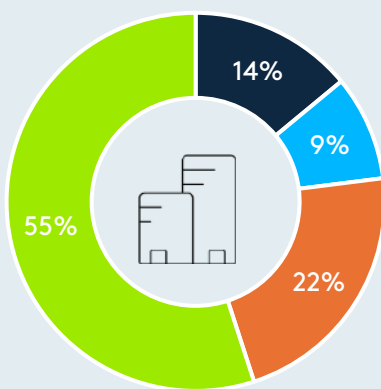
Proportion of Daily Internet Users within Pie
Average Duration Accessing Internet (in Mins)

All India

91 Mins

95%

Urban

94 Mins

94%

Rural

89 Mins

95%
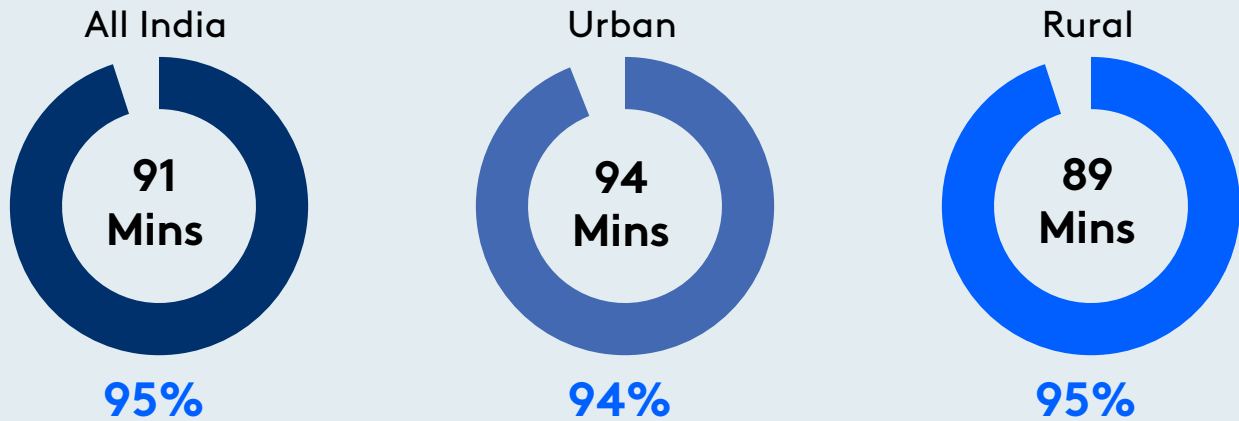
Base: ICUBE 2024, Active Internet Users, 886 Million, Urban India 397 Million, Rural India 488 Million

Rural has more internet users as compared to **urban**. Gender gap is narrowing over the years.

Town Class

14%

9%

22%

55%

- Top 9
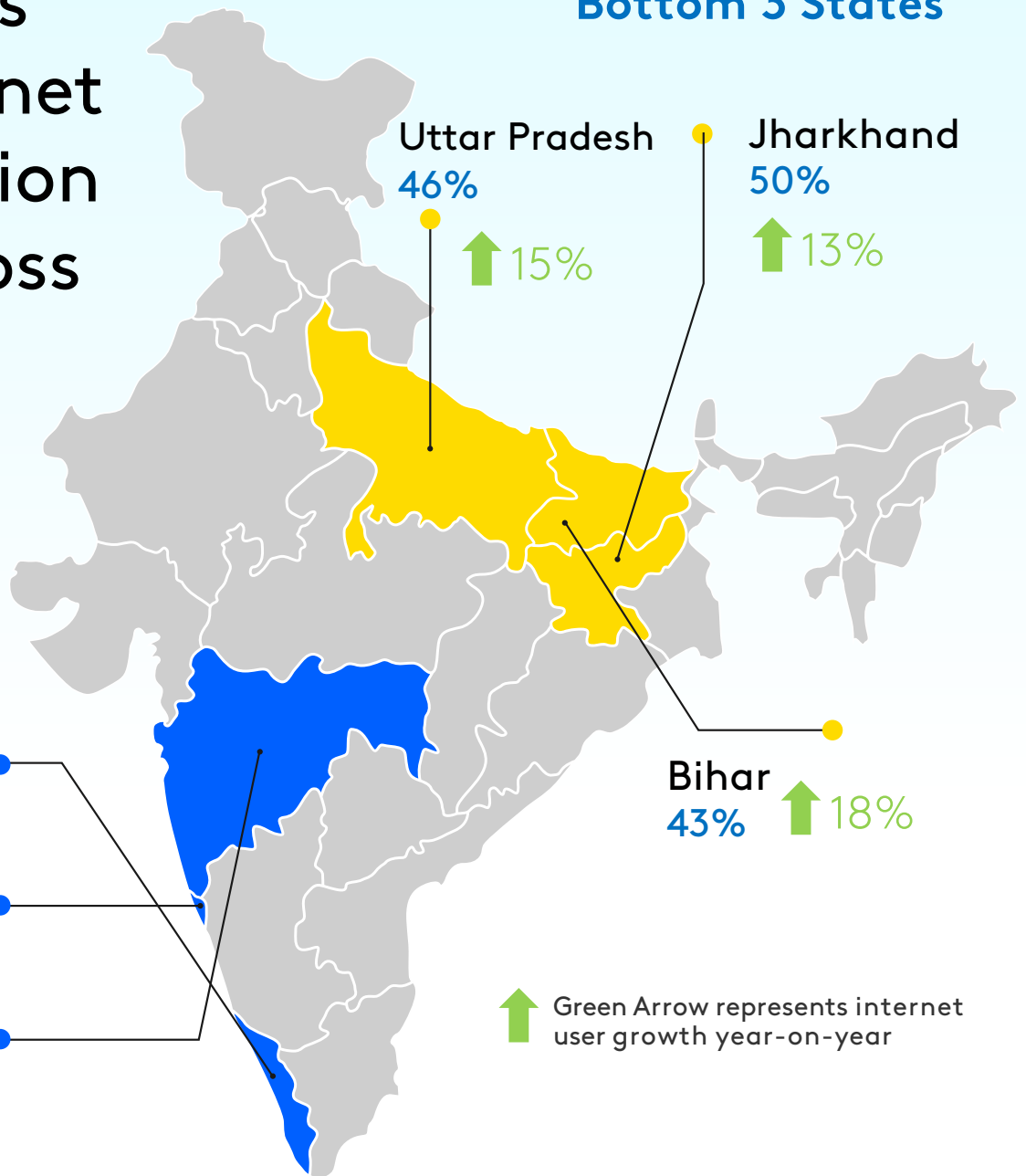- Small Metros
- <10L Towns
- Rural

Gender

53%

47%
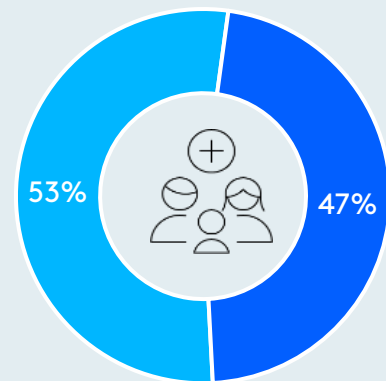
- Male
- Female

Base: ICUBE 2024, Active Internet Users, 886 Million

How does the internet penetration vary across states?

Bottom 3 States

Uttar Pradesh
46%
▲ 15%

Jharkhand
50%
▲ 13%

Bihar
43%
▲ 18%

Top 3 States

Kerala
72% ▲ 4%

Goa
71% ▲ 2%

Maharashtra
70% ▲ 4%

▲ Green Arrow represents internet user growth year-on-year
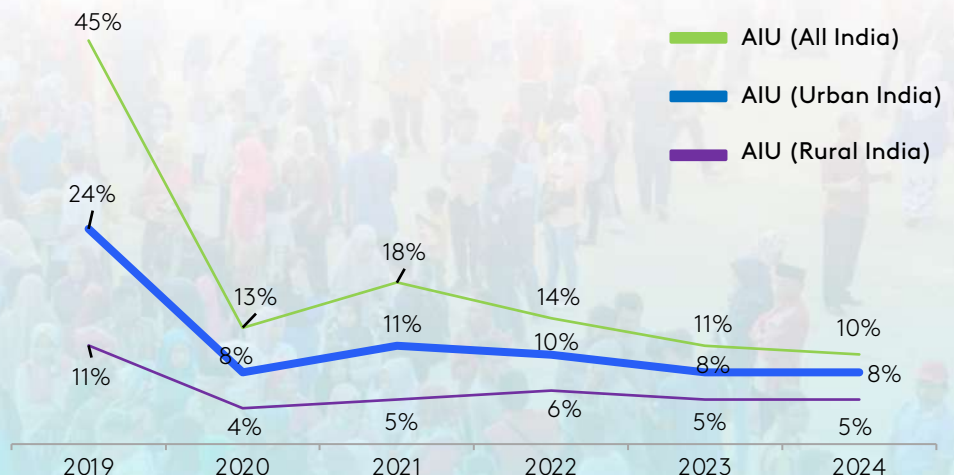
Base: ICUBE 2024, Active Internet Users, 886 Million
*North-East Includes : Assam, Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, Tripura

Growth rates in internet users have slowed overall; however, rural users have witnessed 2X more growth than urban users
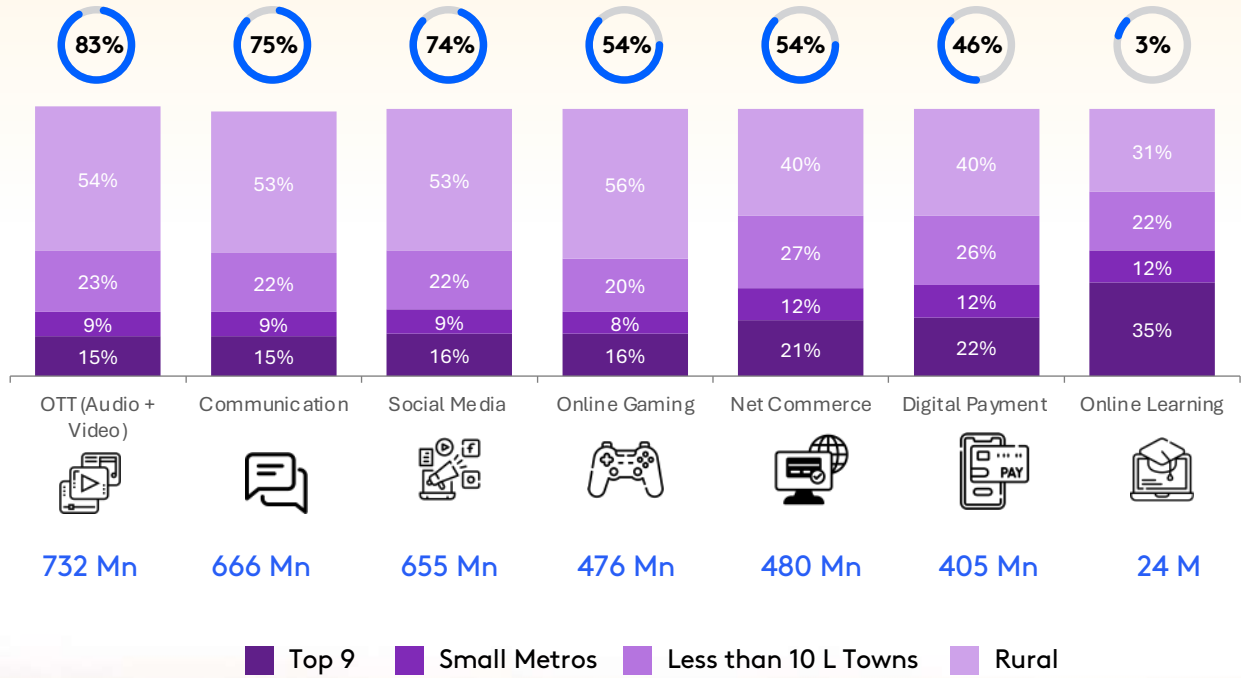
— AIU (All India)
— AIU (Urban India)
— AIU (Rural India)

Year	AIU (All India)	AIU (Urban India)	AIU (Rural India)
2019	45%	24%	11%
2020	13%	8%	4%
2021	18%	11%	5%
2022	14%	10%	6%
2023	11%	8%	5%
2024	10%	8%	5%

Base: ICUBE 2024 All India Population, 1516 Million

Top Activities Done on Internet

Accessing OTT video and music content, online communication **(such as chat, email, and calls),** and **social media** are among the most democratized internet activities across both urban and rural areas.

Activities Done on Internet:
Activity wise Incidences in Parenthesis; Town Class Profile in Chart

	OTT (Audio + Video)	Communication	Social Media	Online Gaming	Net Commerce	Digital Payment	Online Learning
	83%	**75%**	**74%**	**54%**	**54%**	**46%**	**3%**
Rural	54%	53%	53%	56%	40%	40%	31%
Less than 10 L Towns	23%	22%	22%	20%	27%	26%	22%
Small Metros	9%	9%	9%	8%	12%	12%	12%
Top 9	15%	15%	16%	16%	21%	22%	35%
	732 Mn	666 Mn	655 Mn	476 Mn	480 Mn	405 Mn	24 M

Legend: Top 9 | Small Metros | Less than 10 L Towns | Rural

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As the number of internet users is increasing, the users accessing internet using someone else's mobile is also on rise.
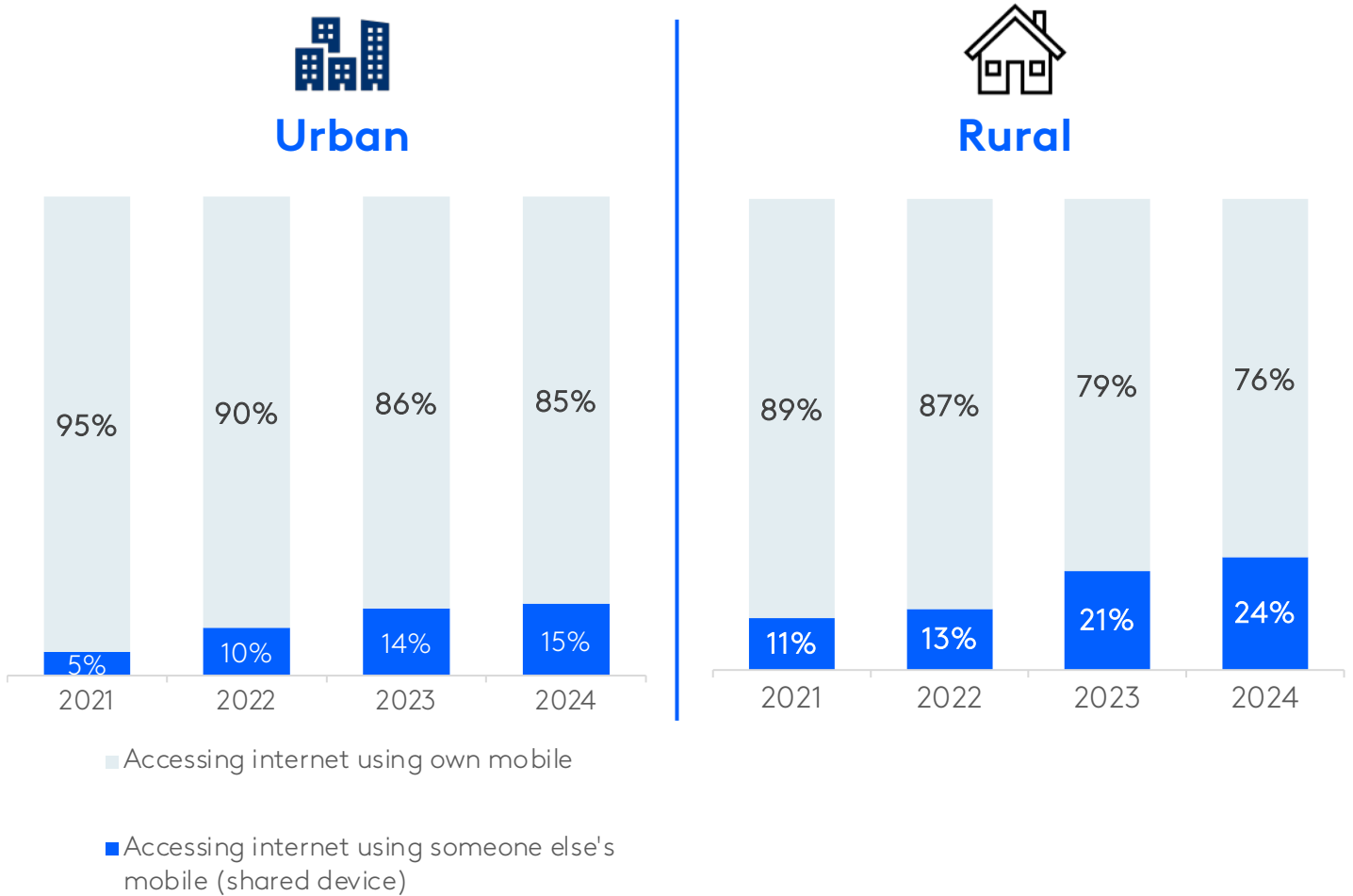
All India

2021: 92% Accessing internet using own mobile, 8% Accessing internet using someone else's mobile
2022: 88%, 12%
2023: 82%, 18%
2024: 80%, 20%

- Accessing internet using own mobile
- Accessing internet using someone else's mobile (shared device)
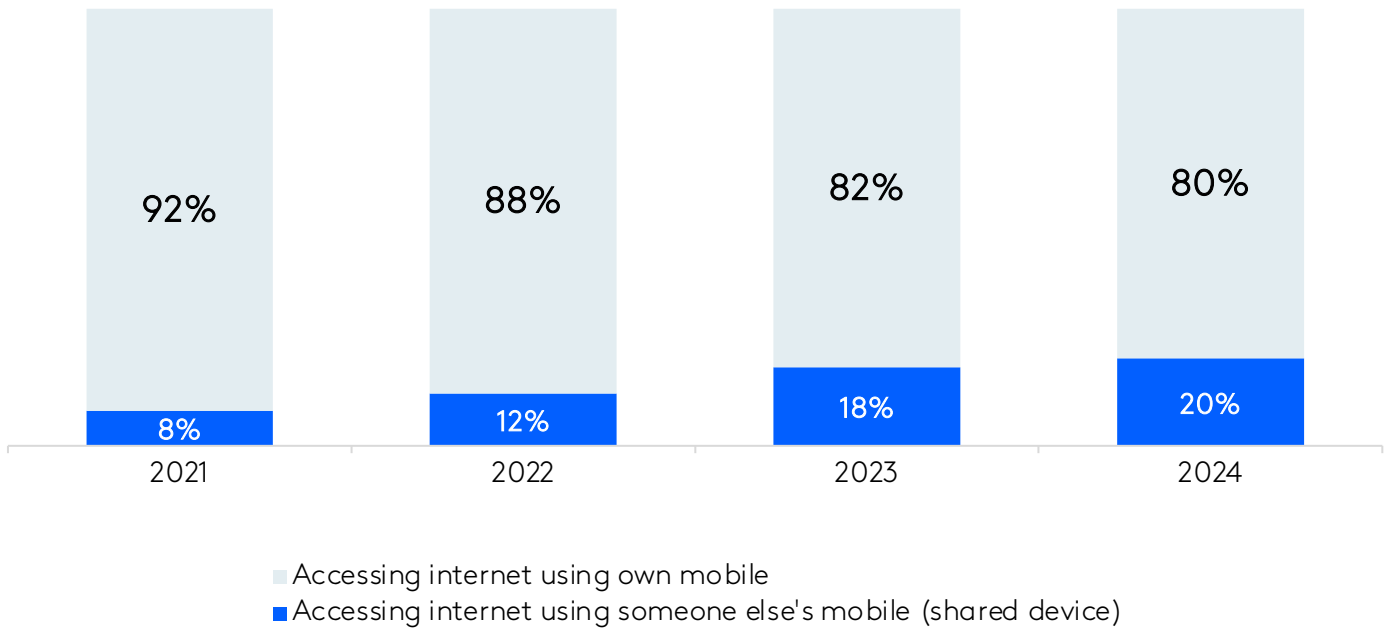
Who are these shared device users?

67% Rural

59% Female

66% <19 Years

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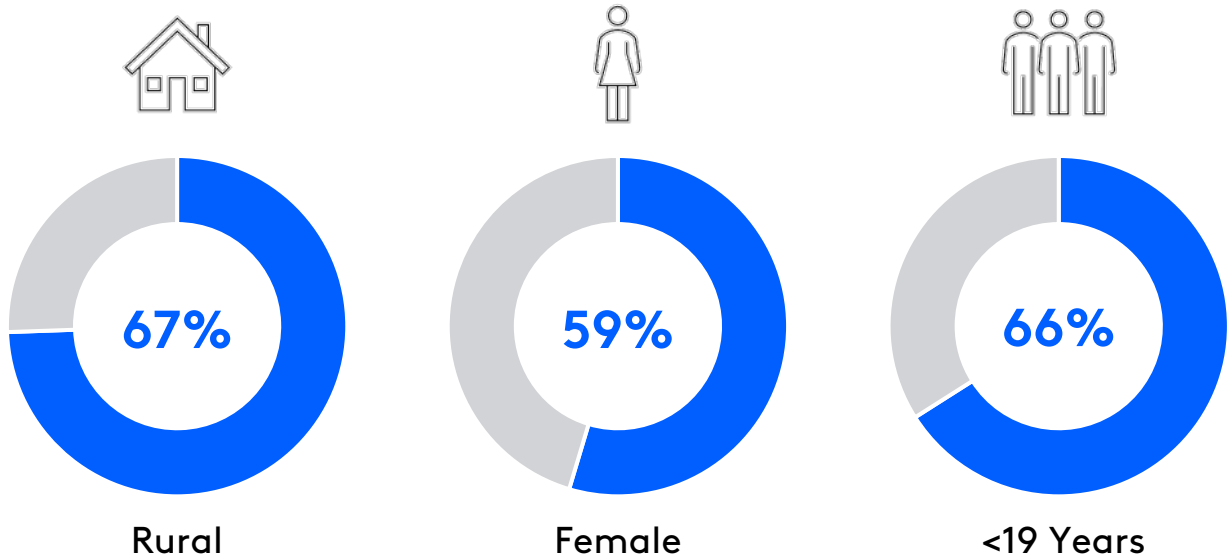
In rural areas, the proportion of internet users accessing the internet through someone else's device (shared device users) is higher than in urban areas. Rural shared device users have witnessed **24% growth since 2024.**

Urban

2021	2022	2023	2024
95%	90%	86%	85%
5%	10%	14%	15%

Rural

2021	2022	2023	2024
89%	87%	79%	76%
11%	13%	21%	24%

■ Accessing internet using own mobile

■ Accessing internet using someone else's mobile (shared device)

Who are these rural shared device users ?

NCCS CDE	Female	<19 Years
62%	58%	76%

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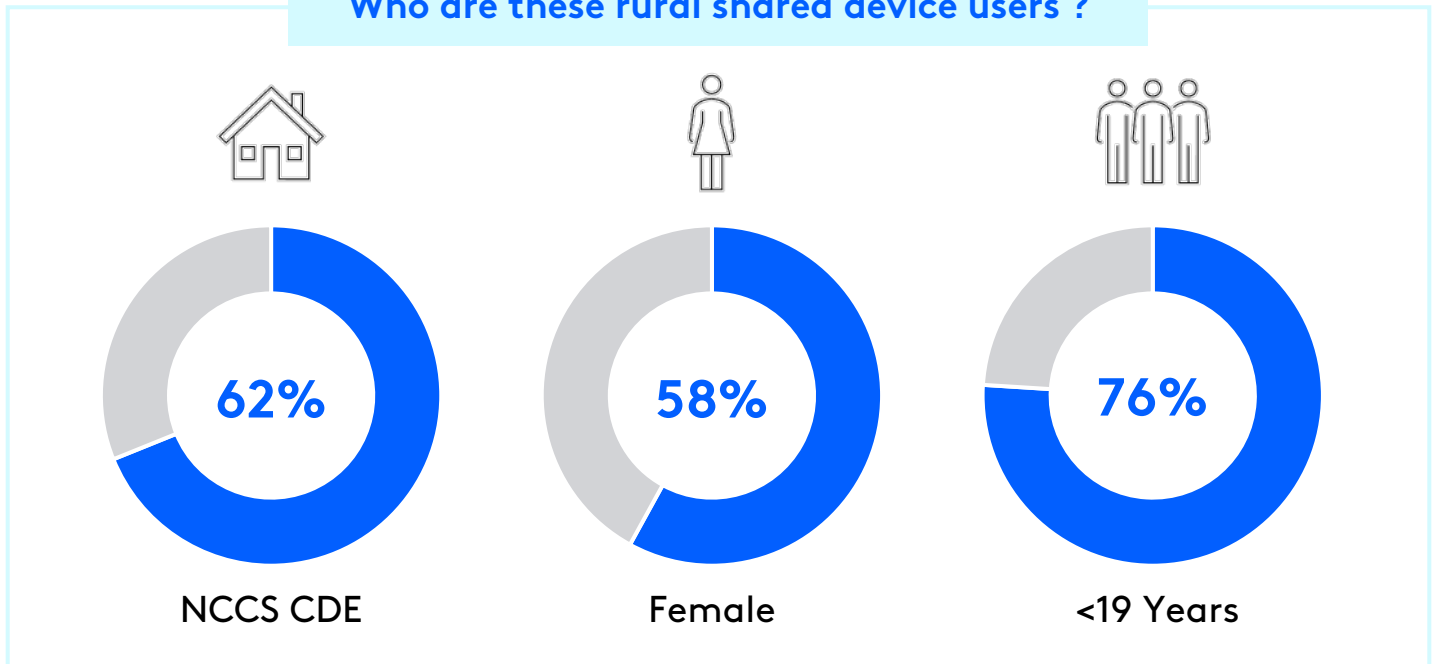
Key Trends in Internet Usage Behavior

Following are the five key trends for 2024

1 Growing Cord Cutters and Non - Traditional Device usage

2 Cash on Delivery on rise; Social Media Commerce slows down

3 Indic language and Voice usage continues to grow

4 Trend in Digital News Users

5 AI usage gaining traction

6 Emergence of Rural users

1.Growing Cord Cutters and Connected TV usage

The diversified use of the internet and evolving consumer preferences, driven by technological advancements, are fueling the growth of users who consume content exclusively through digital platforms, known as **"Cord Cutters."**

Mode of Watching Content

Linear or Traditional TV
26%
305 M

Concurrent Users
50%
599 M

Cord Cutters
24%
286 M
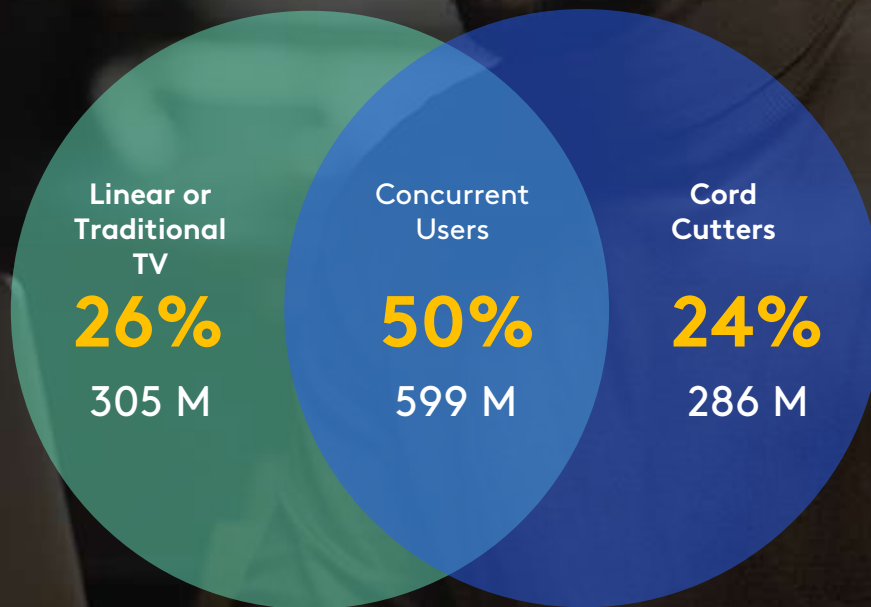
Linear TV: Individuals who have watched content on Linear or Traditional TV in L1Y

Cord Cutters: Individuals who have accessed content via internet using Mobile or Connected TV but not Linear TV in the L1Y.

Concurrent Users: Individuals who have watched content across multiple modes and accessed digital space (Linear TV or Mobile or Connected TV) in L1Y.
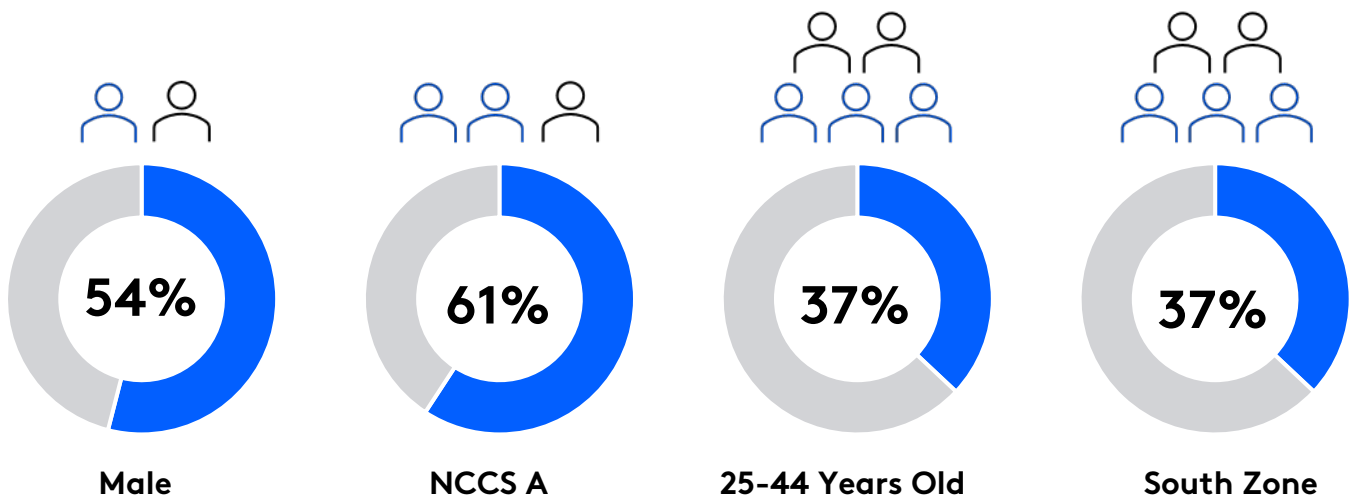
Source : ICUBE All India 2024

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10

Adoption of non - traditional devices continues to rise. While urban India leads the adoption curve, rural areas are showing promising growth.

*Non-Traditional Devices include Smart TV, Smart Speakers, Firesticks, Chromecasts, Blue-ray and Gaming Consoles
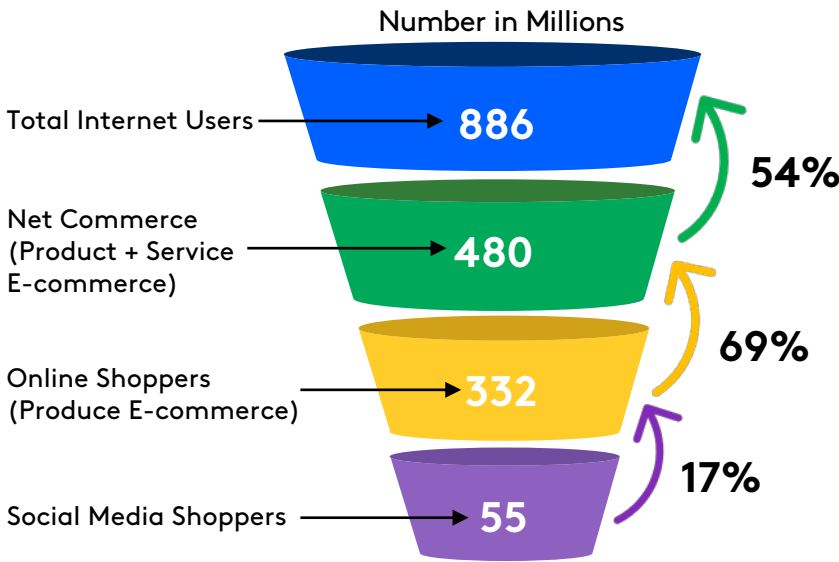
24%

17%

12%

ALL INDIA

URBAN

RURAL

⬆ 70% ⬆ 54% ⬆107%

⬆ Indicates Connected TV User Growth in 2024 vs 2023
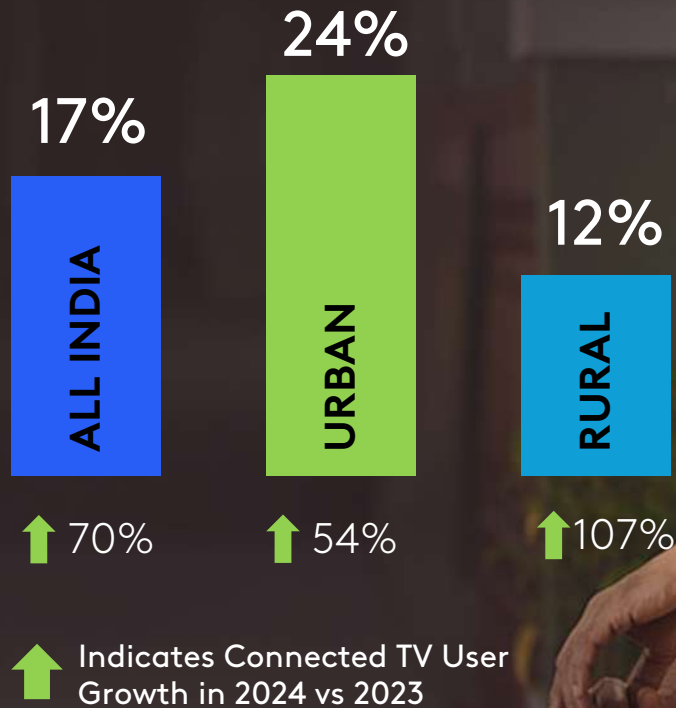
Who are these non - traditional device users?

54%
Male

61%
NCCS A

37%
25-44 Years Old

37%
South Zone

Source : ICUBE All India 2024

2. Cash on Delivery is on the rise, while social media commerce is experiencing a slowdown

## Understanding the E-commerce Users Funnel:

Number in Millions

Total Internet Users → **886**

Net Commerce (Product + Service E-commerce) → **480**

54%

Online Shoppers (Produce E-commerce) → **332**

69%

Social Media Shoppers → **55**

17%

Who are these social media shoppers?

35% Top 9

48% NCCS A

38% 25 – 44 Years old
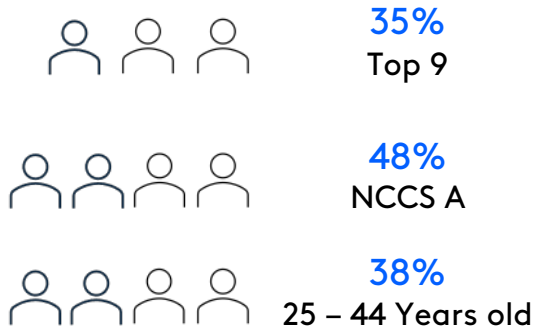
Online shopping through social media apps is witnessing a slowdown, with nearly 1 in 5 online shoppers engaging in it in 2024

In 2024, around 12% of internet users entered the transactors' universe through online shopping. These users engage in **online shopping with Cash on Delivery as their payment method** but do not participate in other online transactional activities.

105 Million
Only COD Shoppers among Online Shoppers

Who are these COD Only Users?

44% Rural India
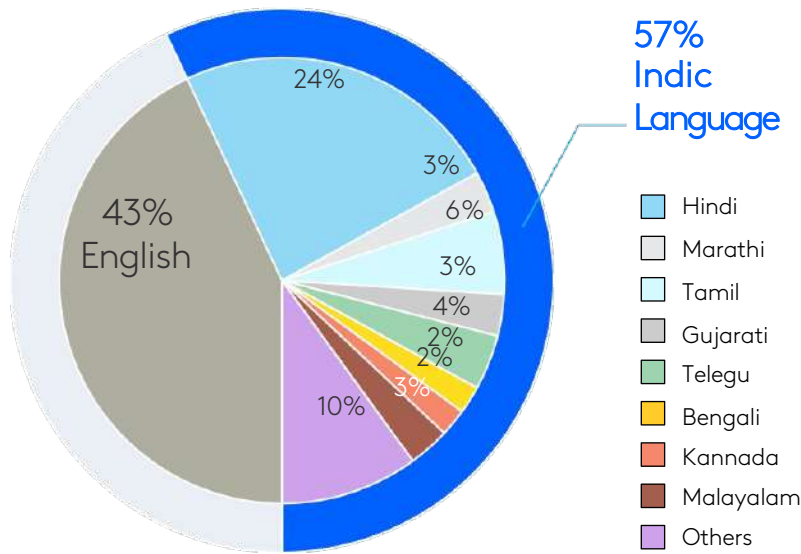
52% Female

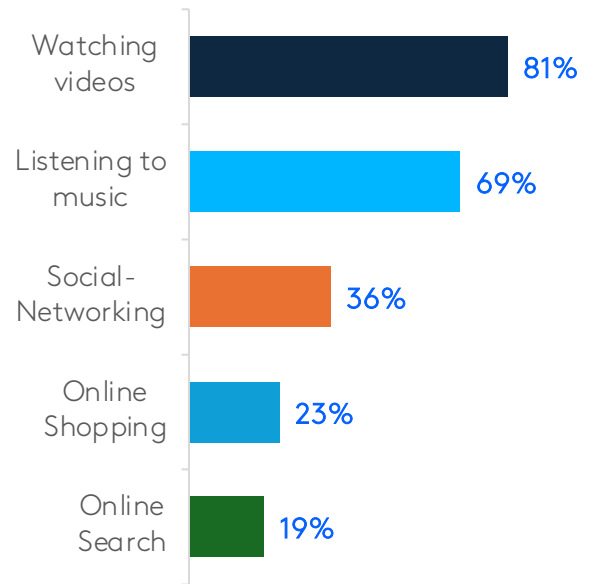**31%** NCCS CDE

27% <19 years
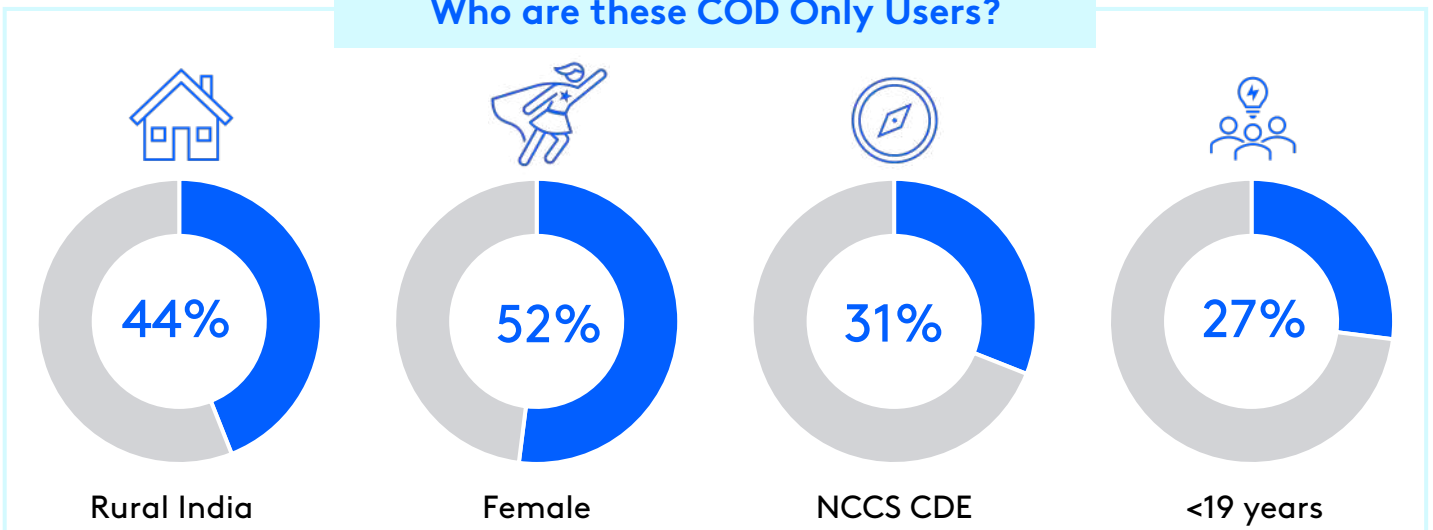
Source : ICUBE All India 2024

3. Indic language and Voice usage on internet continues to grow

There are 870 Million internet users (98% of internet users) who have accessed internet in Indic languages in 2024; 57% of internet users mention that they prefer accessing internet content in Indic languages in Urban India.

## Indic vs English Language Preference to access internet in Urban

57% Indic Language

43% English

24%
3%
6%
3%
4%
2%
2%
3%
10%

- Hindi
- Marathi
- Tamil
- Gujarati
- Telegu
- Bengali
- Kannada
- Malayalam
- Others

Top Activities done on internet using Indic Language in India

Activity	%
Watching videos	81%
Listening to music	69%
Social-Networking	36%
Online Shopping	23%
Online Search	19%

Predominant Indic Languages for accessing internet in Urban (based on Conversion Ratio*)

* Conversion Ratio for each language: Number of internet users who predominantly use the Indic language to access internet : Number of overall internet users who have used the Indic language in last one year.
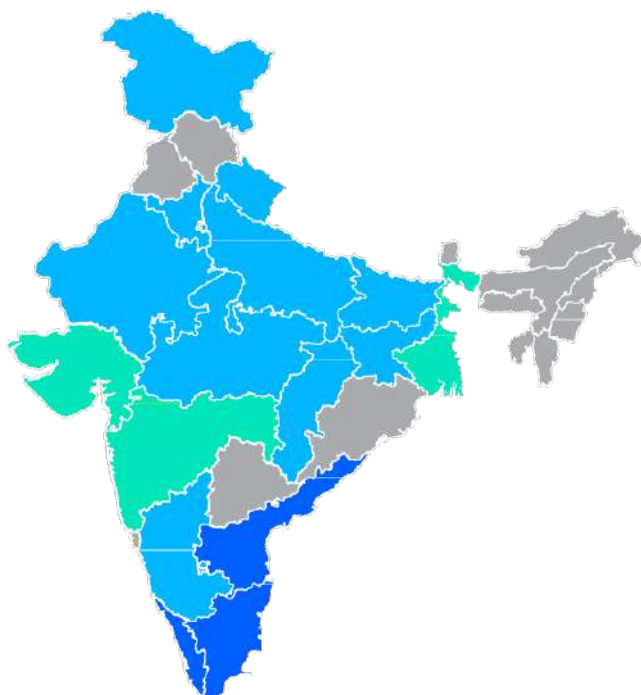
High Conversion Ratio: Tamil, Telegu and Malayalam

Mid Conversion Ratio: Hindi, Kannada

Possible Reasons:
- Users have higher affinity to watch content in their local language
- Extensive availability of content in these local languages

Low Conversion Ratio: Gujarati, Marathi, Bengali

Rest of the local languages

Possible Reasons:
- Users have tendency to watch content in common languages like Hindi and English
- Lower availability of content in these local languages

Source : ICUBE All India 2024

Every 1 in 5 internet users are also using voice - based commands to access internet

Number of Millions

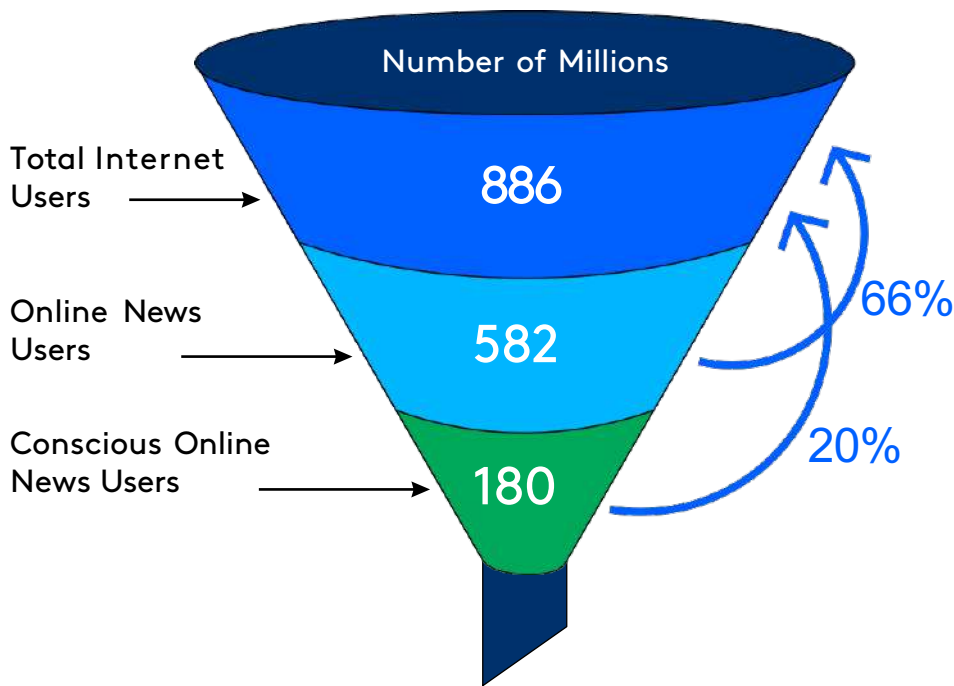All India Internet Users → **886**

Voice Users → **140**

15%
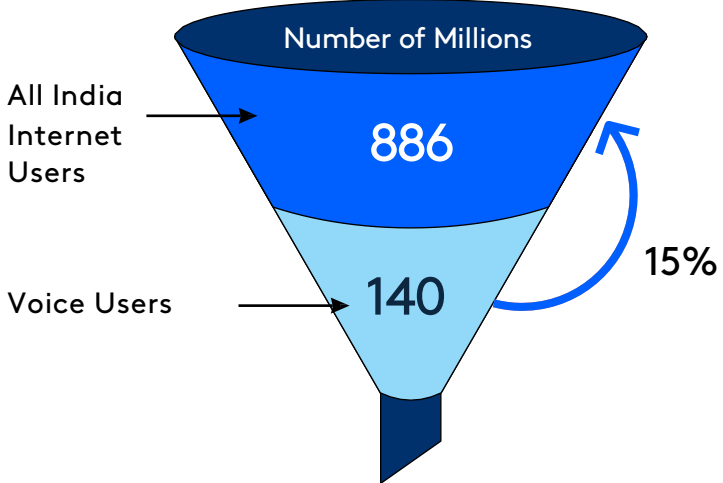
Voice based activities can be used while using apps on mobile phone like **"navigation commands in google maps", "making shopping list", "listening to news", "searching for information",** etc. and doesn't include speaking to others using basic phone function.

Who are these Voice Users

55%

Rural

37%

NCCS A

39%

25 – 44 years

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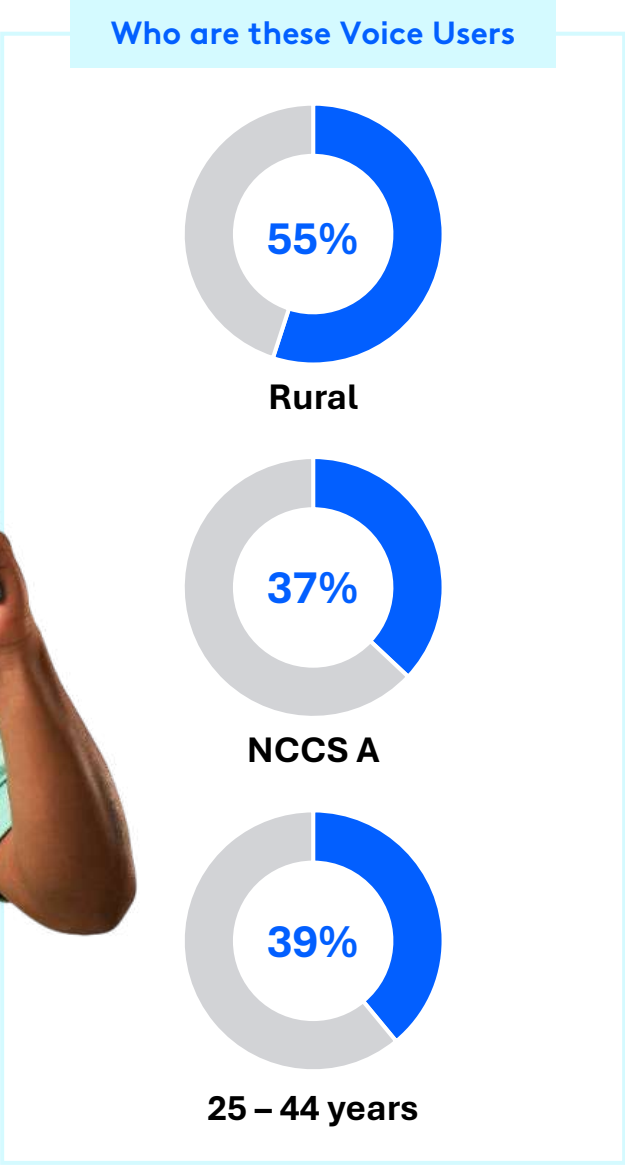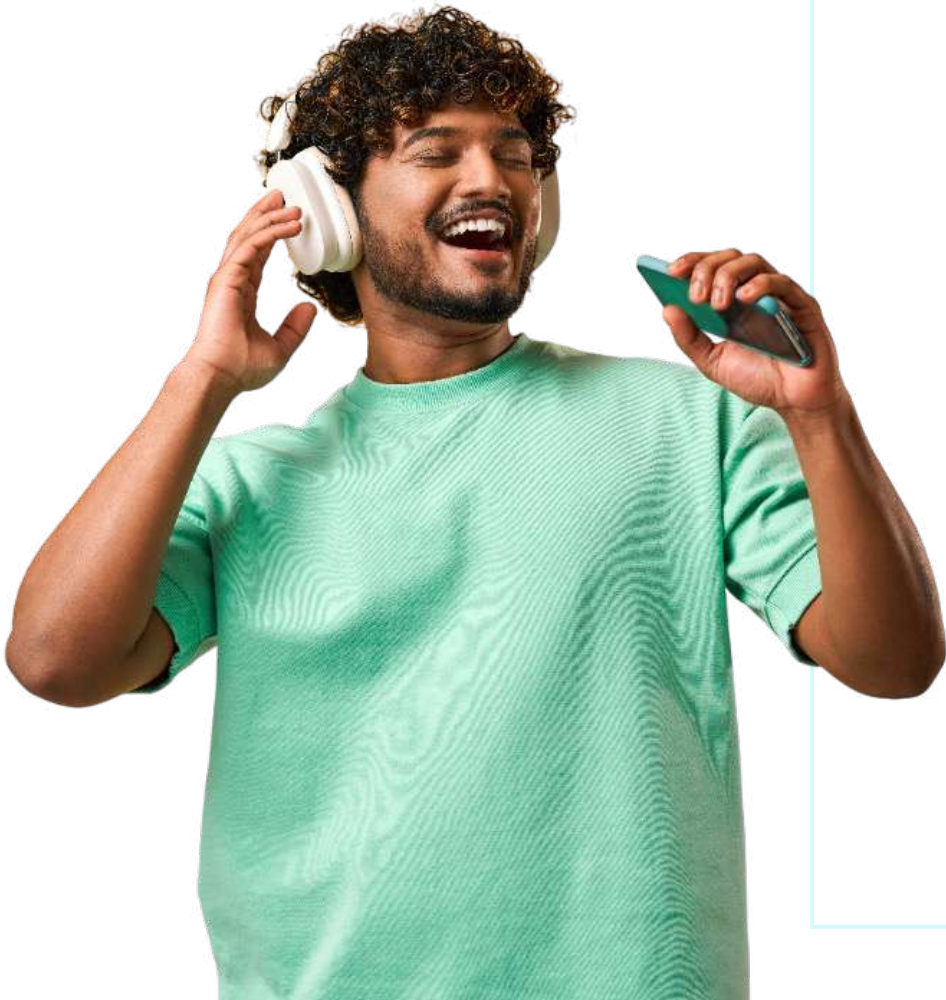
4. Trend in Digital News Readers

3 out of 5 internet users are accessing **news and information online** through various news apps/websites, social media posts, message forwards, Youtube etc., whereas only 1 out of 5 is consciously reading the same.

Number of Millions

Total Internet Users → 886

Online News Users → 582

Conscious Online News Users → 180

66%

20%

Online News Users

Total number of Internet Users who are accessing news online through various news apps/websites, social media posts, message forwards, Youtube etc., either consciously or unconsciously (while browsing internet)

Conscious Online News Users

These are the pull users who are consciously accessing news online through various sources like news apps/websites, Youtube, etc.

Who are these Conscious Online News Users?

53% — Rural

48% — <24 Years

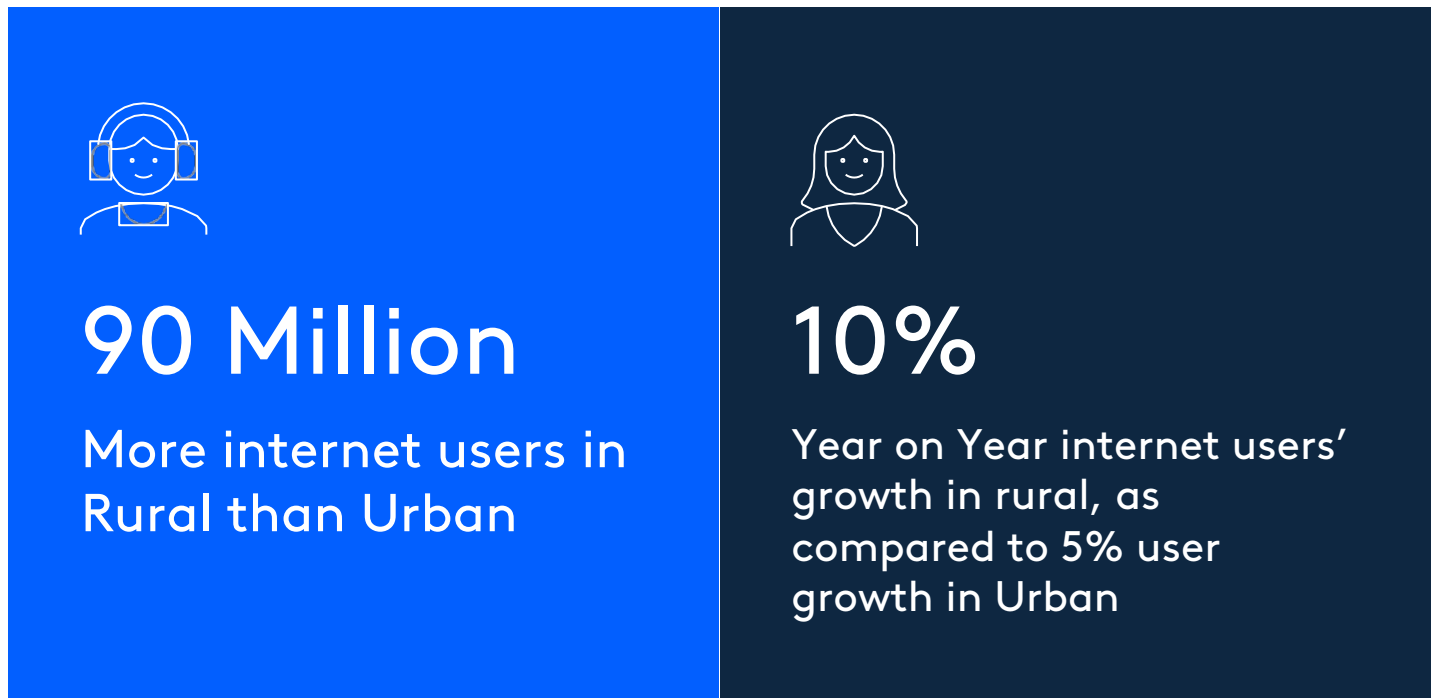**39%** — NCCS A
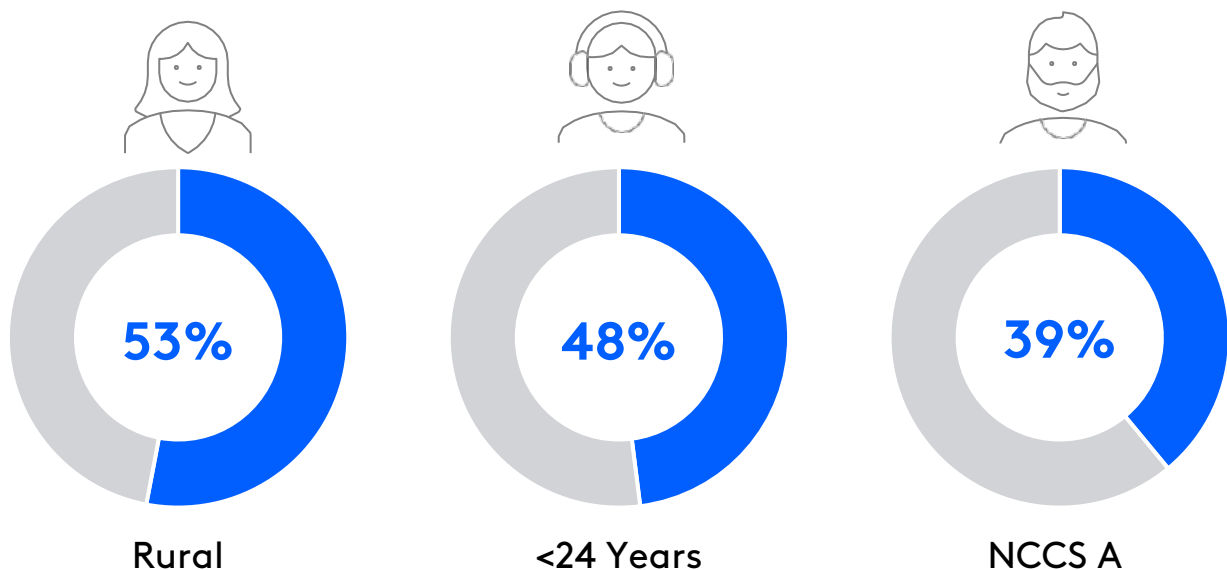
5. AI Usage Gaining Traction

As technology becomes more accessible, AI is gaining traction in both urban and rural areas, creating new opportunities for growth and innovation. While the perception of AI usage is relatively higher in urban India, rural communities are quickly catching up.

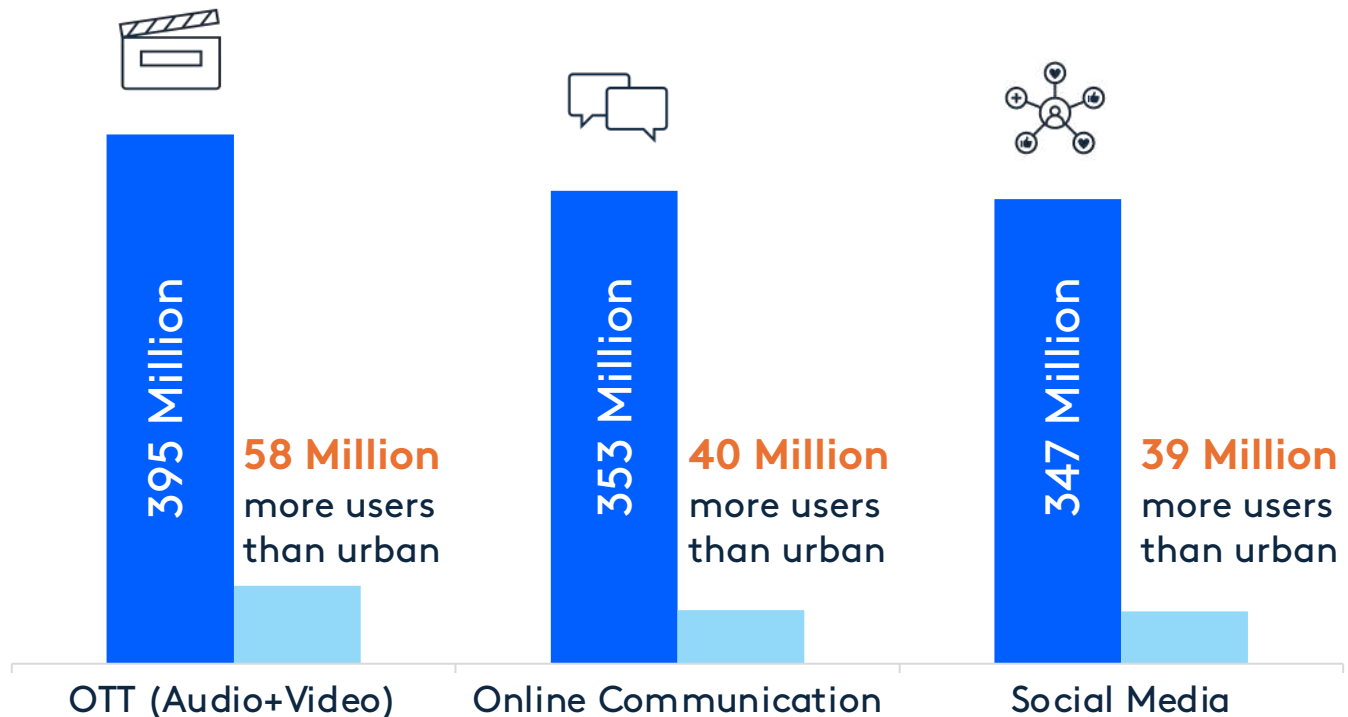| Perception towards AI Usage	Urban	Rural	All India
Use of AI tools makes me more productive and efficient	**50%**	33%	39%
AI bots can answer any of questions or queries	**46%**	35%	39%
Personalized recommendations across shopping platforms saves my time of search	**49%**	37%	42%
I enjoy using AI features across platforms	47%	**49%**	48%
AI based image filters helps me stand out in social media	**51%**	43%	46%
I consider marketing calls from celebrities as important and hear their messages carefully	**50%**	39%	43%
I like interacting with chatbots on apps/websites	**45%**	42%	43%
I find virtual try on feature on shopping apps very useful	**54%**	26%	37%
AI increases my efficiency at work or education	**57%**	34%	43%
Tools like Alexa, Google Home, Siri, etc. makes my tasks simple	**54%**	42%	46%
I struggle using AI tools and interacting with them	45%	**51%**	49%
I don't trust the responses from AI bots	**48%**	29%	36%
Chatbots in websites provides me faster resolution to my query	**45%**	33%	37%
I like interacting with Virtual Assistants like Maya on Myntra, Naina on Instagram, Myra on MMT	**50%**	47%	48%

6. Emergence of Rural Users

Rural internet users have **witnessed 2X more growth** than urban users
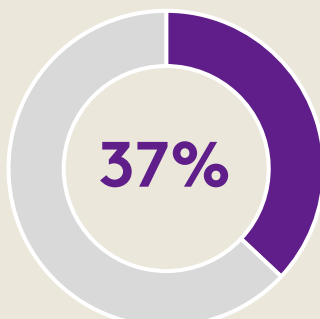
90 Million

More internet users in Rural than Urban

10%

Year on Year internet users' growth in rural, as compared to 5% user growth in Urban

Online activities with more users from rural than urban:

OTT (Audio+Video)	Online Communication	Social Media
395 Million	353 Million	347 Million
58 Million more users than urban	40 Million more users than urban	39 Million more users than urban

Internet usage is becoming increasingly widespread and diversified among rural audiences

68%
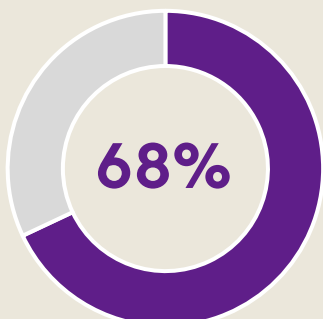
Cord Cutters
All India:286 Million

37%

CTV Users
All India :151 Million

44%
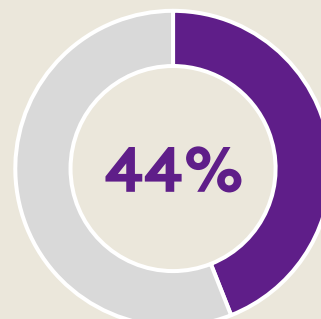
Only COD
All India: 105 Million

57%
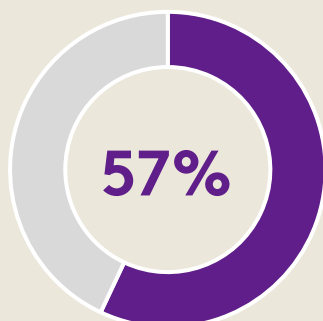
Indic Users
All India:842 Million

55%
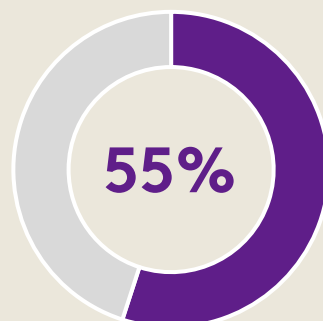
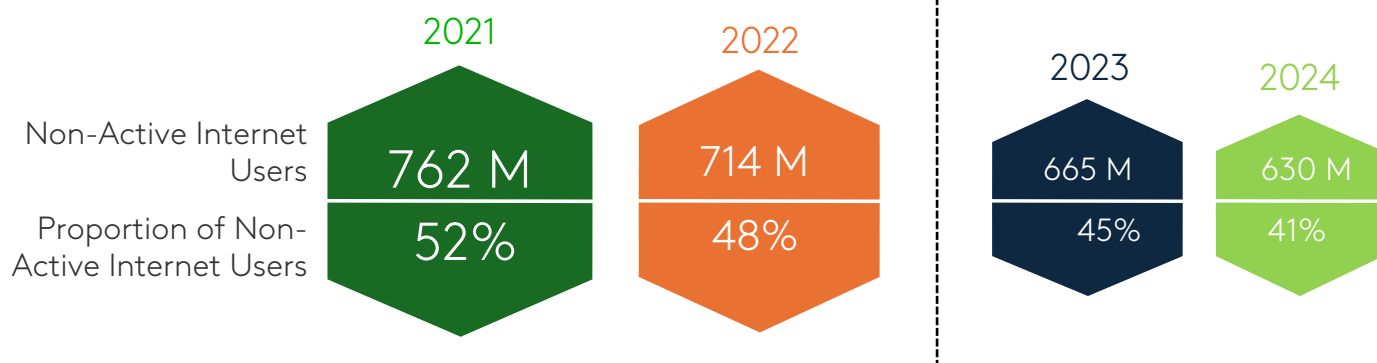**Voice Users**
All India :140 Million

Non Active Internet Users:
41% of Indian population do not access internet

Over the years, the size of non - internet users is declining. 51% of people from rural India falls in this cohort.

	2021	2022		2023	2024
Non-Active Internet Users	762 M	714 M		665 M	630 M
Proportion of Non-Active Internet Users	52%	48%		45%	41%

Reasons for Not Accessing Internet

Unawareness of the internet followed by unavailability of the internet access are top reasons for non internet usage.

Reasons	Rural	Urban	All India
I am not aware of the benefits of the internet	25%	24%	25%
Non-availability of the public Internet access point	12%	9%	11%
I do not own devices(like computer, mobile, etc.) through at my home	18%	14%	17%
I do not own Internet connection at my home	23%	21%	22%
Not interested in accessing Internet	27%	26%	26%
Content on the Internet is not available in my local language	13%	11%	13%
My school/ college/ office does not provide an Internet connection	11%	11%	11%
I cannot afford Internet Connection/ Expensive for me	16%	15%	16%
Nothing interesting for me is available on internet	15%	14%	15%
Bad experiences in the past	14%	13%	14%
I am not allowed to access the Internet	20%	20%	20%
Internet is very confusing to me	16%	18%	16%
Privacy Issues	13%	13%	13%
Too time consuming/ Don t have enough time	16%	15%	16%
Too difficult for me to understand and use	21%	18%	20%
Others	6%	5%	6%

Base: Kantar ICUBE 2024, Non-Active Internet Users, All India 630 Million Urban India 131 Million, Rural India 500 Million

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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 individual

Understand the Digital Ecosystem in India using ICUBE

10+ E-com Platforms

Media & Internet Giants

FMCG, BFSI, & Payments

Indian Govt and Industry Bodies

25 Years+

expertise in tracking Digital users in the region

Extensive Coverage and Representative Sample

Urban/Rural; All India, State, City and SCR Level Estimations

Comprehensive view of Digital Commerce

Internet and Digital Commerce behaviour across categories shopped, platform incidence, online spends, etc.
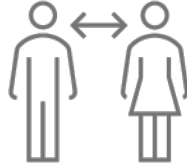
Highlights Emerging/ Future Trends

Highlights current and futures trends across different digital platforms. All India Projections on Census 2011.

ICUBE in a Glimpse

90,000+ Samples
66,000+ Urban Samples.
25,000+ Rural Samples

Face to Face Multistage Random Sampling

Covers **35 States & Union Territories***

400+ Cities Captured

Encapsulates **550+ Districts** covering every nook and corner of the country
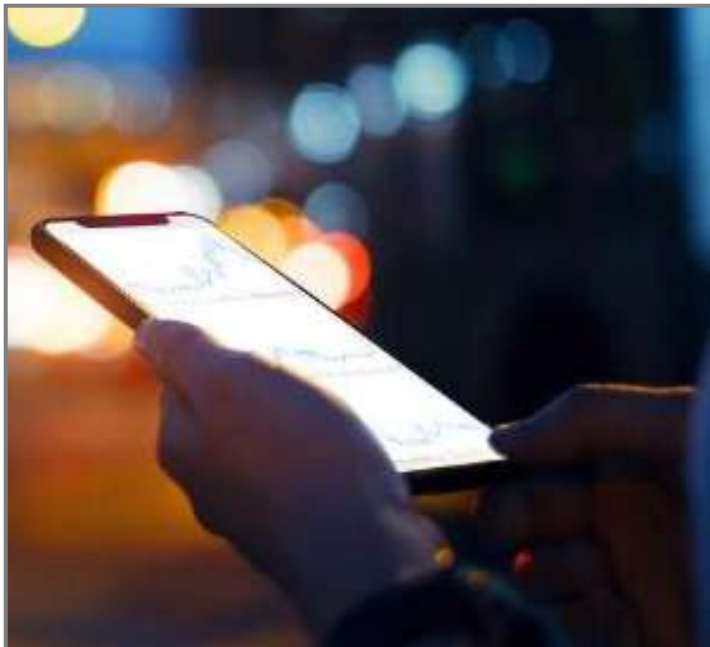
Covers **all 2 Lakh + Cities**

30+ Clients across industry, media and Government bodies

Capability to **fuse data** with other syndicated products for a deeper understanding of psychographics and attitudes

*Covers all States and UTs of India (barring Lakshadweep)

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, Digital Payments & BFSI, Online Entertainment, 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**

KANTAR

∆IAMAI_
Internet And Mobile Association Of India

About Kantar:

Kantar is the world's leading marketing data and analytics business and an indispensable brand partner to the world's top companies. We combine the most meaningful attitudinal and behavioural data with deep expertise and advanced analytics to uncover how people think and act. We help clients understand what has happened and why and how to shape the marketing strategies that shape their future.

For more information,
visit www.kantar.com

About Internet and Mobile Association of India:

Established in 2004, the Internet and Mobile Association of India (IAMAI) is a not-for-profit industry body representing the digital industry. With 580 members, including Indian and multinational corporations, as well as start-ups, IAMAI has been instrumental in shaping India's digital economy. IAMAI advocates free and fair competition, and progressive and enabling laws for businesses as well as for consumers. The overarching objective of IAMAI is to ensure the progress of the internet and the digital economy. Its major areas of activities are public policy and advocacy, business to business conferences, research, and promotion of start-up.

For more information,
visit www.iamai.in