



Executive Summary

There is no doubt that internet access is a crucial way to learn, to bank, to access healthcare, and to stay informed. But people need more than basic internet access.

To benefit from digital technologies, people need regular access with fast speeds, enough data and sufficient devices. The Alliance for Affordable Internet (A4AI) estimates that, while two in three people are now online according to the current definition of internet access,¹ billions lack the meaningful connectivity they need to make the most of the internet.

For an individual, meaningful connectivity can mean the difference between access to education, banking, and healthcare — or none of them. For a society, it can determine how realistic and how impactful digitalisation programs will be.

Furthermore, many of current and future innovations will remain out of reach for the vast majority of the population in each of these countries who remain unconnected or have only basic access.

This report advances the Meaningful Connectivity framework as a way to support more inclusive societies and strengthen digital economies. It measures the gap in the number of people with just basic internet access and those with meaningful connectivity and examines what this digital divide means for people's online experiences.

The framework focuses on four pillars: 4G-like speeds, smartphone ownership, daily use, and unlimited access at a regular location, like home, work, or a place of study.

This report looks at nine low and middle income countries (Colombia, Ghana, India, Indonesia, Kenya, Mozambique, Nigeria, Rwanda, and South Africa), using mobile phone surveys to estimate the number of people with meaningful connectivity in each.

¹ The commonly accepted definition, from the International Telecommunication Union (ITU), is any use of the internet at any time within the past three months.

We found that, on average, only one in ten people in these countries have meaningful connectivity. This compares with just under half who have basic internet access, by latest official figures.

- Across all nine surveyed countries, estimates of meaningful connectivity remain far behind national figures on internet use, underlining that there are large inequalities among those who are online, as well as between those with and without internet access.
- There were large variations in the number of people with meaningful connectivity in the countries we studied, ranging from one in four people in Colombia to fewer than one in 160 Rwandans.
- Consistently in all nine countries, urban internet users were more likely to have meaningful connectivity than rural internet users. The rural meaningful connectivity gap in Rwanda is 267% – meaning that Rwanda’s digital economy would need to grow another 2.5 times over exclusively in meaningfully connecting rural communities to close the urban/rural divide.
- Men who are online are more likely to have meaningful connectivity than women who are online. These disparities exist even in countries that have closed the gender gap in basic access, such as South Africa and Colombia.

Meaningful connectivity offers enormous benefits to those who have it. The survey asked respondents about their experiences online and found:

- Internet users in our surveys generally report high levels of informational confidence, suggesting that internet access, even basic access, has huge potential to share essential information and create more informed populations.
- On average, eight of ten internet users in our surveys felt confident to look up the symptoms of Covid-19 online. Over half could look up how to book a medical appointment, report a crime, and book a ticket on public transportation.
- Users with meaningful connectivity were **around a third more likely** to do essential activities online like access healthcare, take a class, look for a job, or participate in the digital economy.
- Users with meaningful connectivity were more socially active (12% more likely to post on social media) and politically aware (13% more likely to know when the next elections are) than those with only basic access.

As governments develop their broadband policies and national digital agendas with the lessons from the Covid-19 pandemic, meaningful connectivity offers a framework to set targets and ambitions for internet access that has an impact on individuals’ lives.

Governments must prioritise reliable, affordable, and meaningful connectivity for their citizens if they are serious about securing the benefits of a digital society for everyone.