



CENTRAL SQUARE
FOUNDATION



BHARAT SURVEY
FOR EDTECH
Facilitated by CSF

BaSE

Bharat Survey for EdTech 2025





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Executive Summary

Household Survey Findings

The findings presented below are drawn from a multi-stage random sample of **12,500 children** selected from households across **ten states** in India including Gujarat, Kerala, Madhya Pradesh, Maharashtra, Mizoram, Odisha, Tamil Nadu, Telangana, Uttarakhand and Uttar Pradesh.

Access To Technology

Access at a Household Level

- **Ownership of smartphones:** 90% of households own at least one smartphone, with over half (57%) owning two or more smartphones. On average, households own **1.74** smartphones. Urban households own more smartphones per household (**1.96**) than rural households (**1.61**).
- **Non-possession of smartphones:** Among households without a smartphone, the most commonly cited barriers are high device costs (**64%**) and high data costs (**26%**).

Access at a Child Level

- **Access to smartphones:** 72% of children from surveyed households have access to smartphones. While 68% have shared access, 4% have dedicated access. Urban children and those in higher grades are more likely to have smartphone access. 78% of children from urban households have smartphone access compared to 69% from rural households. Access increases with grades attended: 67% of children in grades 1-5, 74% in grades 6-8 and 81% in grades 9-12 have access. No gender differences are observed.
- **Smartphone sharing patterns:** Of children with smartphone access, 95% have shared access and a small percentage (5%) have dedicated access. In 48% of cases, the phone used by the child is owned by the mother and in 36% of the cases it is owned by the father.
- **Non-usage of smartphones:** 17% of children do not use a smartphone despite one being available in the household. Top reasons cited include the phone usually not being at home when needed (34%) and the child being considered too young (26%).

Access to Internet

- **Access to internet:** 99% of children with smartphone access could access the internet on their device. 70% always have internet access, 29% have intermittent access. Older children are more likely to always have internet access; 78% of children in grades 9-12, 71% in grades 6-8 and 61% in grades 1-5 always have internet access.

Frequency and Duration of Access

- **Frequency and duration of access:** 66% of children with smartphone access use them daily. On a given day, 84% of children use their smartphones for at least 30 minutes. On average, children use the smartphone for approximately 1.3 hours in a day. Older children spend more time on smartphones. Children in grades 9-12 use smartphones for 1.6 hours on average, compared to 1.2 hours for those in lower grades.

Usage of EdTech

EdTech Awareness and Usage

- **EdTech awareness:** 82% of children are aware of EdTech. However, rural children and younger children are less likely to be aware of EdTech. 77% of rural children are aware compared to 87% of urban children. 68% of children in grades 1-5 are aware compared to 86% in grades 6-8 and 94% in grades 9-12.
- **EdTech usage:** 63% of children use EdTech. 5% of children have discontinued the use of EdTech after using it in the past and 14% are aware of EdTech but have never used it. Top reasons for non-usage despite awareness include lack of know-how in selecting and operating technology and devices (45%) and device or internet-related issues (40%).

Frequency of EdTech Usage

- **Frequency of EdTech usage:** 58% of EdTech-using children use it daily, while 36% use it a few times a week. Older children and private-school-going children are more likely to use EdTech daily. 63% of children in grades 9-12 use it daily, compared to 57% in grades 6-8 and 52% in grades 1-5. 61% of private-school-going children use EdTech daily compared to 55% of government-school-going children.

Drivers of EdTech Discovery and Usage

- **Drivers of EdTech usage and discovery:** 79% (nearly four out of five) EdTech-using children started using EdTech during or after the COVID-19 pandemic. Children typically first adopted EdTech on the recommendation of school or teachers (63%), friends and classmates (58%) or relatives (23%). Children continue to use EdTech as they feel it helps them achieve better learning outcomes (49%), its role in preparing children for the future (43%) and its ease and convenience of use (42%).

EdTech Use Cases and Commonly Used Tools

- **EdTech use cases:** 81% of EdTech-using children leverage it to support schoolwork; 41% use it exclusively for school-related learning. Top subjects studied include Mathematics (74%), English (63%) and Science/Environmental Studies (57%). Primary use cases of EdTech include practice and doubt solving (77%), test preparation (47%) and self learning new skills (40%).
- **Commonly used tools:** YouTube is the most popular tool (used by 94% of EdTech-using children), followed by WhatsApp (67%) and Google (49%). Only 6% of EdTech-using children use a specialised EdTech application such as DIKSHA etc.

Challenges Faced While Using EdTech

- **Challenges faced while using EdTech:** 67% of EdTech-using children report facing one or more challenges, including high data costs (19%), technology being a distraction (18%), difficulty finding the right content (19%) and difficulty using the tools (18%).

User Sentiment around Education and EdTech

Perceptions of School Education and Learning Support

- **Sufficiency of in-school education:** 61% of parents feel their children's in-school education is completely sufficient for their learning needs, while 35% feel it is somewhat sufficient. Just 2% reported it was not sufficient at all.
- **At-home learning support:** 87% (nearly nine in ten children) receive learning support from family members at home. Mothers are the primary source of support (cited by 64%), followed by fathers (48%) and siblings or cousins (17%). The most common forms of support include helping with homework (83%), assisting with studying and clarifying doubts (60%) and monitoring school work (51%).
- **Paid private tuition:** 38% of children attend paid private tuition after school. A greater share of private-school-going children (42%) attend tuition as compared to government-school-going children (35%).

Perceived Impact of EdTech Usage

- **Perceived impact of EdTech:** 75% of EdTech-using children report improved learning outcomes from the use of EdTech. 95% feel that EdTech helps parents support their children's learning.

Perceived Risks Associated with EdTech Usage

- **Perceived risks of EdTech:** 60% of respondents agree that EdTech use by children is associated with risks. No significant differences in terms of risk perception were found by demographic factors. Top risks acknowledged are linked to overuse (66%) and wrong information (46%).

- **Risk mitigation:** 74% of respondents who acknowledge risks take protective measures, including setting clear rules on what children can access, supervising usage and discussing safe technology use with children. 54% of those who acknowledge risk feel fully equipped to manage them.

Support for EdTech Adoption

- **Support for EdTech adoption:** 84% of respondents report they would recommend EdTech to others. 53% expressed a desire to increase their EdTech use, while 39% wished to maintain current levels. 53% feel technology could support schools, while 33% feel it could fully replace them.

Usage of GenAI for Learning

Awareness and Usage of GenAI

- **Awareness of GenAI:** 50% EdTech-using children have heard of artificial intelligence (AI) and 44% know of its application for learning. Of those who are aware of GenAI, 85% say that they understand how it works. However, 72% (over two-thirds) of them mistake it for an internet search application. Urban children and older children are more likely to have heard of GenAI. 53% of urban children had heard of GenAI compared to 42% of rural children. 60% of children in grades 9-12 had heard of GenAI, compared to 49% in grades 6-8 and 36% in grades 1-5.
- **Usage of GenAI:** 35% of EdTech-using children use GenAI for learning; 96% of GenAI-using children use it multiple times a week, whereas 69% use it daily.

Drivers of Discovery and Usage of GenAI

- **Drivers of discovery and usage of GenAI:** While 68% of GenAI-using children were introduced to it by peers, 46% heard about it from school or teachers. Top drivers for continued use include easy-to-understand explanations (45%), quick responses that save time (41%) and the interactive nature of the tools (40%).

GenAI Use Cases

- **GenAI use Cases:** 96% of GenAI-using children leverage it for school-linked learning, with 59% using it exclusively for schoolwork. While 73% of them use it for doubt solving and practice, 48% use it to learn a new language/skill or translate content and 32% use it for test preparation.

Perceived Impact of GenAI Usage

- **Perceived impact of GenAI usage for learning:** 84% of respondents report improved learning from use of GenAI tools.

Risk Perception Associated with GenAI Usage

- **Perceived risks associated with GenAI usage for learning:** 65% of respondents who are aware that GenAI can be used for learning report that AI amplifies risks associated with EdTech use. Top risks cited include overuse of technology (77%) and wrong information (46%).

Teacher Survey Findings

The findings presented below are drawn from a multi-stage random sample of **2,500 teachers** selected from across **ten states** in India.

Access to Technology

Access to Devices at Home

- **Ownership of devices:** 98% of teachers have access to a smartphone at home, with 94% using it for teaching and school-related activities. Fewer teachers have access to other devices such as laptops (18%), tablets (15%) or desktops (11%) at home. 22% of teachers also have access to a personal device provided by the government, typically a smartphone or tablet. 18% of all teachers use a government-provided device for teaching purposes.
- **Challenges faced:** 58% of teachers with smartphone access face challenges while using their devices, including internet issues (34%), limited phone balance or data recharge (28%) and electricity constraints (14%).

Access to Devices in School

- **In-school devices:** 69% of teachers have access to at least one technology device in school. Smart classroom systems are the most commonly accessible (44% access, 40% usage), followed by laptops and desktops (34% access, 24% usage) and tablets (29% access, 21% usage).
- **Frequency of access:** 63% of teachers with in-school devices have frequent access (at least five days a week). Government-school teachers are more likely to have frequent access (67%) compared to private-school teachers (54%). Similarly, older teachers (aged 51-60 years) are more likely to have frequent access (71%) compared to teachers aged under 30 years. (58%).
- **Challenges faced:** 68% of teachers with access to in-school devices face challenges, such as unreliable internet connectivity (40%), electricity-related issues (22%), lack of familiarity with devices (20%), devices not being available when needed (19%) and devices not working (17%).

Usage of EdTech

EdTech Awareness and Usage

- **EdTech awareness:** Nearly all (98%) teachers are aware that technology can be used for teaching and school-related activities.
- **EdTech usage:** 87% of teachers use EdTech. While 4% have used it in the past but no longer do so, 6% are aware of EdTech but have never used it. Top reasons for non-usage include health concerns (cited by 20% of non-users), internet-related issues (21%) and nobody around the teacher using it (18%).

Frequency of EdTech Usage

- **Frequency of EdTech usage:** While 56% of EdTech-using teachers use EdTech daily, 37% use it a few times a week.

Drivers of EdTech Discovery and Usage

- **Drivers of discovery:** 34% of EdTech-using teachers were already using EdTech before the COVID-19 pandemic. An additional 40% began to use it during the pandemic and 24% started to use it after the pandemic. Teachers typically discover EdTech on their own (37%), through peers (36%) or via school administration (36%).
- **Drivers of continued usage:** Continued use of EdTech is linked to the belief that EdTech improves teaching (47%), is convenient (45%), helps teachers stay modern and prepare for the future (40%) and saves time (36%).

EdTech Use Cases and Commonly Used Tools

- **EdTech use cases:** 77% of EdTech-using teachers use EdTech to communicate with students, parents and colleagues. 63% use it for lesson preparation and delivery, 36% for self-learning and upskilling, 29% for administrative tasks and 27% for creating and conducting assessments.
- **Commonly used tools:** 84% of EdTech-using teachers use at least one of YouTube, Google or WhatsApp. 45% use at least one specialised education app; the most commonly used apps are DIKSHA (21%), followed by NISHTHA (13%) and E-pathshala (12%).

Challenges Faced While Using EdTech

- **Challenges faced:** 53% of EdTech-using teachers report facing one or more challenges, including difficulty finding the right content (19%), trouble fixing issues (17%), high costs (data, subscriptions, etc.) (15%), safety concerns (15%) and files or links not working (14%).

User Sentiment Around Education and EdTech

Perceptions Around Teacher Training on EdTech Usage

- **Training received:** 51% of EdTech-using teachers have attended training or workshops related to the use of technology for teaching. Government-school teachers (55%) are more likely to have received training than their private-school counterparts (41%). 79% of teachers express interest in receiving future training on technology use.

Perceived Impact of EdTech Usage

- **Perceived impact of EdTech:** 81% of EdTech-using teachers agree that EdTech leads to improved educational outcomes. While 53% feel EdTech is beneficial to all types of students, 37% feel it is most beneficial for students who perform well. Nearly all EdTech-using teachers (96%) feel that using EdTech saves time.

Perceived Personal Risks Associated with EdTech Usage

- **Perceived risks of EdTech for self:** 52% of EdTech-using teachers agree that the use of EdTech poses risks to themselves. Top risks acknowledged are overuse (54%) and wrong information (44%).

Perceived Risks to Children Associated with EdTech Usage

- **Perceived risks of EdTech for students:** 59% of EdTech-using teachers agree that EdTech poses risks to students. Top risks acknowledged include overuse (65%), wrong or misleading information (47%) and wasting time (29%). 85% of EdTech-using teachers take measures to safeguard students from perceived risks.

Support for EdTech Adoption

- **Support for EdTech adoption:** 88% of EdTech-using teachers would recommend EdTech to others. While 55% feel technology could support schools, 27% feel it could fully replace them. Similarly, while 57% feel technology could support or partially replace tuitions, 30% feel it could fully replace them.

Usage of GenAI for Teaching

Awareness and Usage of GenAI

- **Awareness of GenAI:** 83% of EdTech-using teachers have heard of GenAI and 71% know of its application for teaching. 46% of those who know of GenAI claim to understand how it works. However, half of them equate it with a search engine and over a third believe it copies information from the internet and repeats it. 93% of government-school teachers and 84% of government-aided-school teachers have heard of GenAI compared to 73% of private-school teachers. No significant differences are observed by the gender of teachers.

- **Usage of GenAI:** 51% of EdTech-using teachers currently use GenAI for teaching and school-related activities. Nine in ten GenAI-using teachers use it multiple times a week, including 61% who use it daily. Government-aided-school teachers (68%) and government-school teachers (51%) are more likely to use GenAI compared to private-school teachers (40%).

Drivers of Discovery and Usage of GenAI

- **Drivers of discovery and usage of GenAI:** 50% of GenAI-using teachers were introduced to it by the school or fellow teachers. Other channels include advertisements or news (28%) or learning about it from students (24%) or relatives (22%). Top benefits cited include easy-to-understand explanations (46%), quick responses that save time (43%) and the ability to ask anything and receive good responses (43%).

GenAI Use Cases

- **GenAI use cases:** 77% of GenAI-using teachers leverage it for lesson preparation and delivery, 47% for assessment creation and grading and 44% for self-learning and upskilling.

Perceived Impact of GenAI Usage

- **Perceived impact of GenAI usage for teaching:** 80% of GenAI-using teachers report improved educational outcomes and 60% report saving time from the use of GenAI.

Perceived Personal Risks Associated with GenAI Usage

- **Risk perception for self:** 56% of teachers who know that GenAI can be used for teaching report that AI amplifies risks associated with EdTech use. Top risks cited include overuse (70%), wrong information (55%) and concerns related to digital privacy and fraud (35%).

Perceived Risks to Children Associated with GenAI Usage

- **Risk perception for students:** 63% report that GenAI amplifies risks associated with EdTech use for students. Top risks include overuse (74%) and wrong information (57%). 28% cite wasting time and 27% cite concerns related to digital privacy and fraud.

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Abbreviations and Key Terms

Abbreviations	
BaSE	Bharat Survey for EdTech
CSF	Central Square Foundation
EdTech	Education Technology
FGD	Focus Group Discussion
GenAI	Generative Artificial Intelligence
IRB	Institutional Review Board
NGO	Non-Governmental Organization
NSS	National Sample Survey
PPS	Probability Proportion to Size
PSU	Primary Sampling Unit

Key Terms

EdTech: EdTech refers to the use of technology by children and teachers to support and enhance the teaching and learning process. For children, this includes using digital tools to undertake activities such as practice and doubt resolution, test preparation, attending online classes etc. For teachers, it includes using digital tools to support lesson planning and delivery, assessment creation and grading, communication with students and parents, professional development, school-related administrative tasks, etc.

GenAI: In the context of this study, GenAI refers to any tool, app or feature that uses generative AI technology and is used by children and teachers to support and enhance the teaching and learning process. For children, examples include using GenAI to complete homework, generate practice questions and better understand concepts. For teachers, examples include using GenAI to create lesson plans, generate assessments, support administrative activities and brush up on knowledge.

Background and Context

India has the world's largest education system, serving nearly 25 crore students across 15 lakh schools with over 1 crore teachers. While we have achieved near-universal school enrolment¹, widespread learning deficits continue to remain. According to The State of Global Learning Poverty: 2022, by The World Bank, 56.1% of children in India are unable to read and understand simple text by the age of 10, a condition termed learning poverty. National surveys reveal the same deficit; the Annual Status of Education Report (ASER) 2024 reports that 73% of Grade 3 students in rural India cannot read a Grade 2-level text and 66% are unable to perform simple Subtraction.

In a system where learning deficits are compounded by systemic challenges, EdTech has the power to democratise access to quality education, especially among low-income communities, where the need is significant. Over the last five years, the EdTech proposition has been strengthened by tailwinds such as a favourable national policy, rising smartphone and internet penetration and emerging evidence of impact. Multiple rigorous studies show that Personalised Adaptive Learning (PAL) solutions significantly improve student achievement, particularly in middle and secondary grades². There is also emerging evidence on the impact of at-home tech interventions on foundational learning for foundational grades³.

More recently, the advent of Generative Artificial Intelligence (AI) has expanded the frontier of EdTech by enhancing personalisation, improving teacher support and enabling new use cases altogether. Recognising this potential, the Government of India has made AI a national priority through the IndiaAI Mission and the establishment of the AI Center of Excellence for Education.

Despite this promise, EdTech adoption remains uneven. Solutions continue to disproportionately serve high- and middle-income, english-speaking users. Crucially, there is limited systematic data on how low-income users access, adopt and experience EdTech and AI for teaching and learning.

Conceived to bridge this information gap, the Bharat Survey for EdTech (BaSE) is a first-of-its-kind large-scale national survey by Central Square Foundation (CSF) that provides insights on access and usage of technology for the purpose of teaching and learning among parents, children and teachers from low-income backgrounds in India. Launched in 2023, BaSE 2023 surveyed over 6,000 households across six states in India⁴, providing critical insights on access to technology, usage of EdTech and user sentiment towards EdTech adoption.

¹ Unified District Information System for Education 2024-25

²An evaluation of Andhra Pradesh's PAL program found learning gains equivalent to 1.9 years of schooling for students in Grades 6–9. Similarly, a randomised control trial in Rajasthan reported that students using PAL across Grades 4–8 achieved twice the learning gains in Math and Hindi compared to peers

³Chimple's teacher-led program showed meaningful gains for early-grade literacy and numeracy, and global initiatives like the XPRIZE demonstrate the potential of self-directed digital learning in low-resource settings

⁴The survey was undertaken in 6 states across India - Uttar Pradesh, Madhya Pradesh, Gujarat, Telangana, Odisha, and Mizoram





Built on this foundation, BaSE 2025 is more expansive in scope and scale. It introduces a timely focus on AI awareness and usage and includes teachers as respondents for the first time. Administered to 15,000 respondents, across ten states in India, including Gujarat, Kerala, Madhya Pradesh, Maharashtra, Mizoram, Odisha, Tamil Nadu, Telangana, Uttarakhand and Uttar Pradesh, BaSE 2025 provides insights across critical demographic groups by ensuring representation along urban and rural settlements, gender, grade and types of school.

What distinguishes BaSE is its practitioner-informed design, shaped by public expert consultations and CSF's decade-long experience in EdTech design and implementation. BaSE 2025 aims to inform decision-making on EdTech policy, product design and programme implementation for inclusive and equitable EdTech adoption at scale.

Study Objectives

The objective of BaSE 2025 is to provide insights on access and use of technology for the purpose of teaching and learning among parents, children and teachers from low-income backgrounds in India. The survey provides insights on three foundation themes of access to technology, usage of EdTech and user sentiment around EdTech adoption. It also introduces a timely focus on AI awareness and usage among children and teachers in low-resource settings.

Survey Themes

Foundational Themes	 Access to Technology	Explores availability of technology infrastructure, smartphones and the internet, extent and duration of usage of smartphones and reasons for non-availability/non-use of devices
	 Usage of EdTech	Explores trends around tech tools used for teaching and learning, prevalent use cases of EdTech, drivers of EdTech use and most valued features
	 User Sentiment around EdTech Adoption	Explores user sentiment around the education system, engagement with learning and mentoring avenues outside of school, risk perceptions, challenges associated with EdTech use and perceived impact of EdTech on teaching and learning
Additional Theme	 AI Awareness and Usage	Explores awareness and use of AI for the purpose of teaching and learning, preferred AI apps, risk perceptions and most valued features

The objective of the survey is to bring out the voice of the end user on the state of EdTech in India with the aim to provide critical insights to policymakers, tech innovators, practitioners, researchers and funders in the EdTech ecosystem for informed decision-making on EdTech policy, product design and programme implementation.

Study Methodology

Research Methods

This study relied on a mixed methods research approach consisting of:

- **Quantitative survey with households and teachers:** Enumerators visited households and schools to conduct in-person interviews. The survey focused on quantifying EdTech and AI access, use and sentiment.
- **Qualitative research:** Focus group discussions were held with groups of teachers, parents and students.

State Selection

The study was conducted in **ten states** across India. The states were selected based on a 3x3 matrix of internet penetration and state population size, while ensuring that selected states were representative of India's geographical spread.

- **Internet penetration:** States were classified as 'internet penetration greater than 90%', 'internet penetration between 70% and 90%' and 'internet penetration less than 70%' using 2024 data published by the Telecom Regulatory Authority of India.
- **State population size:** States were classified as 'more than 7% of national population', 'between 4% and 7% of national population' and 'less than 4% of national population' using data on state population as a proportion of the national population, based on 2024 projections of Census 2011 data published by the National Commission on Population, Ministry of Health and Family Welfare, Government of India.

Internet Penetration	State Population Size		
	States with more than 7% of national population	States with 4%–7% of National Population	States with less than 4% of national population
States with internet penetration greater than 90%		Gujarat Karnataka Tamil Nadu	Andhra Pradesh New Delhi Himachal Pradesh Kerala, Punjab Telangana
States with internet penetration between 70% and 90%	Maharashtra	Rajasthan	Arunachal Pradesh, Assam, Goa, Haryana Jammu and Kashmir Manipur, Meghalaya Mizoram, Nagaland Odisha, Tripura

States with internet penetration less than 70%	Bihar Uttar Pradesh West Bengal	Madhya Pradesh	Chattisgarh Jharkhand, Sikkim Uttarakhand
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*Figure 1: State Selection Matrix (Selected states in **Bold**)*

Based on the matrix, ten states were selected to ensure they cover India's geographical spread. The selected states are Gujarat, Kerala, Madhya Pradesh, Maharashtra, Mizoram, Odisha, Tamil Nadu, Telangana, Uttarakhand, and Uttar Pradesh.



Figure 2: Geographic Distribution of Selected States

Sampling and Sample Size

Quantitative Research

- **Household survey:** The household survey was administered through a questionnaire to a sample of **12,500 eligible households**, across **ten states**. Eligible households are defined as those with children who attend government schools, government-aided schools or private schools whose monthly fees fall within the bottom 90th percentile of education expenditure.⁵

The primary respondents were parents. Parents answered questions about their household and about behaviour of children from ages 6 to 13 under their care. Adolescents from ages 14 to 18 directly responded to questions concerning their access to, use and perception of EdTech.

- **Teacher survey:** The teacher survey was administered through a questionnaire to **2,500 teachers** in schools in the same states and settlements where the household survey was administered.

Qualitative Research

20 Focus Group Discussions (two in each of the ten states) were conducted with adolescents, parents and teachers to supplement quantitative findings with more context and insights.

Sampling Design

For the quantitative household survey, Cochran's sample size formula was used to determine the sample size and ensure representative survey findings, as illustrated below:

$$\text{Sample Size} = \frac{z^2 pq}{d^2} \cdot deff$$

Where **z** is the standard normal deviation for 95% (1.96), **p** is the expected prevalence or proportion for a given question, **q**= (1-p) and **d** is the absolute precision (or margin of error) that is tolerable for said prevalence. The required sample size based on the above formula has been outlined at various thresholds. The degree of prevalence was assumed to be 50%.⁶ A design effect of 1.5 was assumed (as a multiplier to account for sampling strategy deviation from simple random sampling to multi-stage sampling).

Based on the sample size calculations, a sample of 576 households was estimated to ensure representative findings at the state level. Further, to achieve representativeness of findings within a state, as well as for urban-rural settlements, a sample size of **1,250 household respondents** per state was estimated. Thus, overall, **12,500 household surveys** were conducted across the **ten states**.

For the quantitative teacher survey, a sample size of **250 teachers** per state was estimated, resulting in **2,500 teacher surveys** conducted across **ten states**.

⁵The education expenditure data was calculated using microdata from the National Sample Survey Office (NSSO) 75th Round (2017–18), Schedule 25.2 on education, adjusted for inflation using Consumer Price Index (CPI) data for 2025

⁶Since the prevalence of answers was unknown (and likely to vary widely across questions), we used the most conservative estimate, i.e. 50%.

Sampling Design

For the quantitative surveys, a multi-stage stratified random sampling approach was used within each of the ten states to ensure that the survey sample is demographically diverse.

Stage 1	Region segregation of states Districts in each state were clustered into four regions using k-means clustering performed on Quantum Geographic Information System (QGIS) to achieve better representation of respondents within a state.
Stage 2	District selection Between five to eight districts were then randomly selected from across the four regions based on Probability Proportion to Size (PPS), where size implies the number of districts in each region.
Stage 3	Tehsil selection Up to four tehsils were randomly selected from each district to ensure sufficient diversity while also optimising for operational burden.
Stage 4	Settlement selection The settlements were then randomly selected within these tehsils. In each state, a total of 63 rural settlements (villages) and 62 urban settlements (wards) were sampled.
Stage 5a	Household selection Within a settlement, ten eligible households were selected using systematic random sampling with a fixed interval, following the right-hand rule. Within each selected household, one child aged 6-18 years, was randomly selected by the CAPI (Computer Aided Personal Interview) tool for the survey. If the child was aged between 6-13 years, their parent responded to the survey questionnaire on the child's behalf. If the child was aged between 14-18 years, the child responded for themselves.
Stage 5b	Teacher selection Within a settlement, one school was randomly selected from a roster of schools compiled in consultation with the village or ward leader. Within each school, a maximum of two full-time teachers teaching core academic subjects (language, Mathematics, Science, Social Science, Computer Science, etc.) were randomly selected by the CAPI tool for the survey.

Figure 3: Sampling Approach

Respondents for the qualitative FGDs were drawn from the sampled settlements, but may not have been from the quantitative survey respondent pool.

Institutional Review Board Approval

The Institutional Review Board (IRB) issued an approval for this study after careful review of data collection protocols to ensure that:

- The selection of subjects was equitable
- Informed consent was sought and documented from each prospective subject or the subject's legally authorised representative (in addition to seeking informed assent for minors)
- There were adequate provisions to protect the privacy of subjects and to maintain their confidentiality
- Research plans made adequate provision for monitoring the data collected to ensure subject safety, including safeguarding of minors
- Any risks to subjects were minimised and reasonable in relation to any anticipated benefits to subjects and to the importance of the knowledge that may reasonably be expected to result from the research

Quality Control and Assurance

To ensure the rigour, reliability and integrity of the collected data, a structured quality assurance (QA) and quality control (QC) process was implemented across the entire lifecycle of the survey. Specifically, the process was instituted to ensure:

- **Field implementation fidelity and monitoring:** To ensure adherence to field protocols, a set of checks was implemented during data collection. Enumerator training was supported by structured training documentation and supervisor oversight to ensure that enumerators were well versed in and adhered to both ethics guidelines and sampling and data collection protocols. Geolocation checks were used to confirm that interviews were conducted within sampled settlements and interview duration was monitored to flag atypical survey completions. In addition, CATI callback verification checks were conducted with a sub-sample of respondents to confirm interview occurrence and compliance with survey procedures.
- **Sample fidelity and monitoring:** To ensure that the achieved sample was in alignment with the intended design, distributional and benchmarking checks were conducted. Household and teacher samples were reviewed across key demographic characteristics, including age and gender. These distributions were benchmarked against external sources such as Census projections and Unified District Information System for Education (UDISE) to validate sample fidelity.
- **Output quality:** To ensure the internal validity and consistency of the data, a series of output-level checks were conducted. These included eligibility checks to confirm that responses met survey inclusion criteria, as well as skip logic checks to ensure that respondents were routed through the questionnaire as intended. Data validation checks were applied to verify input formats and acceptable data ranges, including review of mutually exclusive response options for consistency.

- **Insight-level monitoring:** Early trend analysis was conducted for key indicators such as device access and EdTech usage to sense-check emerging findings and ensure their plausibility.

Analysis

For the analysis, household survey responses were weighted to match Census 2025 projected population distributions of children across states, settlement type (rural/urban), gender and age cohorts.

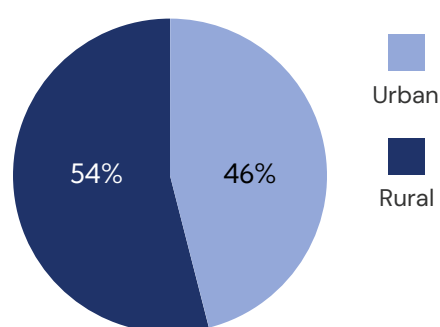
Comparative assessments across key sub-groups were tested for statistical significance to distinguish meaningful differences from random variation.

Profile of Respondents

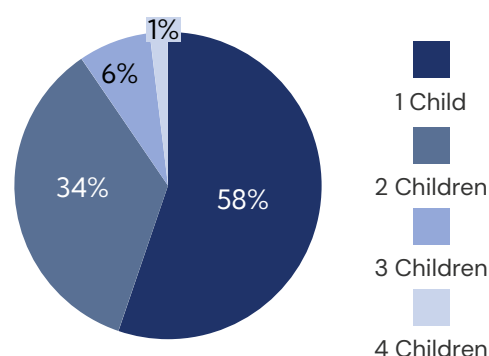
Household Survey

Profile of Surveyed Households

12,500 households with children of school-going age were surveyed across **ten states**. The sample was comparably drawn from rural and urban settlements. Most households had one or two school-going children.⁷



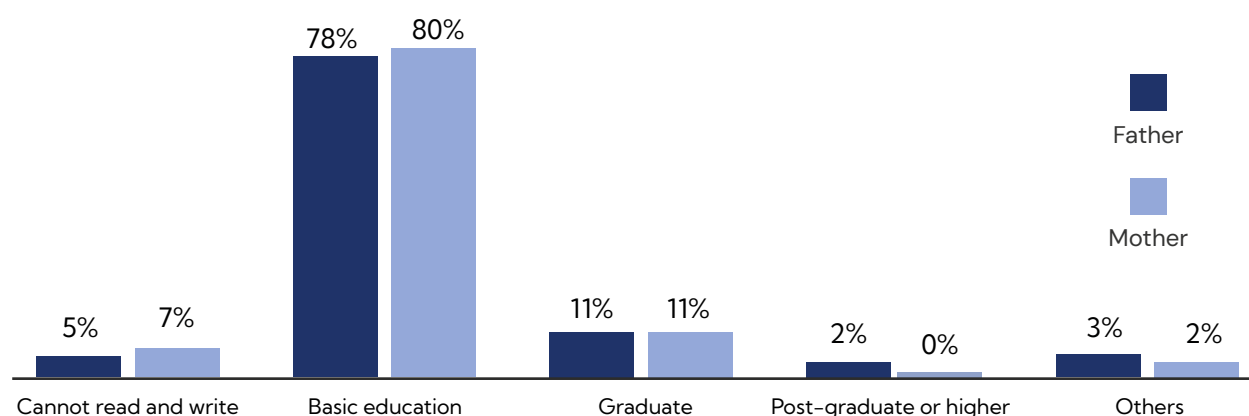
% of households surveyed
Figure 4: Settlement Type



% of households surveyed
Figure 5: Number Of Children In Household

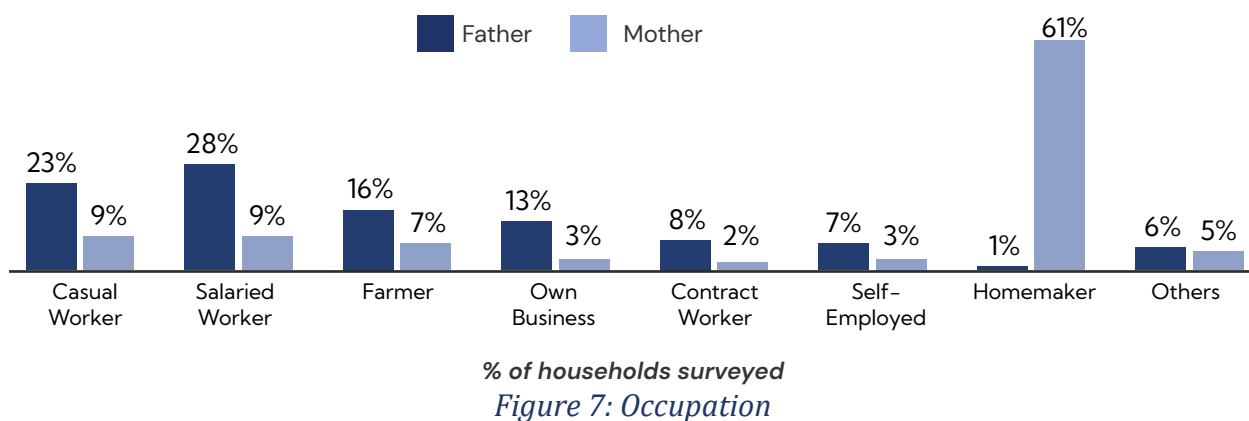
Profile of Parents of Selected Children

In **56%** of surveyed households, the mother was the respondent and in **37%** the father was the primary respondent. Very few parents attained post-secondary education. Occupational profiles pointed to predominantly informal livelihoods.



% of households surveyed
Figure 6: Highest Level of Education

⁷For the analyses in this report, the sample was re-weighted to reflect population proportions across the survey states



Profile of Children Selected for the Survey

12,500 children, one from each selected household, were surveyed across **ten states**. Most children are enrolled in government schools (**59%**), with a smaller share attending private schools (**27%**) and government-aided institutions (**13%**). Among private- and government-aided-school-going children, the majority were paying monthly school fees between ₹ 200–1,000.

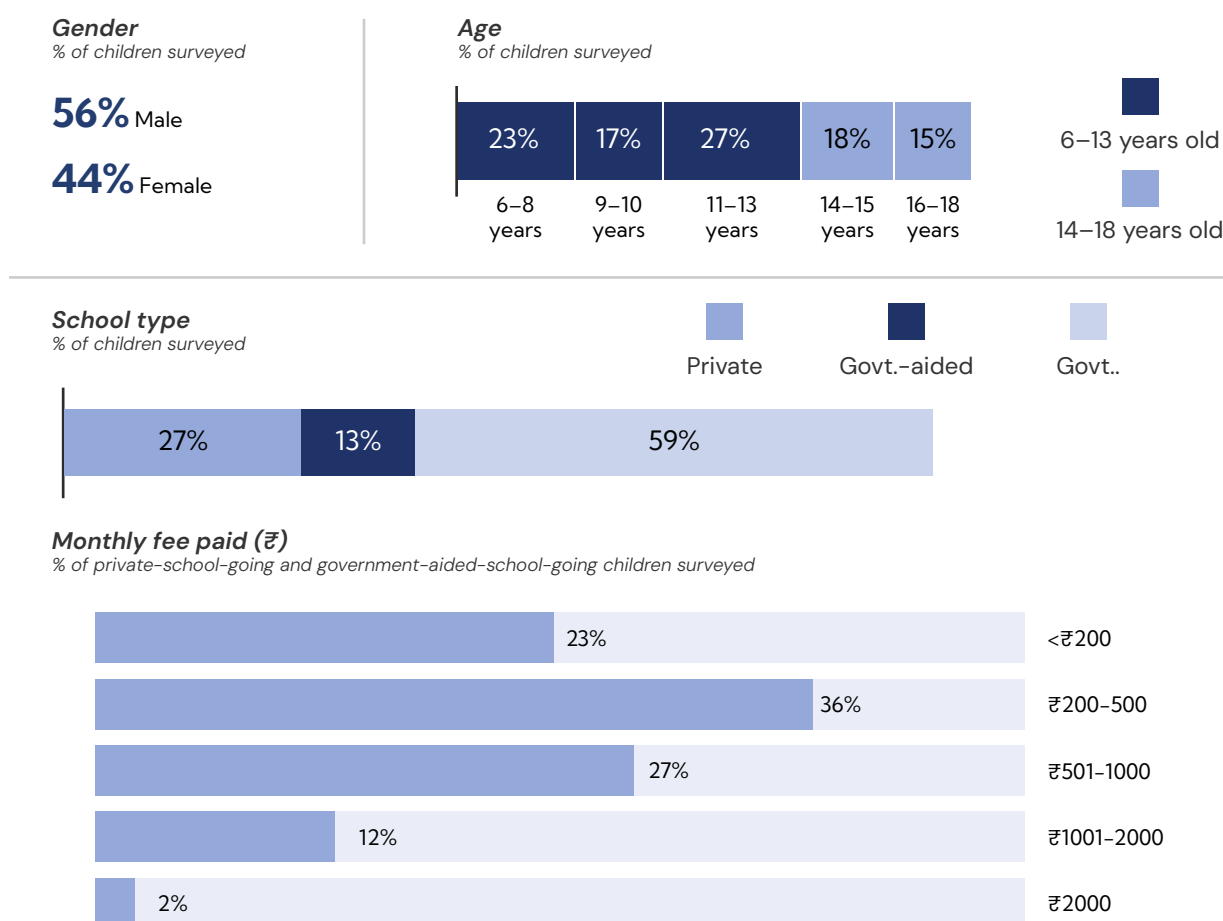
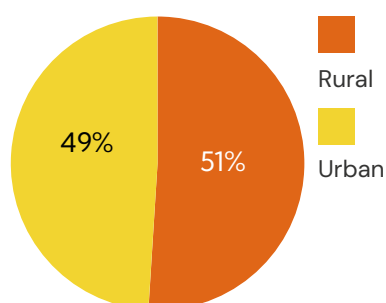


Figure 8: Child Characteristics

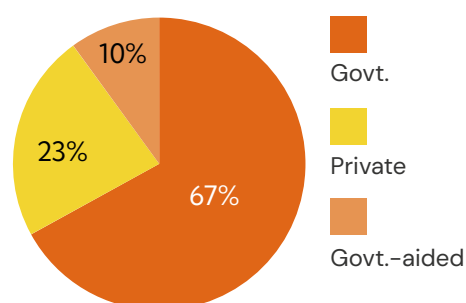
Teacher Survey

The unweighted teacher sample of **2,500 teachers** was largely drawn from government schools, with most teachers in the 31-50 age bracket. The sample was equally split between male and female teachers. A majority of teachers taught primary grade students and sizeable proportions taught middle and high school students.

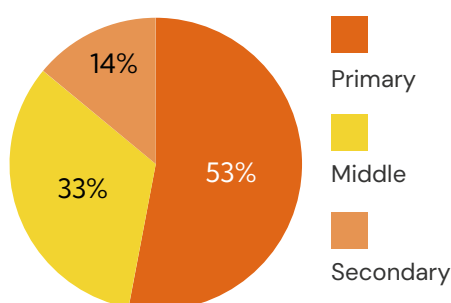
Settlement type
% of teachers surveyed



School type
% of teachers surveyed



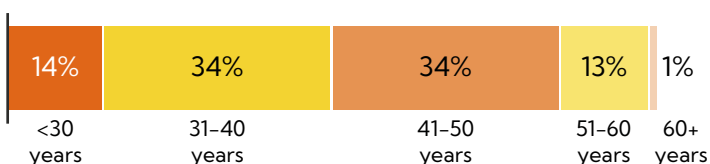
School category
% of teachers surveyed



Gender
% of teachers surveyed

51% Male
49% Female

Age
% of teachers surveyed



Grades taught by teacher

% of teachers surveyed | Percentages add to more than 100% as teachers reported teaching multiple

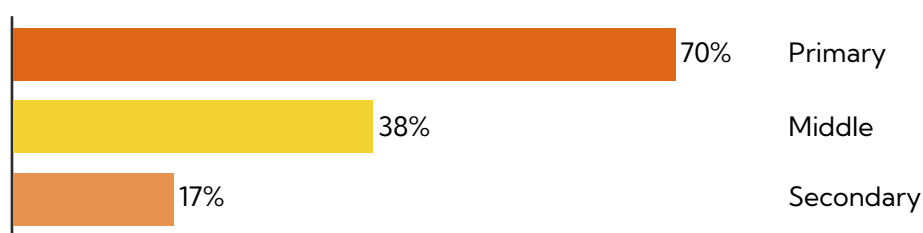


Figure 9: Teacher Characteristics

Household Survey

Findings

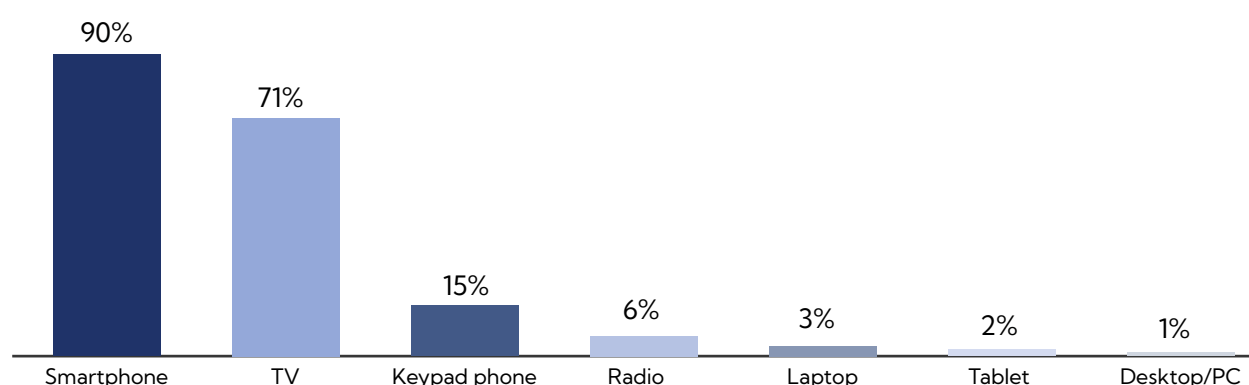
Access to Technology.....	28
Usage of EdTech	33
User Sentiment around Education and EdTech.....	39
Usage of GenAI for Learning	44



Access To Technology

Access at a Household Level

Nearly all households (98%) have access to at least one of the surveyed technology devices¹. Smartphones are the most commonly present devices, with 90% of households having at least one. This is followed by televisions (available in 71% of households) and keypad phones (available in 15% of households). Other devices such as laptops, desktops and tablets are present in just ~5% of households.

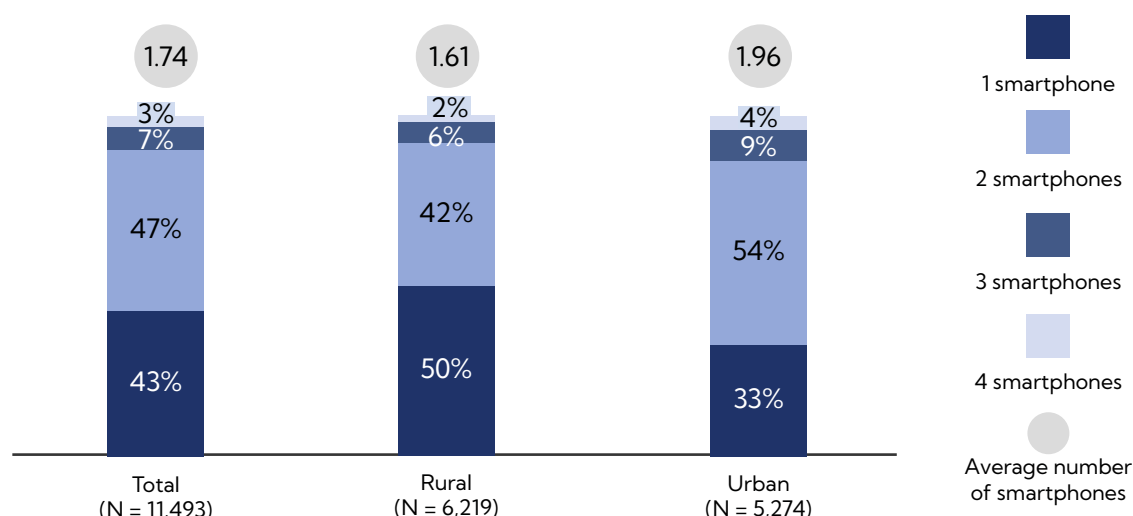


% of households | N = 12,500

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 1: Access to Devices in Households

57% of households report that they have two or more smartphones. On average, a household has 1.74 smartphones. Households in urban settlements have more smartphones on average (1.96) compared to those in rural settlements (1.61).



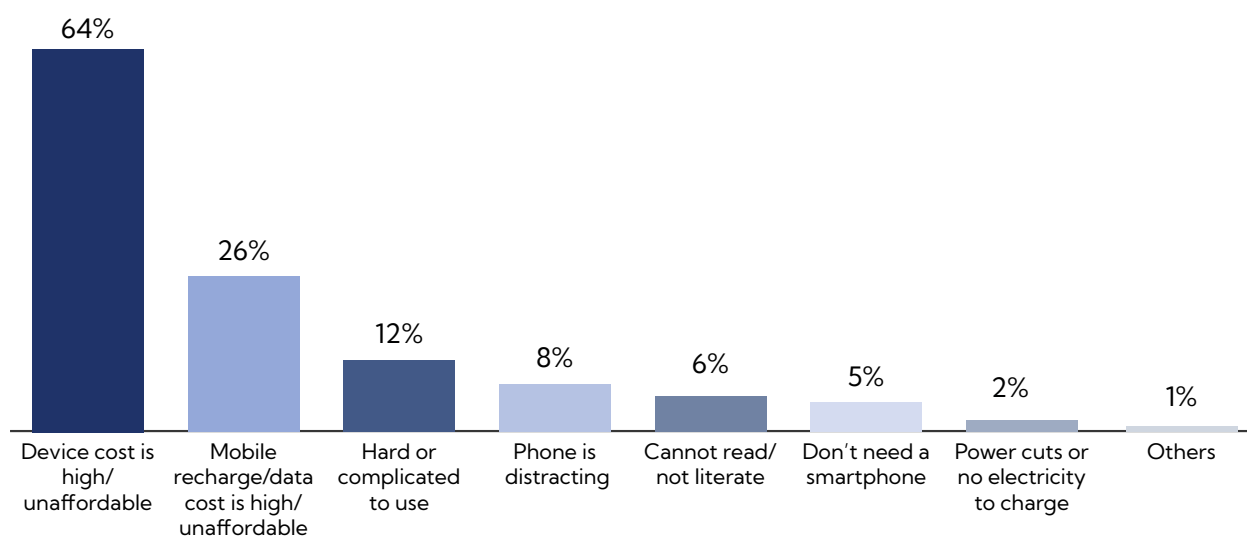
% of households with smartphones

Note: Numbers may not add up to 100% due to rounding

Figure 2: Distribution of Households by Number of Smartphones

¹ The data weighting for this insight, as with others in the report, is based on the population of children rather than of households.

Top reasons cited by households that do not have smartphones include high device cost (64%) and high data cost (26%). Difficulty in operating a smartphone, no need for a smartphone and other reasons are each cited by ~10% or fewer respondents.



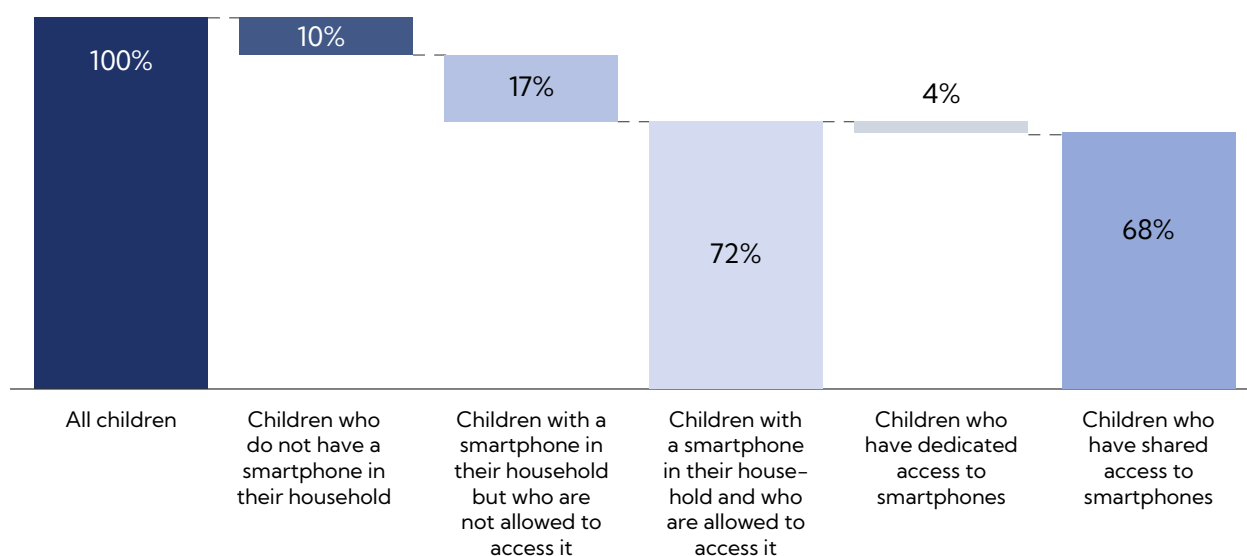
% of households that do not have a smartphone | N = 1,007

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included;

Figure 3: Reasons for Non-ownership of a Smartphone

Access at a Child Level

72% of children have access to a smartphone in their household. 68% of children have shared access² and only 4% of children have dedicated access³. Out of the children that have shared access, 75% share the smartphone with their mother, 57% with their father, 19% with siblings/ cousins and 4% with grandparents.⁴



% of children | N = 12,500

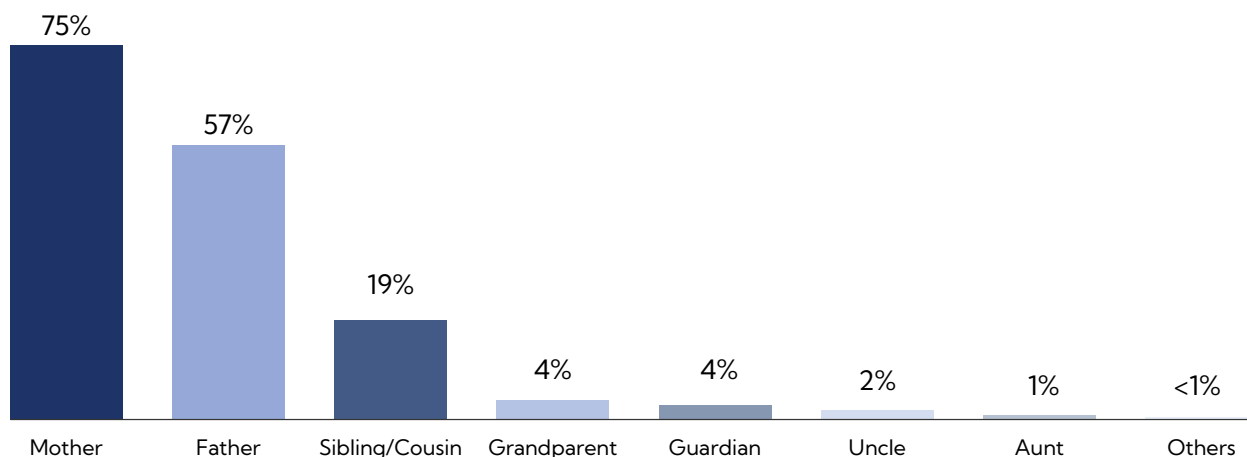
Note: Numbers may not add up to 100% due to rounding

Figure 4: Smartphone Access among Children

²Shared access refers to cases where household members other than the child also use the smartphone which the child uses the most

³Dedicated access refers to cases where children alone use the device

⁴Numbers add up to more than 100% since children report sharing smartphones with multiple family members



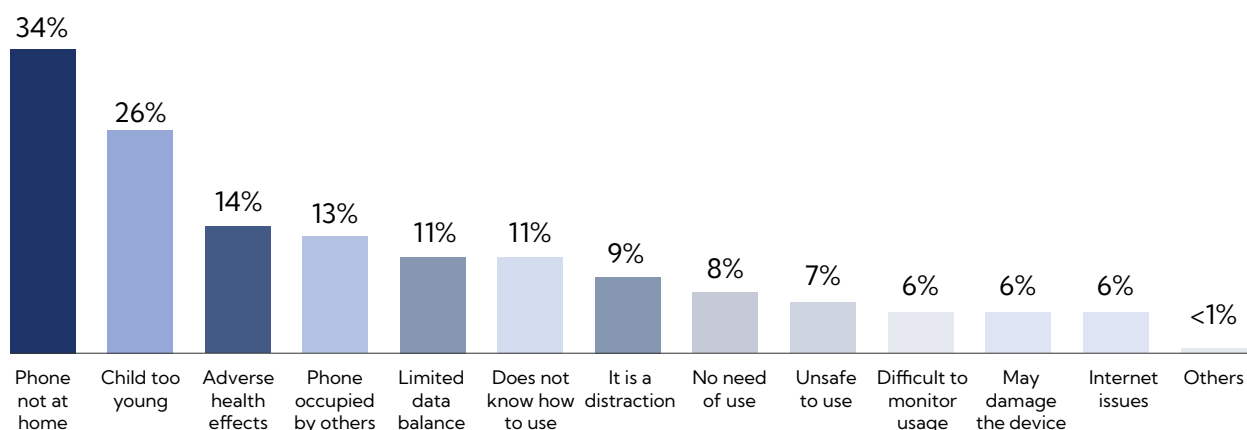
% of children | N = 9,474

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 5: Household Members with Whom Children Share a Smartphone

More children from urban households (**78%**) have access to a smartphone than their rural counterparts (**69%**). There is no significant difference in access to smartphones between government-school-going children (**74%**) and private-school-going children⁵ (**71%**) at an aggregate level; however, the degree of access for private-school-going children varies by school fee. While **64%** of private-school-going children paying a monthly school fee of less than ₹ 500 have access to a smartphone, this number increases to **74%** for those paying between ₹ 500 and ₹ 1,000 and **87%** for those paying over ₹ 1,000. Smartphone access also increases with the grade children are in; **67%** of children studying in grades 1-5 have access to a smartphone as compared to **74%** in grades 6-8 and **81%** in grades 9-12. No significant differences are observed by gender.

17% of children do not use a smartphone, despite the household owning one. Among such households, the most cited reasons include the phone not being at home (**34%**) and the child being too young to use a smartphone (**26%**).



% of children not allowed to access smartphone(s) despite availability in household | N = 1,560

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 6: Reasons for Children Not Accessing Smartphone(s) Available in Household

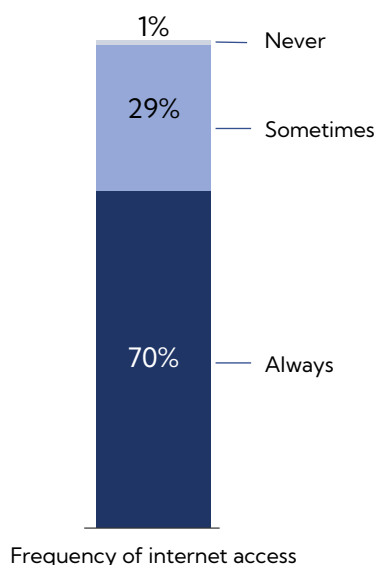
⁵The category "private school-going children" includes children enrolled in both private-unaided and government-aided schools. These categories are combined in the household survey analysis due to similarities in fee structures

Access to Internet

99% of children with smartphone access have access to the internet on the device they use. While **70%** of them always have internet access on their device, **29%** cite that they sometimes have internet access. Only **~1%** of children report never having internet access.

78% of children in grades 9-12 always have internet access as compared to **71%** of children in grades 6-8 and **61%** of children in grades 1-5. No significant differences are observed by settlement type, gender or type of school attended.

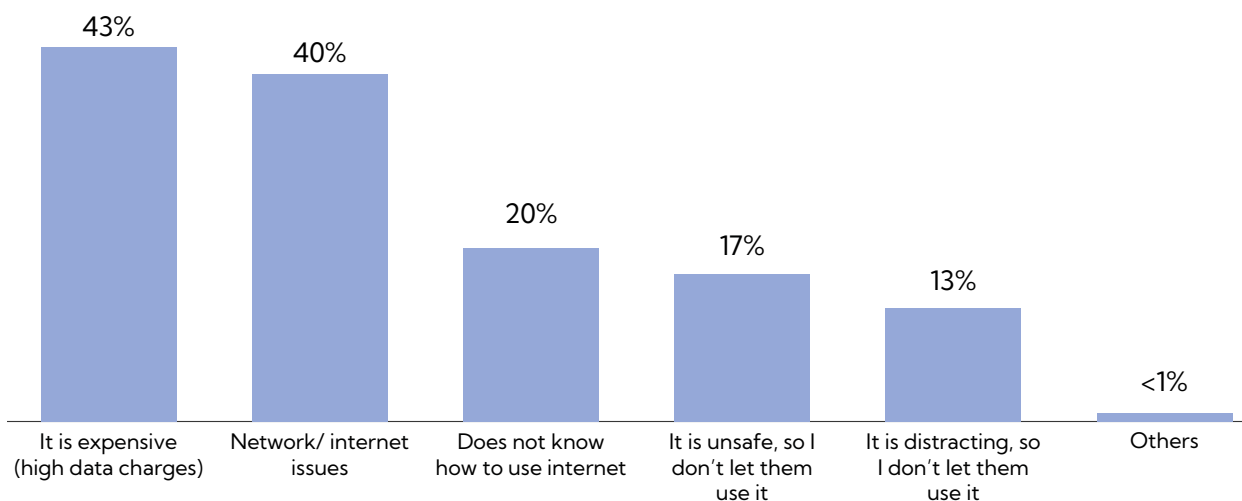
Despite widespread access, **69%** of children with smartphone access face some issue while using the internet on their smartphones. The most common challenges include high data charges (cited by **43%**) and network challenges (cited by **40%**).



% of children with access to smartphone(s) | N = 9,933

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 7: Internet Access for Children with Smartphone Access



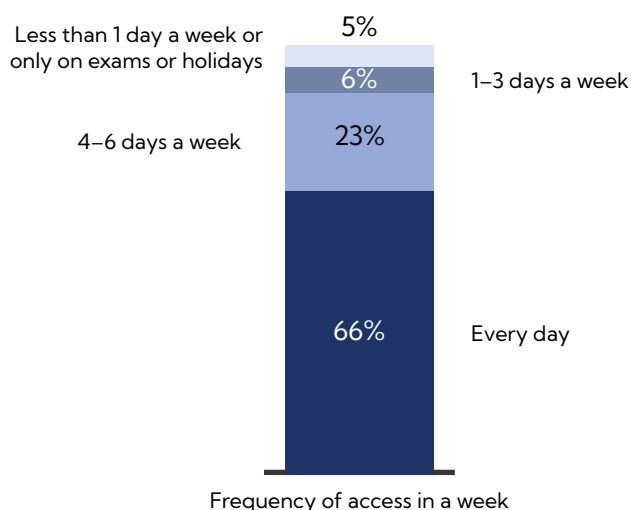
% of children with access to smartphone(s) | N = 9,933

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 8: Challenges Faced by Children When Accessing Internet on Smartphone

Frequency and Duration of Access

66% of children who have smartphone access use the device every day. A further **23%** use the device four to six days a week.



% of children with access to smartphone(s) | N = 9,933

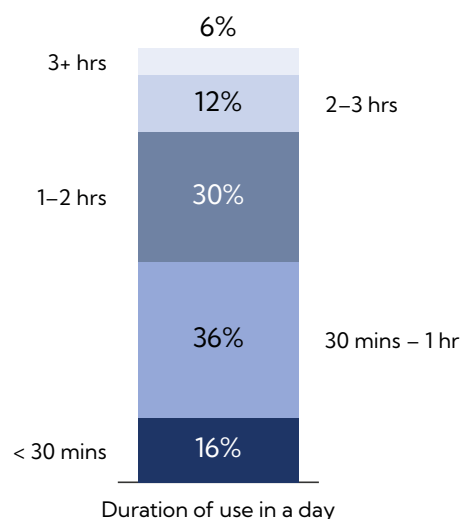
Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 9: Frequency of Children's Smartphone Usage

On average, older children, boys, government school-going children and children from smaller households spend more time using smartphones in a day. Children in grades 9-12 use their smartphones for **1.6** hours, on average, as compared to **~1.2** hours for children in lower grades. Male children use their smartphone for **1.5** hours on average, as compared to **1.2** hours for female children. While government-school-going children use their smartphone for **1.4** hours, private-school-going children use it for **1.2** hours. On average, children from households with only one child use smartphones for **1.4** hours and those from multiple-child households use their smartphones for **1.2** hours. No significant differences are observed in the duration of usage between children in urban and rural settlements.

Older children are more likely to use smartphones daily, with **73%** of children in grades 9-12 being daily users compared to **60%** of children attending lower grades. No significant differences are observed by settlement type, gender or type of school attended.

Typically, 84% of children use their smartphones for at least 30 minutes and 48% use it for at least one hour, in a day. The average duration of smartphone usage for children with access to a device is **~1.3** hours, in a day.



% of children with access to smartphone(s) | N = 9,933

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 10: Duration of Children's Smartphone Usage on a Typical Day



My son is 10 years old. After my husband comes back from work, he uses my husband's smartphone for a maximum of half an hour. I don't allow him to use the phone beyond that and it is only for studying.

Savithri, Parent, Tamil Nadu

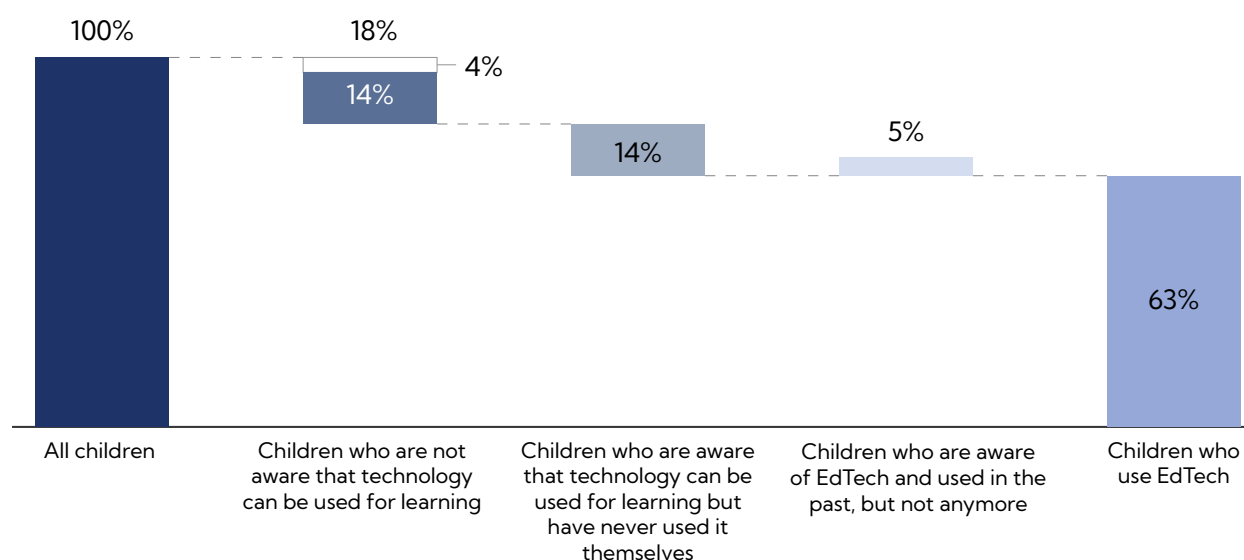


Usage of EdTech

EdTech Awareness and Usage

82% of children are aware of EdTech. A higher share of children from urban areas (**87%**) are aware of EdTech, as compared to rural areas (**77%**). Awareness also rises with age; **94%** of children in grades 9-12 are aware of EdTech as compared to **86%** in grades 6-8 and **68%** in grades 1-5. No significant differences are observed based on gender or type of school attended.

63% of children are current users of EdTech. While **5%** of children report having used EdTech in the past but do not anymore, **14%** of children, despite being aware of EdTech, have never used it. Following the same patterns as awareness, uptake is higher amongst urban areas (**71%** of children from urban areas use EdTech) versus rural areas (**58%**). Uptake also rises with age; **79%** of children in grades 9-12 use EdTech vs **68%** of those in grades 6-8 and **48%** of those in grades 1-5. No significant differences are seen among children from different school types or by gender.

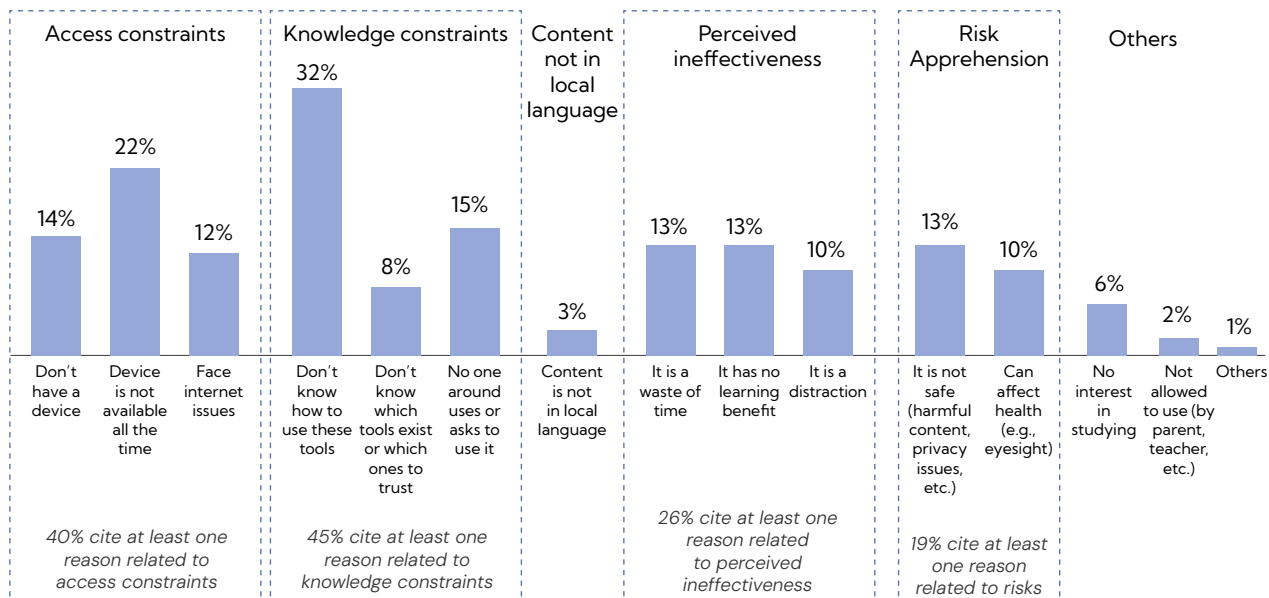


% of children | N = 12,500

Note: Numbers may not add up to 100% due to rounding; White sub-segment represents 4% of respondents who responded "I don't know" or refused to answer the question.

Figure 11: Awareness and Adoption of EdTech Among Children

Top reasons cited by children who are aware of EdTech but do not use it are constraints related to knowledge (**45%**) and access (**40%**).



% of children who know about EdTech but do not currently use it | N = 2,446

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included. (2) Respondents to this question refer to both children who are aware of EdTech and have never used it, and children who have used EdTech in the past but do not at present.

Figure 12: Reasons Cited for Children Who Do Not Use EdTech Despite Being Aware of its Usage

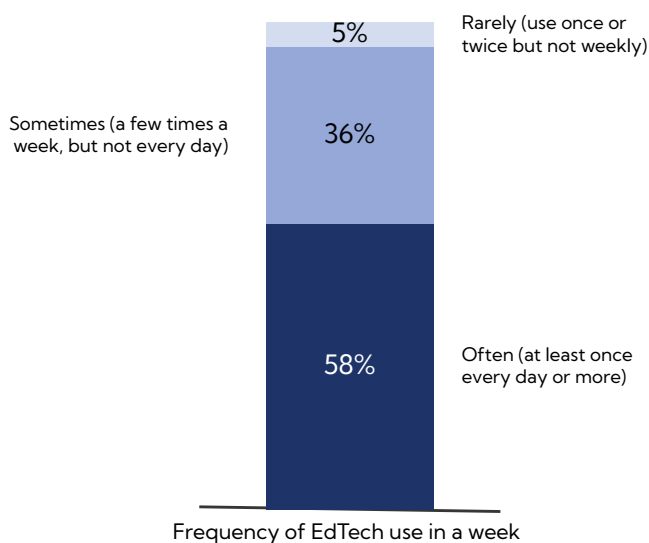
My family does not allow the use of smartphones for learning. They have set up some rules. Their view is that if I have any doubts, I should go to the teacher and that a mobile phone is not required for it. Their fear is that if I use smartphone, I might get distracted and not perform well on exams.

Jayesh, Grade 10 student, Gujarat

Frequency of EdTech Usage

While **58%** of children who use EdTech do so daily, **36%** use it only a few times a week. **5%** of EdTech-using children report using it rarely.

A greater share of older children and private-school-going children report using EdTech daily. **63%** of children in grades 9-12 use EdTech daily, as compared **52%** in grades 1-5.⁶ **61%** of private-school-going children use EdTech daily, as compared to **55%** attending government schools. No significant differences are observed by gender or settlement type.



% of EdTech-using children | N = 7,866

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

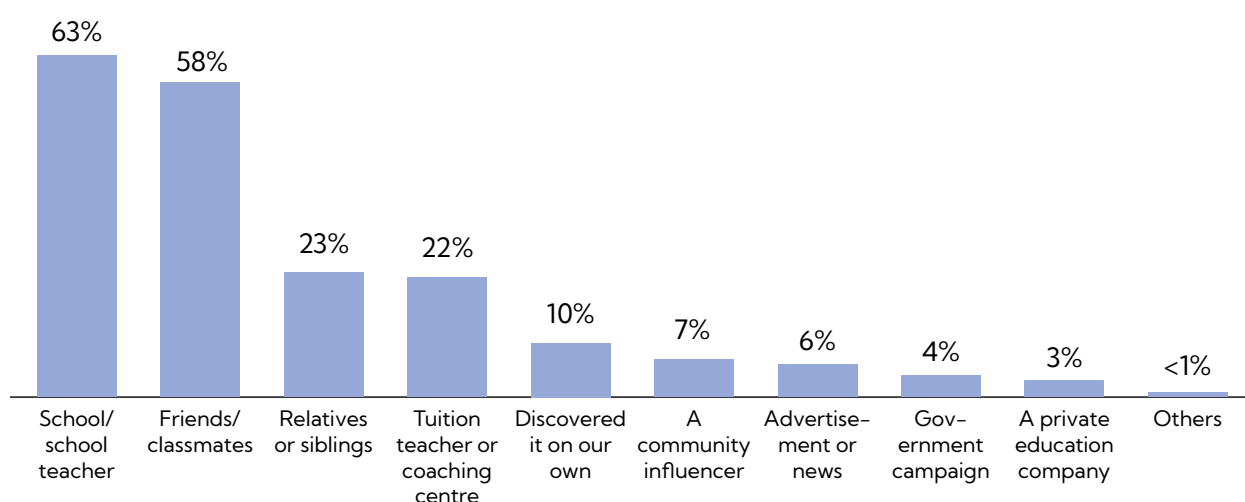
Figure 13: Frequency of EdTech Usage Among Children

⁶ 57% of children in grades 6-8 use EdTech daily; however, this difference is not statistically significant compared to children in other grades

Drivers of EdTech Discovery and Usage

79% of EdTech-using children started using EdTech after the advent of the COVID-19 pandemic. This stands true for children across all grades.

Most EdTech-using children first started using it on the recommendation of their school or teachers (**63%**), friends and classmates (**58%**), relatives and siblings (**23%**), or tuition teachers (**22%**). Only **10%** of EdTech-using children discovered it on their own, while less than **10%** came across it on channels such as news, government campaigns or local CSO campaigns.

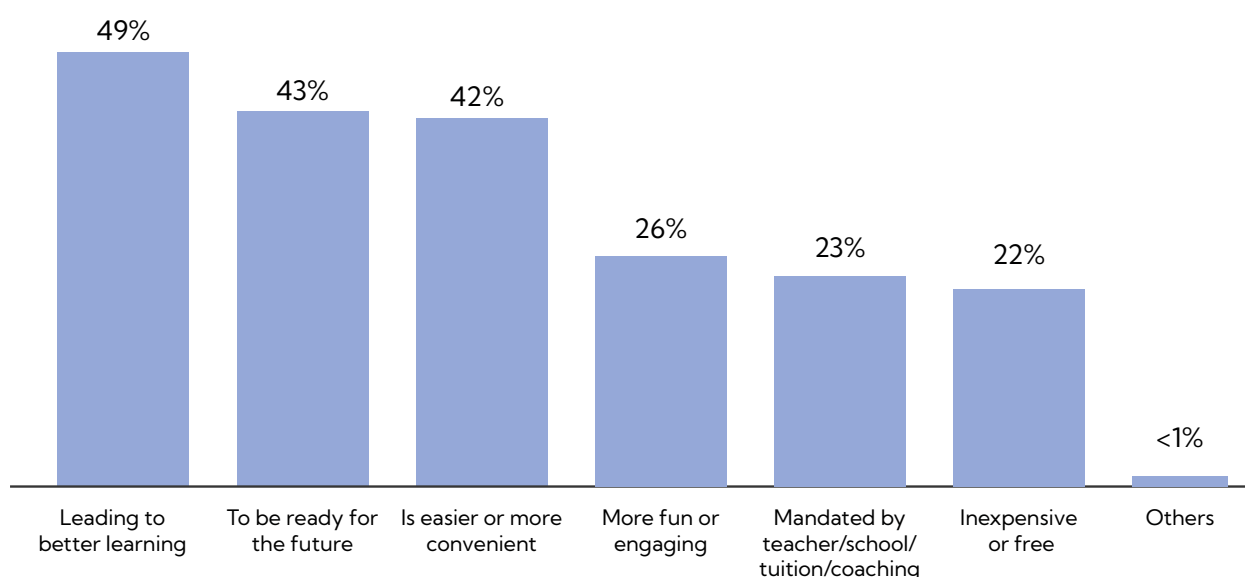


% of EdTech-using children | N = 7,866

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 14: Channels of EdTech Discovery

The most commonly cited drivers for continued usage of EdTech include improving learning (**49%**), getting ready for the future (**43%**) and for ease of use and convenience (**42%**). Other reasons include EdTech being fun and engaging (**26%**), mandated use by teachers/school/tuition/coaching classes (**23%**) and its inexpensive or free nature (**22%**).



% of EdTech-using children | N = 7,866

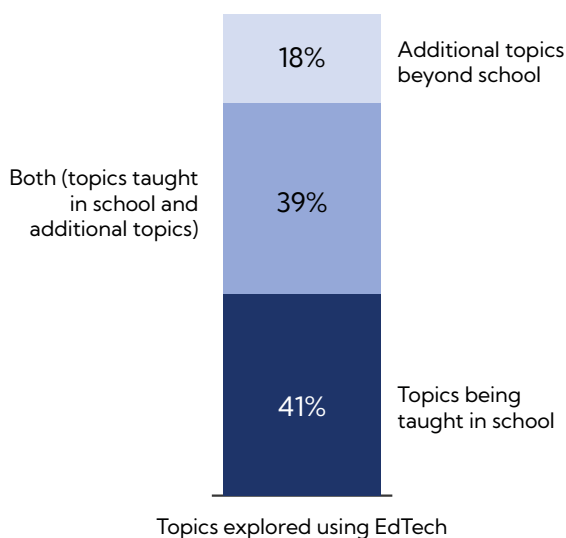
Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 15: Drivers of Continued EdTech Usage

EdTech Use Cases and Commonly Used Tools

81% of EdTech-using children leverage it to support schoolwork. While **41%** of them use it exclusively for schoolwork, **39%** use it for both schoolwork and additional topics. Only **18%** use it solely for additional topics beyond school syllabus.

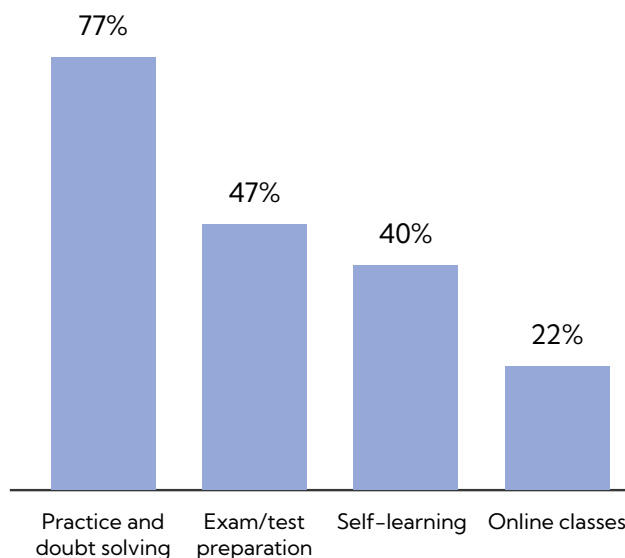
Top use cases for EdTech include practice and doubt solving (**77%**), test preparation (**47%**) and self-learning of new languages or skills (**40%**). Only **22%** use it to attend online classes, though discussions during focus group discussions indicated that many used to attend on-line/virtual classes during the COVID-19 pandemic.



% of EdTech-using children | N = 7,866

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 16: Type of Topics Explored through EdTech



% of EdTech-using children | N = 7,866

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Responses for individual activities have been combined into the above categories.

Figure 17: Use Cases of EdTech

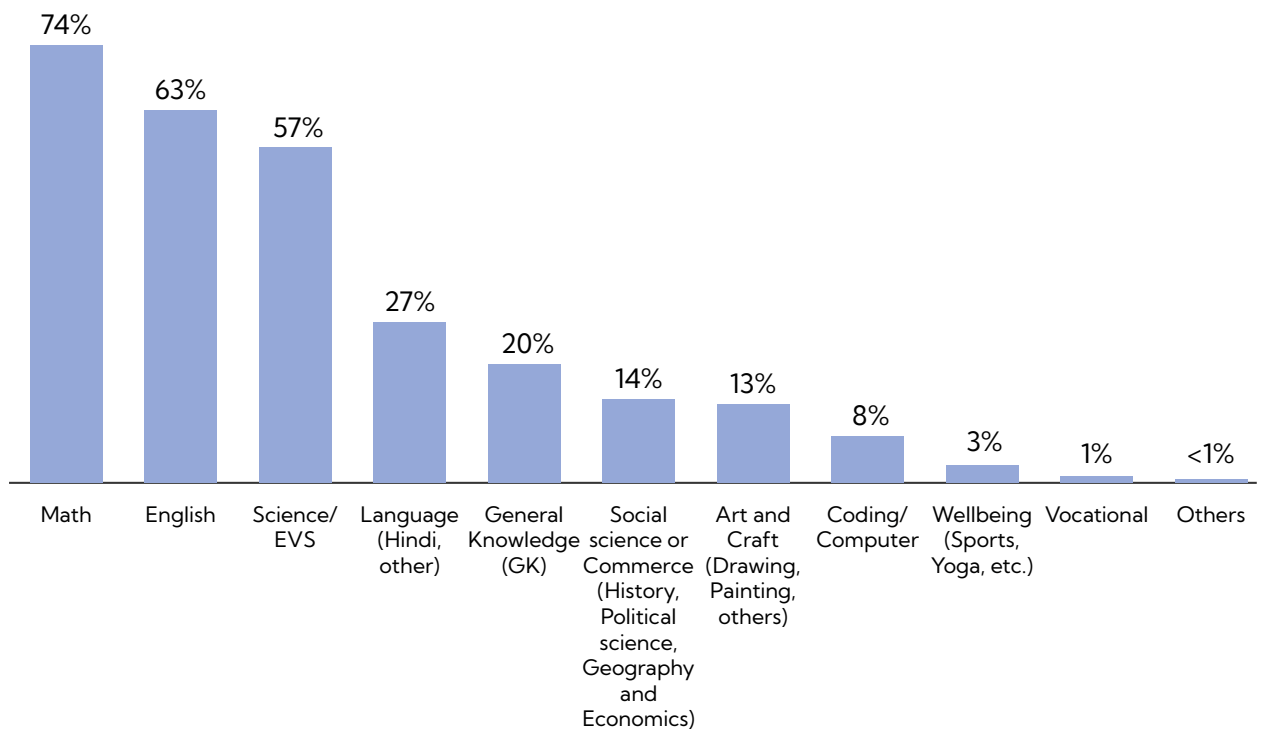
“

My daughter had to make a geometrical wall hanging for a school project. We don't understand what it is. She just searched it on YouTube and made it.

Neha, Parent, Gujarat

”

Children most commonly use EdTech to study Mathematics (used by **74%**), English (used by **63%**) and Science/Environmental Studies (EVS) (used by **57%**).

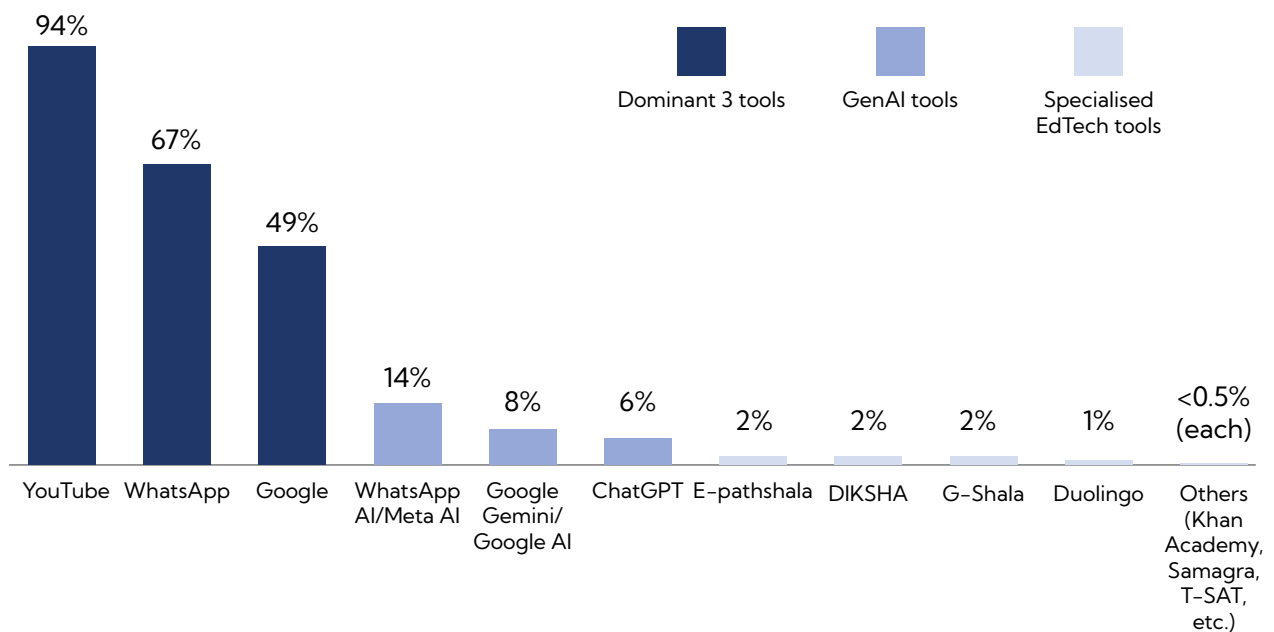


% of EdTech-using children | N = 7,866

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 18: Subject-distribution for EdTech Usage Among Children

Among EdTech-using children, the most commonly used tools are YouTube (94%), WhatsApp (67%) and Google (49%). While GenAI tools form a distant second tier, dedicated education apps are far less frequently used. Only 6% of EdTech-using children use specialised EdTech tools.



% of EdTech-using children | N = 7,866

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 19: Commonly Used Apps for Learning



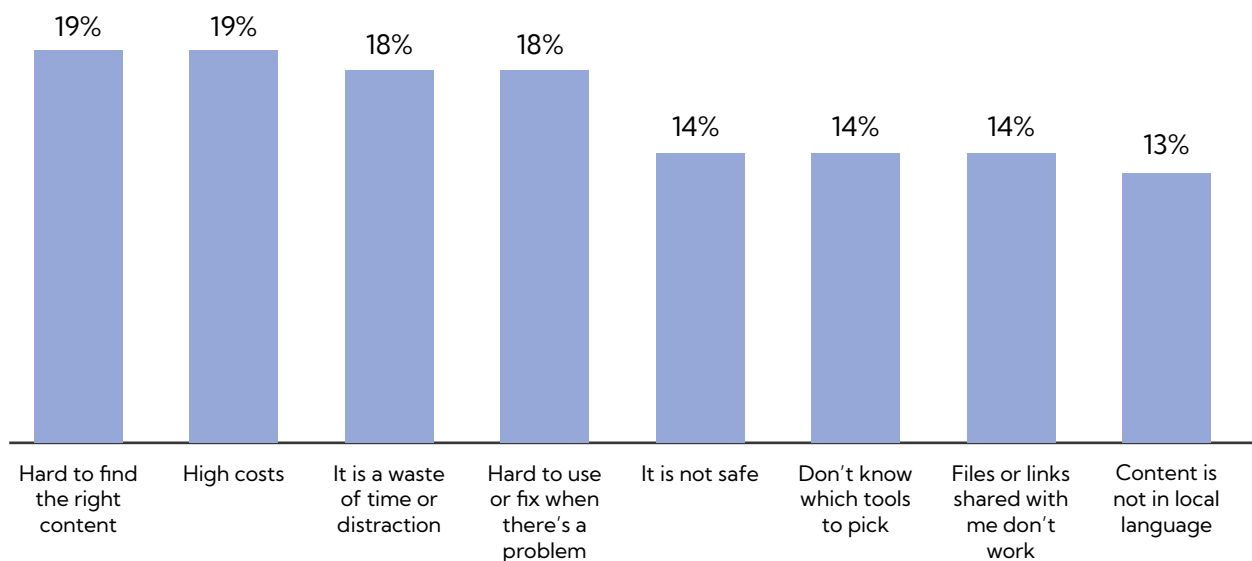
There are videos on YouTube Shorts that we can use to understand concepts or specific questions for exams.

Prerna, Grade 10 student, Uttarakhand



Challenges Faced While Using EdTech

Two-thirds (**67%**) of EdTech-using children face some challenges while using technology for learning. The most frequently cited challenges include difficulty finding suitable content (**19%**), high cost of data subscriptions (**19%**), technology being a distraction (**18%**) and difficulty using EdTech tools (**18%**).



% of EdTech-using children | N = 7866

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

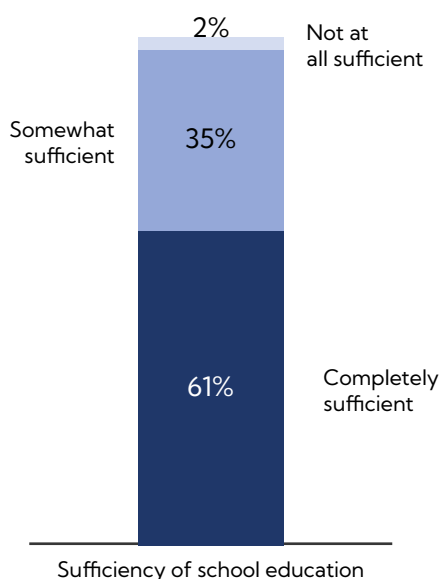
Figure 20: Challenges Faced While Using EdTech (Past 12 Months)

User Sentiment around Education and EdTech

Perceptions of School Education and Learning Support

While 61% of parents feel that their child's in-school education is completely sufficient for their learning, 35% feel it is somewhat sufficient. Only 2% feel that it is not sufficient at all.

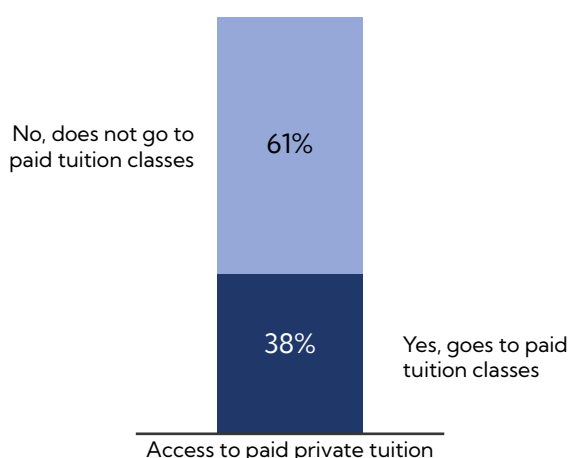
A greater share of urban parents (66%) feel that their child's in-school education is completely sufficient, as compared to those living in rural settlements (59%). Similarly, a greater share of parents with children studying in private schools (65%) report that in-school education is completely sufficient as compared to parents of children in government schools (59%). No significant differences are observed by a child's grade or gender.



% of respondents | N = 12,500

Note: (1) Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Numbers represent perception of parents with respect to children

Figure 21: Perceptions around Sufficiency of School Education



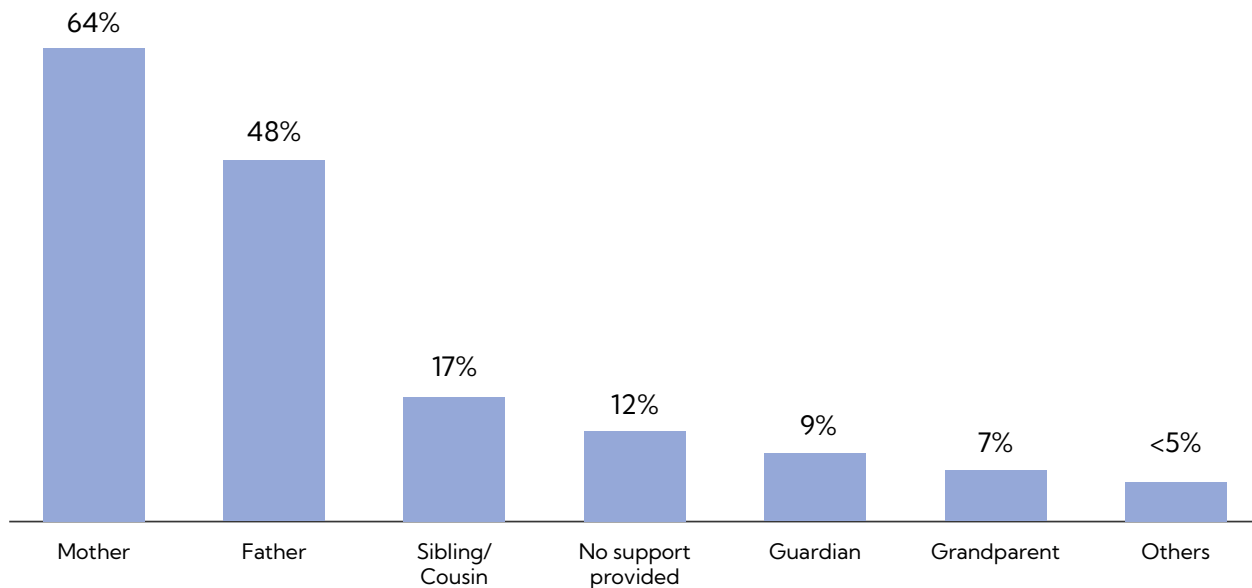
% of children | N = 12,500

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 22: Access to Paid Private Tuition Outside of School

38% of children attend paid private tuition after school. A greater share of private-school-going children (42%) attend private tuition, as compared to government-school-going children (35%). No significant differences are observed by gender, settlement type or the child's grade.

Nine in ten (**87%**) children receive some form of learning support at home, from family members. The support is most often provided by mothers (**64%**) and fathers (**48%**), followed by siblings or cousins (**17%**).

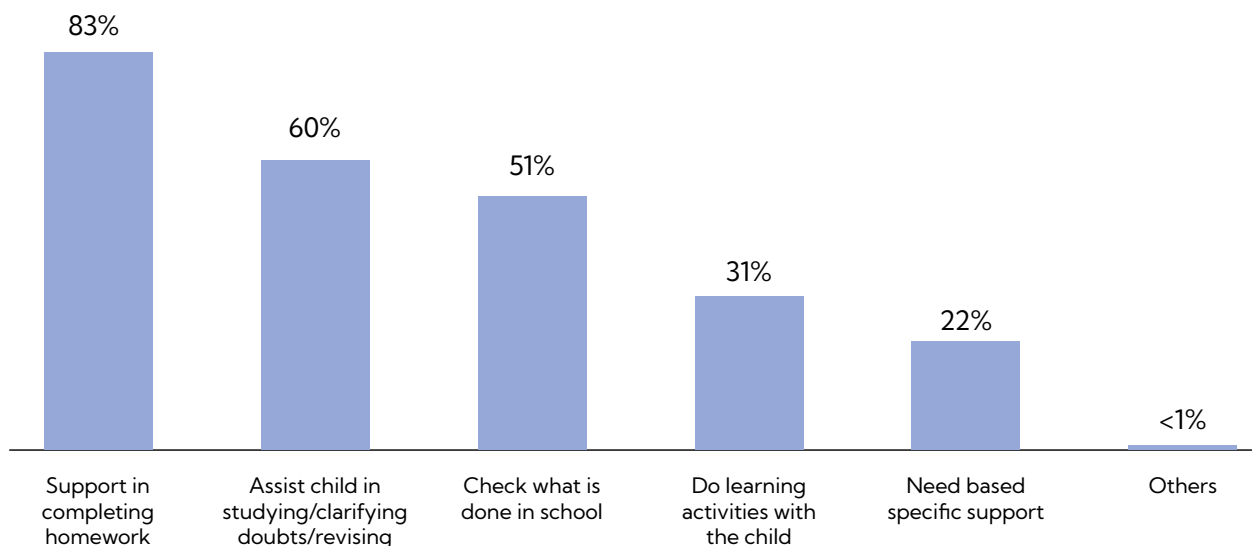


% of children | N = 12,500

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 23: Access to Learning Support at Home

The most commonly offered forms of support are assistance with completing homework (**83%**), helping with studying or clarifying doubts (**60%**) and monitoring the child's school activities (**51%**). A smaller share (**31%**) report doing learning activities with the child.



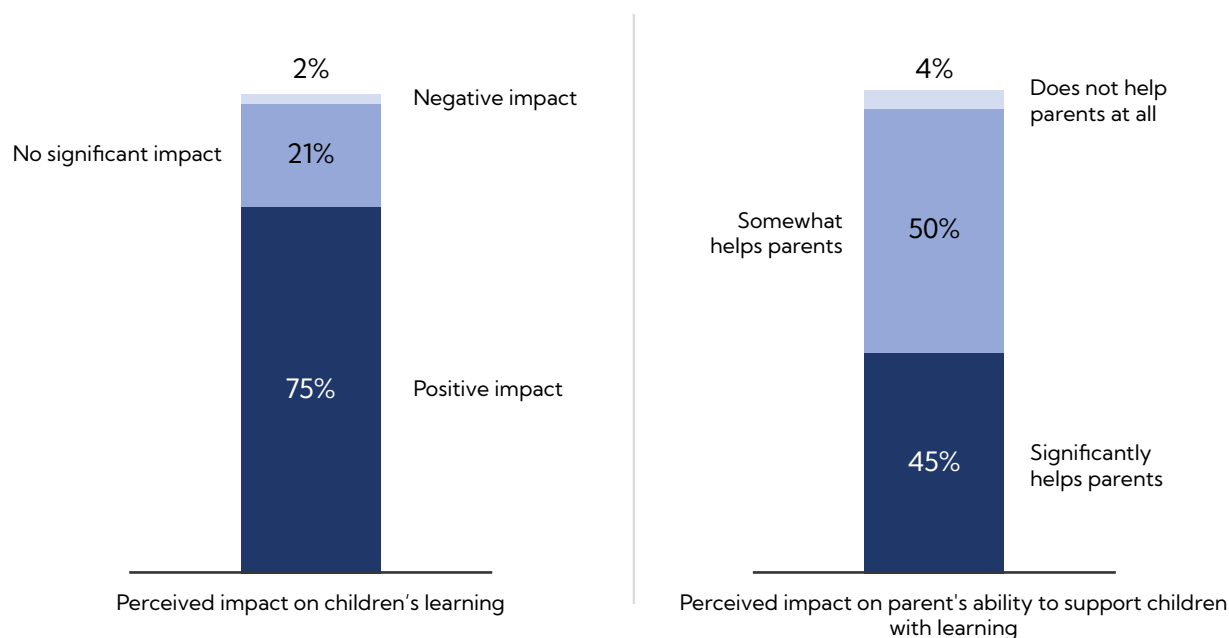
% of children who were provided support at home | N = 11,371

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 24: Nature of Learning Support at Home

Perceived Impact of EdTech Usage

For EdTech-using children, 75% of respondents⁷ report improved learning outcomes resulting from EdTech usage. 95% of respondents feel that EdTech helps parents better support their children with learning.



% of EdTech-using children (or their parents) | N = 7,866

Note: (1) Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Numbers represent perception of parents with respect to children for children aged 6–13 and perception of children themselves for those aged 14–18

Figure 25: Perceived Impact of EdTech Usage

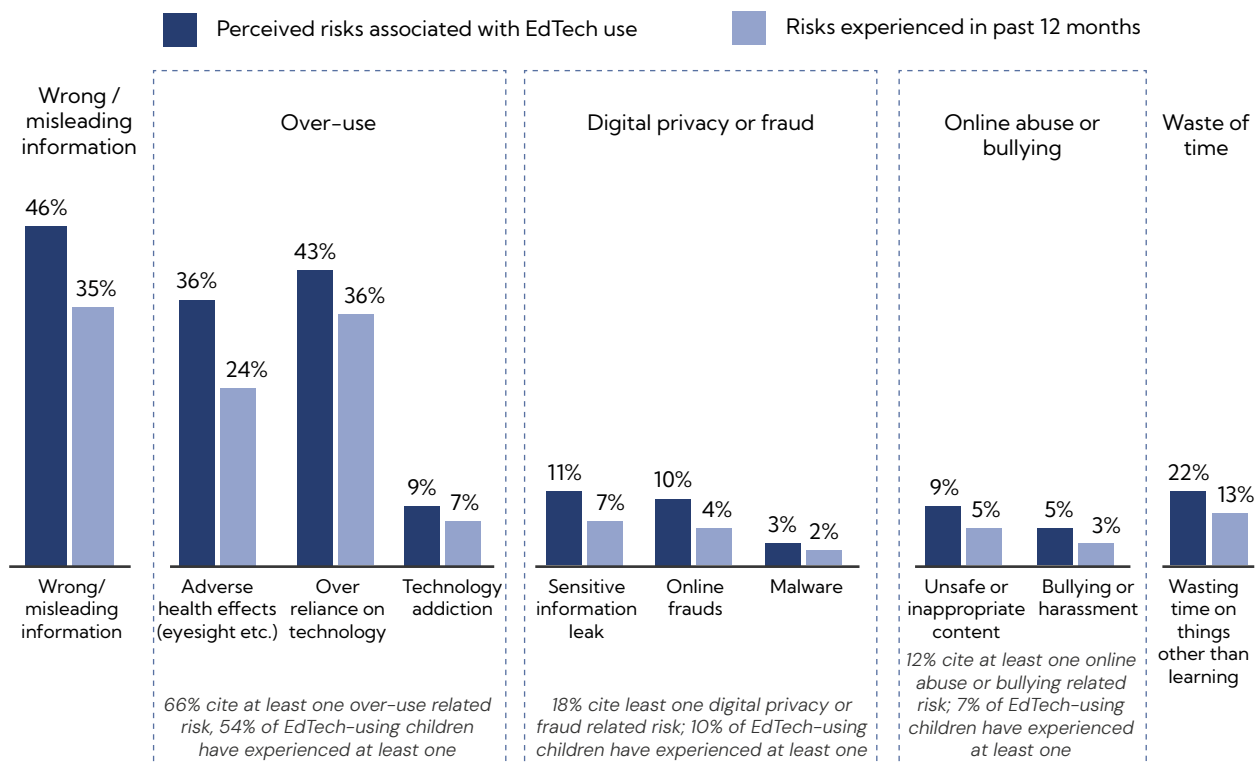
Perceptions of EdTech's impact are broadly positive across households with EdTech-using children, with no statistically significant differences observed by school type, the child's grade, gender or settlement type. However, perceptions vary by maternal education. **29%** of respondents, in cases where the child's mother cannot read or write, report that EdTech significantly helps parents support their child's learning, compared to **46%** among those where the mother has at least basic literacy or numeracy skills.

Perceived Risks Associated with EdTech Usage

60% of respondents agree that the use of EdTech by children is associated with risks. While **24%** neither agree nor disagree with this assertion, **12%** explicitly disagree. No significant differences in risk perception were found by demographic factors, including gender and age.

64% of respondents report that EdTech-using children experienced at least one risk in the past 12 months. Top risks acknowledged and experienced include overuse (acknowledged for **66%** and experienced by **54%** of EdTech-using children) and wrong information (acknowledged for **46%** and experienced by **35%**).

⁷For perception-based questions, responses are reported at the respondent level since for children aged 6–13, these questions were answered by parents or caregivers, while children aged 14–18 responded directly

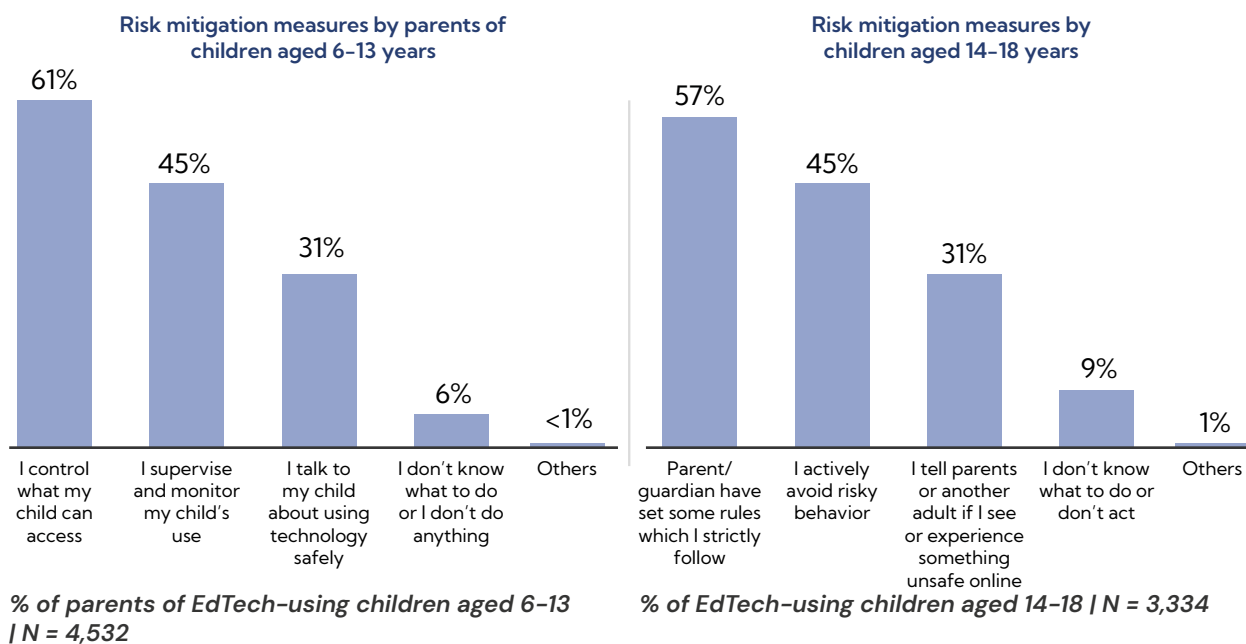


% of EdTech-using children (or their parents) | N = 7,866

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Numbers represent perception of parents with respect to children for children aged 6-13 and perception of children themselves for those aged 14-18

Figure 26: Perception and Experience of Risks Associated with EdTech Usage

For EdTech-using children, **74%** of respondents took some protective measures. These include setting clear rules and restrictions for permitted applications and content, adult supervision, avoiding risky behaviour and discussing risks with adults.



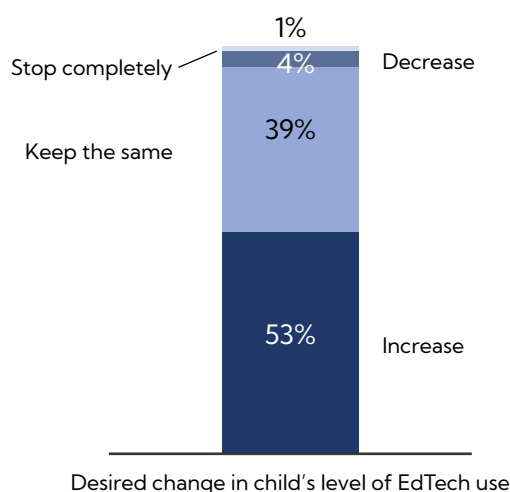
Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 27: Measures Taken to Reduce Risks from EdTech Usage

Despite taking protective measures, only half (**54%**) of respondents who perceive risks feel fully confident about dealing with them, while **40%** say they feel 'somewhat equipped' and **5%** report not feeling confident at all.

Support for EdTech Adoption

84% of respondents report that they would recommend EdTech to others. While **53%** of respondents report that they would like to increase the use of EdTech, **39%** report that they would like to maintain their current. **6%** say that they would like to decrease EdTech use or stop using it altogether.

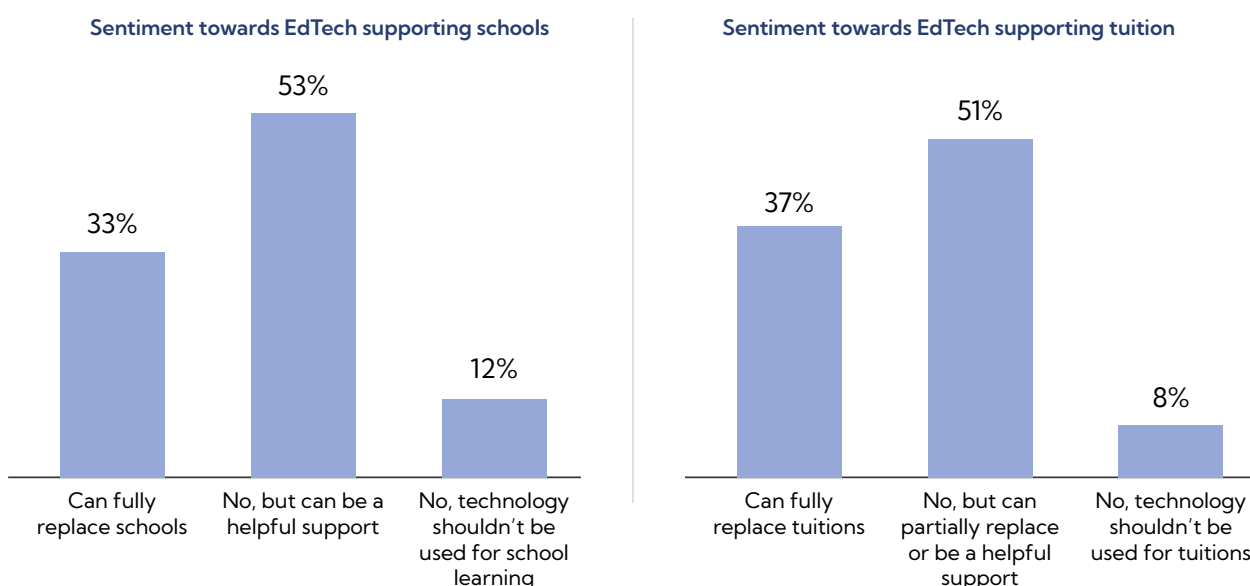


% of EdTech-using children (or their parents) | N = 7,866

Note: (1) Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included (2) Numbers represent perception of parents with respect to children aged 6–13 and perception of children themselves for those aged 14–18

Figure 28: Sentiment Around the Extent of Children's EdTech Usage

Among respondents for EdTech-using children, **53%** believe technology can serve as a helpful support for the existing schooling system, while **33%** believe it can fully replace schools. However, **12%** believe that technology should not be used for school learning. Similarly, **51%** of respondents believe that technology can be a helpful support for tuitions, while **37%** believe that technology can fully replace tuitions. A small share (**8%**) believe that technology should not be used for tuitions.



% of EdTech-using children (or their parents) | N = 7,866

Note: (1) Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included (2) Numbers represent perception of parents with respect to children aged 6–13 and perception of children themselves for those aged 14–18

Figure 29: Sentiment Towards EdTech's Potential to Support Schools and Tuitions

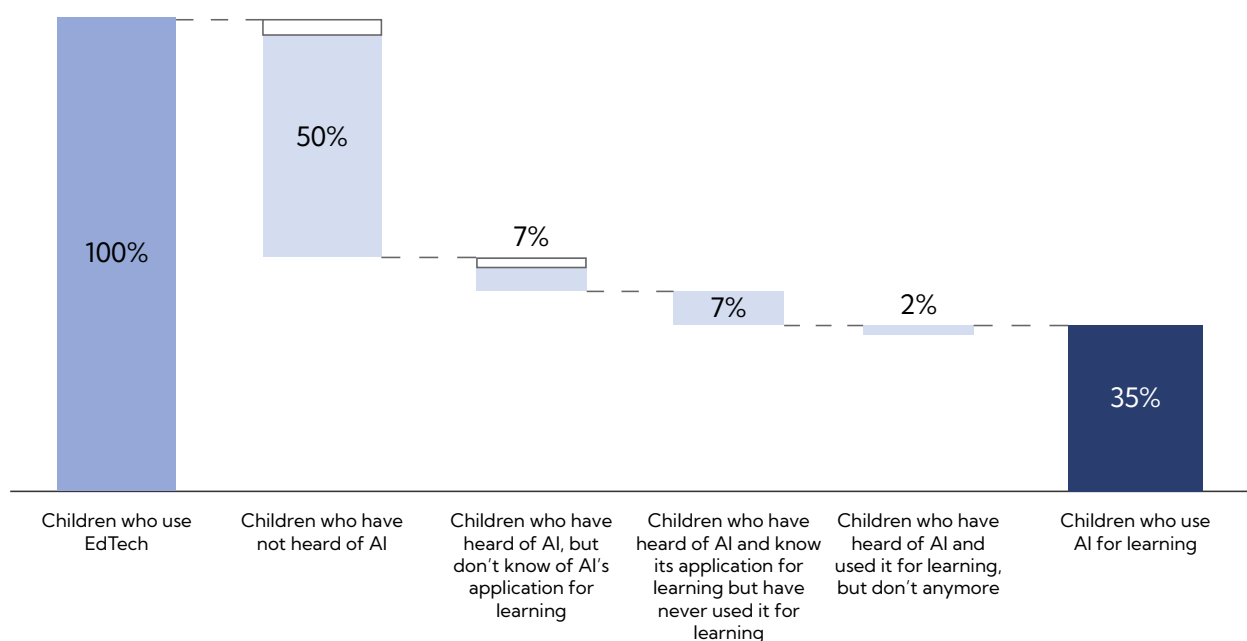
Usage of GenAI for Learning

Awareness and Usage of GenAI

50% of EdTech-using children have heard of GenAI and 44% know of its application for learning. Of those who are aware of GenAI, **85%** say that they understand how it works. However, **72%** (over two-thirds) of them mistake it for an internet search application.

Awareness of GenAI varies by demographic characteristic. **53%** of EdTech-using children in urban areas have heard of GenAI, as compared to **42%** of EdTech-using children in rural areas. Similarly, awareness also increases with grade level, rising from **36%** among children in grades 1-5, to **49%** in grades 6-8 and **60%** in grades 9-12. Differences are also observed by maternal education; **32%** of EdTech-using children whose mothers cannot read or write, report having heard of AI, as compared to **50%** among those whose mothers have basic education and **57%** among those whose mothers have college-level education⁸. No significant differences are observed by school type and gender.

35% of EdTech-using children report using GenAI for learning-related activities. **96%** (almost all) children who use GenAI for learning do so multiple times a week, while **69%** use it every day.



% of EdTech-using children | N = 7,866

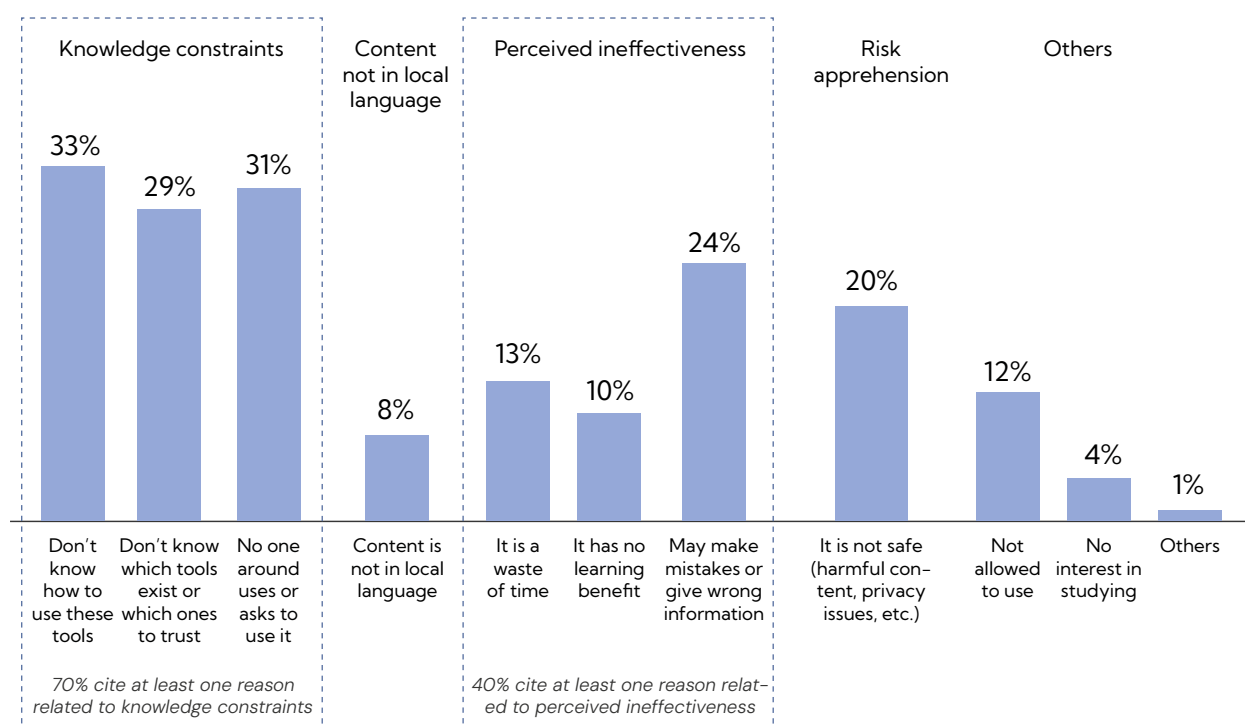
Note: Numbers may not add up to 100% due to rounding. White sub-segments in bar represents ~2% of EdTech-using children who responded "I don't know" or refused to answer if they've heard of GenAI and if it can be used for learning (each).

Figure 30: Awareness and Adoption of GenAI Among Children

⁸While differences in proportions having heard of GenAI by maternal education are statistically significant between children whose mothers cannot read or write and those whose mothers have at least basic education or college-level education, the difference between children whose mothers have basic education and those whose mothers have college-level education (50% vs 57%) is not statistically significant

Similar to awareness, a higher share of older children, those from urban areas and those with more educated mothers use GenAI for learning, as compared to their peers. **42%** of EdTech-using children in grades 9-12 and **36%** in grades 6-8 use GenAI for learning, as compared to only **25%** in grades 1-5. Similarly, among EdTech users, **39%** of children in urban areas use GenAI, as compared to **32%** of children in rural areas. Usage also varies by maternal education; **21%** of EdTech-using children whose mothers cannot read or write use GenAI for learning, compared to **36%** of those whose mothers are literate. No significant differences are observed based on school type and gender of child.

Nearly **one in ten** EdTech-using children know of GenAI's use for learning but do not currently use it. The most cited challenges include constraints related to knowledge (**70%**) and perceived ineffectiveness of tools (**40%**).



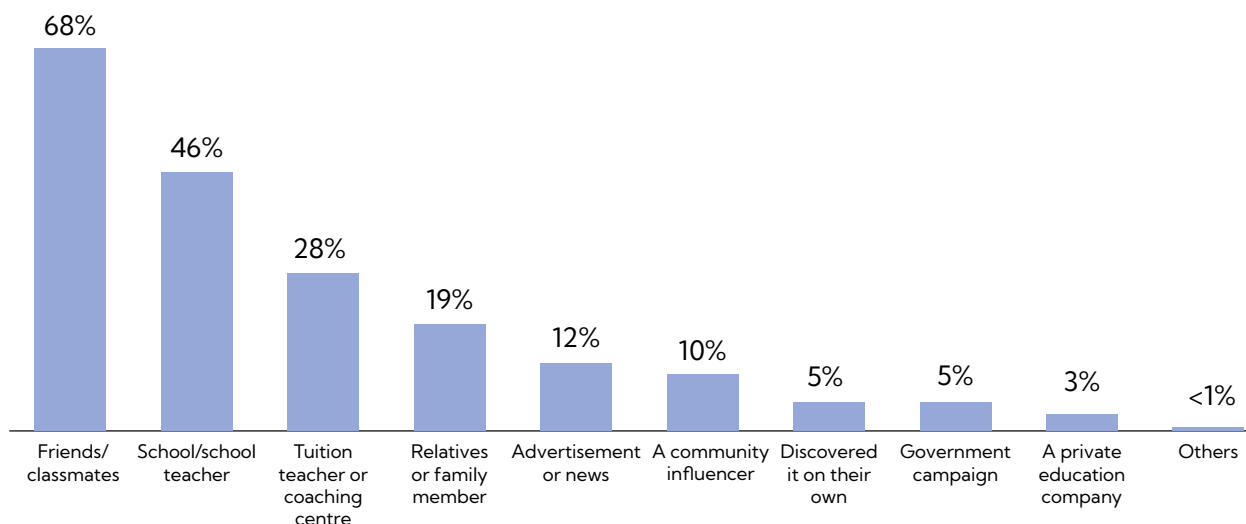
% of EdTech-using children who know of GenAI's learning applications but do not currently use it | N = 743

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Respondents to this question refer to both children who are aware of GenAI and have never used it for learning, and children who have used GenAI for learning in the past but do not at present.

Figure 31: Challenges Faced by Children Who Do Not Use GenAI Despite Being Aware of its Usage

Drivers of Discovery and Usage of GenAI

68% of GenAI-using children were introduced to it by peers, while **46%** of them heard about it from school or teachers. Tuitions and coaching centres and relatives are other notable but less frequently cited channels of discovery. Discovering GenAI tools on their own is less common.

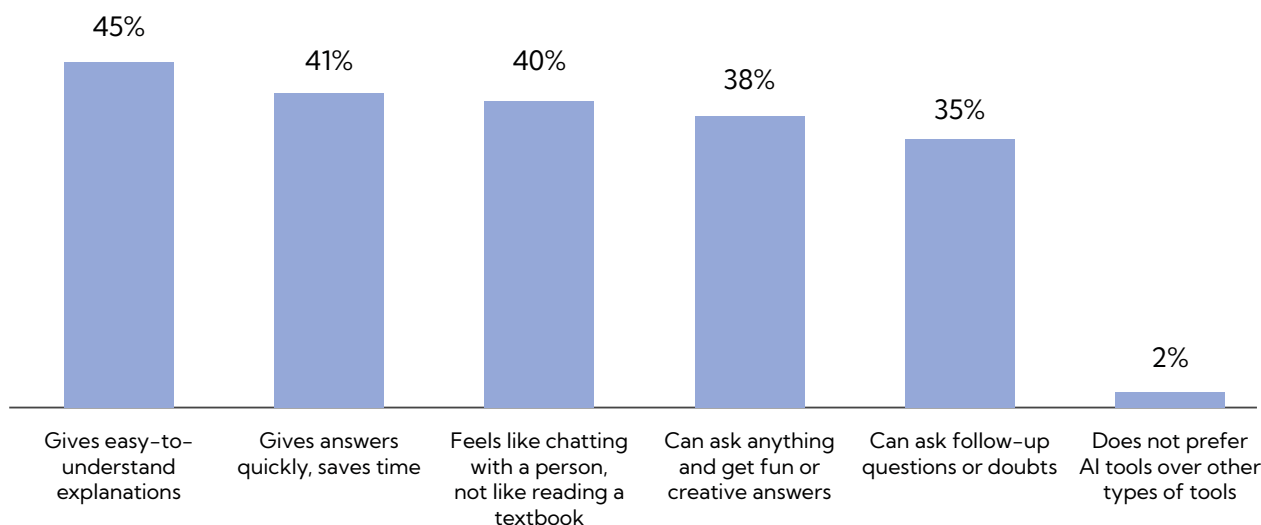


% of GenAI-using children | N = 3,038

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 32: Channels of Discovery of GenAI

Among GenAI-using children, the most commonly cited drivers of continued use include easy-to-understand explanations (45%) and receiving quick responses that save time (41%). In addition, a sizable share value the interactive nature of these tools, with 40% reporting that it feels like chatting with a person, and 38% stating that they can ask anything and receive fun or creative responses. 35% also appreciate the ability to ask follow-up questions to clear doubts. 2% also do not prefer AI tools over other types of tools.



% of GenAI-using children | N = 3,038

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included

Figure 33: Drivers of Continued Usage of GenAI



There is a fear of asking doubts to teachers. But AI feels like a friend and helps us.

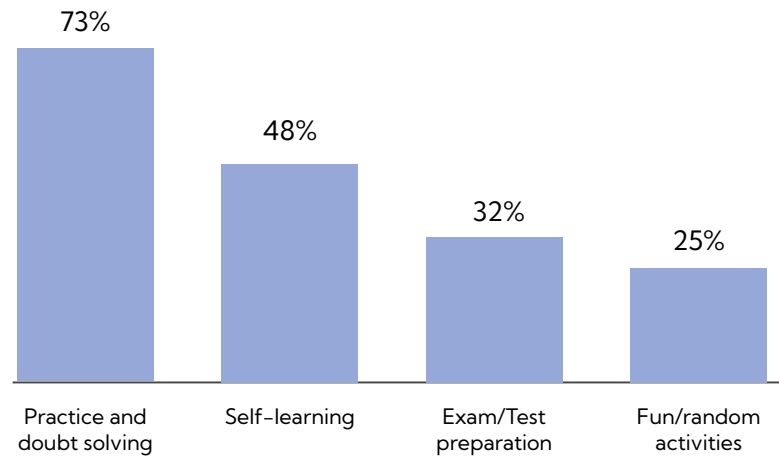
Aditya, Grade 10 student, Kerala



GenAI Use Cases

96% of GenAI-using children leverage it for school-linked learning. **59%** of users use it exclusively for schoolwork.

73% use GenAI for doubt solving and practice, including completing and submitting homework or assignments and taking notes to better understand what is taught in school. While **48%** use it to learn a new language/skill and translate content, **32%** use it for test preparation. **25%** (one in four) users report using GenAI to play with the tool and ask fun/random questions.



% of GenAI-using children | N = 3,038

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Responses for individual activities have been combined into the above categories

Figure 34: Use Cases of GenAI



I use AI to take big paragraphs and turn them into small notes that are easy to understand. It is a huge help that way.

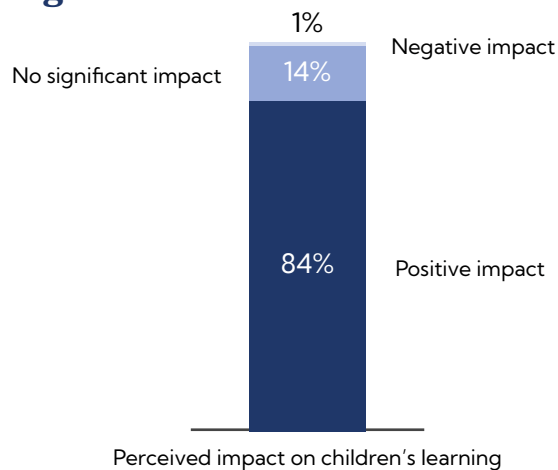
Raja, Grade 11 student, Kerala



Perceived Impact of GenAI Usage

Use of GenAI for learning is widely regarded to improve educational outcomes for children. For GenAI-using children, **84%** of respondents report improved learning outcomes from its use, while **14%** report no significant impact.

No significant differences are observed in perceived impact of GenAI use across gender, grade attended, school type, or settlement type (rural vs urban).



% of GenAI-using children (or their parents) | N = 3,038

Note: (1) Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Numbers represent perception of parents with respect to children for children aged 6–13 and perception of children themselves for those aged 14–18

Figure 35: Perceived Impact of GenAI Usage



When I don't understand the lesson, I ask AI. It explains the lesson in a simple way allowing me to understand. I have scored good marks in my exam.

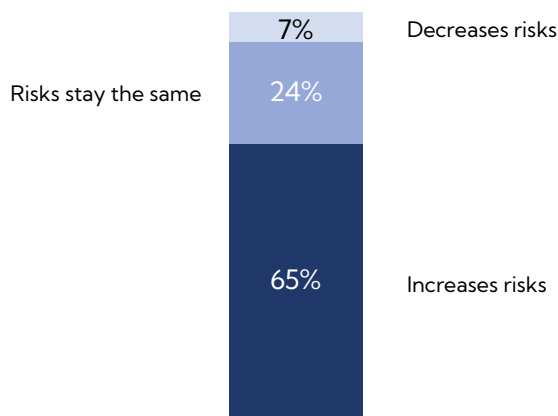
Arinjaya, Grade 9 student, Tamil Nadu



Risk Perception Associated with GenAI Usage

Among children who know GenAI can be used for learning, **65%** report that the introduction of GenAI amplifies the risks associated with EdTech use. **24%** in turn believe the risks stay the same, while **7%** believe that risks decrease.

The top risks linked to GenAI use for learning are overwhelmingly related to overuse. Among GenAI-using children, **77%** cite risks linked to overuse of technology, including health concerns, over-dependency on technology and addiction to technology. **46%** (nearly half) are concerned about GenAI giving incorrect information.

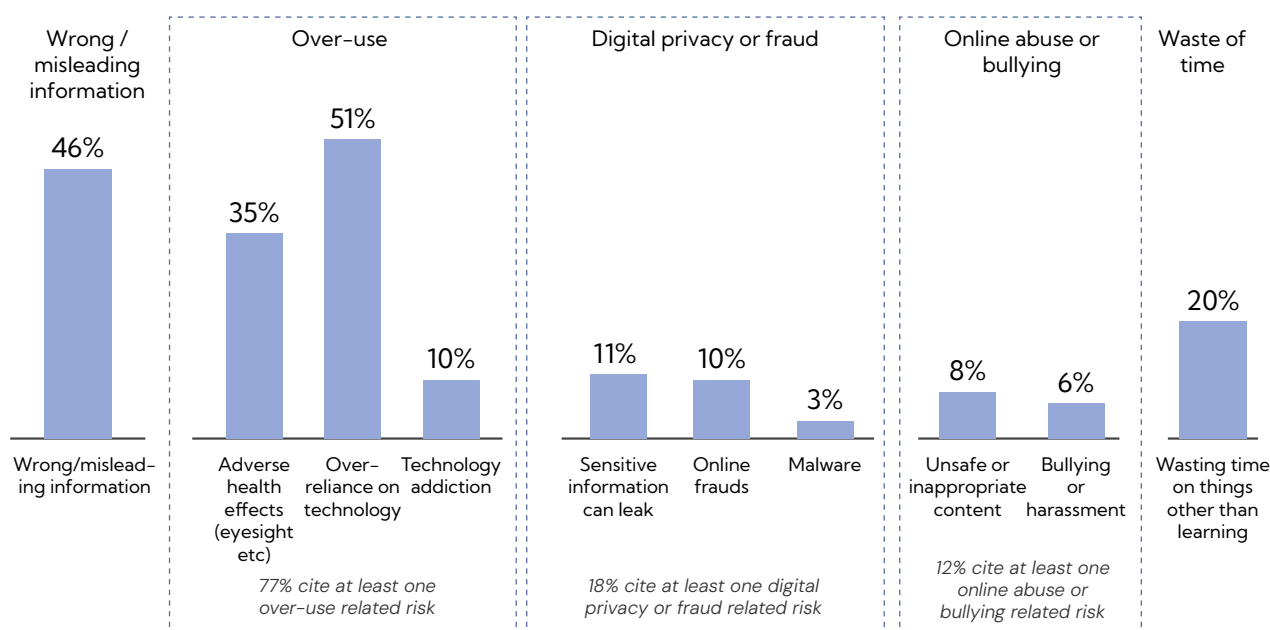


Impact of GenAI use on risks faced by children from EdTech use

% of EdTech-using children aware of GenAI application for learning (or their parents) | N = 3,781

Note: (1) Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Numbers represent perception of parents with respect to children for children aged 6–13 and perception of children themselves for those aged 14–18

Figure 36: Perception of Risk Associated with GenAI Usage as Compared to EdTech Usage



% of GenAI-using children (or their parents) | N = 3,038

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Numbers represent perception of parents with respect to children for children aged 6–13 and perception of children themselves for those aged 14–18

Figure 37: Perceived Risks Associated with GenAI Usage



If we use AI often, we may lose our ability to make decisions or take the right decisions on our own. We may become too dependent on it and hence I try to limit my use.

Poornima, Student, Uttarakhand



Teacher Survey

Findings

Access to Technology.....	50
Usage of EdTech	53
User Sentiment around Education and EdTech	58
Usage of GenAI for Teaching.....	64



Access to Technology

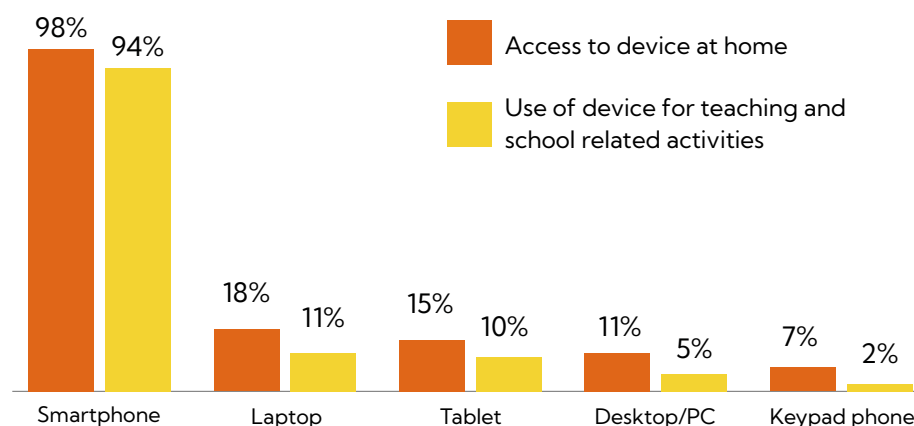
Access to Devices at Home

Nearly all, i.e., 99% of the surveyed teachers have access to at least one technology device at home and 97% use them for teaching and school-related activities. No significant differences are observed by demographic factors.¹ 98% of teachers have access to a smartphone at home; 94% use it for teaching and school-related activities. Fewer teachers have access to other devices, such as laptops, tablets and desktops, in their homes or use them for teaching and school-related activities.

22% of teachers have access to a device provided by the school or government, usually a smartphone or a tablet; 18% (of all teachers) use a school or government provided device for teaching and school-related purposes.

58% of teachers with smartphone access face one or more challenges while using their smartphones.

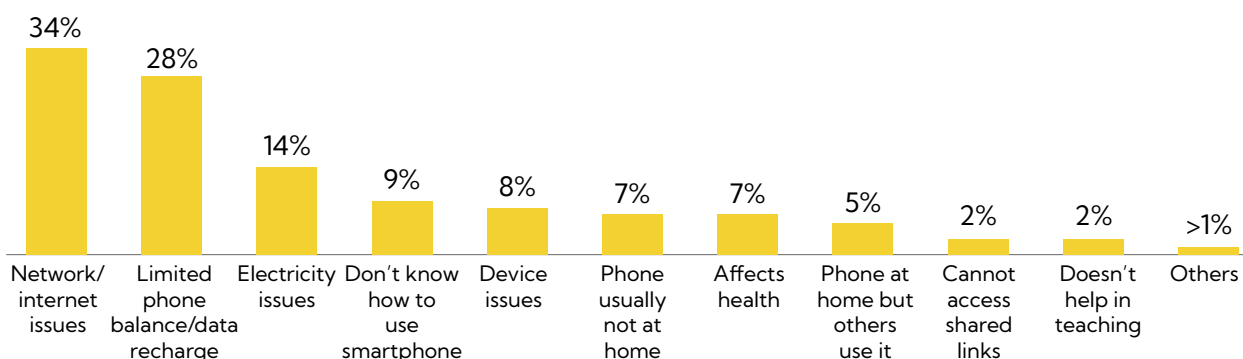
These include network or internet issues (34%), limited phone balance or data recharge (28%) and electricity issues (14%).



% of teachers | N = 2,500

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 1: Access to and Usage of At-home Devices for Teaching



% of teachers who have access to a smartphone | N = 2,457

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 2: Challenges Faced by Teachers When Using Smartphones

¹ Demographic factors analysed for teacher survey findings include gender, age, school type (government vs government aided vs private), and settlement type (rural vs urban)

Access to Devices in School

69% of teachers have access to at least one type of technology device in school. These include smart classroom systems (accessible to **44%** of teachers and used by **40%**); laptops/desktops (accessible to **34%** and used by **24%**); and tablets (accessible to **29%** and used by **21%**). No significant differences are observed by demographic factors.

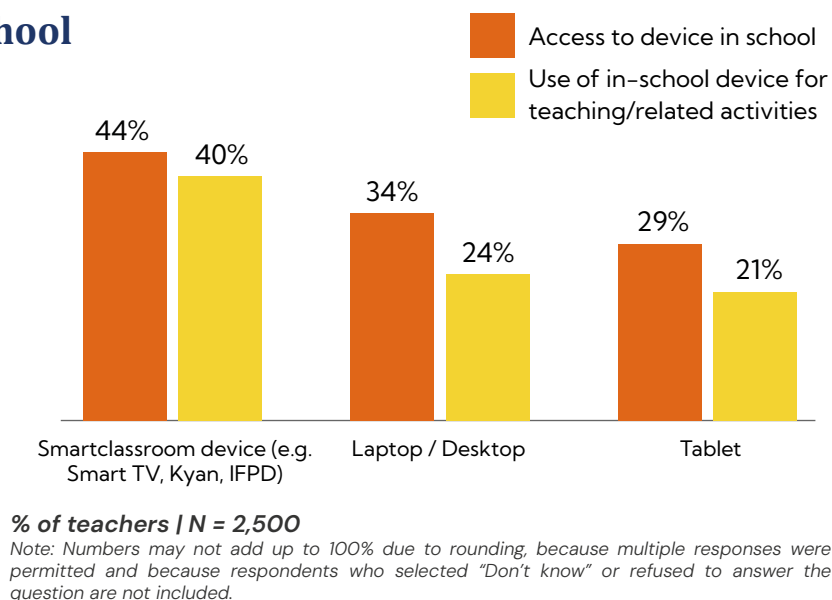


Figure 3: Access to and Usage of In-school Devices for Teaching

Among those teachers with access to in-school devices, 63% have frequent access (at least five days a week). 22% have access two to four days a week, 4% have access once a week and 10% have access less than once a week.

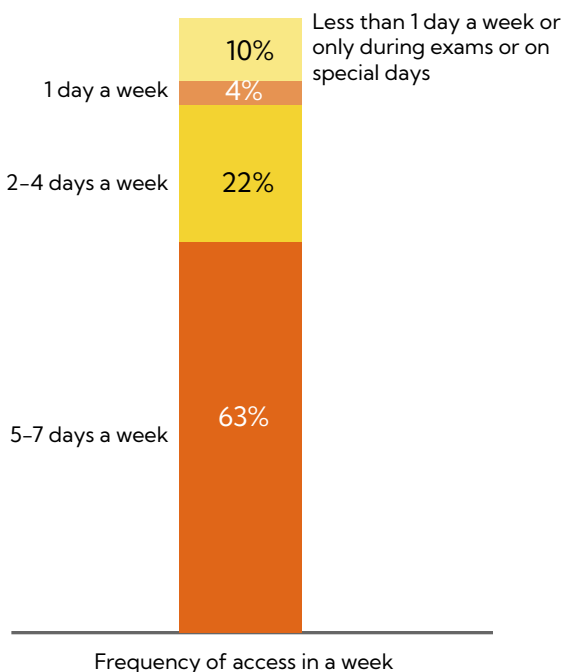
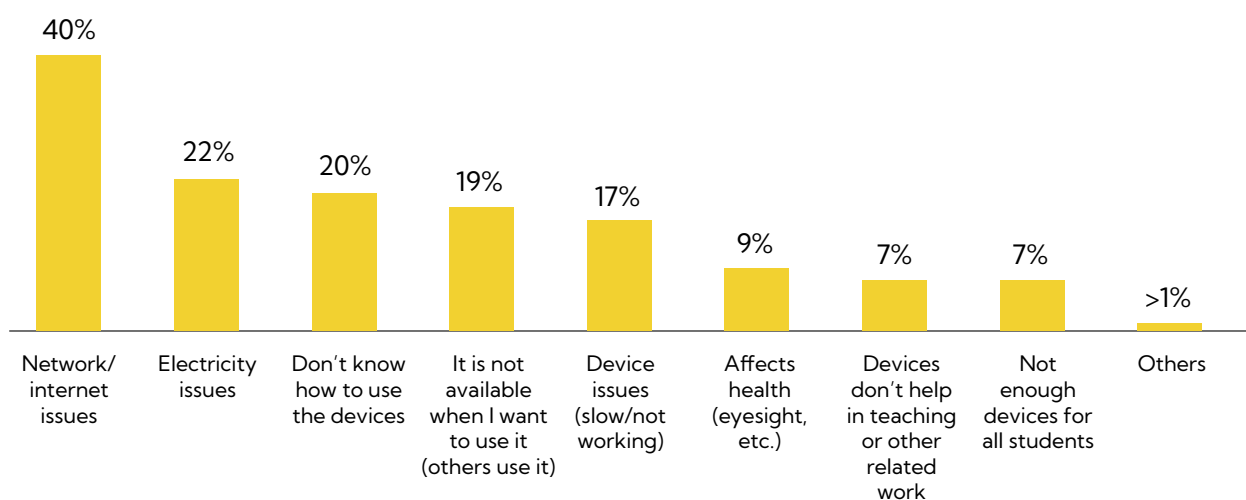


Figure 4: Frequency of Access to In-school Devices

A higher proportion of government school teachers and older teachers report having frequent access to devices in school. **67%** of government school teachers have frequent access, compared to **54%** of teachers in private schools.² Similarly, while **71%** of teachers, aged 51–60 report frequent access, that figure drops to **58%** for teachers under 30. No significant differences are observed in access to or use of in-school devices by gender and settlement type (rural vs urban).

68% of teachers with access to technology devices at school face at least one challenge while using these devices. These include unreliable internet connectivity (**40%**), electricity-related issues (**22%**) and device-related issues including lack of familiarity with using the device (**20%**), devices not being available when needed (**19%**) and devices not functioning properly (**17%**).

² 63% of aided school teachers report frequent access. No (statistically significant) difference was observed between government school teachers and aided school teachers



% of teachers who have access to a device in school | N = 1,735

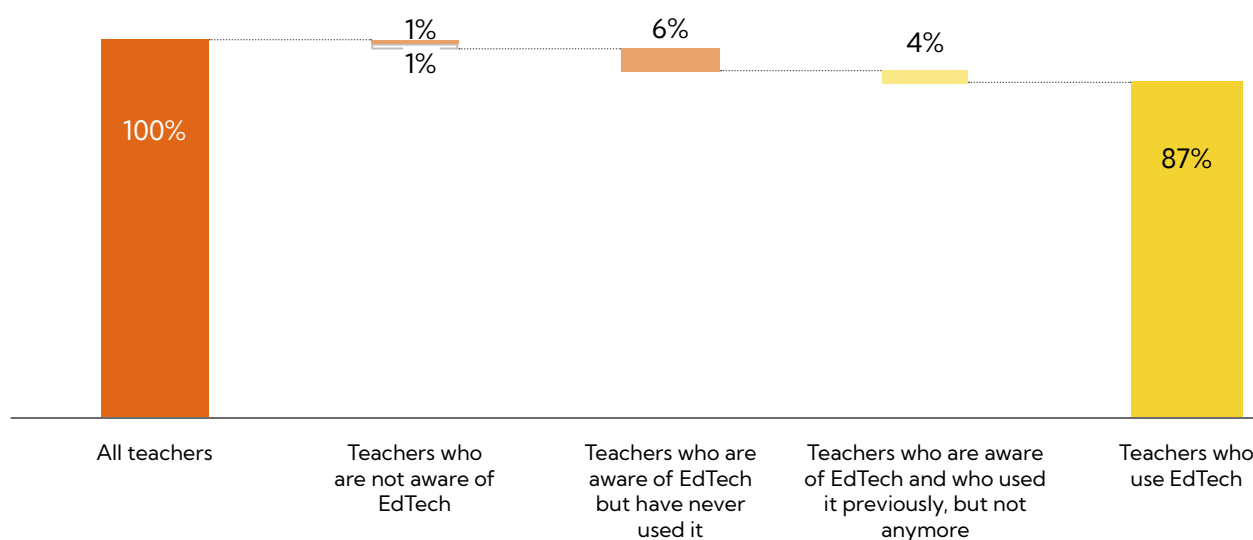
Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 5: Challenges Faced by Teachers When Using In-school Devices

Usage of EdTech

EdTech Awareness and Usage

Nearly all, i.e., 97% of the surveyed teachers are aware that technology can be used for teaching and school-related activities. 87% of teachers currently use EdTech; an additional 4% of teachers have used EdTech in the past but do not at present. 6% of teachers are aware of EdTech but have never used it.



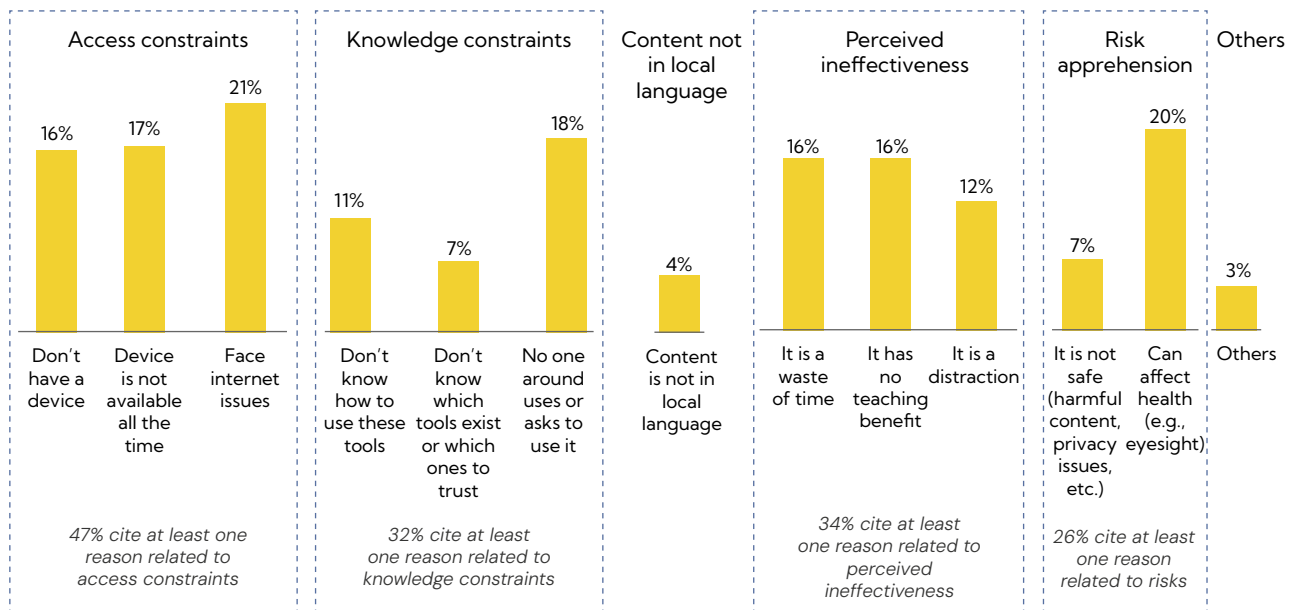
% of teachers | N = 2,500

Note: Numbers may not add up to 100% due to rounding; white sub-section represents 1% of teachers who responded "I don't know" or refused to answer the question.

Figure 6: Awareness and Adoption of EdTech Among Teachers

No significant differences are observed in teachers' adoption of EdTech based on demographic factors.

Top reasons cited by teachers who do not use EdTech, despite being aware of it, include internet-related issues (cited by 21% of non-users) and health concerns (cited by 20%). Other reasons include nobody around the teacher using it (18%), devices not being available all the time (17%), not having/owning a device (16%) perceptions around EdTech being a waste of time (16%), and providing no teaching benefits (16%).



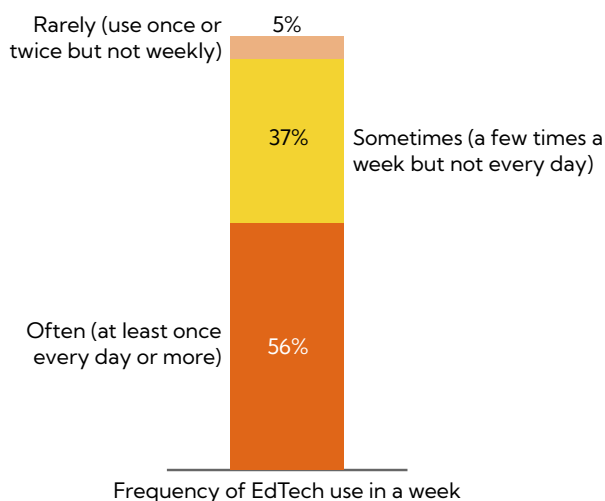
% of teachers who know about EdTech but do not currently use it | N = 258

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Respondents to this question include teachers who are aware of EdTech and have never used it as well as teachers who have used EdTech in the past but do not at present.

Figure 7: Reasons Cited by Teachers Who Do Not Use EdTech Despite Being Aware of it

Frequency of EdTech Usage

56% of EdTech-using teachers use it daily for teaching and school-related activities. An additional **37%** use it a few times a week, while **5%** of this group rarely use it. No significant differences are observed in teachers' frequency of EdTech usage based on demographic factors.



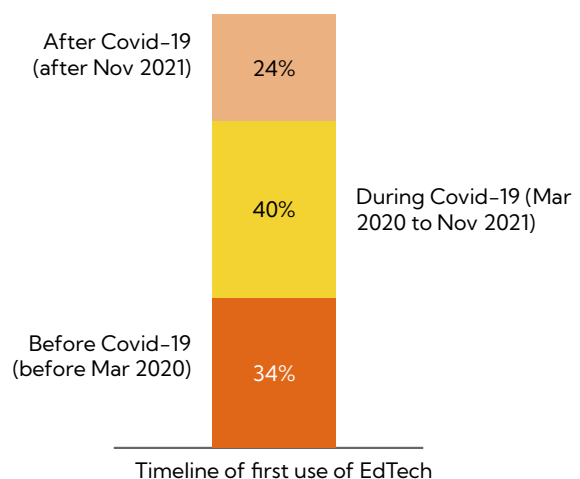
% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 8: Frequency of EdTech Usage Among Teachers

Drivers of EdTech Discovery and Usage

40% (two out of five) EdTech-using teachers adopted technology for teaching and school-related activities during the COVID-19 pandemic. While **34%** of teachers (one-third) were already using it earlier, **24%** started using these tools after the pandemic.

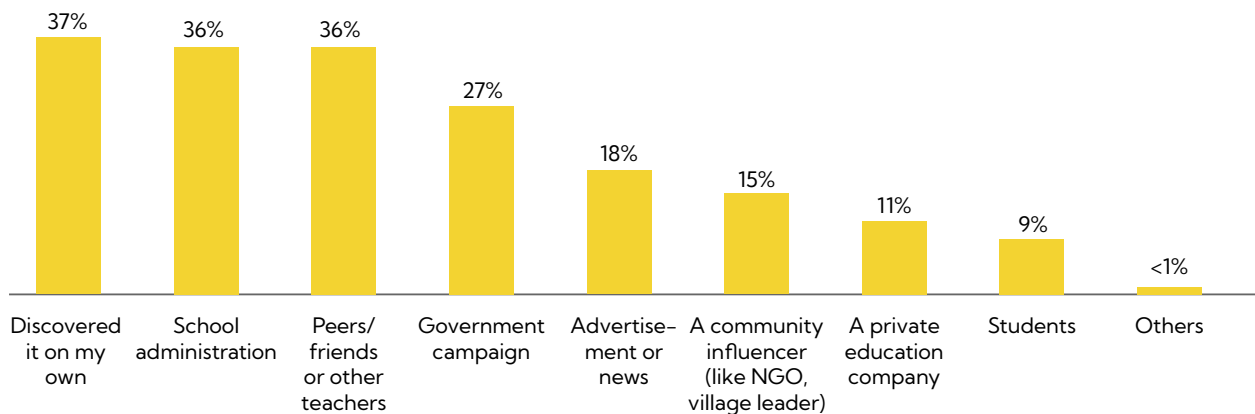


% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 9: Timeline of First Use of EdTech (Relative to COVID-19 Pandemic)

EdTech-using teachers typically first start using EdTech by either discovering it on their own (37%), or on the recommendation of the school administration (36%) and/or their peers (36%). 27% of EdTech-using teachers started using it following a government campaign.

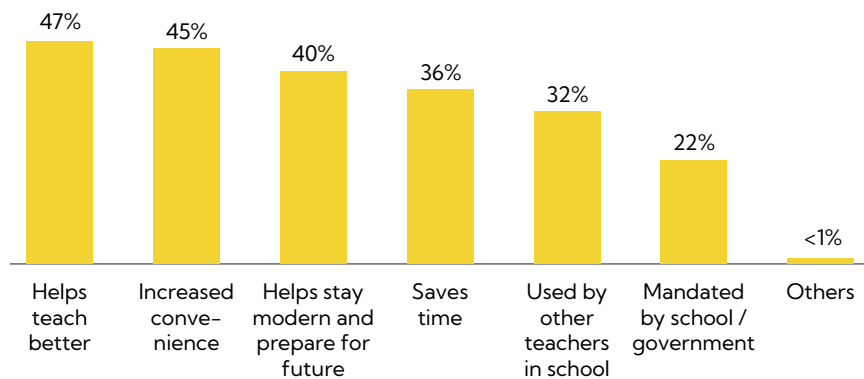


% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 10: Channels of Discovery of EdTech

EdTech-using teachers continue to use technology for teaching and school-related purposes as it helps them teach better (cited by 47%), offers increased convenience (45%), helps them stay modern and prepare for the future (40%) and saves time (36%).



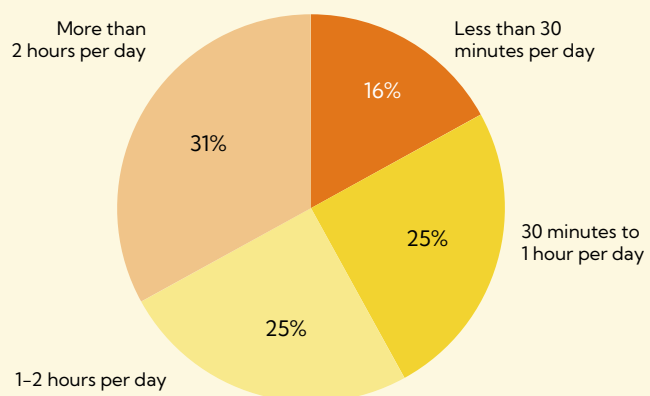
% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 11: Drivers of Continued Usage of EdTech

Time Spent Daily on Teaching or School-Related Activities Outside of School Hours

Over half (56%) of teachers spend at least one hour outside school hours on teaching or school-related activities on a normal day.

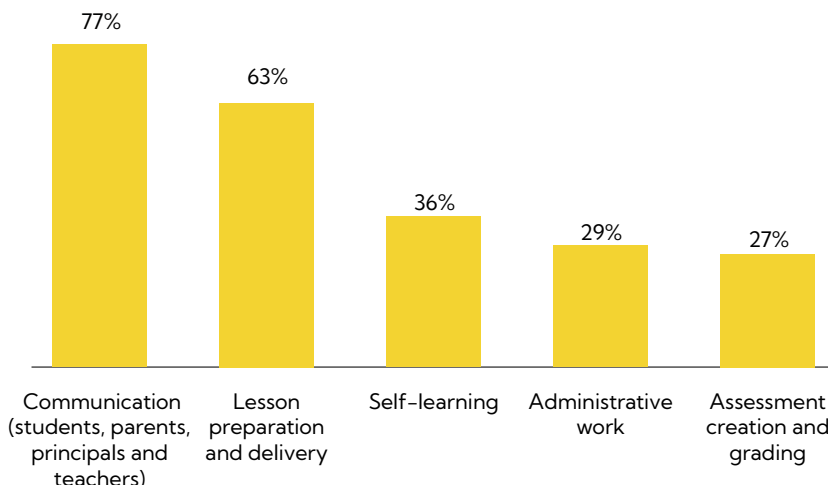


% of teachers | N = 2,500

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

EdTech Use Cases and Commonly Used Tools

77% (over three quarters) of EdTech-using teachers employ technology to communicate with students, parents of students, principals and/or other teachers. **63%** use it to prepare and deliver lessons in the classroom. Beyond these, adoption for other uses tapers: **36%** use it for self-directed learning or upskilling, while less than one-third use it for administrative tasks such as tracking attendance or maintaining records (**29%**), or for creating and conducting assessments (**27%**).



% of EdTech-using teachers | N = 2,186

Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included; (2) Responses for individual activities have been combined into the above categories.

Figure 12: Use Cases of EdTech

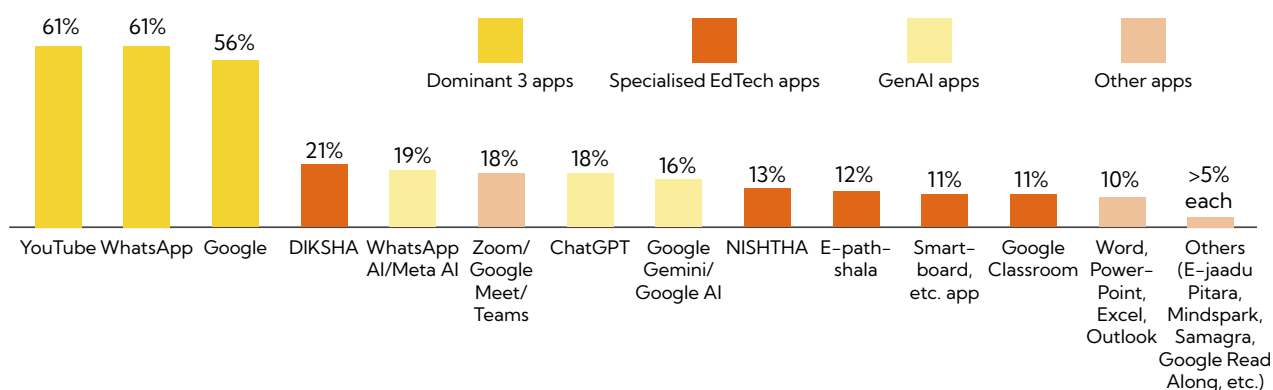


If we have less teachers, then through this media we get one or two more teachers, because we have two tablets in our school... I gave the content to the children where one teacher video is playing, and I am teaching another class, so I get the benefit of one more assistant like teacher.

Raghav, Government school teacher, Uttar Pradesh



84% of EdTech-using teachers use at least one tool among YouTube, Google and WhatsApp to support teaching and school-related activities. **45%** of EdTech-using teachers use at least one specialised education app³ - DIKSHA leads the field (used by **21%**), followed by NISHTHA (**13%**), E-pathshala (**12%**), Smartboard (**11%**) and Google Classroom (**11%**).



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 13: Commonly Used Apps for Teaching and School-related Activities

³ Specialised EdTech applications refer to those developed solely for teaching/learning purposes. These include apps like DIKSHA, NISHTHA, Khan Academy, and Google Classroom. These are different from other apps like YouTube or Microsoft Suite that may also be used for purposes other than teaching and/or learning



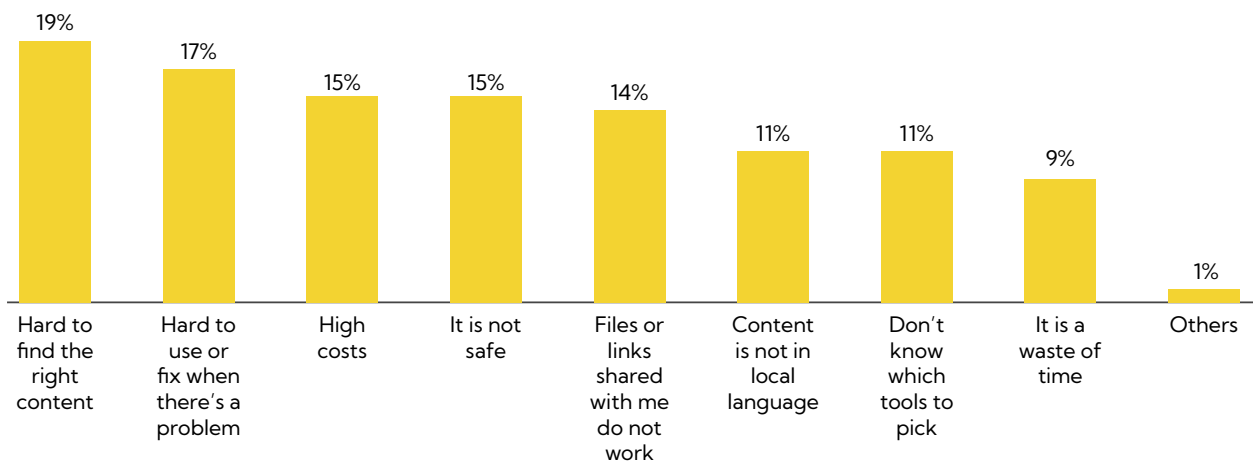
After covering the topic as per lesson plan, I also go to YouTube and Diksha to see what solution they are providing and to compare how different their method is from what I have used.

Nehal, School teacher, Uttar Pradesh



Challenges Faced While Using EdTech

53% of EdTech-using teachers faced at least one challenge while using technology for teaching and school-related activities. The challenges include difficulty finding the right content (**19%**), troubleshooting problems (**17%**), high costs (**15%**), safety concerns (**15%**) and files or links not working (**14%**), among others.



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 14: Challenges Faced While Using EdTech (Past 12 Months)

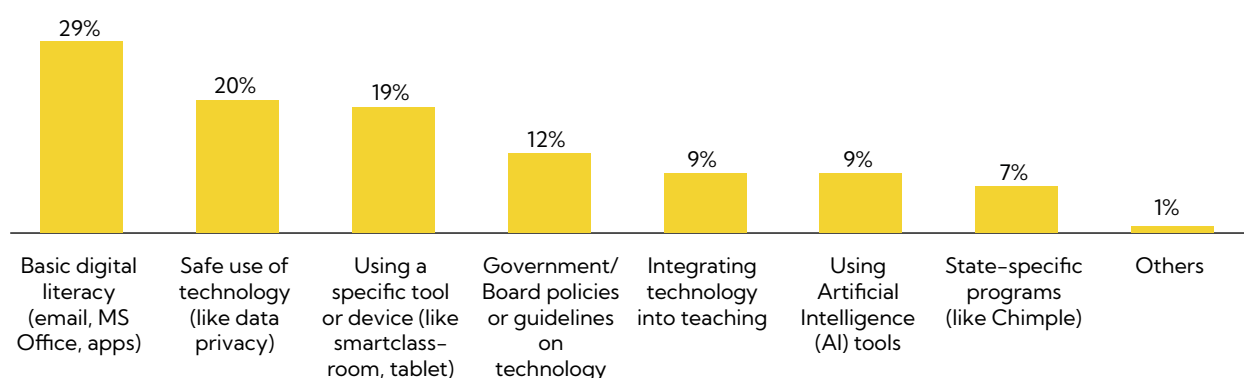
User Sentiment around Education and EdTech

Perceptions Around Teacher Training on EdTech Usage

51% of EdTech-using teachers have attended training or workshops related to the use of technology for teaching and school-related activities in the last 12 months.

A greater share of government school teachers (**55%**) than private school teachers (**41%**) have attended such trainings⁴. Younger teachers report lower exposure to training (**43%** of those under 30) than do mid- and late-career teachers (**56%** among those aged 41–50 and **59%** among those aged 51–60). No significant differences emerged based on other demographic factors such as gender or settlement type (rural/ urban) of teachers.

In the previous 12 months, teachers most commonly attended training on basic digital literacy (**29%**), safe use of technology (**20%**) and using specific tools or devices (**19%**).

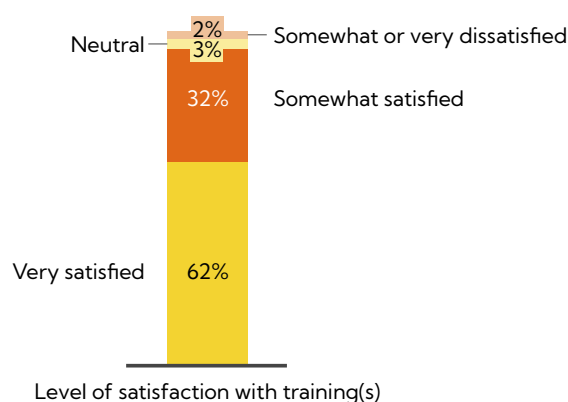


% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 15: Focus of Trainings on Technology Usage Attended in Last 12 Months

62% of teachers report feeling very satisfied with the training they received, **32%** at somewhat satisfied, **3%** feeling neutral and **2%** at somewhat or very dissatisfied.



% of EdTech-using teachers who received training in last 12 months | N = 1,079

Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 16: Level of Satisfaction with Trainings on Technology Usage

⁴ 51% of government-aided school teachers have attended training. However the difference between this percentage and that of private school teachers who have attended training is not statistically significant.

79% of EdTech-using teachers report that they would like to receive training in the future on using technology for teaching. This perspective is shared without significant variation amongst EdTech-using teachers regardless of age, gender, settlement type (rural/urban) and school type.

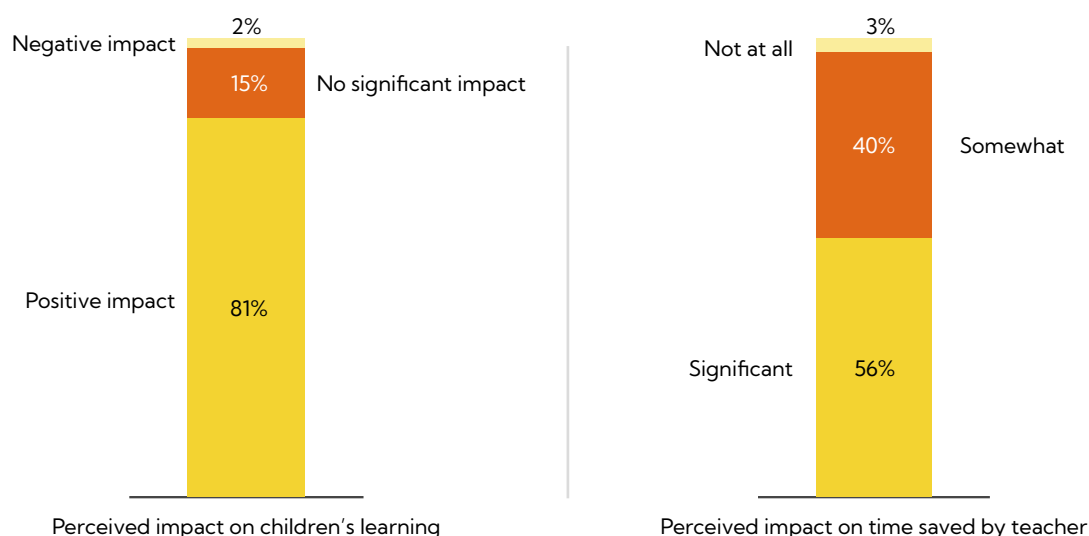
Perceived Impact of EdTech Usage

While 81% of EdTech-using teachers agree that use of technology improves children’s learning, 15% believe that it has no significant impact and 2% report that it has a negative impact.

Older teachers are less likely to assert perceived positive impact. Over eight out of ten teachers (**83%**), aged 50 or younger, believe that the use of technology improves children’s learning, as compared to **69%** of teachers aged 51–60. No significant differences are observed among teachers based on gender, school type, or settlement type.

While 56% of EdTech-using teachers believe it helps them “significantly” save time, 40% acknowledge that it ‘somewhat’ saves time. Only 3% report that usage of EdTech does not save time.

Similar to perceptions of improvement in educational outcomes, fewer teachers aged 51–60 report time-savings (**44%**) as compared to teachers aged 31–40 (**59%**) and 41–50 (**57%**). Moreover, a greater share of teachers in private schools believe that EdTech use significantly helps them save time (**65%**), as compared to both government-school teachers and government-aided school teachers (**53%** each). No significant differences are observed among teachers by gender and rural/ urban location.



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding and because respondents who selected “Don’t know” or refused to answer the question are not included.

Figure 17: Perceived Impact of EdTech Usage



In my class, I am able to show 2D shapes, then rotate them and continue to 3D before continuing with my lesson. That rotation is shown through a video rather than explaining, and the concept is more clear for students.

Vani, Private school teacher, Kerala



While **53%** of EdTech-using teachers believe that EdTech is beneficial to all types of students, **37%** think that it is most beneficial only for students who perform well. Only **7%** of this group believe that EdTech is most beneficial for students who are behind.

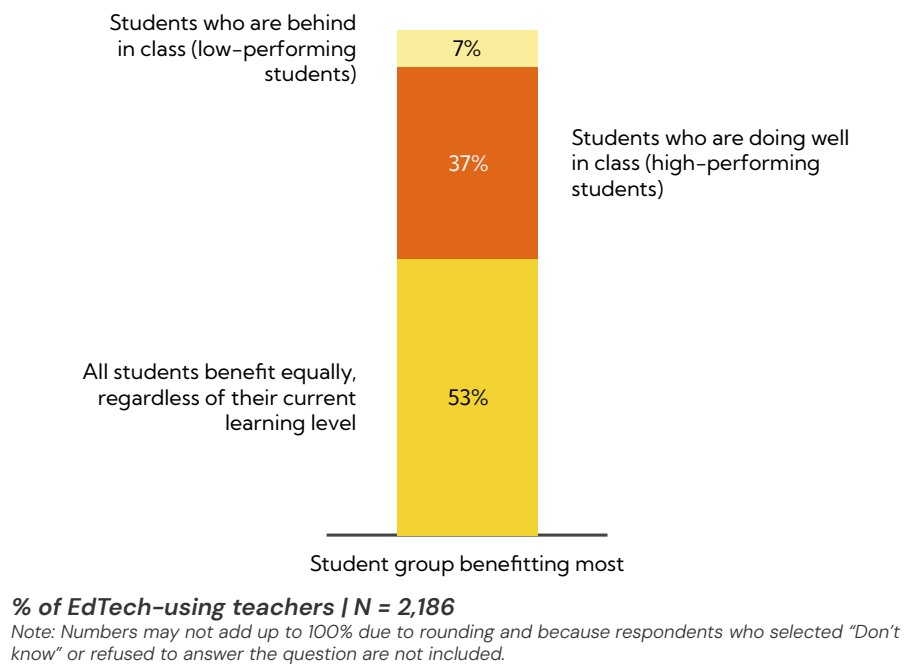


Figure 18: Perception of Student Groups Benefitting Most from EdTech Usage

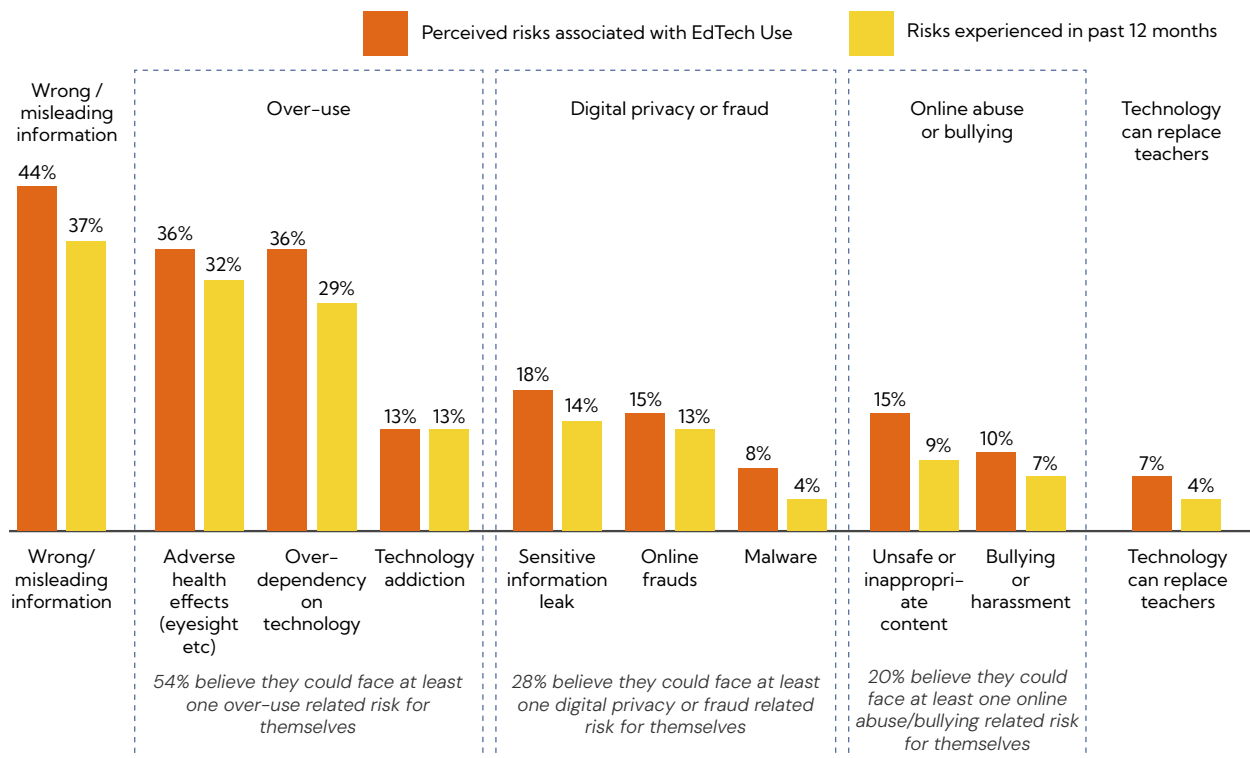
“Not every student in the class is the same. As a teacher we want to teach the one who doesn't know anything by using technology and videos. If a below average student understands, the rest of them also easily understand. That is our intention.

Abdul, Government school teacher, Telangana

Perceived Personal Risks Associated with EdTech Usage

52% (over half) of EdTech-using teachers agree that the use of technology poses a personal risk to them. A further **25%** neither agree nor disagree with that assertion and only **20%** disagree that there are any risks to themselves. **76%** of EdTech-using teachers have personally experienced at least one risk associated with technology in the past 12 months.

The most commonly perceived and experienced risks are linked to overuse (acknowledged by **54%** and experienced by **48%**), including issues like health concerns and over-dependence on or addiction to technology, as well as wrong information (acknowledged by **44%** and experienced by **37%**).

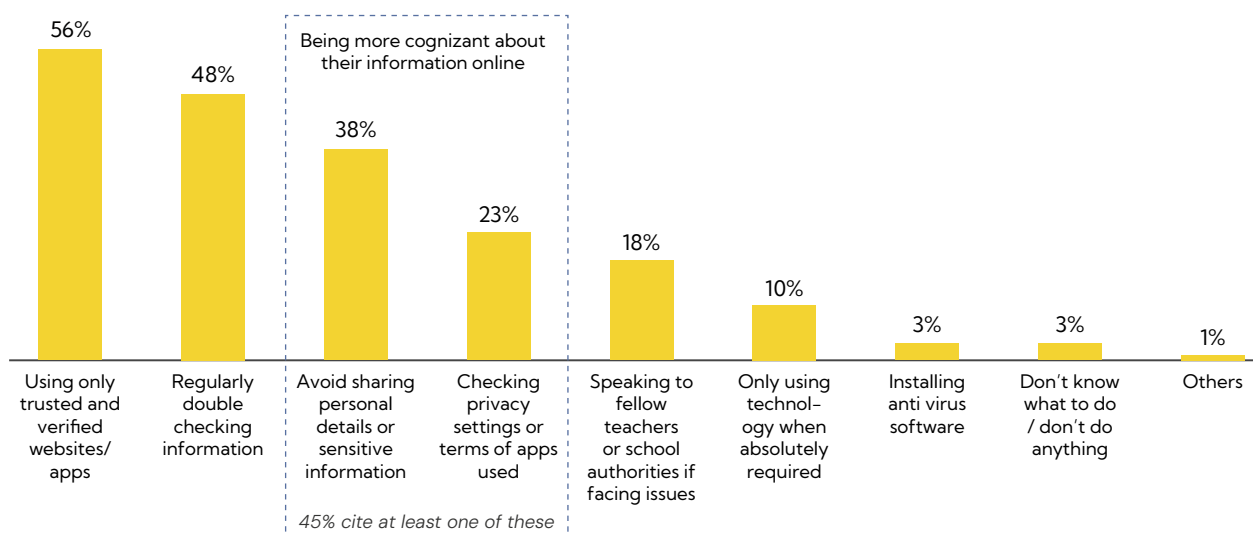


% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 19: Perception and Experience of Personal Risks Associated with EdTech Usage

86% of EdTech-using teachers take measures to mitigate risks. These include using only trusted tools and websites (cited by **56%** of EdTech-using teachers), double checking information for credibility (**48%**) and being more cognizant and deliberate about digital privacy (**45%**) by avoiding 'sharing personal contact details or sensitive information online' or 'regularly checking the privacy settings of tools' they use.



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

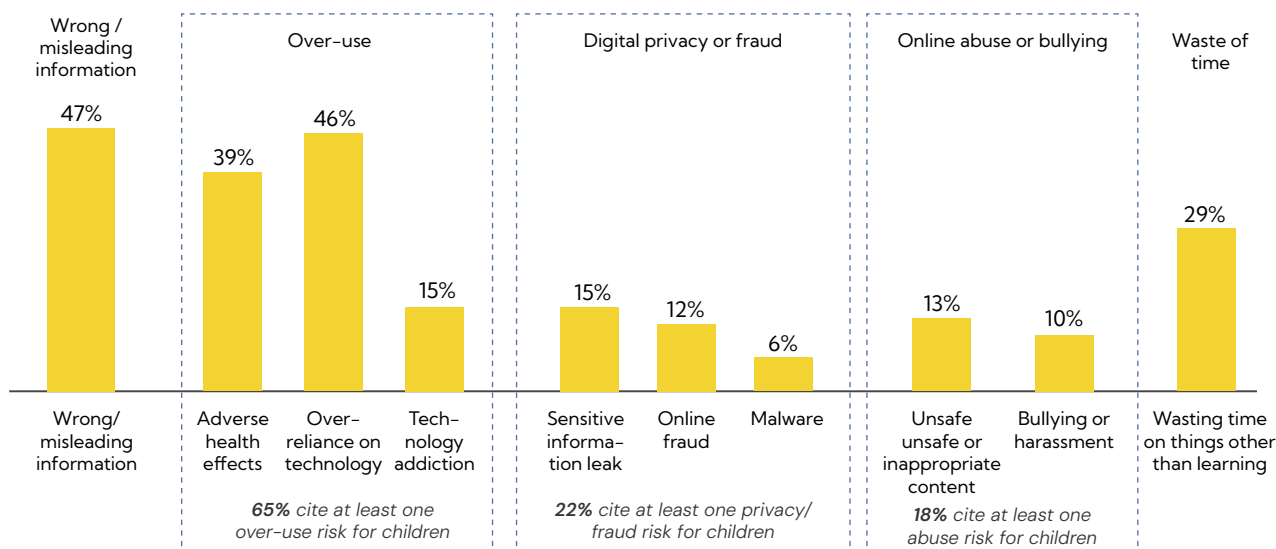
Figure 20: Measures Taken to Mitigate Personal Risks from EdTech Usage

51% (nearly half) of EdTech-using teachers who acknowledged risks or were neutral that using EdTech puts them at risk feel 'completely equipped' to manage risk. While **44%** feel 'somewhat equipped', a small share of **3%** feel not equipped at all.

Perceived Risks to Children Associated with EdTech Usage

59% of EdTech-using teachers agree that EdTech usage poses risks to children. While **23%** neither agree nor disagree with that assertion, only **15%** explicitly disagree that use of EdTech by children is associated with risks.

The most frequently acknowledged risks to children are related to overuse (cited by **65%** of EdTech-using teachers), wrong or misleading information (**47%**) and wasting time (**29%**).



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 21: Perception of Risks to Children Associated With EdTech Usage

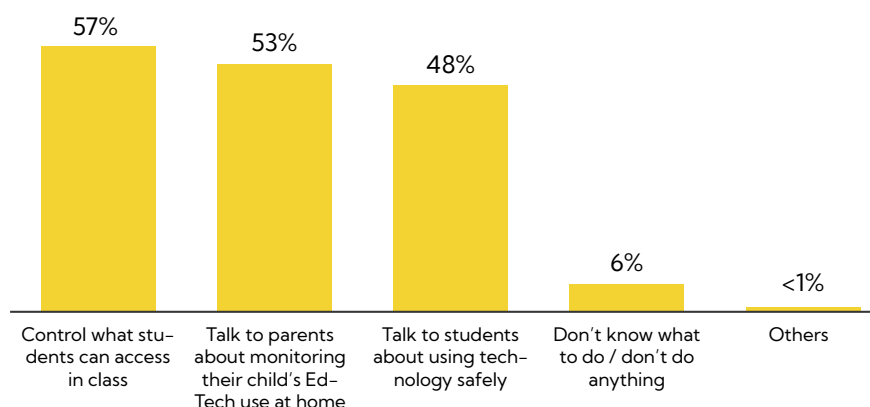


When children put in the effort to think and apply their minds, their grasp on topics is stronger. But today I am seeing children scan the question on Google and the answer is available instantly. Now he or she is not applying his own mind to learn, due to which creativity is reducing.

Neeta, Government school teacher, Uttar Pradesh



85% of EdTech-using teachers take measures to safeguard their students from perceived risks. The most cited measures are enforcing access controls in the classroom (cited by **57%** of all EdTech-using teachers), urging parents to monitor their child's usage (**53%**) and improving students' awareness of risk (**48%**).



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 22: Measures Taken to Mitigate Risks to Children from EdTech Usage

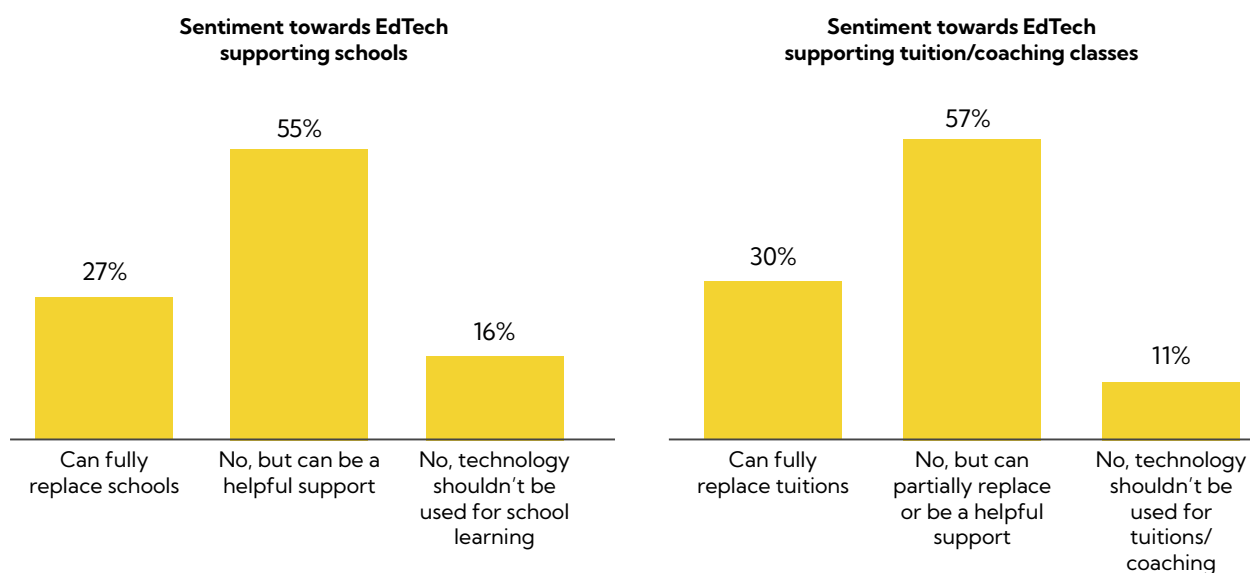
49% of EdTech-using teachers who perceive risks to children feel ‘completely equipped’ to manage those risks. Another **47%** feel only ‘somewhat equipped’, while a small share at **3%** do not feel equipped at all.

Support for EdTech Adoption

While **88%** of EdTech-using teachers report that they would recommend EdTech to others, **8%** say they would not recommend it.

55% of EdTech-using teachers believe that technology can provide helpful support to the existing schooling system. While **27%** believe that it can fully replace schools (for students), **16%** maintain that technology should not be used for school learning.

Similarly, **57%** of EdTech-using teachers believe that technology can support or partially replace tuitions/coaching and **30%** believe that technology can fully replace them. **11%** maintain that technology should not be used for tuitions/coaching.



% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 23: Sentiment Towards EdTech's Potential to Support Schools and Tuitions

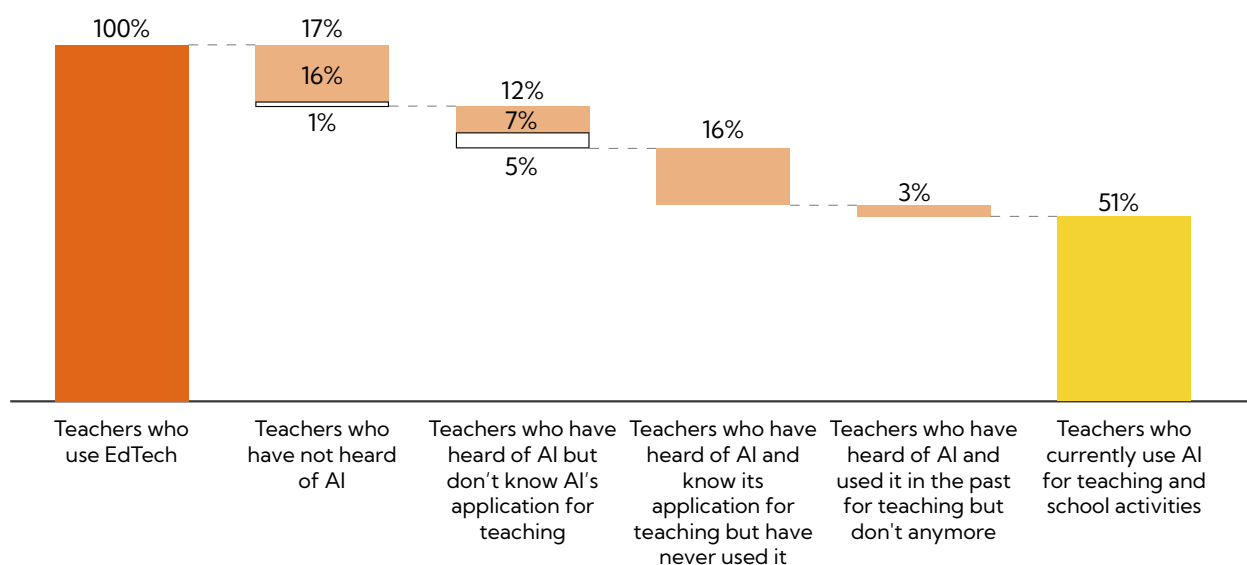
Usage of GenAI for Teaching

Awareness and Usage of GenAI

While most EdTech-using teachers have heard of artificial intelligence (AI) (83%) and know it can be used for teaching (71%), many do not understand the technology. 46% of those who know of GenAI claim to understand how it works. However, **half** of them equate it with a search engine and **over a third** believe it copies information from the internet and repeats it.

Among EdTech-using teachers, those in private schools are less likely (73%) than those in government (93%) and government-aided (84%) schools to have heard of GenAI. No significant differences are observed among male versus female teachers, teachers of different ages and those from rural versus urban settlements.

51% (half) of EdTech-using teachers use GenAI for teaching and school-related activities. Nine out of ten teachers who use GenAI for teaching do so multiple times a week, including 61% who use it every day.



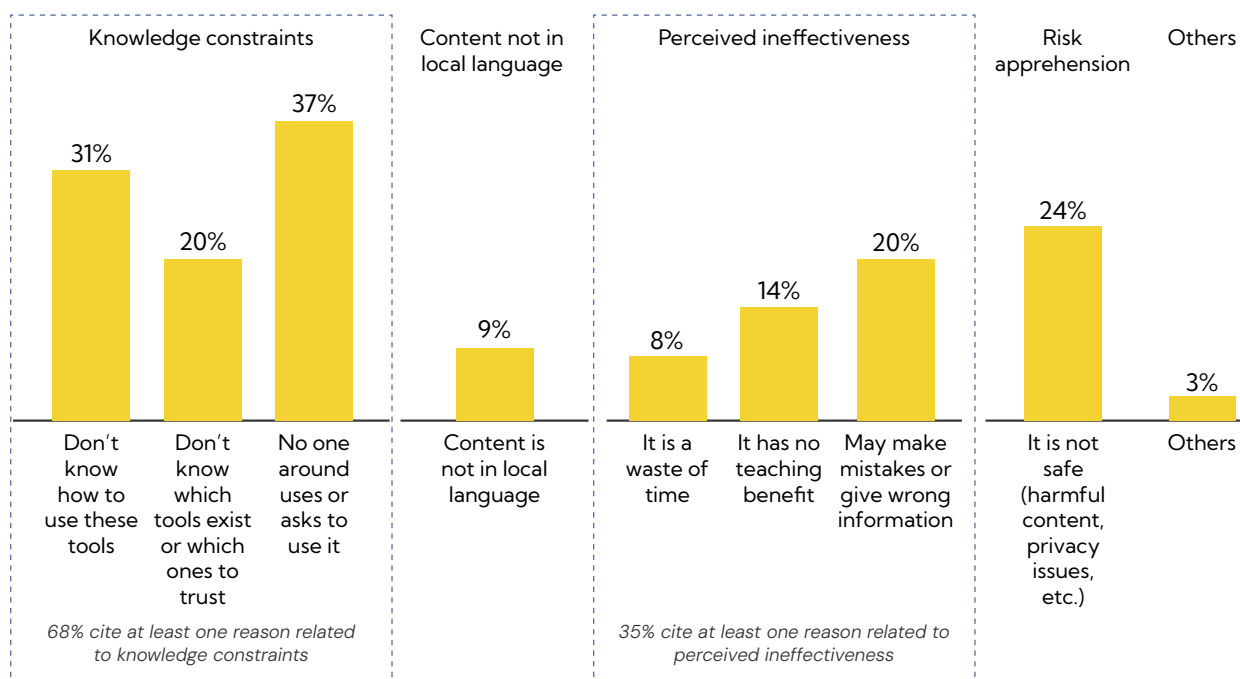
% of EdTech-using teachers | N = 2,186

Note: Numbers may not add up to 100% due to rounding. White sub-segments in the bars represent EdTech-using teachers who responded "I don't know" or refused to answer whether they have heard of GenAI and if it can be used for teaching.

Figure 24: Awareness and Adoption of GenAI Among Teachers

A higher share of EdTech-using government-aided school teachers at 68% use GenAI for teaching and school-related activities than their counterparts in government schools (51%) and private schools (40%). No significant differences are observed among male versus female teachers, those from rural versus urban settlements and teachers of different age groups.

One in five EdTech-using teachers are aware of GenAI's applications for teaching but do not currently use it for teaching and school-related activities. Top challenges cited by these teachers are knowledge constraints (68%) and perceived ineffectiveness (35%).



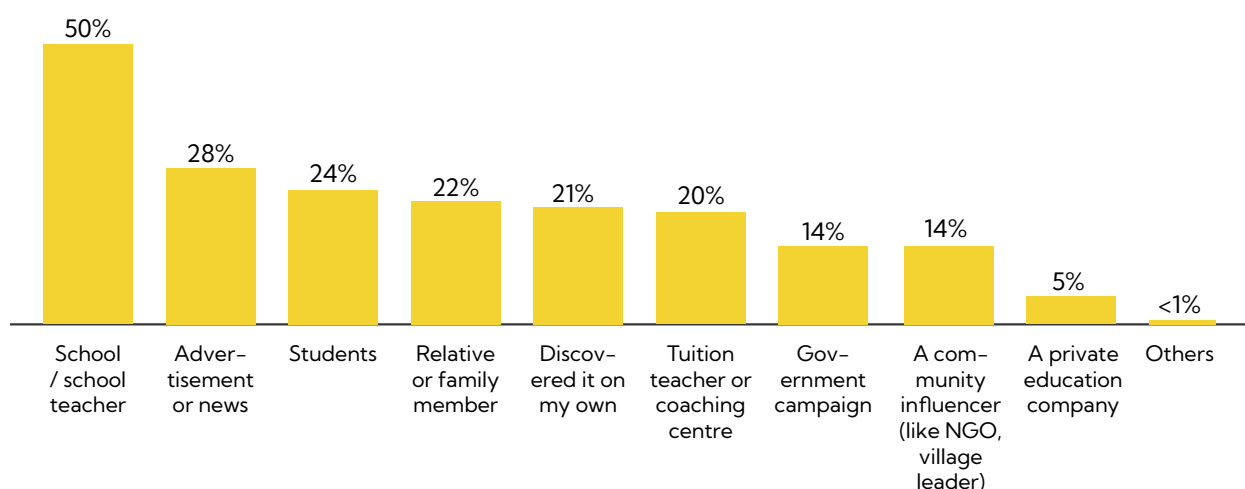
% of EdTech users who are aware of GenAI teaching applications but do not currently use it | N = 427

(1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer are not included. (2) Respondents include teachers aware of GenAI who have never used it for teaching or school activities, and those who used it previously but do not use it currently.

Figure 25: Challenges Cited by Teachers Who Do Not Use GenAI Despite Being Aware of it

Drivers of Discovery and Usage of GenAI

Half (50%) of all GenAI-using teachers were introduced to it by school or fellow school teachers. Advertisements or news (28%), students (24%), relatives (22%), discovering GenAI on their own (21%) and tuition and coaching centres (20%) are sizeable, but less frequently cited channels of discovery. Other channels, including government campaigns (14%), are less common.

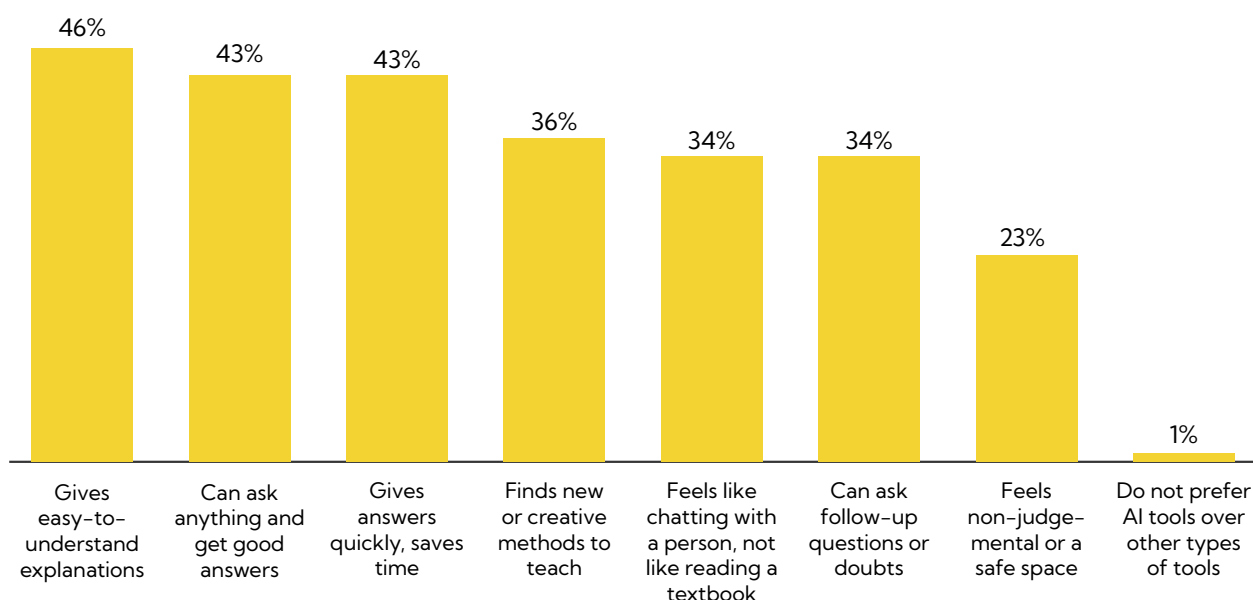


% of GenAI-using teachers | N = 1,118

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 26: Channels of Discovery of GenAI

Among GenAI-using teachers, the most commonly cited drivers for choosing GenAI tools over others include easy-to-understand explanations (46%) and receiving quick responses that save time (43%). A sizeable share also values the interactive nature of these tools - 43% report that they can ask anything and receive good responses.



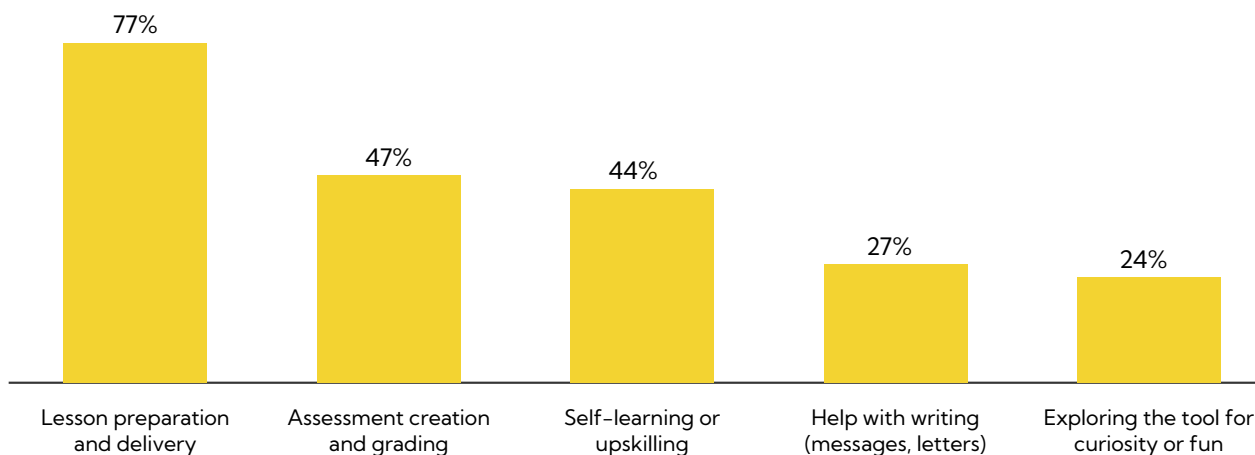
% of GenAI-using teachers | N = 1,118

Note: Numbers may not add to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer are not included.

Figure 27: Drivers of Continued Usage of GenAI

GenAI Use Cases

77% of GenAI-using teachers leverage it to support lesson preparation and delivery, **47%** use it for assessment creation and grading and **44%** use it for self-directed learning and upskilling. Approximately, one in four users explore GenAI tools for fun and to satisfy their curiosity.



% of GenAI-using teachers | N = 1,118

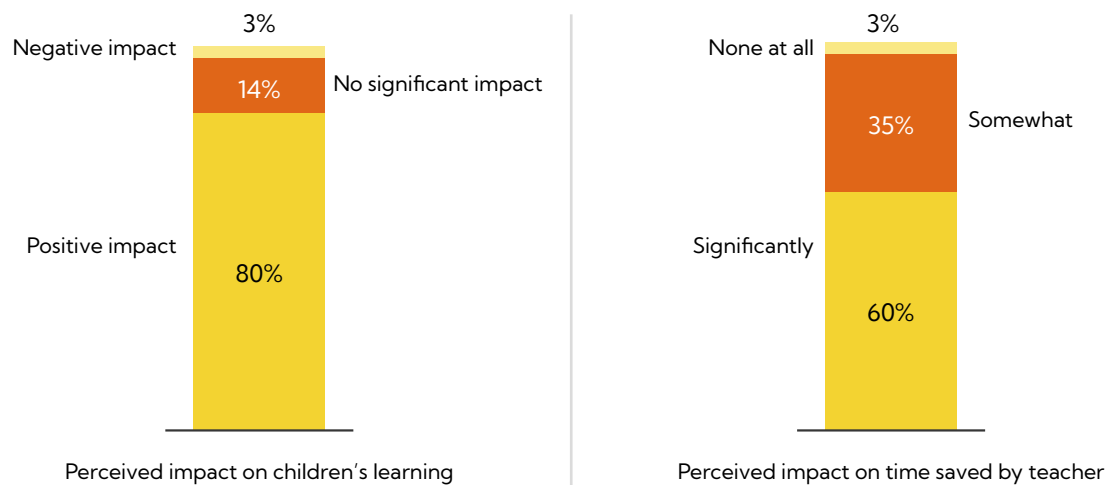
Note: (1) Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included. (2) Responses for individual activities have been combined into the above categories.

Figure 28: Use Cases of GenAI

Perceived Impact of GenAI Usage

While **80%** of GenAI-using teachers report improved educational outcomes from the use of GenAI tools, **14%** report no significant impact and **3%** believe it has a negative impact.

While **60%** of GenAI-using teachers report significant time savings from the use of GenAI tools for teaching and related activities, **35%** feel that it 'somewhat' saves time and **3%** believe it has no impact.



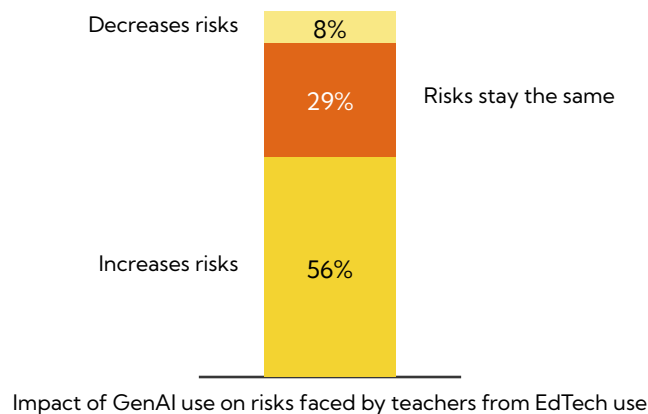
% of GenAI-using teachers | N = 1,118

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer are not included.

Figure 29: Perceived Impact of GenAI Usage

Perceived Personal Risks Associated with GenAI Usage

56% of teachers who know that GenAI can be used for teaching report that the introduction of AI amplifies the risks they face in using EdTech. However, while **29%** believe that the risks are unchanged, **8%** believe that risks decrease.

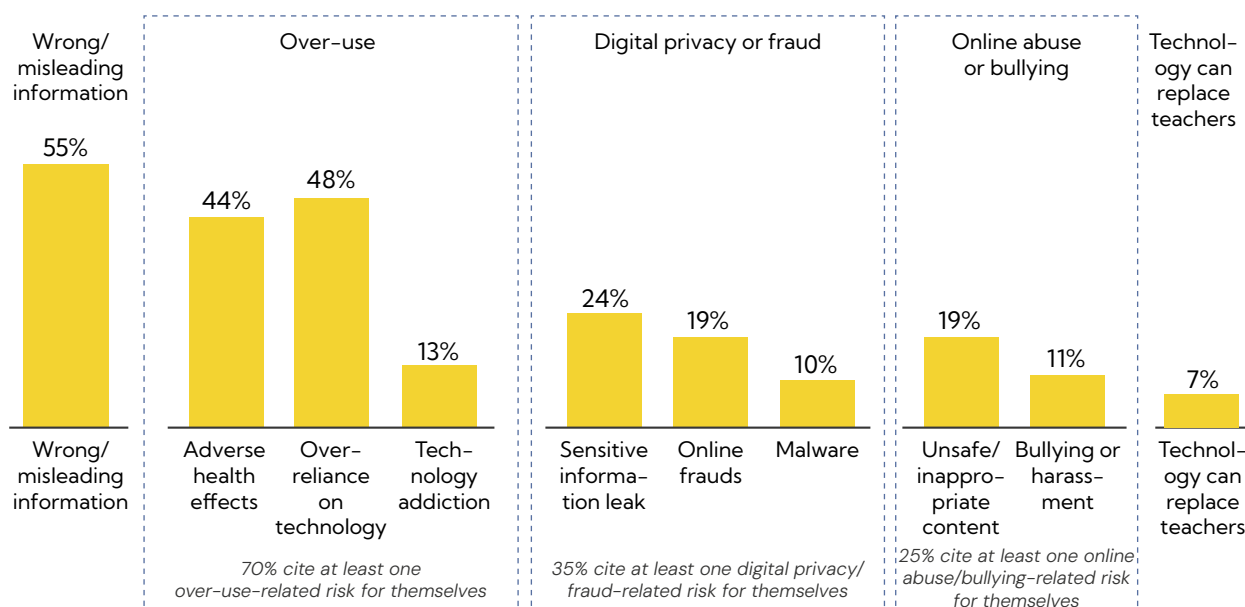


% of EdTech-using teachers aware of GenAI's application for teaching | N = 1,545

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer are not included.

Figure 30: Perception of Personal Risk Associated with GenAI Usage Compared to EdTech Usage

70% of GenAI-using teachers cite risks associated with overuse of technology including health concerns, over-dependency on technology and addiction to it. While a majority at **55%** cite the risk of GenAI providing the wrong information, **35%** indicate concerns about digital privacy and fraud.



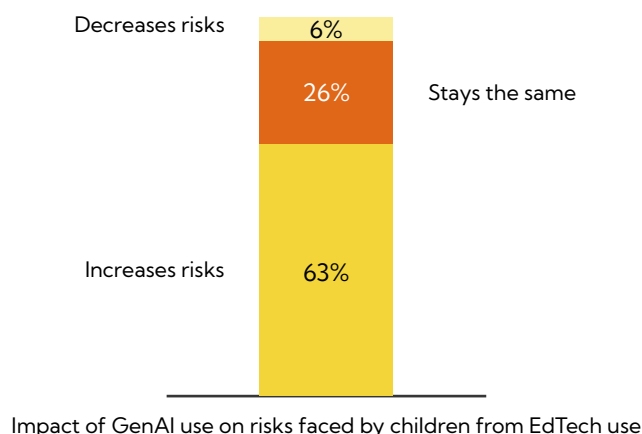
% of GenAI-using teachers | N = 1,118

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 31: Perceived Personal Risks Associated with GenAI Usage

Perceived Risks to Children Associated with GenAI Usage

63% of teachers who know that GenAI can be used for teaching report that introduction of GenAI amplifies the risks children face in using EdTech. While **26%** of teachers believe these risks remain unchanged, **6%** believe that risks decrease.

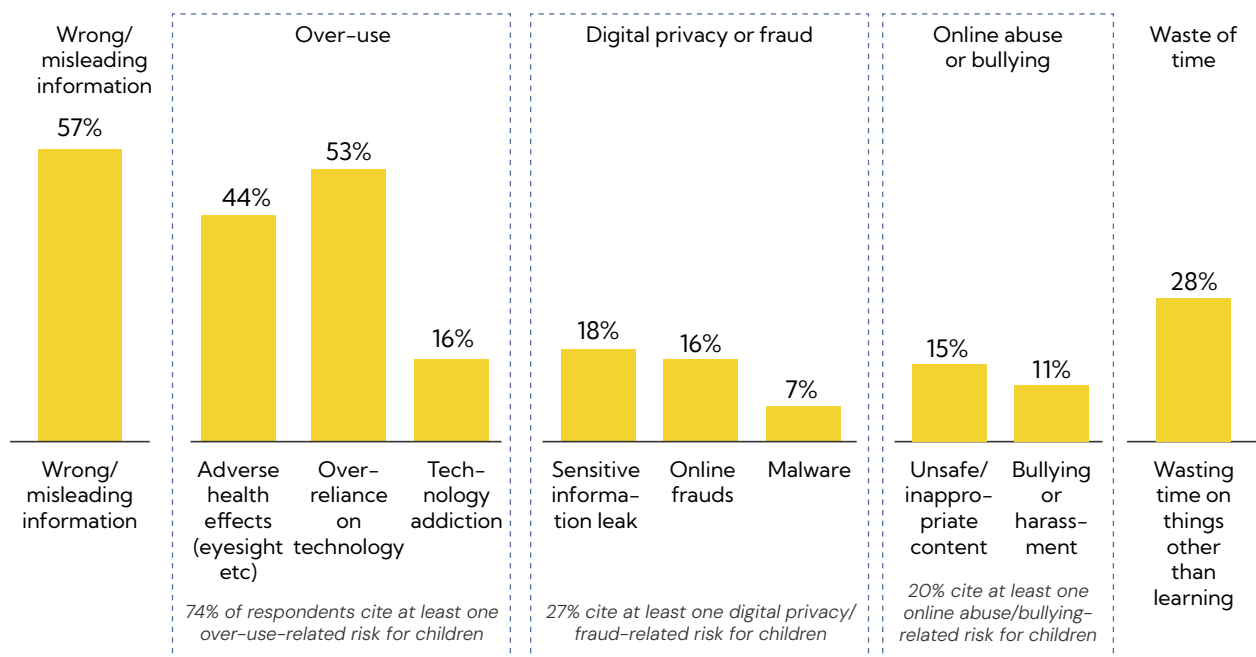


% of EdTech-using teachers aware of GenAI's application for teaching | N = 1,545

Note: Numbers may not add up to 100% due to rounding and because respondents who selected "Don't know" or refused to answer the question are not included.

Figure 32: Perception of Risks to Children Associated With GenAI Usage Compared to EdTech Usage

74% (three quarters) of GenAI-using teachers link children's use of AI to risks associated with overuse of technology including health concerns, over-dependency on technology and addiction to it. Additionally, while **57%** point to the risk of wrong information, **28%** cite potential time wasting and **27%** express concern about digital privacy and fraud.



% of GenAI-using teachers | N = 1,118

Note: Numbers may not add up to 100% due to rounding, because multiple responses were permitted and because respondents who selected "Don't know" or refused to answer are not included.

Figure 33: Perceived Risks to Children Associated with GenAI Usage

Annexure

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User Segmentation

Segmentation Approach

An unsupervised clustering approach (k-means clustering) was used to create user segments by identifying patterns in how children and teachers engage with EdTech and AI-enabled tools for learning. This approach is useful for uncovering multi-dimensional usage and perception patterns that may not emerge from demographic cross-tabs alone. The objective of this exercise was to surface distinct usage and perception profiles that emerge when multiple dimensions of engagement are considered together. The resultant user segments help us understand how different types of users perceive and engage with EdTech and GenAI for teaching and learning.

Unlike approaches that rely on pre-defined thresholds (for example, classifying users as “high” or “low” based on a single metric), K-means clustering allows the data itself to determine groupings. In practice, the method partitions respondents into K number of segments by iteratively assigning each respondent to the nearest cluster “centroid” (under a Euclidean distance metric) and updating centroids to minimise within-cluster variation. Prior to clustering, we prepared a common feature set across respondents and applied standard preprocessing to make variables comparable: missing values were imputed (median for numeric fields; most frequent category for categorical fields), categorical survey responses were one-hot encoded into indicator variables and numeric variables were scaled so that no single numeric measure dominated the distance calculation. To prevent very rare response options from creating noisy, high-dimensional features, low-frequency categories were grouped during encoding.

Through this approach, respondents were clustered based on similarity across a set of input variables, enabling identification of groups that share consistent patterns across access, EdTech and AI use, diversity of tools used and perceptions of impact and risk.

The clustering was run on a selected set of variables capturing:

- Demographic variables of respondents (e.g., age, gender, settlement type)
- Access to technology (e.g., children’s access to smartphones, access to in-school devices for teachers, access to internet)
- Breadth and intensity of EdTech usage (e.g., number of tools used, frequency of use)
- Nature of engagement (e.g., types of learning activities undertaken, active versus passive use)
- Exposure to and usage of GenAI for teaching and learning
- Perceived impact, risks and challenges

The resulting clusters should be interpreted as descriptive segments, not rigid categories. They highlight dominant patterns observed in the data and individuals within a segment may still exhibit variation in specific behaviours.

User Personas - Household Survey

A wide range of indicators covering intensity and frequency of EdTech use, diversity of learning activities, awareness and use of GenAI, perceived impact and risks, help-seeking behaviours and demographic factors were incorporated into the analyses. The model was iteratively refined to ensure that the resulting clusters were distinct, internally coherent and interpretable in real-world terms. While a broad set of indicators informed the clustering, the resulting segments were most clearly differentiated along five dimensions:

- Academic orientation, reflected through access to paid private tuition and perceived academic performance compared to peers
- Frequency of EdTech usage
- Awareness and usage of GenAI tools for learning, including frequency of usage
- Perceived impact of EdTech on learning
- Confidence in managing risks associated with EdTech usage

Based on these, three distinctive segments emerge:

EdTech beginners, who are typically younger children with limited and infrequent engagement with EdTech. They are the least academically oriented among the three segments, with lower access to paid private tuition and a more modest perception of their own academic performance. They are least likely to be aware of or use GenAI tools for learning. Correspondingly, beginners and their parents hold a more moderate perception of both the benefits of EdTech and its associated risks.

Adolescent basic users demonstrate higher academic orientation and more regular engagement with EdTech compared to beginners. While they exhibit the greatest device access amongst the three segments, usage remains moderate in both frequency and intensity. Awareness of GenAI tools is higher in this group, and a subset reports using such tools for learning, though usage is less frequent than among power users. The perceived impact of EdTech on learning is also higher than among beginners, but remains mixed.

Ambitious power users stand out as the most academically oriented group, with higher access to paid private tuition and a stronger perception of their own academic performance. They report the highest frequency and intensity of EdTech use, and are substantially more likely to be aware of and frequently use GenAI tools for learning, despite slightly lower smartphone access than adolescent basic users. Members of this group also report the strongest perceived impact of EdTech on learning, and are collaborative in their use, actively seeking and providing help.

In addition to these core differentiating dimensions, differences across segments are also observed along a wider set of indicators related to access to devices, learning use cases, help-seeking behaviour, perceptions of risk and confidence in managing them. The subsequent table provides a detailed comparison across these indicators.¹

¹ The categorisation of these user segments into high/medium/low across the dimensions has been done as follows: segments whose mean exceeds the overall sample mean by more than 1 standard error have been classified “high”, those whose mean falls within 1 standard error of the sample mean have been classified “moderate”, and those whose mean is lower by more than 1 standard error have been classified “low.”

User Segmentation (children)

		EdTech beginners	Adolescent basic users	Ambitious power users
Share of EdTech user population		35%	29%	35%
Who are they? (profile)	Age	Entirely (100%) younger users, 6–13 years	Almost entirely (99%) adolescents, 14–18 years	Mix of different aged user – 54% (6–13) years, 46% (14–18) years
	Academic orientation	Largely perform “ about the same ” as peers (59%); Less likely to attend extra classes/ tuition (28%)	Largely perform “ about the same ” as peers (60%); More likely to attend extra classes/ tuition (37%)	Mostly perform “ better than ” their peers in class (91%). Most likely to attend additional classes/ tuitions (64%)
	School fee of private- school-going children	47% of children pay more than ₹ 500 per month on school fee	55% of children pay more than ₹ 500 per month on school fee	40% of children pay more than ₹ 500 per month on school fee
Technology access	No. of smart-phones owned, duration of smart-phone usage & share of children with dedicated access	Have moderate device access • 8% of households own 2+ smartphones • Child gets it for ~0.9 hours per day • 3% of them have dedicated access	Have high device access • 17% of households own 2+ smartphones • Child gets it for ~1.6 hours per day • 12% of them have dedicated access	Have moderate device access • 8% of households own 2+ smartphones • Child gets it for ~1 hour per day • 2% of them have dedicated access
	Internet access	Low – 61% report having access to internet “always”	High – 74% report having access to internet “always”	Moderate – 68% report having access to internet “always”
EdTech usage behaviours & preferences	Frequency of Ed-Tech usage (share of daily users)	35% use EdTech daily	48% use EdTech daily	90% use EdTech daily
	Use case for EdTech (school linked vs additional topics)	Mostly school focused – 86% school-linked topics; 12% additional beyond-school topics	Mostly school focused – 88% school-linked topics; 12% additional beyond-school topics	More diverse – 69% school-linked topics; 30% additional beyond-school topics
	Openness to col-laboration (give vs ask for help while using EdTech)	Less likely to give and ask for help. 26% ask for help often; 19% give help often	Least likely to ask for help. 23% ask for help often; 19% give help often	Most likely to ask for and give help. 71% ask for help often; 75% give help often
GenAI exposure & usage	Heard of GenAI	Low – only 33% have heard of GenAI	High – 53% have heard of GenAI	High – 64% have heard of GenAI
	Use GenAI for learning	Low – only 16% use GenAI for learning	Moderate – 32% use GenAI for learning	High – 56% use GenAI for learning
	Frequency of GenAI usage	Low – 41% (of AI users) use it daily	Low – 45% (of AI users) use it daily	High – 89% (of AI users) use it daily
Perception around EdTech	Impact on learning outcomes	Low – 62% report improved learning	Low – 70% report improved learning	High – 93% report improved learning
	Acknowledgement & experience of risks (experience in past 12 months)	Low – 54% acknowledge risks; 54% experienced risks	Low – 49% acknowledge risks; 51% experienced risks	High – 76% acknowledged risks; 86% experienced risks
	Confidence dealing with risks	Low – 24% are “completely confident”	Low – 30% are “completely confident”	High – 87% are “completely confident”

User Personas - Teacher Survey

Similar to the analysis of the household survey, the clustering incorporated a range of indicators spanning access to school-level digital infrastructure, training exposure, intensity and diversity of EdTech use, awareness and use of GenAI tools and perceptions of impact and risk. A small number of indicators informed most of the differentiation between different teacher groups. These indicators include:

- Intensity and diversity of EdTech usage
- Usage and frequency of usage of GenAI for teaching
- Access to school-level digital infrastructure and training
- Perceived impact of EdTech usage and approaches to managing risks associated with EdTech usage

Based on these, three distinctive segments emerge:

Foundational users exhibit moderate engagement with EdTech in terms of both frequency and diversity of use. They report relatively low use of GenAI tools for teaching and lower confidence in managing EdTech-related risks compared to other segments. While their overall perception of EdTech is moderately positive, its use for teaching remains limited.

AI enthusiasts are distinguished primarily by their high adoption and frequent use of GenAI tools for teaching, despite otherwise moderate levels of EdTech use and comparatively low digital maturity. Members of this group have received less formal training on the use of technology than others, yet report strong confidence in their ability to manage risks and hold highly positive views about the potential of technology, particularly GenAI, to improve educational outcomes.

Discerning power users stand out through intensive and diverse use of not just GenAI, but also a wide range of specialised EdTech applications, across multiple teaching and school-related activities. They also report higher access to in-school digital devices and training support. Their perceptions of EdTech's impact on educational outcomes are more measured than those of GenAI enthusiasts, as they report greater exposure to EdTech-related risks and also take more proactive steps to mitigate these risks.

The subsequent table provides additional data on these segments.

User Segmentation (teachers)

		Foundational users	AI enthusiasts	Discerning power users
Share of EdTech user population		48%	18%	34%
Who are they? (profile)	Grades taught	Follows sample distribution; 67% teach primary grades; 42% teach middle and 17% teach secondary	Heavily skewed towards primary; 86% teach primary grades; 20% teach middle and 7% teach secondary	Skewed towards older grades; 64% teach primary grades; 45% teach middle and 25% teach secondary
	Digital maturity of teacher (share that pays, shops and socializes online)	High – 44% pay, shop and socialize online	Low – 18% pay, shop and socialize online	High – 52% pay, shop and socialize online
What kind of technology access or support do they have?	In-school device access	Low – 33% have more than one type of devices in school	Low – 24% have more than one type of devices in school	High – 61% have more than one type of devices in school
	Frequency of in-school device access (% of those w/ access)	Low – 36% get access for 5+ days	Moderate – 51% get access for 5+ days	High – 60% get access for 5+ days
	Trainings received	Low – 8% have received on using specific tools, 3% have received on integrating tech into teaching	Low – 11% have received on using specific tools, 1% have received on integrating tech into teaching	High – 38% have received on using specific tools, 22% have received on integrating tech into teaching
EdTech usage behaviours	Share of daily users of EdTech	35% use EdTech daily	83% use EdTech daily	70% use EdTech daily
	Diversity of EdTech use cases / activities	Moderate – ~59% use for 2+ activities	Low – ~26% use for 2+ activities	High – ~73% use for 2+ activities
	Type and diversity of EdTech tools used	Low – Use 2.9 apps on average; 24% use a specialised EdTech app	Low – Use 2.2 apps on average; 39% use a specialised EdTech app	High – Use 4.9 apps on average; 77% use a specialised EdTech app
GenAI exposure & usage	Heard of GenAI	Low – 74% have heard of GenAI	High – 88% have heard of GenAI	High – 90% have heard of GenAI
	Use GenAI for teaching/related activities	Low – only 26% use GenAI	High – 71% use GenAI	High – 58% use GenAI
	Frequency of GenAI use amongst users	Low – 32% (of AI users) use it daily	High – 88% (of AI users) use it daily	Moderate – 63% (of AI users) use it daily
Perception about EdTech	Acknowledgement of risks associated with using EdTech for teaching	Low – 37% agree there is risk associated with EdTech	High – 72% agree there is risk associated with EdTech	High – 62% agree there is risk associated with EdTech
	Personal experience of risks associated with using EdTech for teaching	Low – 24% experienced 2+ risks	Low – 12% experienced 2+ risks	High – 37% experienced 2+ risks
	Protection measures taken against risks	Low – 1.6 on average	Low – 1.2 on average	High – 2.8 on average
	Confidence in dealing with risks for themselves	Low – 24% are “completely confident”	High – 88% are “completely confident”	High – 56% are “completely confident”
	Perception of impact on outcomes	Moderate – 78% say improved	High – 92% say improved	Moderate – 78% say improved
	Perception on tech as replacement for school	Low – 12% say it can fully replace school, while 66% say it's a helpful support	High – 70% say it can fully replace school, while 24% say it's a helpful support	High – 25% say it can fully replace, 56% say it's a helpful support

*Note: we see similar trends in terms of teachers' perception of risks to children as well

Data Tables for Household Survey

A1.1 Access to Technology

% of HHs with available devices ¹	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Smartphone	90%	91%	89%	90%	89%	89%	89%	96%	91%	88%	89%	96%
TV	71%	83%	64%	73%	69%	72%	67%	86%	68%	71%	73%	80%
Radio	6%	8%	5%	7%	5%	6%	5%	7%	5%	5%	6%	9%
Keypad phone	15%	13%	16%	15%	15%	18%	10%	23%	17%	13%	15%	13%
Tablet	2%	3%	1%	2%	1%	2%	1%	2%	1%	1%	3%	2%
Laptop	3%	5%	2%	3%	3%	2%	3%	5%	3%	2%	3%	3%
Desktop/PC	1%	1%	<1%	1%	1%	<1%	1%	1%	1%	1%	1%	1%

Table A1.1.1: Devices Available in Households (N = 12,500)

% of HHs with given number of smartphones	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
1	43%	33%	50%	41%	46%	43%	44%	41%	47%	45%	38%	39%
2	47%	54%	42%	48%	45%	48%	44%	49%	46%	47%	50%	44%
3	7%	9%	6%	8%	6%	7%	8%	7%	5%	6%	9%	14%
4 or more	3%	4%	2%	2%	3%	2%	4%	3%	2%	2%	4%	4%

Table A1.1.2: Distribution of Households by Number of Smartphones in Household (N = 11,493)

% of children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Have access to smartphone	72%	78%	69%	74%	70%	74%	65%	90%	67%	74%	79%	86%
Don't have access to smartphone	28%	22%	31%	26%	30%	26%	35%	10%	33%	26%	21%	14%

Table A1.1.3: Children's Access to Smartphones (N = 12,500)

% of children that report getting access to the device	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Less than one day a week	2%	3%	2%	2%	2%	3%	2%	2%	3%	3%	2%	2%
1-3 days a week	6%	6%	6%	5%	8%	6%	7%	5%	7%	7%	7%	3%
4-6 days a week	23%	22%	23%	23%	22%	24%	18%	29%	25%	28%	19%	14%
Daily (7 days a week)	66%	66%	65%	66%	65%	63%	70%	63%	62%	60%	70%	78%
Only on special occasions/exams	3%	3%	3%	4%	2%	3%	3%	2%	3%	3%	3%	3%

Table A1.1.4: Frequency of Access to Smartphone by Children (N = 9,933)

¹ Includes both self-owned and smartphones provided by schools/government

% of children that report getting access to the device	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
<30 mins	16%	17%	15%	13%	19%	14%	19%	12%	24%	16%	9%	5%
30 mins - 1 hour	36%	34%	37%	34%	38%	31%	38%	51%	38%	40%	37%	24%
1 hour - 2 hours	30%	30%	30%	30%	30%	32%	28%	24%	25%	31%	34%	33%
2 hours - 3 hours	12%	12%	12%	14%	10%	15%	10%	6%	9%	11%	14%	18%
More than 3 hours	6%	6%	6%	9%	3%	8%	5%	6%	3%	4%	6%	19%

Table A1.1.5: Duration of Usage of Smartphone by Child on a Given Day (N = 9,933)

% of children that report getting access to the device	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Always	70%	71%	70%	72%	68%	70%	70%	75%	61%	71%	78%	82%
Sometimes	29%	28%	29%	27%	31%	29%	29%	25%	37%	28%	22%	18%
Never	1%	1%	1%	1%	1%	1%	1%	<1%	1%	1%	<1%	<1%

Table A1.1.6: Frequency of Access to Internet by Children (N = 9,933)

% of children whose households own a smartphone but don't give access to child	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Phone balance or data recharge is limited	11%	14%	10%	13%	9%	12%	11%	2%	11%	12%	7%	9%
Does not know how to use the smartphone	11%	12%	11%	14%	8%	10%	12%	10%	14%	6%	1%	13%
May break or damage the device	6%	11%	5%	7%	6%	5%	8%	4%	7%	5%	3%	12%
Phone is usually not at home	34%	31%	35%	30%	38%	29%	38%	32%	26%	38%	54%	51%
Phone is at home but others use it	13%	11%	14%	13%	13%	15%	12%	4%	8%	25%	16%	14%
Network/internet issues	6%	9%	4%	6%	5%	10%	2%	3%	4%	7%	12%	2%
Does not need to use any smartphone	8%	10%	7%	7%	8%	8%	8%	2%	9%	6%	7%	3%
Affects their health (eyesight, etc.)	14%	20%	12%	15%	13%	18%	9%	27%	15%	11%	16%	12%
It is a distraction (games, movies, cartoons, etc.)	9%	11%	8%	8%	9%	11%	5%	39%	10%	8%	10%	3%
It is unsafe	7%	10%	6%	6%	7%	10%	4%	5%	7%	6%	8%	5%
It is difficult for me to monitor what the child is doing	6%	8%	6%	8%	5%	7%	6%	8%	7%	8%	6%	2%
Child is too young to use a smartphone	26%	31%	24%	25%	26%	32%	21%	14%	40%	11%	<1%	1%

Table A1.1.7: Reasons for Non-use of Smartphone by Child (N = 1,560)

A1.2 Usage of EdTech

% of children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Aware of EdTech	81%	88%	77%	82%	80%	79%	81%	96%	68%	87%	95%	95%
Not aware of EdTech	19%	12%	23%	18%	20%	21%	19%	4%	32%	13%	5%	5%

Table A1.2.1: Awareness of EdTech among Children (N = 12,500)

% of children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Uses EdTech	63%	71%	58%	64%	62%	60%	60%	87%	48%	68%	77%	82%
Doesn't use EdTech	37%	29%	42%	36%	38%	40%	40%	13%	52%	32%	23%	18%

Table A1.2.2: Usage of EdTech Among Children (N = 12,500)

% of EdTech-using children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Often (at least once a day or more)	58%	56%	60%	59%	58%	55%	63%	58%	52%	57%	63%	63%
Sometimes (a few times a week, but not every day)	36%	38%	34%	35%	36%	38%	32%	35%	41%	36%	31%	33%
Rarely (have used once or twice)	5%	5%	6%	6%	5%	6%	4%	7%	7%	5%	5%	4%

Table A1.2.3: Frequency of Usage of EdTech (N = 7,866)

% of EdTech-using children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Practice and doubt solving	77%	78%	76%	76%	79%	77%	74%	84%	77%	76%	77%	83%
Exam / test preparation	47%	51%	44%	48%	46%	46%	46%	54%	41%	44%	55%	54%
Self-learning	40%	40%	41%	41%	40%	42%	37%	42%	38%	36%	45%	45%
Online classes	22%	23%	21%	23%	21%	21%	22%	25%	19%	20%	26%	24%

Table A1.2.4: Use Cases of EdTech (N = 7,866)

% of EdTech-using children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
YouTube	94%	93%	94%	95%	92%	95%	92%	91%	93%	91%	94%	97%
WhatsApp	67%	71%	65%	68%	67%	66%	63%	82%	63%	62%	71%	79%
WhatsApp AI/Meta AI	14%	16%	13%	17%	12%	14%	16%	11%	12%	11%	13%	26%
Google	49%	53%	46%	48%	49%	50%	44%	58%	35%	47%	62%	62%
Google Gemini/Google AI	8%	10%	7%	8%	8%	8%	8%	10%	4%	6%	12%	13%
ChatGPT	6%	7%	5%	7%	6%	5%	7%	8%	2%	7%	8%	11%
Duolingo	1%	1%	1%	1%	1%	<1%	3%	1%	<1%	2%	2%	2%
DIKSHA	2%	2%	2%	2%	2%	2%	2%	3%	1%	2%	3%	3%
E-pathshala	2%	1%	3%	2%	2%	1%	4%	2%	2%	3%	3%	1%
G-Shala	2%	1%	2%	1%	3%	1%	3%	<1%	2%	2%	3%	1%

Table A1.2.5: Top EdTech Apps used by Children (N = 7,866)

A1.3 User Sentiment Around Education and EdTech

% of respondents	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Completely	61%	65%	59%	63%	60%	59%	64%	65%	59%	63%	64%	64%
Somewhat	35%	32%	37%	34%	37%	37%	34%	33%	38%	34%	34%	35%
Not at all	2%	2%	2%	2%	2%	2%	1%	1%	3%	2%	1%	1%

Table A1.3.1: Perceived Sufficiency of In-school Learning (N = 12,500)

% of EdTech-using children (or their parents)	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Improved	75%	74%	77%	76%	75%	76%	78%	65%	71%	77%	76%	80%
No significant impact	21%	23%	20%	21%	21%	20%	20%	30%	25%	20%	21%	18%
Has a negative impact	2%	2%	2%	2%	2%	2%	1%	3%	3%	2%	2%	1%

Table A1.3.2: Perceived Impact of EdTech on Learning (N = 7,866)

% of EdTech-using children (or their parents)	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Significantly	45%	47%	43%	44%	46%	49%	43%	36%	43%	46%	46%	44%
Somewhat	50%	47%	52%	50%	49%	46%	53%	52%	52%	49%	48%	51%
Not at all	4%	5%	4%	5%	4%	4%	3%	11%	5%	3%	5%	4%

Table A1.3.3: Perceived Impact of EdTech in Enabling Parents Better Support Children (N = 7,866)

% of EdTech-using children (or their parents)	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Agree; can pose risks for children	60%	61%	60%	61%	59%	58%	63%	61%	60%	68%	57%	52%
Neither agree or disagree	24%	23%	25%	23%	25%	25%	24%	17%	23%	18%	28%	28%
Disagree; doesn't pose risks	12%	13%	11%	11%	13%	12%	10%	17%	11%	10%	13%	17%

Table A1.3.4: Perception of EdTech Posing Risks for Children (N = 7,866)

% of children who know about EdTech but do not currently use it ²	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Technology doesn't help learn better	13%	17%	10%	12%	14%	12%	13%	9%	15%	15%	8%	5%
Don't know how to use these tools or they are too difficult or confusing	32%	33%	32%	28%	37%	27%	39%	27%	35%	33%	29%	29%
No one around us (school, teachers, friends) uses or asks to use it	15%	14%	16%	14%	17%	17%	13%	22%	19%	17%	9%	10%
It is a time waste	13%	14%	13%	14%	12%	12%	13%	20%	17%	13%	6%	9%
It is a distraction	10%	12%	10%	11%	10%	10%	9%	25%	15%	7%	6%	9%
It is not safe (harmful content, privacy issues, etc.)	13%	22%	8%	11%	15%	11%	14%	17%	14%	12%	14%	8%
Content is not in local language	3%	4%	3%	3%	4%	4%	3%	2%	5%	3%	2%	1%
Don't know which tools exist or which ones to trust	8%	13%	5%	7%	9%	5%	12%	4%	8%	8%	10%	5%
No interest in studying	6%	6%	6%	7%	4%	8%	3%	10%	6%	3%	6%	6%
Don't have a device	14%	11%	15%	12%	16%	17%	10%	12%	13%	11%	21%	14%
Device is not available all the time	22%	21%	22%	19%	24%	21%	22%	17%	18%	25%	28%	25%
Health-related issues (like eyesight)	10%	17%	6%	12%	8%	12%	9%	2%	8%	10%	12%	8%
Internet-related issues	12%	9%	14%	11%	14%	16%	9%	6%	13%	8%	13%	19%

Table A1.3.5: Reasons for Non-use of EdTech by Children (N = 2,446)

A1.4 Usage of GenAI for Learning

% of EdTech-using children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Have heard of GenAI	50%	56%	45%	50%	49%	47%	53%	51%	36%	49%	58%	64%
Have not heard of GenAI	50%	44%	55%	50%	51%	53%	47%	49%	64%	51%	42%	36%

Table A1.4.1: Share of Children That Have Heard of GenAI (N = 7,866)

% of EdTech-using children	Total	By Settlement		By Gender		By School Type			By Grades			
		Urban	Rural	Male	Female	Govt.	Private	Aided	1-5	6-8	9-10	11-12
Uses GenAI for learning/related activities	35%	39%	32%	36%	33%	33%	37%	35%	25%	36%	41%	43%
Have not heard of GenAI	65%	61%	68%	64%	67%	67%	63%	65%	75%	64%	59%	57%

Table A1.4.2: Usage of GenAI for Learning Among Children (N = 7,866)

²Respondents to this question refer to both children who are aware of EdTech and have never used it, and children who have used EdTech in the past but do not at present

Data Tables for Teacher Survey

A2.1 Access to Technology

% of teachers with available devices	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Smartphone	98%	98%	98%	99%	98%	98%	99%	100%	99%	99%	99%	99%
Keypad phone	7%	6%	8%	8%	6%	6%	8%	9%	6%	10%	5%	3%
Tablet	15%	16%	15%	14%	17%	17%	10%	12%	13%	18%	13%	22%
Laptop	18%	20%	17%	15%	22%	19%	13%	31%	15%	20%	19%	15%
Desktop/PC	11%	11%	10%	12%	9%	12%	7%	10%	9%	12%	9%	16%
Any device	99%	100%	99%	100%	100%	99%	100%	100%	100%	100%	100%	100%

Table A2.1.1: Access to Personal Devices at Home (N = 2,500)

% of teachers with available devices	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Smartclassroom device (e.g., smart TV, Kyan, IFPD)	44%	44%	45%	40%	49%	45%	38%	57%	43%	43%	50%	44%
Laptop / desktop	34%	30%	38%	71%	60%	34%	33%	40%	30%	37%	31%	38%
Tablet	29%	30%	28%	29%	29%	32%	23%	24%	24%	30%	30%	39%

Table A2.1.2: Access to Devices in School (N = 2,500)

A2.2 Usage of Technology

% of teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Aware of EdTech	98%	98%	98%	98%	99%	98%	98%	99%	98%	99%	99%	97%
Not aware of EdTech	2%	2%	2%	2%	1%	2%	2%	1%	2%	1%	1%	3%

Table A2.2.1: Awareness of EdTech among Teachers (N = 2,500)

% of teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Uses EdTech	88%	89%	86%	86%	90%	88%	87%	86%	84%	87%	92%	87%
Does not use EdTech	12%	11%	14%	14%	10%	12%	13%	14%	16%	13%	8%	13%

Table A2.2.2: Usage of EdTech amongst Teachers (N = 2,500)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Often (at least once a day or more)	56%	56%	55%	55%	56%	56%	54%	58%	53%	51%	59%	54%
Sometimes (a few times a week, but not every day)	37%	38%	37%	37%	37%	37%	39%	37%	39%	41%	34%	40%
Rarely (have used once or twice)	5%	5%	5%	5%	5%	5%	6%	4%	6%	5%	5%	5%
Never	1%	1%	1%	1%	0%	1%	1%	0%	1%	1%	1%	1%

Table A2.2.3: Frequency of Usage of EdTech (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Communication (inter- and intra-school)	77%	78%	76%	77%	77%	75%	79%	85%	72%	81%	77%	78%
Lesson preparation and delivery	63%	63%	62%	63%	62%	64%	56%	65%	57%	62%	63%	76%
Self-learning or upskilling	36%	35%	37%	37%	36%	39%	29%	35%	34%	35%	36%	46%
Administrative work	29%	29%	28%	28%	30%	31%	22%	32%	25%	29%	29%	35%
Assessment creation and grading	27%	67%	71%	72%	67%	69%	72%	61%	25%	29%	26%	31%

Table A2.2.4: Use Cases of EdTech (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
YouTube	61%	60%	63%	60%	63%	62%	55%	73%	59%	65%	60%	71%
WhatsApp	61%	61%	61%	62%	60%	60%	63%	64%	56%	65%	59%	66%
WhatsApp AI / Meta AI	19%	18%	20%	18%	20%	19%	13%	33%	20%	18%	19%	25%
Google	56%	55%	58%	57%	55%	58%	51%	57%	54%	59%	55%	67%
Google Gemini / Google AI	16%	16%	16%	17%	16%	17%	12%	24%	19%	15%	17%	20%
ChatGPT	18%	18%	17%	15%	20%	17%	12%	33%	24%	21%	14%	19%
Zoom / Google Meet / Teams	18%	17%	20%	17%	19%	20%	9%	27%	11%	17%	19%	30%
Google Classroom	11%	10%	12%	10%	13%	11%	8%	16%	13%	11%	11%	11%
Smartboard, etc. app	10%	10%	10%	7%	12%	10%	8%	14%	10%	10%	9%	12%
Word, PowerPoint, Excel, Outlook	11%	12%	10%	9%	13%	11%	12%	10%	12%	10%	9%	9%
DIKSHA	21%	18%	23%	21%	20%	26%	7%	13%	15%	14%	22%	45%
E-pathshala	12%	9%	14%	10%	14%	14%	7%	9%	14%	10%	11%	19%
NISHTHA	13%	12%	15%	13%	14%	17%	3%	3%	8%	9%	13%	31%

Table A2.2.5: Top EdTech Apps used by Teachers (N = 2,186)

A2.3 User Sentiment around Education and EdTech

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Improves	81%	82%	80%	79%	83%	79%	85%	86%	86%	83%	81%	69%
No significant impact	15%	15%	16%	16%	14%	16%	13%	13%	13%	14%	15%	21%
Has a negative impact	2%	2%	2%	3%	2%	3%	1%	1%	1%	1%	2%	5%

Table A2.3.1: Perceived Impact of EdTech on Educational Outcomes (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Significantly	56%	57%	55%	57%	56%	53%	65%	53%	57%	59%	57%	44%
Somewhat	40%	40%	40%	39%	42%	41%	34%	44%	42%	39%	39%	44%
Not at all	3%	3%	3%	4%	2%	4%	1%	1%	0%	1%	3%	10%

Table A2.3.2: Perceived Impact of EdTech on Time Saved (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Students who are doing well in class (high- performing students)	37%	36%	38%	40%	33%	36%	37%	37%	31%	35%	42%	33%
All students benefit equally, regardless of their current learning level	53%	55%	51%	50%	56%	53%	54%	52%	57%	58%	47%	54%
Students who are behind in class (low performing students)	7%	7%	8%	7%	8%	7%	7%	9%	9%	5%	8%	11%

Table A2.3.3: Perceptions of Student Groups Benefitting Most from EdTech Usage (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Agree; can pose risks for teachers	52%	51%	53%	53%	52%	52%	49%	61%	43%	51%	57%	52%
Neither agree or disagree	25%	24%	27%	23%	27%	27%	24%	16%	35%	27%	21%	19%
Disagree; doesn't pose risks	20%	23%	17%	21%	18%	18%	26%	19%	20%	20%	22%	25%

Table A2.3.4: Perception of EdTech Posing Risks to Self (Teachers) (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Agree; can pose risks for children	59%	59%	60%	59%	60%	59%	55%	71%	48%	56%	66%	62%
Neither agree or disagree	23%	23%	24%	22%	25%	25%	23%	15%	33%	27%	18%	17%
Disagree; doesn't pose risks	15%	16%	15%	17%	14%	14%	21%	13%	16%	16%	15%	18%

Table A2.3.5: Perception of EdTech Posing Risks for Children (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Yes; would like to receive training	79%	79%	79%	78%	80%	80%	78%	74%	81%	77%	81%	79%
No; would not like to receive training	19%	18%	19%	20%	18%	18%	19%	24%	17%	21%	17%	20%

Table A2.3.6: Inclination to Receive Training on Technology Usage in the Future (N = 2,186)

% of teachers who don't use EdTech but are aware of its application	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Access constraints (don't have device / device isn't available or internet issues)	47%	46%	47%	50%	42%	53%	47%	15%	39%	47%	55%	57%
Knowledge constraints (don't know how to use tools, which tools exist, or people around don't use)	32%	28%	35%	29%	36%	29%	38%	33%	37%	37%	30%	13%
Perceived ineffectiveness (perception that tech is a waste of time / has no teaching benefit or is a distraction)	34%	33%	35%	30%	39%	30%	23%	70%	28%	42%	39%	17%
Risk apprehension (belief that it can affect health or is not safe)	26%	27%	25%	22%	31%	23%	17%	58%	28%	34%	18%	10%
Language constraints (content is not in local language)	4%	3%	4%	2%	6%	4%	3%	3%	0%	2%	5%	0%

Table A2.3.7: Reasons for Non-Use of EdTech by Teachers (N = 258)

A2.4 Usage of GenAI for Teaching

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Have heard of GenAI	82%	84%	81%	79%	86%	84%	73%	93%	74%	82%	85%	84%
Have not heard of GenAI	18%	16%	19%	21%	14%	16%	27%	17%	26%	18%	15%	16%

Table A2.4.1: Share of Teachers That Have Heard of GenAI (N = 2,186)

% of EdTech-using teachers	Total	By Settlement		By Gender		By School Type			By Teacher Age			
		Urban	Rural	Male	Female	Govt.	Private	Aided	Under 30	31-40	41-50	51-60
Uses GenAI for teaching / related activities	51%	50%	48%	52%	46%	51%	43%	68%	50%	49%	46%	48%
Doesn't use GenAI	39%	50%	52%	48%	54%	49%	57%	32%	50%	51%	54%	52%



Table A2.4.2: Usage of GenAI for Teaching and School Related Activities Among Teachers (N = 2,186)

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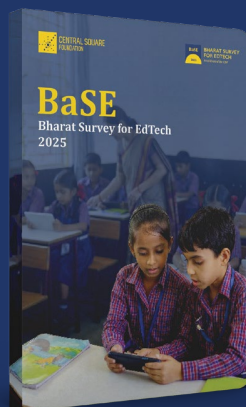
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