



## Digital Equity Survey

### **Executive Summary**

Surveys were conducted in the United States, United Kingdom, Australia, Canada, India, Mexico and South Africa to learn more about digital equity and respondents' access to technology and internet in September 2020. Commissioned by Visa and conducted by Morning Consult among a sample of 2,200 adults in the United States, and 1,000 adults in each of United Kingdom, Canada, Australia, India, Mexico, and South Africa. The interviews were conducted online. In each market, the audience reflected the general population to ensure representation across gender, age, and economic status. Results from the full survey have a margin of error of +/- 3 percentage points. The goal of the study was to learn more about digital equity and respondents' access to technology and the internet.

### **Internet Connectivity**

- Across all countries surveyed, the vast majority of respondents reported accessing the internet every day, but the ways in which they accessed it differed depending on where they lived. Those in India and South Africa reported using mobile data far more than respondents in other countries, who were more likely to have at-home internet access.
- When compared to the more developed countries in the study (the United States, United Kingdom, Australia and Canada), a much higher percentage of Indian, Mexican and South African respondents reported having issues with their technology (~70% in comparison to approximately 40% throughout the other countries). Across the more developed countries, the top issues reported had to do with price and slow/unreliable internet connection. In India, South Africa and Mexico, the primary issues had to do with speed and price of the internet, while an unreliable connection was less of a problem. This indicates that Indian, South African and Mexican respondents who have access to the internet do not tend to experience unreliability in their service, but price still remains a barrier and the internet they do have is slow.
- While about 25% of respondents in the United States, United Kingdom, Australia and Canada and about 15% of respondents in South Africa report feeling that they have better internet access than others in their communities, nearly 60% of respondents in India report feeling that they have better internet access than others in their communities. This could be an indication of more equal internet access in developed areas, compared to developing areas where there is more disparity between those with and without internet access
  - Most Mexican respondents tend to report feeling that they have the same or better internet access than others in their communities, similar to Indian respondents.

- Internet usage varies between consumers in more developed countries and those in less developed countries. In more developed markets, the internet plays a larger role in social communications and entertainment, whereas work is secondary. In contrast, respondents in India and Mexico are much more reliant on the internet for their work. South Africa, while still considered a developing country, aligns more closely with developed countries in regards to the role the internet plays in their daily lives.
- Compared to the vast majority of respondents in other surveyed countries, only about 70% of South Africans access the internet from their homes. South Africans and Indians more commonly access the internet via mobile data. For those with in-home internet access, developed countries are more likely to have high-speed connections compared to those in South Africa, Mexico, and India.

### **Device Ownership**

- While smartphone ownership by respondents from all countries exceeds 80%, laptop ownership is stronger in developed markets or markets that are rapidly developing. In the US, UK, Australia, South Africa and Canada, 75% or more of adults personally own a laptop. In Mexico, approximately 70% of adults report personally owning a laptop. In India, 52% personally own a laptop and shared devices in the household are more common.
- Only 28% of Indian respondents report feeling that they own the same amount of tech devices as others in their communities, as opposed to nearly 45% of respondents from the United States, United Kingdom, Australia, Mexico and Canada and 65% of respondents in South Africa that reported feeling they own the same amount of tech devices as others in their communities.
  - Similarly to perceived internet access, there appears to be more disparity in perceived tech ownership among Indian and Mexican adults, who are more likely to report feeling that they own more tech devices than others in their community.
- While respondents from all countries consider price a barrier to buying tech products, respondents in India, Mexico, South Africa and Canada reported significant issues with the price of their data plans. Because of this, Indian, Mexican, South African and Canadian respondents may have more difficulty maintaining their connectivity due to the expense of data plan payments. Approximately 40% of South African respondents report issues with data plan prices, exceeding that of all other surveyed countries.

## COVID-19

- When it comes to actions large technology and digital payment companies can take to address digital equity during the COVID-19 pandemic, respondents across countries suggest lowering prices. South Africans and Mexicans specifically request that large technology and digital payment companies make internet connectivity more available. Americans are more likely to suggest companies make their services completely free during the pandemic.
- COVID-19 has changed the way consumers make payments. Across all countries, respondents have been using cash less and credit and debit cards more since the outbreak of COVID-19. About 50% of Mexican respondents report using digital payment methods more since the start of the pandemic.
- 98% of Indian and Mexican respondents and 96% of South African respondents believe that access to technology is very or somewhat important for supporting economic recovery from the pandemic, which exceeds the percentage of respondents who share that sentiment in more developed countries.
  - This indicates the importance of technology in India's, Mexico's, and South Africa's economic potential and ability to recover from COVID-19 economically.

## **Summary of Findings - United States**

### **Methodology**

This poll was conducted between September 4 – September 5, 2020 among a national sample of 2,200 Adults in the United States. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, race, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

### **Executive Summary**

- Internet usage is widespread in the United States, with the majority having a connection in their homes. Many Americans personally own a smartphone and laptop or desktop.
- Slightly less than 50% of respondents report having issues accessing the internet. The top issues being price, internet speed, and reliability.
- During the COVID-19 pandemic, the internet has been most important for connecting with loved ones and buying essential items. Most respondents (88%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit and debit cards more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (94%). Internet access being more important for daily life (70%) than it is for work life (47%)
  - The top three reasons respondents use the internet are social media, searching for information, and communicating with family and friends.
- The vast majority of American adults access the internet from their homes (87%) and nearly half access it through their mobile data (49%). Internet cafes are very uncommon in the US.
- For Americans with internet connectivity at home, most have high-speed access (89%) while 11% have basic internet. Very few have dial-up internet.
  - 62% think they have about the same internet connection as others in their community.
  - Nearly 25% of adults believe they have better internet connection than others in their community
- Slightly less than 50% of respondents report having issues accessing the internet. The top three issues respondents report are high prices (22%), and slow (16%) and unreliable (13%) internet connection.
  - The top three aspects of life impacted by internet connectivity issues are staying connected with family and friends (24%), receiving news updates (18%) and entertainment (18%).

- Some respondents report that they feel there is “nothing they can do” when their technology is not working properly. Others tend to ask family members or try to look up solutions.

### **Device Ownership**

- Most American adults personally own a smartphone (85%) and a laptop or desktop (74%). About 65% have a television in their home. Smartwatches (26%), eReaders (18%) or drones (6%) are less common.
  - Americans are more likely to personally own their tech devices, versus devices that are in the household they don't use.
  - Approximately 40% of adults believe they own the same amount of tech devices as other members of their communities. 31% believe they own fewer tech devices, and 19% believe they own more tech devices in comparison to others in their communities.
- 66% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive they are to purchase/use.
  - Approximately 25% of adults are unable to afford new tech devices, and 22% say that data and service plans are too expensive.

### **COVID-19 & Digital Equity**

- Many respondents were unable to define digital equity. Those who did described it as equal access to digital devices and internet.
- During the COVID-19 pandemic, internet access has been most important for connecting with friends and family (87%) and buying essential items (73%). Accessing the internet for work is considered less important by comparison (56%), 39% of respondents say they don't need the internet to do their job.
- The vast majority of respondents (88%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe the federal and local governments are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Many respondents strongly encouraged large technology and digital payment companies to make their services free and to donate to those who cannot afford their services.
- COVID-19 has impacted how respondents make payments. Approximately 40% of adults use cash less, while about 40% use credit or debit cards more. Approximately 25% of respondents report using digital payment methods more.

## **Summary of Findings - United Kingdom**

### **Methodology**

This poll was conducted between September 4 – September 6, 2020 among a national sample of 1,000 Adults in the United Kingdom. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

### **Executive Summary**

- Internet usage is widespread in the United Kingdom. The majority have internet access in their homes.
- Approximately 40% of respondents report having issues accessing the internet, the top issues being internet speed, reliability, and price.
- During the COVID-19 pandemic, the internet has been most important for connecting with loved ones and buying essential items. Most respondents (91%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit and debit cards more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (97%). Internet access being more important for daily life (66%) than it is for work life (49%).
  - The top three reasons respondents use the internet are searching for information, social media and communicating with family and friends.
- The vast majority of British adults access the internet from their homes (96%) and 64% access it through their mobile data. Internet cafes are very uncommon in the UK.
- For British adults with internet connectivity at home, most have high-speed access (80%) while 16% have basic internet. Very few have dial-up internet.
  - 63% think they have about the same internet connection as others in their community.
  - Nearly 25% of adults believe they have better internet connection than others in their community
- Approximately 40% of respondents report having issues accessing the internet. The top three issues respondents report are unreliable (18%) and slow (16%) internet connection and price (15%).
  - The top three aspects of life impacted by internet connectivity issues are staying connected with family and friends (22%), work responsibilities (17%) and entertainment (17%).

- Many respondents look up solutions when their technology isn't working, but some find it hard to find clear instructions regarding how to troubleshoot.

### **Device Ownership**

- Most British adults personally own a smartphone (90%) and a laptop or desktop (81%). More than 50% personally own a tablet. GPS devices (28%), eReaders (24%) and drones (4%) are less common.
  - British people are more likely to personally own their tech devices, versus devices that are in the household they don't use.
  - Approximately 45% of adults believe they own the same amount of tech devices as other members of their communities. 28% believe they own fewer tech devices, and 18% believe they own more tech devices in comparison to others in their communities.
- 61% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive they are to purchase/use and a lack of understanding about how to use the features available.
  - Approximately 25% of adults are unable to afford new tech devices, and 18% say that data and service plans are too expensive.

### **COVID-19 & Digital Equity**

- Many respondents defined digital equity as having equal access to the internet and digital technology in a way that prevents people from being excluded from opportunities.
- During the COVID-19 pandemic, internet access has been most important for connecting with friends and family (92%) and buying essential items (77%). Accessing the internet for work is considered less important by comparison (57%), 33% of respondents say they don't need the internet to do their job.
- The vast majority of respondents (91%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe the local and federal governments are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Many respondents want large technology and digital payment companies to reduce prices and some encourage them to donate to organizations supporting people in accessing technology.
- COVID-19 has impacted how respondents make payments. Approximately 63% of adults use cash less, while about 54% use credit or debit cards more. Approximately 34% of respondents report using digital payment methods more.

## **Summary of Findings - Canada**

### **Methodology**

This poll was conducted between September 4 – September 6, 2020 among a national sample of 1,000 Adults in Canada. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

### **Executive Summary**

- Internet usage is widespread in Canada, with the majority having a connection in their homes. Most Canadians with connection in their homes have high-speed internet.
- Approximately 50% of respondents report having issues accessing the internet, the top issue being price.
- During the COVID-19 pandemic, the internet has been most important for connecting with loved ones, getting healthcare and buying essential items. Most respondents (88%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit and debit cards more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (98%). Internet access being more important for daily life (67%) than it is for work life (47%).
  - The top three reasons respondents use the internet are searching for information, communicating with family and friends, and social media.
- Most Canadian adults access the internet from their homes (96%) and 45% access it through their mobile data. Internet cafes are very uncommon in Canada.
- For Canadians with internet connectivity at home, most have high-speed access (88%) while 12% have basic internet. Very few have dial-up internet.
  - 66% think they have about the same internet connection as others in their community.
  - 21% of adults believe they have better internet connection than others in their community
- Approximately 50% of respondents report having issues accessing the internet. The top three issues respondents report are the price (32%), and slow (15%) and unreliable (11%) internet connection.
  - The top three aspects of life impacted by internet connectivity issues are staying connected with family and friends (24%), entertainment (19%), and getting news updates (14%).



- Some respondents report reaching out to their service providers when their technology isn't working well to negotiate a better deal.

### **Device Ownership**

- Most Canadian adults personally own a smartphone (82%) and a laptop or desktop (80%). 50% personally own a tablet. Smart watches (20%), eReaders (14%) and drones (3%) are less common.
  - Canadians are more likely to personally own their tech devices, versus devices that are in the household they don't use.
  - Approximately 44% of adults believe they own the same amount of tech devices as other members of their communities. 30% believe they own fewer tech devices, and 13% believe they own more tech devices in comparison to others in their communities.
- 71% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive the data and service plans are and how expensive devices are to purchase.
  - 29% of adults are unable to afford new tech devices, and 32% say that data and service plans are too expensive.

### **COVID-19 & Digital Equity**

- Many respondents defined digital equity as equal access to internet and technology regardless of your economic class or circumstances.
- During the COVID-19 pandemic, internet access has been most important for connecting with friends and family (91%), getting healthcare (69%) and buying essential items (66%). Accessing the internet for work is considered less important by comparison (55%), 35% of respondents say they don't need the internet to do their job.
- The vast majority of respondents (88%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe the federal and local governments are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Respondents overwhelmingly encouraged large technology and digital payment companies to reduce their prices during COVID-19.
- COVID-19 has impacted how respondents make payments. Approximately 49% of adults use cash less, while 49% use credit or debit cards more. Approximately 22% of respondents report using digital payment methods more.

## **Summary of Findings - India**

### **Methodology**

This poll was conducted between September 4 – September 5, 2020 among a national sample of 1,000 Adults in India. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

### **Executive Summary**

- Internet usage in India is most commonly accessed through mobile data. Only 57% have at-home internet connection, and among those that do, two-thirds have high-speed internet. Indian adults are much more likely to own a smartphone over a laptop or desktop.
- Approximately 70% of respondents report having issues accessing the internet, the top issues being price and internet speed.
- During the COVID-19 pandemic, the internet has been most important for getting healthcare, connecting with friends and family, buying essential items, education and accessing work. 95% of respondents report needing access to the internet to do their job. Most respondents (98%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit/debit cards and digital payment methods more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (95%). Internet access is about equally important for daily life (82%) and work life (84%).
  - The top three reasons respondents use the internet are social media, education.
- The vast majority of Indian adults access the internet through mobile data (85%) and 57% access it through at-home internet connection. 21% access the internet through public spaces.
- For Indians with internet connectivity at home, most use mobile data (79%) and about two thirds have high-speed internet (67%). Far fewer have basic internet (15%) and dial-up internet (10%).
  - 56% think they have better internet connection than others in their community. Due to inconsistent access to internet throughout the region, those with internet connection typically feel that they have better access than members of their communities.
  - 38% of adults believe that their internet connection is about the same as others in their community.

- Approximately 70% of respondents report having issues accessing the internet, a much higher rate than in Western countries. The top issues respondents report are the price (32%) and slow internet connection (25%).
  - The top three aspects of life impacted by internet connectivity issues are learning about new topics (33%), staying connected with family and friends (31%), and getting news updates (28%).

### **Device Ownership**

- Most Indian adults personally own a smartphone (85%) and about half own a laptop or desktop (52%). eReaders (13%) and drones (4%) are less common.
  - Shared household use of computers is more common in India (25% have a laptop in the home to use).
  - Approximately 28% of adults believe they own the same amount of tech devices as other members of their communities. 30% believe they own more tech devices, and 19% believe they own fewer tech devices in comparison to others in their communities.
- 69% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive the data and service plans are and how expensive they are to purchase.
  - 21% of adults are unable to afford new tech devices, and 29% say that data and service plans are too expensive.

### **COVID-19 & Digital Equity**

- Many respondents consider digital equity to be the access to technology to be able to fully participate in society.
- During the COVID-19 pandemic, internet access is reported as being important for getting healthcare (91%), connecting with friends and family (90%), buying essential items (90%), education (89%) and accessing work (88%). Only 5% of respondents say they don't need the internet to do their job.
- Most respondents (98%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe local governments and individuals are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Many respondents called on large technology and digital payment companies to reduce their prices during COVID-19 and to simplify their processes to make things easier for people to use. COVID-19 has impacted how respondents make payments. Approximately 51% of adults use cash less, while 43% use credit or debit cards more. Approximately 58% of respondents report using digital payment methods more.

## **Summary of Findings - Australia**

### **Methodology**

This poll was conducted between September 4 – September 8, 2020 among a national sample of 1,000 Adults in Australia. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

### **Executive Summary**

- Internet usage is widespread in Australia, with the majority having a connection in their homes.
- Slightly less than 50% of respondents report having issues accessing the internet, the top issues being price and slow and unreliable internet connection.
- During the COVID-19 pandemic, the internet has been most important for connecting with loved ones and buying essential items. Most respondents (90%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit and debit cards more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (97%). Internet access being more important for daily life (60%) than it is for work life (45%).
  - The top three reasons respondents use the internet are social media, finding information, and communicating with family and friends.
- The vast majority of Australian adults access the internet from their homes (90%) and 62% access it through their mobile data. Internet cafes are very uncommon in Australia.
- For Australians with internet connectivity at home, most have high-speed access (74%) while 21% have basic internet. Very few have dial-up internet.
  - 68% think they have about the same internet connection as others in their community.
  - Nearly 20% of adults believe they have better internet connection than others in their community
- Slightly less than 50% of respondents report having issues accessing the internet. The top three issues respondents report are high prices (21%), and slow (20%) and unreliable (16%) internet connection.
  - The top three aspects of life impacted by internet connectivity issues are staying connected with family and friends (21%), work responsibilities (16%) and entertainment (16%).

- Most respondents report trying to handle technology issues on their own or asking a friend or family member for help.

### **Device Ownership**

- Most Australian adults personally own a smartphone (90%) and a laptop or desktop (82%). About 68% own or have a television in their home. Smartwatches (25%), eReaders (13%) or drones (8%) are less common.
  - Australians are more likely to personally own their tech devices, versus devices that are in the household they don't use.
  - Approximately 44% of adults believe they own the same amount of tech devices as other members of their communities. 32% believe they own fewer tech devices, and 15% believe they own more tech devices in comparison to others in their communities.
- 67% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive they are to purchase/use.
  - Approximately 29% of adults are unable to afford new tech devices, and 23% say that data and service plans are too expensive.

### **COVID-19 & Digital Equity**

- Many respondents do not know how to define digital equity. For those who did, they described it as everyone having equal access to information and digital technology.
- During the COVID-19 pandemic, internet access has been most important for connecting with friends and family (89%) and buying essential items (64%). Accessing the internet for work is considered less important by comparison (51%), 37% of respondents say they don't need the internet to do their job.
- Most respondents (90%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe the federal and local governments are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Many respondents believe that large technology and digital payment companies should reduce their prices during COVID-19, especially for low-income individuals.
- COVID-19 has impacted how respondents make payments. 47% of adults use cash less, while about 40% use credit or debit cards more. Approximately 30% of respondents report using digital payment methods more.

## **Summary of Findings - Mexico**

### **Methodology**

This poll was conducted between September 14 – September 17, 2020 among a national sample of 1,000 Adults in Mexico. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, race, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

### **Executive Summary**

- Internet usage is widespread in Mexico, with the majority having a connection in their homes. Many Mexicans personally own a smartphone and about 70% laptop or desktop.
- Slightly less than 50% of respondents report having issues accessing the internet. The top issues being price and internet speed.
- During the COVID-19 pandemic, the internet has been most important for connecting with friends and family, education and school and accessing work, getting healthcare and buying essential items. Nearly all respondents (98%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit and debit cards and digital payments methods more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (96%). Internet access is considered slightly more important for daily life (93%) than for work life (88%).
  - The top three reasons respondents use the internet are communicating with family and friends, finding information, and accessing work.
- The vast majority of Mexican adults access the internet from their homes (93%) and more than half access it through their mobile data (55%). Internet cafes are very uncommon in Mexico.
- For Mexicans with internet connectivity at home, about two-thirds have high-speed internet access and about a third have dial-up internet. About 25% have basic internet.
  - 62% think they have about the same internet connection as others in their community.
  - Nearly a third of adults believe they have better internet connection than others in their community
- Slightly less than 50% of respondents report having issues accessing the internet. The top issues respondents report are slow internet connection (23%) and high prices (22%).
  - The top three aspects of life impacted by internet connectivity issues are connecting for work (31%) and school (30%) responsibilities and staying connected with family and friends (29%).

- Many respondents report looking up information on their own as the primary way that they handle technological issues.

### **Device Ownership**

- Most Mexican adults personally own a smartphone (88%) and a laptop or desktop (70%). About 69% have a television in their home. eReaders (13%) and drones (7%) are less common.
  - Mexicans are more likely to personally own their tech devices, versus devices that are in the household but don't own personally.
  - Approximately 45% of adults believe they own the same amount of tech devices as other members of their communities. 17% believe they own fewer tech devices, and 28% believe they own more tech devices in comparison to others in their communities.
- 66% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive they are to purchase/use.
  - Approximately 22% of adults are unable to afford new tech devices and say that data and service plans are too expensive.

### **COVID-19 & Digital Equity**

- Many respondents were able to describe digital equity and described it as equal access to digital devices and the internet. Some respondents noted that they felt the likelihood of achieving digital equity was low because inequality in the rest of society is so vast.
- During the COVID-19 pandemic, internet access has been most important for connecting with friends and family (96%), education and school (92%) and accessing work (90%), getting healthcare (83%) and buying essential items (83%). Only 5% of respondents say they don't need the internet to do their job.
- Nearly all respondents (98%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe the federal and local governments are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Many respondents strongly encouraged large technology and digital payment companies to reduce their prices and make internet connectivity more widely available.
- COVID-19 has impacted how respondents make payments. Approximately 43% of adults use cash less, while 54% use credit or debit cards more. 50% of respondents report using digital payment methods more.

## **Summary of Findings - South Africa**

### **Methodology**

This poll was conducted between September 14 – September 17, 2020 among a national sample of 1,000 Adults in South Africa. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, educational attainment, gender, race, and region. Results from the full survey have a margin of error of plus or minus 3 percentage points.

### **Executive Summary**

- At-home internet usage is relatively common in South Africa. Approximately 70% of respondents report having a connection in their homes while 73% report accessing the Internet via mobile data. Many South Africans personally own a smartphone and laptop or desktop.
- Approximately 60% of respondents report having issues accessing the internet. The top issues being slow connectivity and price.
- During the COVID-19 pandemic, the internet has been most important for connecting with friends and family, accessing work and education and school. Most respondents (96%) believe that equal access to technology is very or somewhat important for supporting economic recovery from the pandemic.
- Since the pandemic started, respondents have been using cash less and credit and debit cards more.

### **Complete Analysis**

#### **Internet Connectivity**

- Nearly all respondents access the internet every day (97%). Internet access is considered more important for daily life (87%) than for work life (79%).
  - The top three reasons respondents use the internet are finding information, social media, and communicating with family and friends.
- Approximately 70% of respondents have internet connection at home. 73% access the internet via mobile data. Internet cafes are relatively uncommon in South Africa.
- For South Africans with internet connectivity at home, about 59% have high-speed internet access and about 7% have dial up internet. About 29% have basic internet.
  - 65% think they have about the same internet connection as others in their community.
  - About 25% believe they have better internet connection than others in their community.
- Approximately 60% of respondents report having issues accessing the internet. The top issues respondents report are slow internet connection (35%) and high prices (27%).
  - The top three aspects of life impacted by internet connectivity issues are staying connected with family and friends (45%), and connecting for work (31%) and school (27%).



- Some respondents report reaching out to their service providers when their technology isn't working. Others report moving physical locations to get better internet speed/reliability. Those experiencing issues with price of access tend to concede and pay the price anyways, or look to switch service providers.

### **Device Ownership**

- Most South African adults personally own a smartphone (95%) and a laptop or desktop (80%). About 70% have a smart television in their home, or own one personally. eReaders (8%) and drones (3%) are less common.
  - South Africans are more likely to personally own their tech devices, versus devices that are in the household but don't own personally.
  - Approximately 47% of adults believe they own the same amount of tech devices as other members of their communities. 30% believe they own fewer tech devices, and only 13% believe they own more tech devices in comparison to others in their communities.
- 71% of respondents report having some issues with their tech devices. Many issues with tech devices involve how expensive they are to purchase and the high prices of data and service plans.
  - Approximately 39% of adults say that data and service plans are too expensive, and 37% are unable to afford new tech devices.

### **COVID-19 & Digital Equity**

- While many respondents correctly identified digital equity as everyone having access to information technology that allows them to fully participate in society, those who did not believed the term referenced the value or number of technological devices someone owns.
- During the COVID-19 pandemic, internet access has been most important for connecting with friends and family (92%), accessing work (86%) and education and school (85%). 10% of respondents say they don't need the internet to do their job.
- Nearly all respondents (96%) consider equal access to technology to be very or somewhat important for everyone in supporting economic recovery from the COVID-19 pandemic.
- Respondents believe the federal and local governments are most responsible for supporting community recovery from COVID-19. They consider businesses to be least responsible.
  - Many respondents strongly encouraged large technology and digital payment companies to reduce the prices of their services or make their services free. They also encouraged these companies to provide internet access to members of poorer communities who may not have it.
- COVID-19 has impacted how respondents make payments. Approximately 48% of adults use cash less, while an equal amount use credit or debit cards more. About a third of respondents report using digital payment methods more.