

KANTAR

22nd edition
ICUBE™ Digital
adoption and usage
trends



2020

ICUBE™ : Internet in India

Asia's largest authoritative resource for digital marketing and planning decisions

Comprehensive view: Digital Consumer

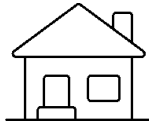
(Internet behavior across devices i.e. PC, Mobile etc.)

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)



75,000+
Households

Urban - 58,000+

(Spread across 390+ cities across different Town Classes(TC))

Rural - 17,000+

(Spread across 350+ districts, 1000+ villages across different Village Classes(VCL))

Face-to-Face (CAPI) survey among Individuals in Urban/Rural India using Multistage Random Sampling Approach covering all NCCS and Age groups
Projections on Census 2011

What ICUBE™ provides?

Basic Measures

– Size and Reach

– Purpose

– Profile and Usage

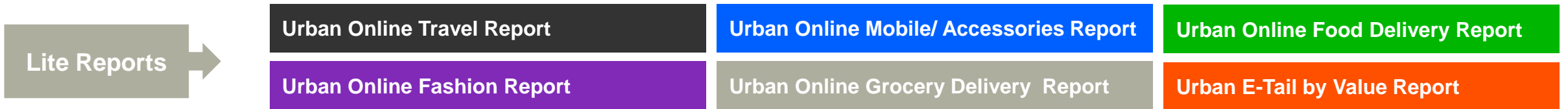
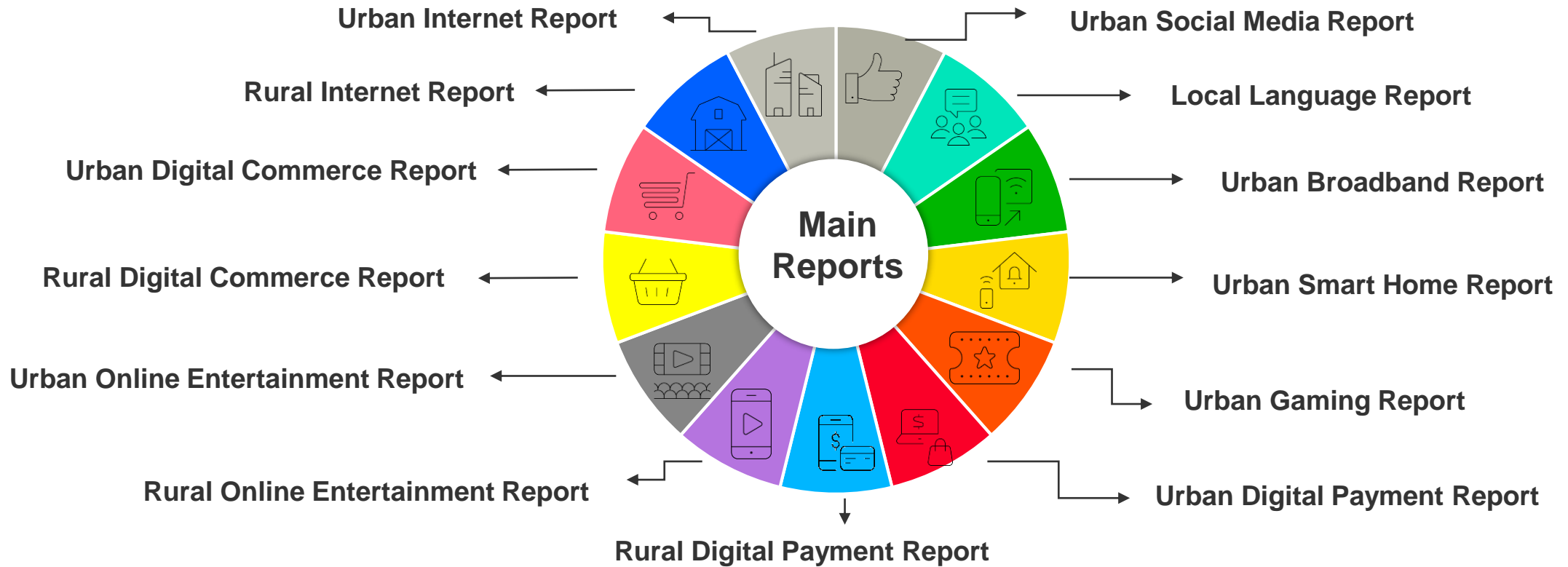
Metrics to decide

– Communication planning

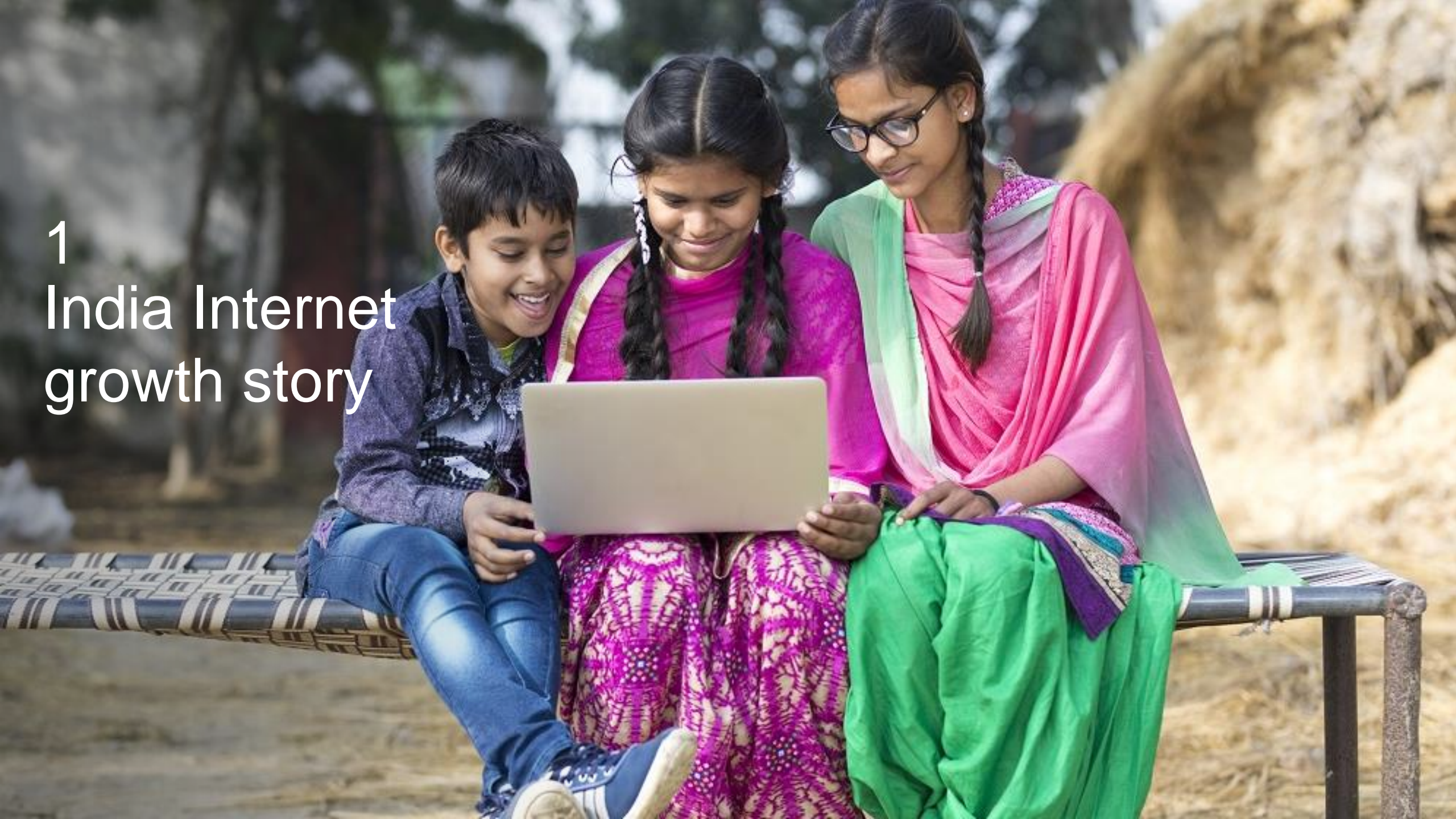
– Designing products and services

– Tariff plans

Offerings: Bouquet of Reports

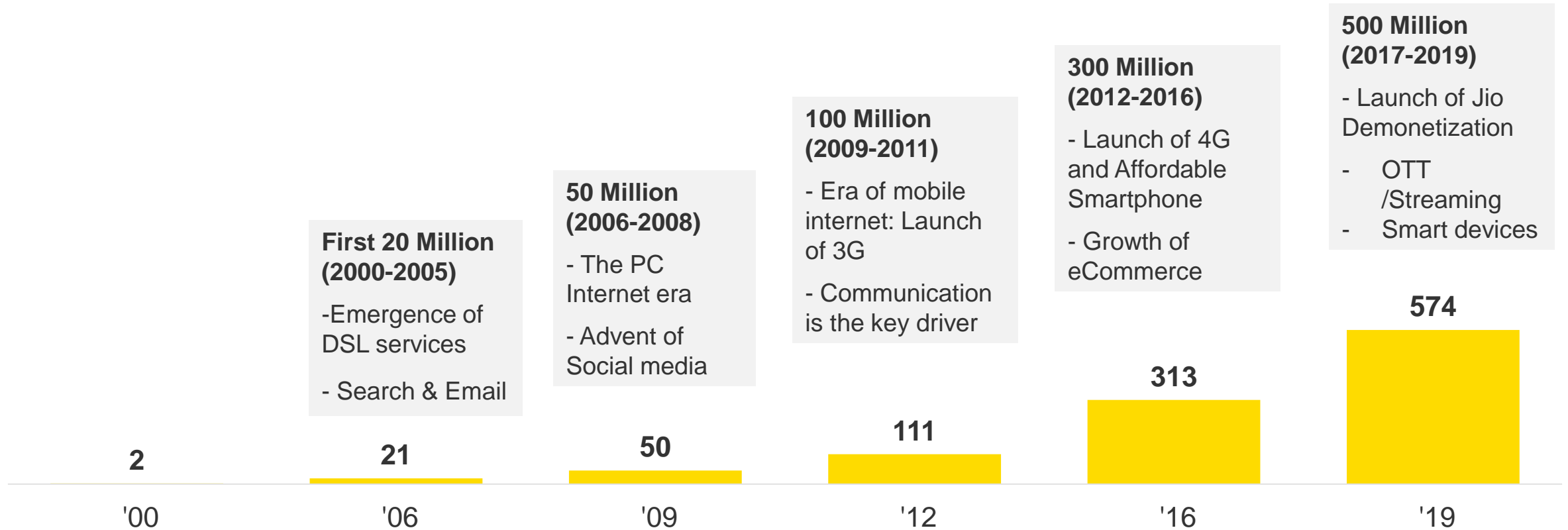


1 India Internet growth story

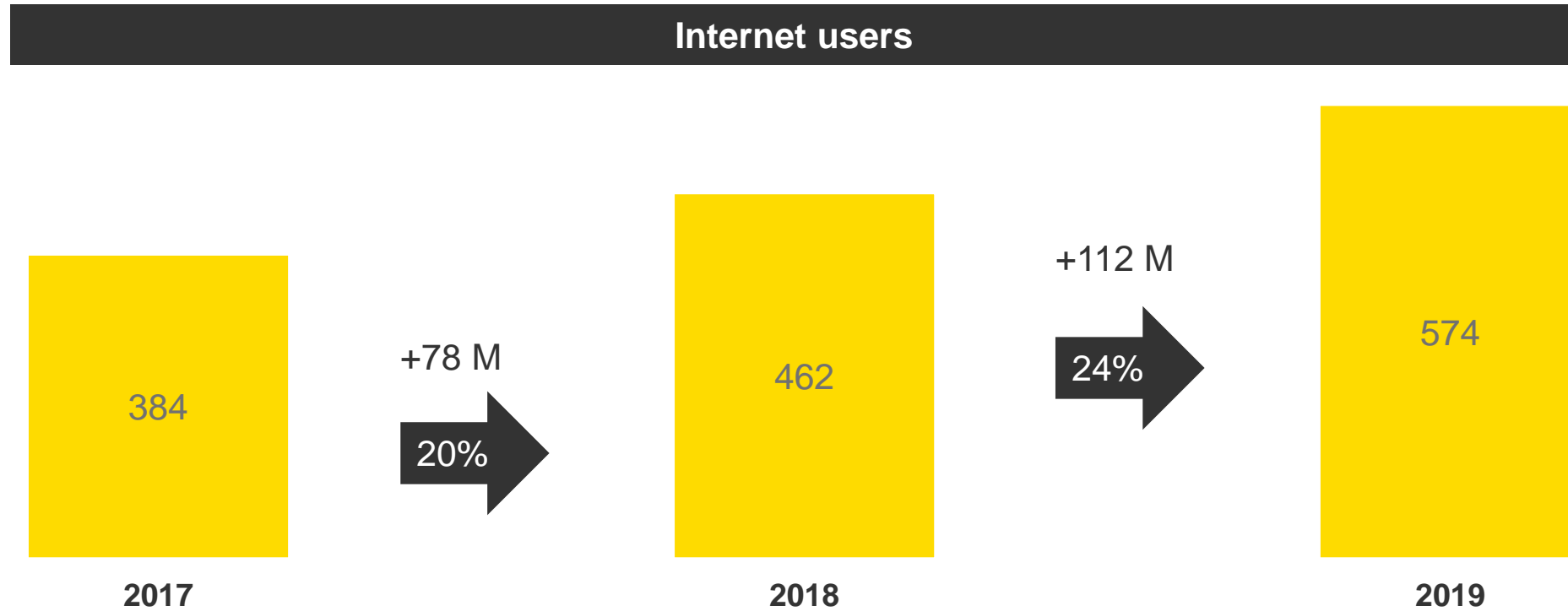


Digital evolution of India

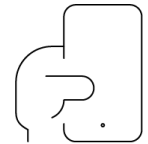
Both Government led and technology led events have resulted step changes every 3-4 years



Monthly active internet users crosses 574 million - registered an annual growth of 24% in 2019



Device of Access

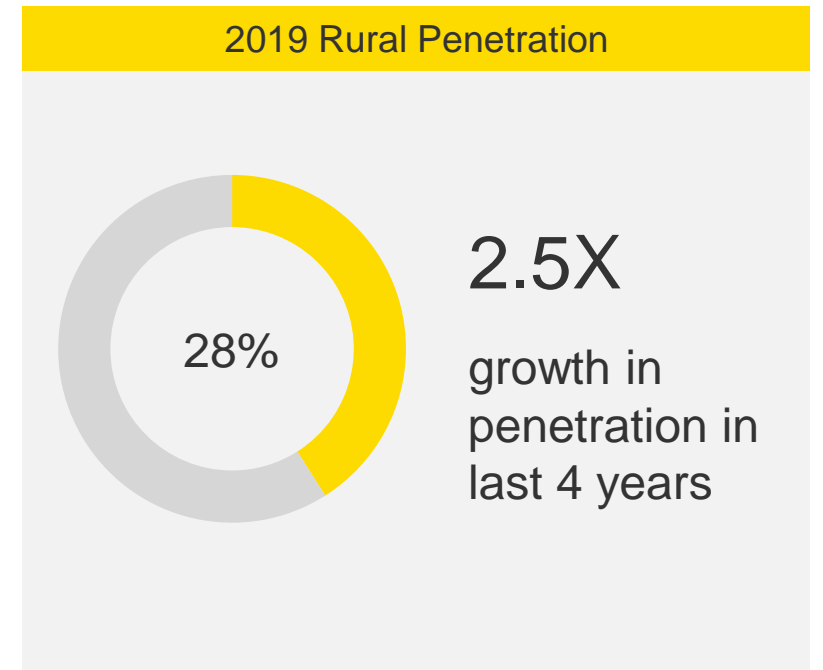
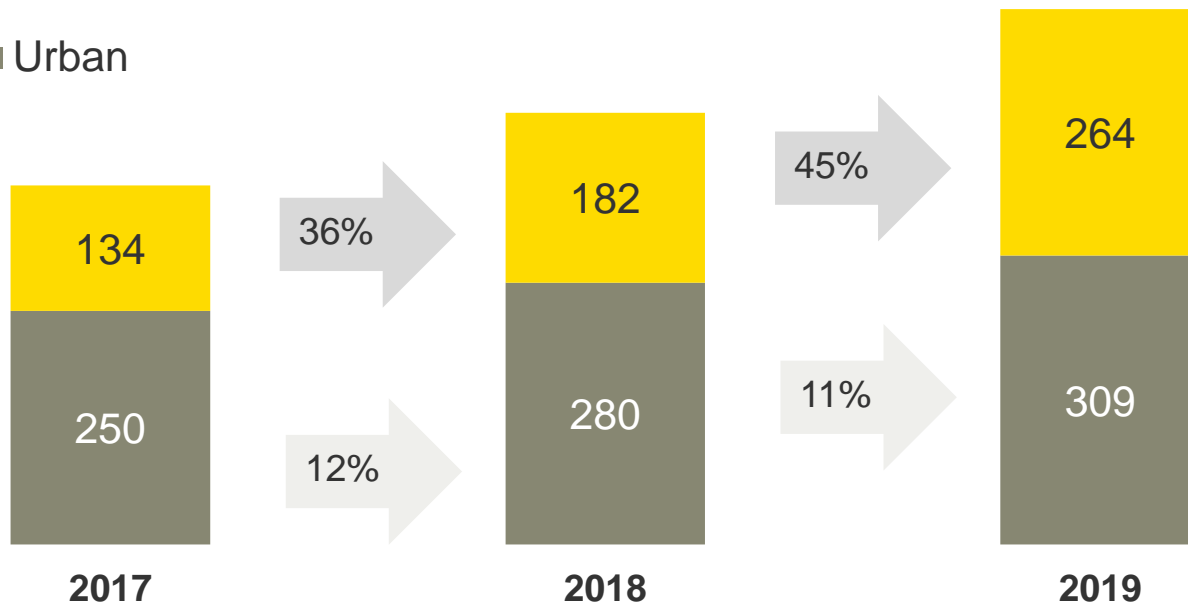


Mobile is the key device of choice. **100%** active internet users browse internet through mobile phones.

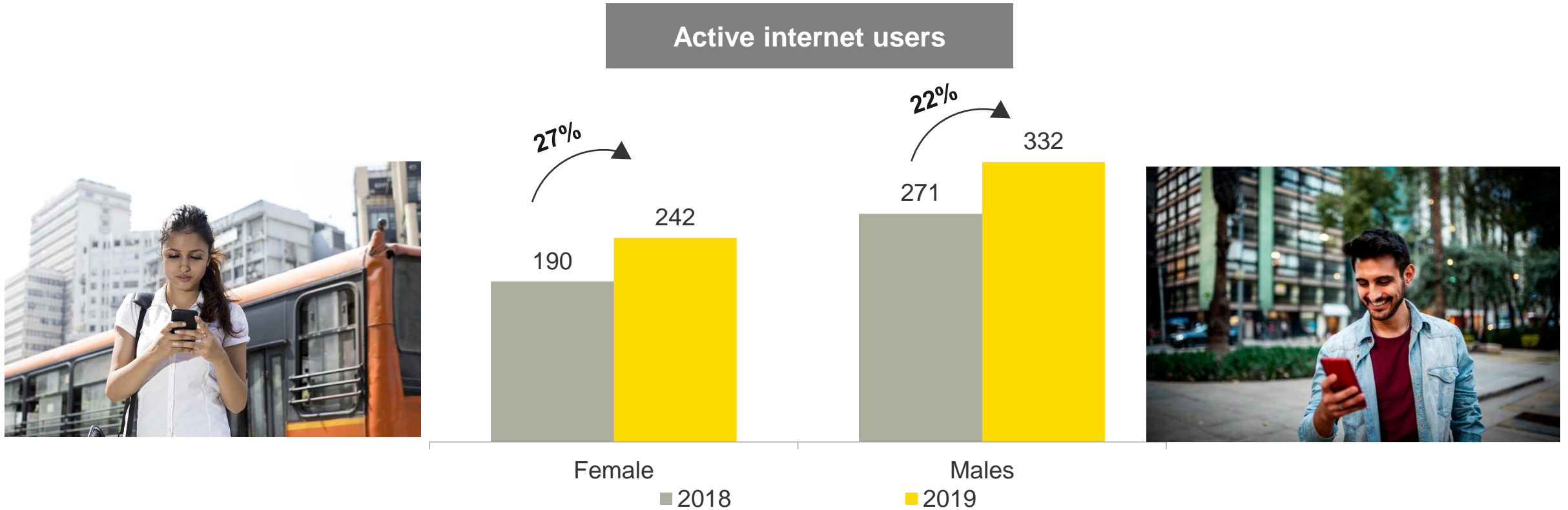
Rural masses continue to propel India's digital revolution – registers internet growth at 45%, while Urban India is maturing at 11% growth

Internet users: Urban vs Rural

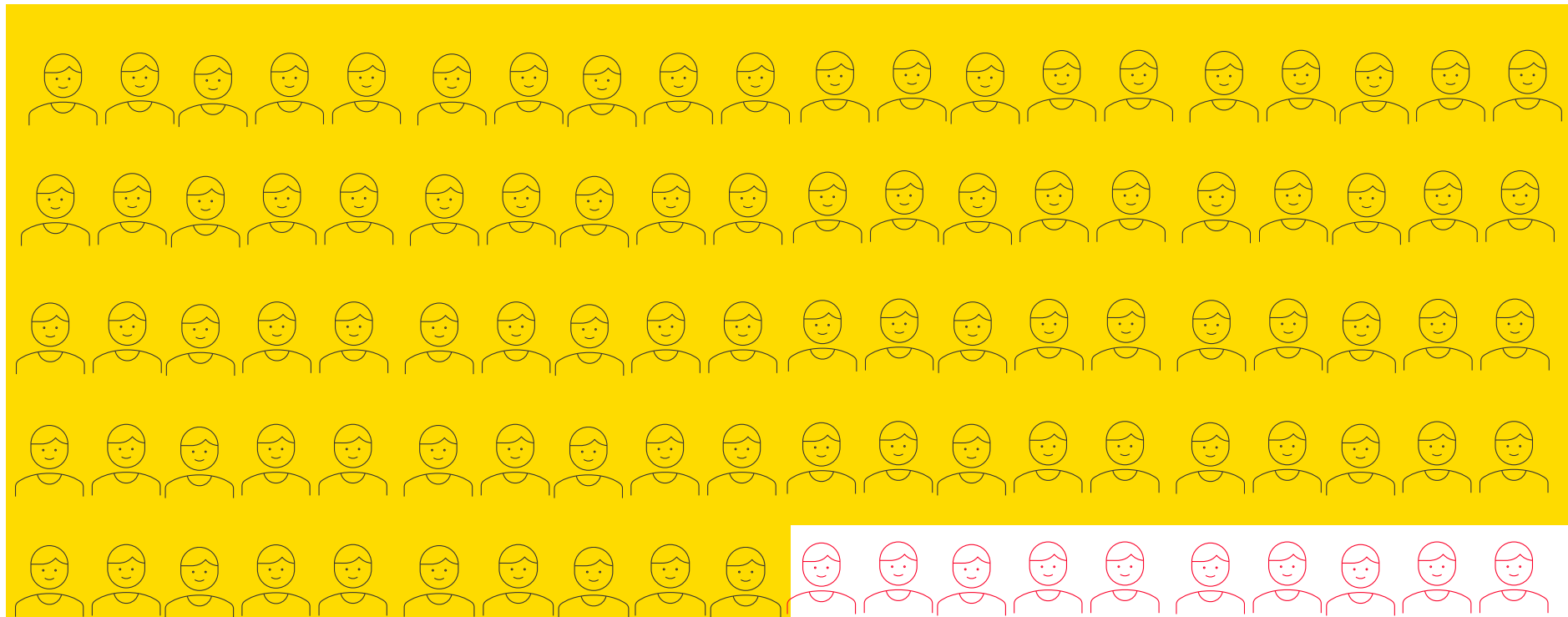
■ Rural ■ Urban



Female users continue to grow at a faster rate than males



Daily internet usership has increased owing to entertainment and communication needs; Daily internet users have increased by 60% over the last year



Almost
9 out of 10
internet users access
internet every day



60%
growth of daily users
as compared to last
year

In summary, changing internet landscape of India..



28%

Current Internet penetration
in rural India



27%

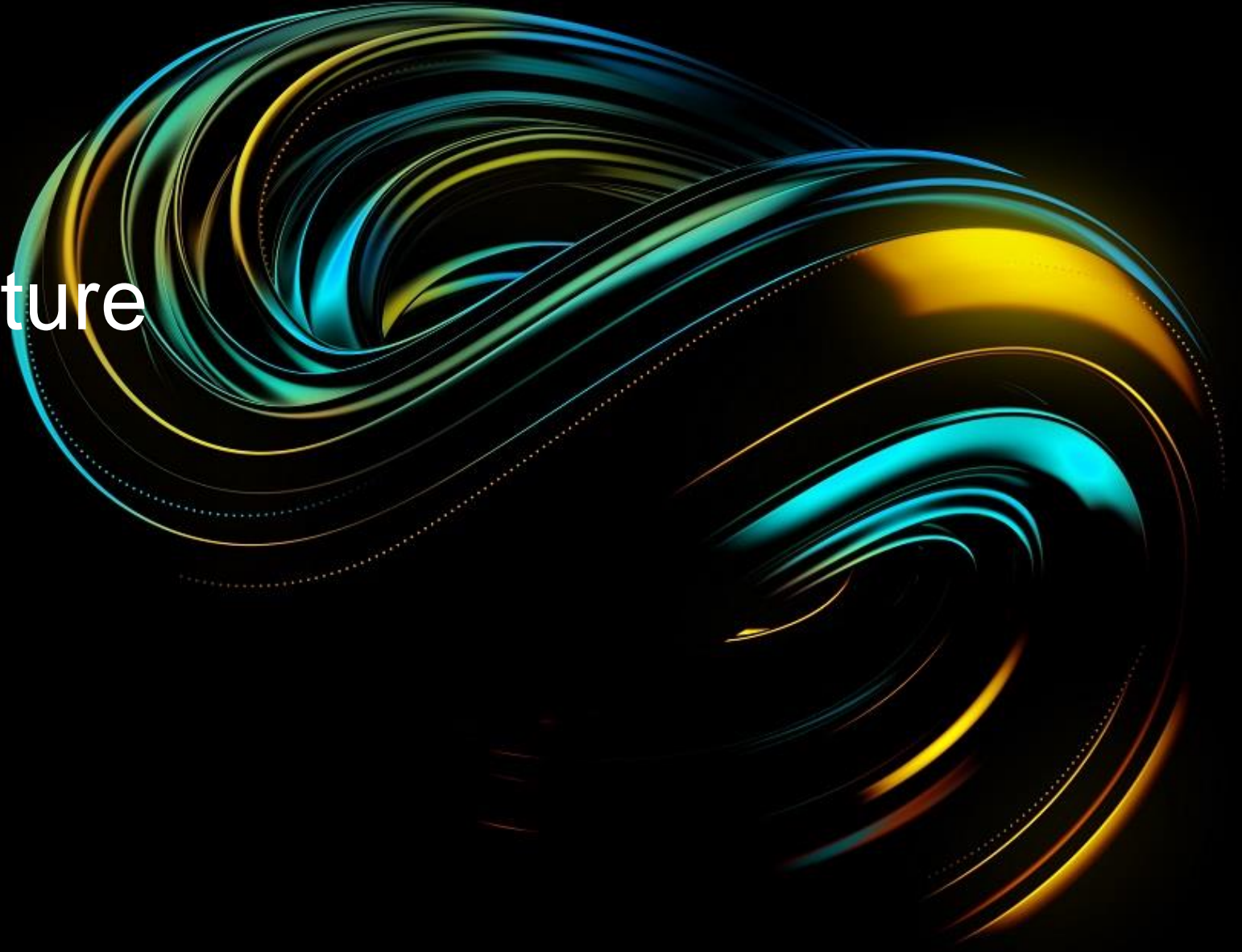
Growth among females
driving overall digital
adoption



60%

Increase in the daily
internet users over the
last one year

2 Few Emerging/Future Trends



Entertainment moves online and continues to drive internet users online



84%

Penetration of online entertainment related activities i.e. watching videos, listening to music, online gaming, etc.



37%

Growth in streaming video consumers

Shopping online – a new necessity?



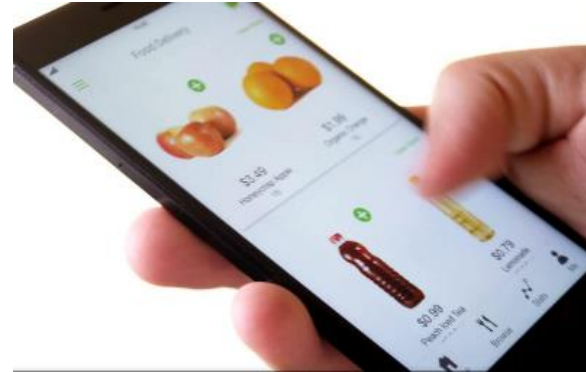
20%

Growth of online shoppers in India



43%

Growth of online shoppers in Rural and Small Towns driving the overall growth



32%

Revenue growth in online shopping



39%

E-Wallets/ UPI is the most preferred mode of payment

India will have about 900 million Internet users by 2025

Lower penetrated segments will drive the next wave of Internet adoption

900 Million+

Internet users in 2025

Rural India

71% of the new users will come from rural India (from 46% in 2019)



Women

Penetration

2019: 35%

2025: 52%



School Going Children (Less than 19 yrs.)

Penetration

2019: 37%

2025: 60%



Thank you

Biswapriya Bhattacharjee

biswapriya.bhattacharjee@kantar.com

Sumesh Pansari

Sumesh.pansari@kantar.com