



Executive Summary

This report details the urban-rural connectivity gap in nine low- and middle-income countries (LMICs) and what that means for their potential to achieve the Sustainable Development Goals.

It guides policymakers from the problem (the lack of connectivity) and the consequences (more limited user experiences) to the policy solutions that can aid them to narrow the connectivity gap and boost connectivity in rural areas.

The report uses the [Meaningful Connectivity framework](#), launched in 2020 by the Alliance for Affordable Internet (A4AI) to measure the gap and explore its consequences. It also bolsters the 2019 [Rural Broadband Policy Framework](#) and explores other factors of connectivity, including PC ownership. In particular, it focuses on the impact that meaningful connectivity can have in places with Least Developed Countries (LDC) classification.

How big is the urban-rural connectivity gap?

Across all nine countries, roughly only one in ten people have meaningful connectivity. In urban areas, this increases to one in seven. In rural areas, the ratio drops to one of every twenty.

This disparity becomes even worse in the two LDC countries in our study: in Mozambique and Rwanda, fewer than one in every fifty people in rural areas have meaningful connectivity. This should alarm policymakers because as a share of the world's rural population, one in four lives within an LDC country: as part of the world's online population, only one of every twenty users connects from an LDC country.

What is meaningful connectivity?

Meaningful Connectivity is a policy framework and internet access metric to understand the quality of internet access someone has. This is a step beyond the current binary indicator of single use, any time within the past three months to understanding when the internet, as a technology, has the potential to transform societies and economies.

We understand meaningful connectivity as when someone has 4G-like speeds on a smartphone they own, with a daily use of an unlimited access point at somewhere like home, work, or a place of study.

Why should we care about meaningful connectivity for rural areas?

Meaningful connectivity is a valuable policy objective — and meaningful connectivity in rural areas specifically — because of the tremendous potential this kind of access has in increasing countries' potential to achieve various Sustainable Development Goals.

- In our surveys of 1,000 mobile internet users in nine LMICs, users with meaningful connectivity across different demographic groups were 30-33% more likely to use the internet to do essential activities like access healthcare, take a class, look for work, or participate in the digital economy.
- Meaningful connectivity in rural areas correlated with jumps in essential online activity. For example, rural respondents were 88.4% more likely to have bought something online in the past three months if they had meaningful connectivity rather than just basic internet access.
- Greater meaningful connectivity also saw online activity gaps between urban and rural users narrow, suggesting a way for internet access to be a means to reducing other social and economic inequities.
- In addition to meaningful connectivity, PC ownership also correlated with jumps in informational autonomy and digital participation. These jumps grow larger across our study countries as rates of internet penetration increase, suggesting a societal factor to connectivity and its benefits.

How do we close the connectivity gap?

The reach and quality of internet access in the world is a consequence of the broadband policies we have. In tandem with vast populations underserved or completely disconnected, many countries offer underwhelming results in setting rural targets within their national broadband plans and rural-inclusive broadband policies.

There are policy strategies available to governments looking to expand meaningful connectivity in rural areas and build the foundations for an inclusive digital economy.

What do policymakers need to do?

The gap that exists to today is not a fact that must be but a consequence of the policy choices we make. Policymakers looking to narrow this gap should prioritise three steps:

1

Engage rural communities
in the broadband policy agenda

2

Embed Meaningful Connectivity
indicators within key ICT statistics

3

Leverage public access solutions
to provide affordable and meaningful
resources to rural and remote
communities

We have the opportunity to learn from our past and build better policies that enable greater meaningful connectivity in rural areas. This report summaries a suite of options available to policymakers, from Brazil to Jamaica, Kenya to Ghana.