



**Research: The digital divide is wider than you may think**  
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As the world emerges from one of its most challenging years, human resilience and ingenuity showed that, even with schools and most workplaces abruptly shuttered, we adapted to the conditions thrust upon us. During this time, connectivity became the backbone of society, not only linking our homes with work and school, but in some cases, offering the final moments of connection between loved ones.

As resilient as we are, this trying time exposed some key aspects of connectivity that we need to address as a society in order to prevent a broadening digital divide. While some think that the digital divide only exists in rural areas - [which are indeed struggling](#) - that's not the whole story. We surveyed\* US consumers about their connectivity experiences and uncovered a more subtle gap that shows the challenge is even more significant than some expect. In general, we've identified three segments we refer to as fundamental connectivity divides:

### Fundamental Connectivity Divides

#### Premium Broadband



Have access to premium broadband, but with less than satisfactory experiences

#### Rural Connectivity



Do not have access to broadband due to location

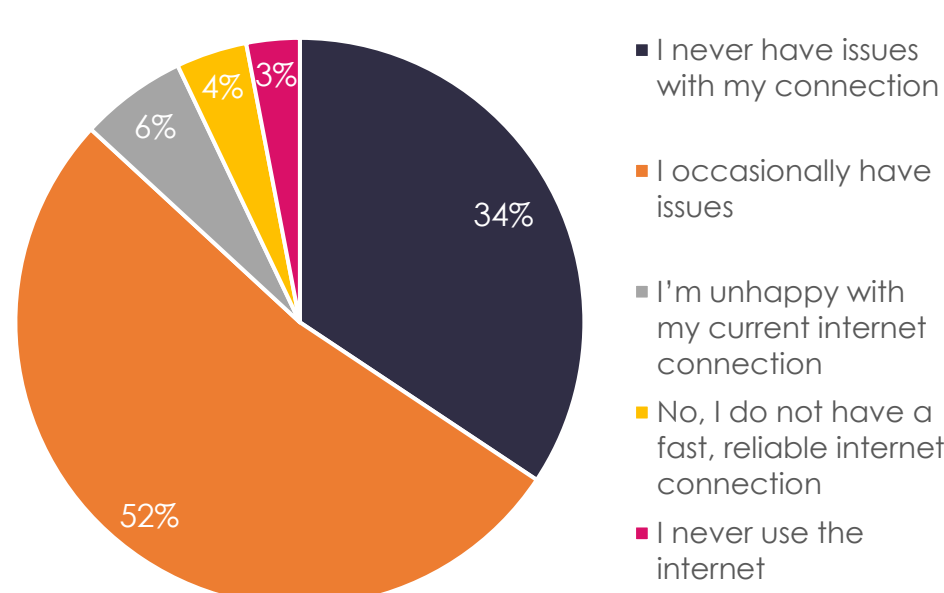
#### Affordable Access



Do not have access to basic broadband due to financial constraints

### Premium Broadband customers found connectivity to be less than dependable over the past year

Throughout the COVID-19 pandemic, there has been an increased focus on connectivity and individuals' ability to conduct work or schooling remotely. Despite 2/3<sup>ds</sup> of respondents living in areas considered to have "reliable" availability, 62% said they experienced issues connecting. Furthermore, more than one-third (36%) had a situation where they had lost or experienced connectivity degradation while conducting a critical task.



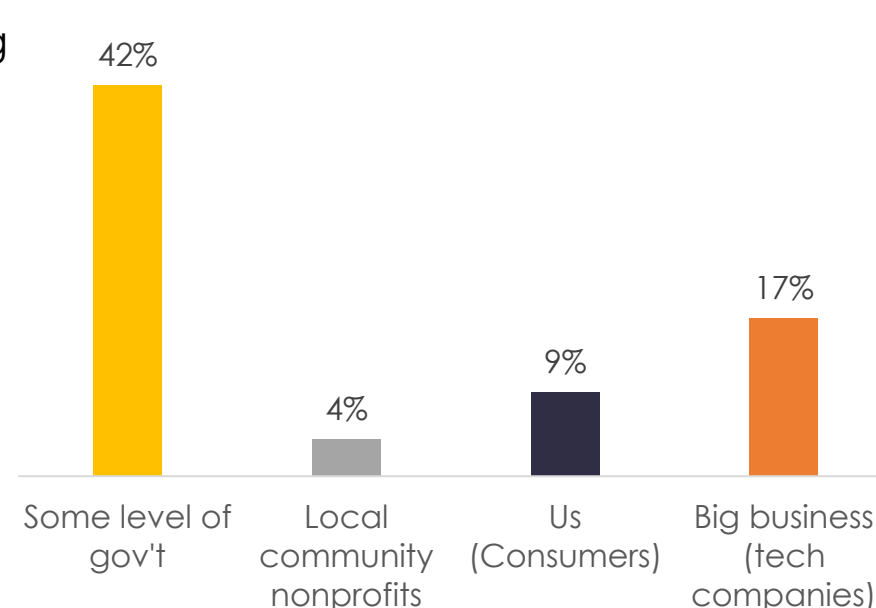
As the hybrid work environment isn't going away anytime soon, there's an expectation that broadband connectivity will be synonymous to having electricity in your home. It's dependable, reliable, you know what you get, and it's always on.

**Do you have a fast, reliable internet connection at home that allows you to work, stream and learn without issue?**

### Rural Connectivity customers are divided about how to ensure they have reliable connectivity

While 27% are torn and unsure who should take the lead, 42% believe some level of government should be responsible for ensuring their community has reliable internet access. However, an additional 17% would like to see tech companies tackle these issues head on because of their expertise, technological advancements and financial power. When asked where they want to see the most improvements, consumers requested faster speeds (58%) and greater reliability (44%).

**Who do you think is responsible for ensuring your community has reliable internet access?**



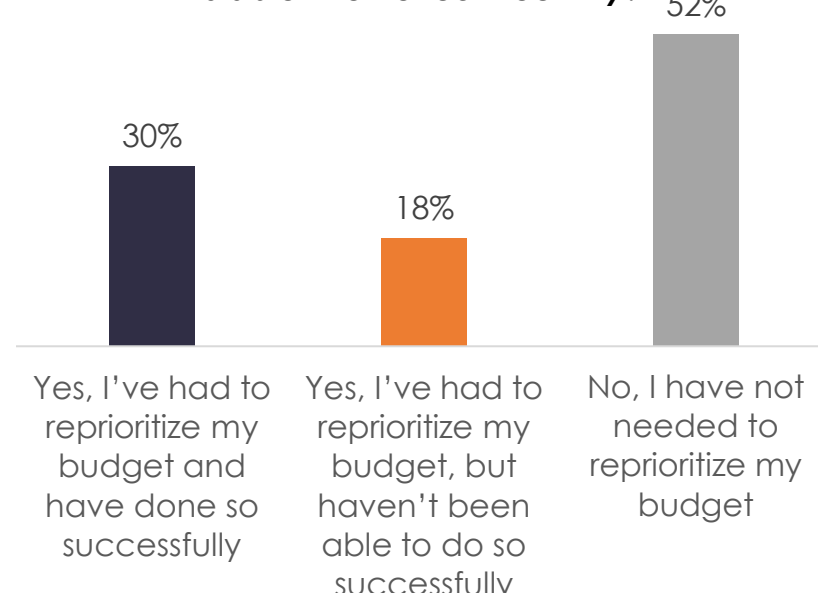
Next generation, low-earth orbit satellite (LEO) broadband providers and mid-band 5G networks may be critical in covering those rural geographies. The challenge continues to be one of economics; high capital infrastructure costs combined with relatively low subscriber numbers create a difficult economic equation that technological advancements and government investment could address.

### Affordable Access customers are being forced to re-prioritize their spending to access broadband connectivity

During a time in which the market was fluctuating, jobs were scarce and the cost of basic goods rose, the financial burden of internet connections required to work from home or attend school remotely weighed heavily on Americans nationwide.

Demonstrating a growing economic divide impacting consumers' access to affordable and dependable internet connections, 48% had to reprioritize their budget to support more reliable connectivity. Of that, 18% were unable to successfully reprioritize their budget to support this adjustment.

**Amid the ongoing COVID-19 pandemic, have you had to reprioritize your budget to support more reliable and stable internet connectivity?**



While I'm as excited as anyone about the 'next big thing' in 5G and next generation connectivity, like bringing virtual reality or better cloud gaming to my living room; or in the newly coined 'hybrid work environment', being able to prioritize important Zoom meetings with the touch of a few buttons, it's clear that we can't only focus there. Across the broader communications landscape, we must consider the fundamental connectivity divides, working with government and industry organizations alike, to deliver a better-connected society that ensures equitable access for all.

In the same way that utilities such as electricity, running water and sewage are not optional aspects of modern society, broadband needs to be incorporated into the 'needs pyramid.' Failure to do this means a widening of the digital divide, putting those on the lower end of the socioeconomic spectrum at increasing disadvantage – in their personal, professional and academic lives.

As technology and connectivity propel the global economy, it's our shared responsibility to continuously focus on narrowing the gap.

\*Data based on a survey of 1,000 U.S. consumers by Dynata

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