

Cisco Broadband Index

Workforce Insights on Access
to Internet Services

2022



The bridge to possible

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Executive summary

Broadband connectivity is much more than just the ability to access the Internet. It powers an individual's access to basic needs, including healthcare and education, as well as empowers them to participate in the global economy.

According to the global survey of almost 60,000 workers across 30 markets about their home broadband access, quality and usage, economic and societal growth will not happen without universal access to fast and reliable Internet.

Indeed, the success of an accelerated shift to hybrid working model hinges on the quality of underlying reliable and secure connectivity. 75% of the people we polled believe broadband services must dramatically improve to fully support hybrid work. This is further reflected in 43% of respondents who are planning to upgrade their Internet in the next 12 months.

Workers are not simply concerned about connectivity at home. According to our study, 76% believe fast, stable Internet services can propel economic growth in their country. Almost as many (75%) think high-quality connectivity is critical to maintaining a well-educated and informed population.

Meanwhile, a similar majority (78%) say the reliability and quality of their broadband connection is important to them. This is hardly surprising considering the increase in online traffic sparked by lockdowns, and other social and commercial restrictions imposed during the pandemic.

New broadband behaviours

With almost two thirds (61%) of workers relying on broadband connections in their daily lives, and nearly half (49%) suggesting their Internet usage will either stay the same or increase in the next year, a strong network is imperative.

The results of the survey underscore concern regarding the digital divide, with 65% of respondents indicating that accessible, affordable and reliable broadband will become a major issue for people. Well over half (58%) claim they were unable to access critical services such as medical appointments and ongoing education online during lockdown.

With an eye on the future, nearly half (48%) of the workforce now relies on their home Internet to work from home or run their own business. With 59% of households sustaining three or more people online at any one time, and 84% of respondents around the world going online from home for at least four hours per day, universal and reliable access is crucial.

Owing to these observations, more than 3 in 4 (78%) people assert that everyone should be able to securely connect to fast and reliable Internet regardless of location.

The critical need for universal broadband presents a big opportunity for governments and industries to work together and take action. Three quarters (75%) of respondents would like to see governments accelerate plans to ensure high-speed and reliable Internet is available to everyone.

Governments can establish broadband policies and programs that encourage competition, drive Internet investments and expand its reach. Employers can support their workforce by adopting the right technology for their particular hybrid work model.

Meanwhile, service providers can partner with policymakers to develop programs that address the needs of the unserved or underserved, and adopt new ways of networking to power the 'Internet for the Future' that will meet demand.

Spotlight: Australia

Workers prioritise reliable, accessible connectivity as significant investment is made to bridge the digital divide and shore up hybrid access



With more than half (51%) of Australians connecting to work from home or run their own business, the population understands the need to stay connected while away from the office.

In the next year, more than half (56%) expect to use the Internet just as much or even more than they previously did – as do 54% of current hybrid workers. This is leading to concerns over bandwidth: 71% agree broadband services must dramatically improve to support future hybrid work.

A similar majority (75%) state the reliability and quality of their connection is important. In more than half of workers' households, three or more people use the Internet at the same time of day, underlining the importance of a reliable high-speed network.

Connecting the country

It should be noted networks largely stood up to the challenges of a rapid step-change to home and hybrid working. The Australian Government is also taking further steps to address this shift. Its National Broadband Network is largely complete, providing universal access to high-speed broadband.

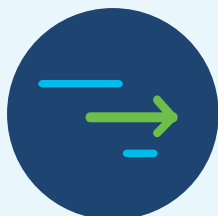
An additional \$4.5bn has been committed to ensure that, by 2023, 75% of homes and businesses should benefit from the upgrade, supporting business innovation, productivity and growth. Meanwhile, \$85m has been allocated to expanding the country's Regional Connectivity Program for better Internet and mobile access in remote regions.

Despite the benefits promised through these investments, 69% of workers believe officials should accelerate the roll-out to ensure high-speed, reliable Internet for all.

Key takeaways



75% of workers in Australia state fast, reliable Internet service is crucial to their daily lives



69% say accelerating plans to create better connectivity across Australia is vital



Nearly 2 in 3 people believe affording high-quality digital services will become an issue



84% of respondents actively use their broadband at home for four hours or more each day

Australians have high expectations of digital networks. Nearly three-quarters (74%) see fast, reliable connectivity as crucial to the country's future economic growth. A further 71% believe it is critical to maintaining a well-educated population.

Digital equality is another issue raised. Some 62% predict the cost of broadband will become difficult for some people, with 61% expressing the opinion that Internet access currently costs too much.

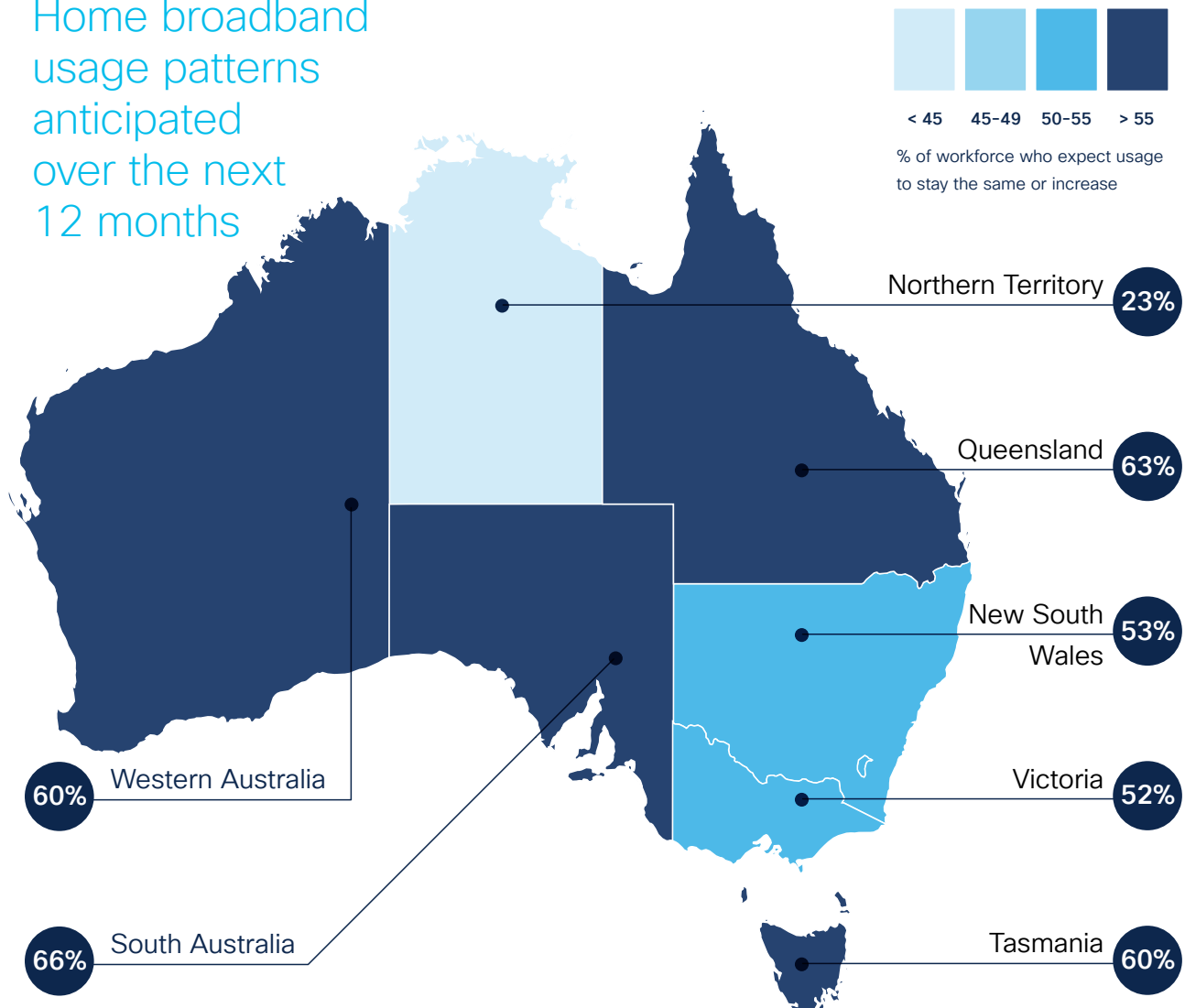
Furthermore, 42% of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Hybrid hopes

Despite the challenges of affording Internet access, workers are aware of the need for strong defences against cyber attacks. Overall, 73% agree all citizens should enjoy a secure connection whether they're connecting in a public or private space.

Almost half (46%) would be willing to pay more for a safer connection than they have today - including 50% of full-time remote workers and 48% of those counting themselves as hybrid workers.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Brazil

Workers in Brazil share emerging expectations for improved Internet infrastructure – and what that means for societal and economic growth



Brazilian workers show some strong opinions on how the nation’s digital infrastructure should develop. More than 8 in 10 (81%) believe plans should accelerate to ensure high-speed, reliable Internet is available to all citizens.

Meanwhile, slightly more think Brazil is not yet set up to fully support a shift to hybrid and remote working patterns: 82% think broadband services must dramatically improve to help these workers do their job properly.

These views come against a backdrop of high dependence on Internet services. A similarly large majority (82%) state that the reliability and quality of their broadband connection is important in their daily lives.

Digital futures

Respondents see good reasons for having fast, reliable Internet services. More than 8 in 10 (81%) say this is crucial to the country’s future economic growth. In addition, more than 3 in 4 (78%) workers believe a good network is important to underpin a well-educated and informed population.

A large proportion (63%) suggest three or more people are active online simultaneously throughout the day. With more than half (56%) of respondents stating they work or run their own business at home this is a cause for concern amid the connection difficulties described above.

Key takeaways



82% : the amount of workers in Brazil stating reliable, quality broadband is important to them



More than 8 in 10 respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



More than 3 in 4 respondents say fast, reliable Internet connections are cost-prohibitive for low-income households



88% of respondents actively use their broadband at home for four hours or more each day

More than 4 in 10 (44%) workers say their household's Internet usage will increase or stay the same in the 12 months ahead. For this reason, perhaps, almost half (49%) say they will seek to upgrade their Internet service during the same period.

Network for everyone

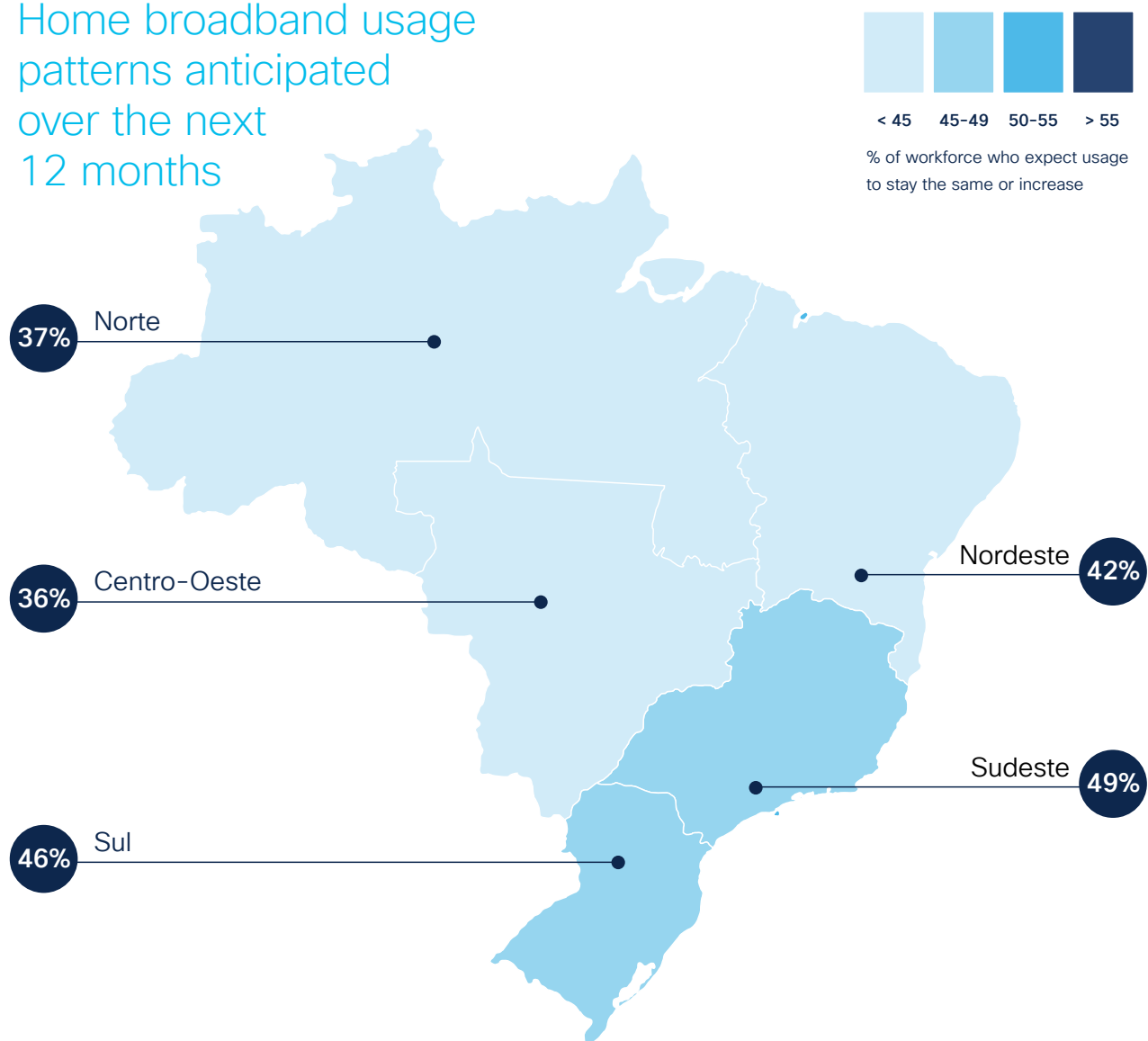
Affordability is a factor for many people, with more than three-quarters (77%) indicating the cost of broadband is too high for low-income families to be able to get online. 60% of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Additionally, 84% of respondents who think everyone should be able to securely connect to fast, reliable Internet in public places, regardless of location.

While the service providers should focus on increasing speed and reliability of the broadband connections in the country, the government should create policies to foster this development.

Also, there's a role for the government to provide connectivity in areas unserved by the service providers and to segments of the populations that are economically unable to pay for those services. Connectivity is one of the pillars of true citizenship as it allows the population access to several public services.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Canada

A growing economy and well-educated population depend on better Internet services, claim most workers in Canada



Over the past two years, Canada's digitization has accelerated at a pace not seen before.

Canadians' reliance on digital infrastructure became more acute with the digitization of services from healthcare and education to social services and remote work.

According to nearly three-quarters (74%) of Canadian workers, access to fast, reliable Internet is critical to the future growth of the nation's economy recovery and prosperity, ensuring all can contribute.

Canada is now at an inflection point. Governments at all levels and Internet service providers have made significant investments to build Canada's digital infrastructure, and both public and private sectors are investing heavily to digitize their operations.

Some 70% of Canadian workers believe the Government should accelerate its plans to ensure high-speed and reliable Internet is available for everyone in the country.

A further 73% think every citizen should be able to connect to fast, reliable networks when in public places or on the move - regardless of location.

Meanwhile, more than 7 in 10 (71%) respondents say speedy and stable Internet services must be maintained to underpin a well-educated population.

Inclusive infrastructure

During several waves of COVID-19, access to critical services was limited for many Canadians. Nearly half (45%) the workers surveyed agreed a lack of reliable home Internet prevented access to critical services such as virtual healthcare, online education, social care and utility services.

Yet affordability is seen as a pressing problem that could create a bigger digital divide between those with and without access. A large majority of workers (73%) think low-income families are being priced out of Internet services.

Key takeaways



74% : those stating that fast, reliable Internet is critical to future growth of the nation's economy



More than 7 in 10 respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



73% think low-income families are being priced out of Internet services by the cost of broadband



51% of respondents in Canada say they use the Internet at home to either work or run their own business

As Canadian communities re-open post-pandemic, many workers (72%) anticipate their workplace will adopt a hybrid work model¹. With the shift to hybrid, a large majority of workers (71%) think broadband services must dramatically improve for people to continue to work effectively. While many workers (64%) stated their home connection is either strong or very strong, and 67% stated that the reliability of their broadband quality is good or excellent, home Internet services are under strain.

Many households now support multiple family members working or studying from home, with 48% of workers claiming three or more people under their roof are active online simultaneously throughout the day.

¹ Cisco Canada (2021) Hybrid Work Survey, Angus Reid. <https://newsroom.cisco.com/press-release-content?type=webcontent&articleId=2206290>

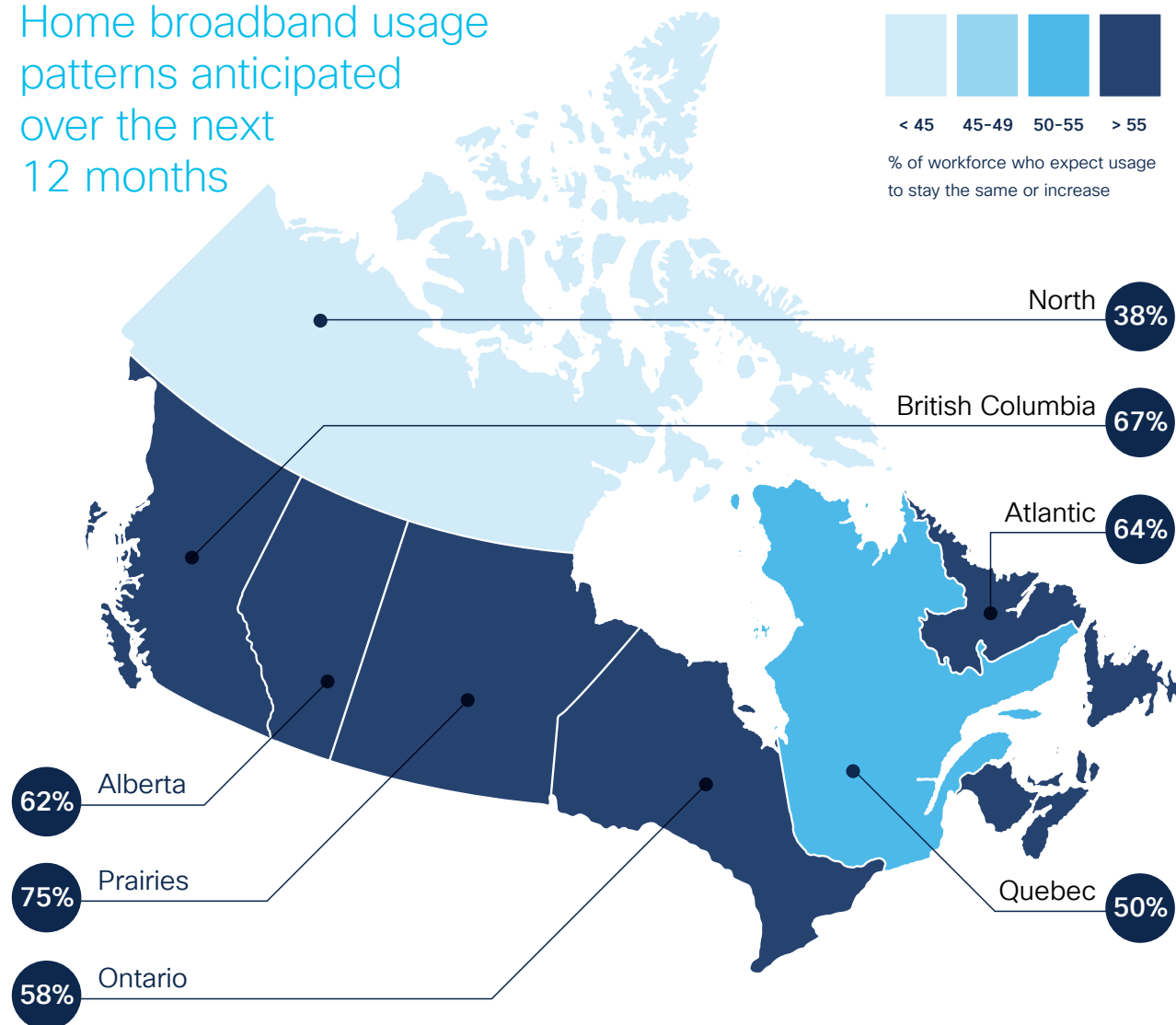
Hybrid work response

Furthermore, remote and hybrid working is more prevalent than ever, with 51% of the Canadian workforce relying on their domestic Internet connection to work from home or run a business. Meanwhile, 6 in 10 (60%) expect their Internet usage during the next 12 months to either grow or stay the same.

Considering this growing online activity, almost a quarter (24%) would like to upgrade their Internet service at some point in the next year.

Nearly half (48%) would like their employer to start paying for their home Internet service.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: China

Workers have voiced strong desires about the future of digital services, stating these must continue to improve to underpin economic growth



When it comes to connecting the country workers in China seek continued improvement. More than 4 in 5 (85%) want plans accelerated to boost high-speed, reliable Internet services for people regardless of where they live and work.

Furthermore, a similar proportion (83%) take the view that dramatic improvements in service are required to support hybrid work models. This includes almost 9 in 10 (89%) respondents currently in a hybrid working role.

In this context, it's hardly surprising that a large majority (87%) of workers overall say high-quality, reliable internet service is important to them.

Universal connection

As nearly 2 in 3 households (64%) have more than three people online simultaneously, supporting strong web services is vital. Some 84% of workers argue that secure, fast and reliable Internet should also be available in all locations outside the home.

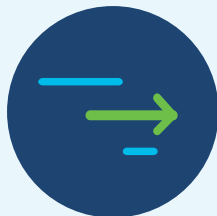
Accessibility is a key component in the emerging expectations of workers, as 76% say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

The Chinese Government will point to the creation of the world's biggest broadband infrastructure, transforming industries and improving quality of life across the population. A focus on 5G roll-out to meet consumer demand seems certain.

Key takeaways



87% of workers in China state fast, reliable internet service is crucial to their daily lives



85% say accelerating plans to create better connectivity across the country is vital



Nearly 1 in 5 people will increase their internet usage in the next 12 months



64% of respondents state that on average, three or more members of their household use the same Internet connection at the same time throughout the day

As hybrid working takes off, people will become used to connecting in many different settings: in the office, at home, in public places and even on the move.

Respondents are also keen on more secure services. A large majority (86%) of hybrid workers think secure connection should be available in all locations, and almost three-quarters (72%) of the same group would pay higher bills for safer broadband.

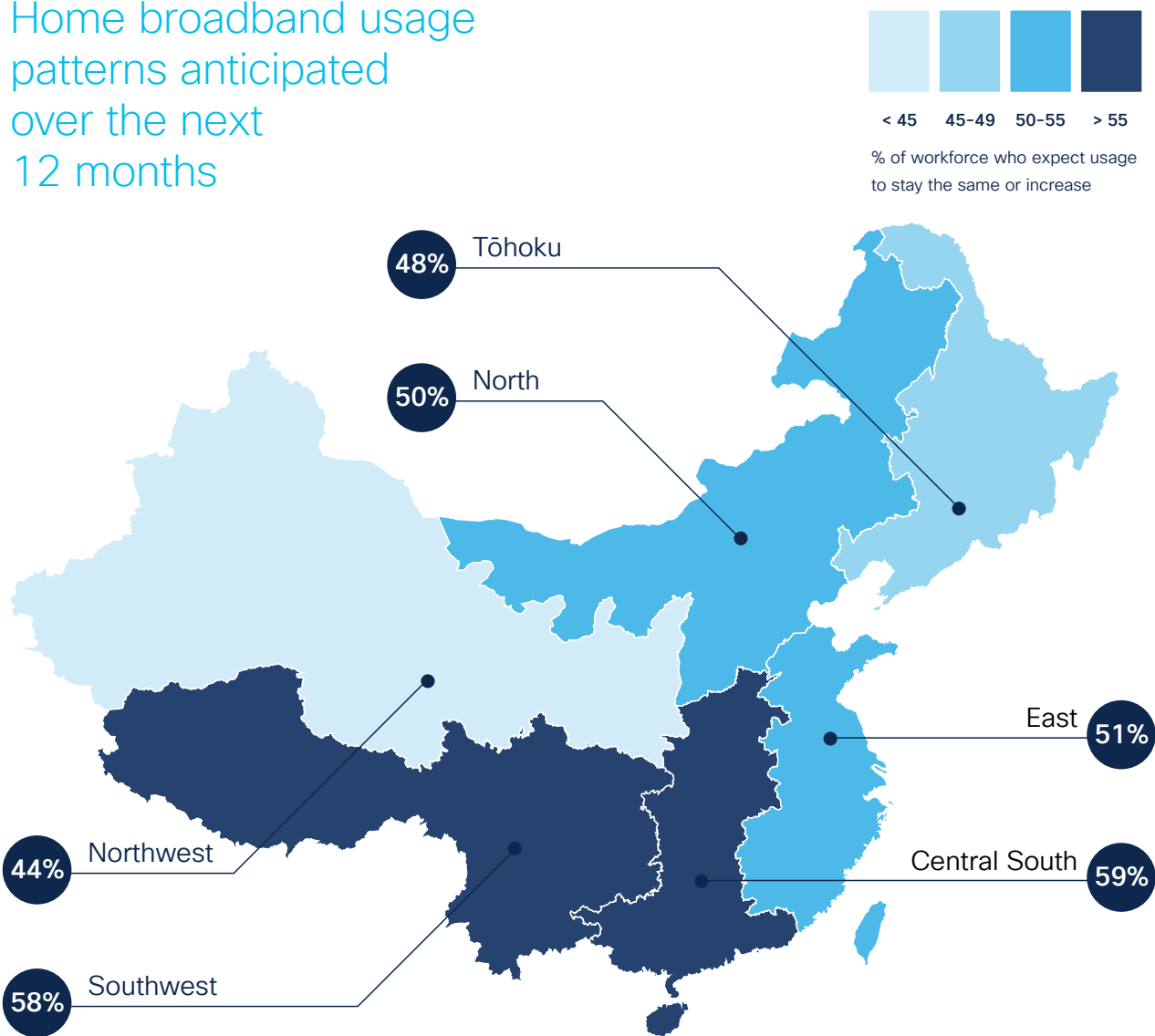
Economic and social boom

Most respondents are on the same page when it comes to recognising the financial and societal gains that can be made from fast and reliable internet services.

More than 4 in 5 (83%) workers think this is critical to developing and maintaining a well-educated and informed population, with almost as many claiming it will drive future economic growth.

With almost 1 in 5 (19%) expecting to use the internet more during the next year, and 68% feeling certain that they will seek to upgrade their service in the same period, it is clear that workers are relying on fast and dependable connectivity.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: France

French workers are focused on reliable, accessible broadband amid shifts in work, and Internet infrastructure improvements



The French Government stepped up plans in 2020 to deploy high-quality fibre across the country. That year, 5.8 million premises became eligible for fibre upgrades under the France Très Haut Débit program. It promises broadband access for all by 2022 and fibre for all by 2025.

To satisfy shifts in working, ministers are set to invest €240m in broadband as part of post-pandemic recovery plans, partly backed by the EU Recovery Fund.

The increasing expectations of the French workforce are evident, with 71% of respondents stating they want faster digital service policy implementation, while 73% suggest emergent hybrid working models will only function properly if services greatly improve.

Internet investment

Almost 3 in 4 (73%) note broadband connection reliability and quality is important to them.

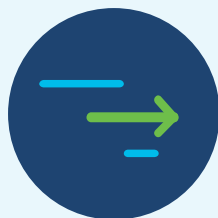
Nearly half of respondents (46%) state that three or more people use the Internet in their home at any one time, and 30% are using home broadband to do their job or run a business - which includes 65% of hybrid workers and 47% of full-time home workers - emphasising that hybrid work relies on quality Internet.

More than half (53%) expect their Internet usage to stay the same or increase in the next year, and 30% want to upgrade their broadband service.

Key takeaways



Almost 3 in 4 workers in France state fast, reliable Internet service is crucial to their daily lives



71% say accelerating plans to create better connectivity across the country is vital



53% : the proportion of workers whose Internet use will increase or stay the same in the next year



73% claim hybrid working patterns must be aided by dramatic improvements to connectivity

A majority of workers in France are convinced that better Internet access will power a brighter future for the national economy and across society in general. Almost 3 in 4 (72%) believe a fast and reliable service is critical for boosting GDP and around 2 in 3 (67%) state it's vital for developing a well-informed population.

Yet French workers place high value on equitable access. Some 68% think low-income families aren't able to afford broadband Internet access, while 69% state access to affordable and reliable broadband will become a major issue for all.

Additionally, 50% of respondents say they were unable to access critical services such as online medical appointments, online education, social care

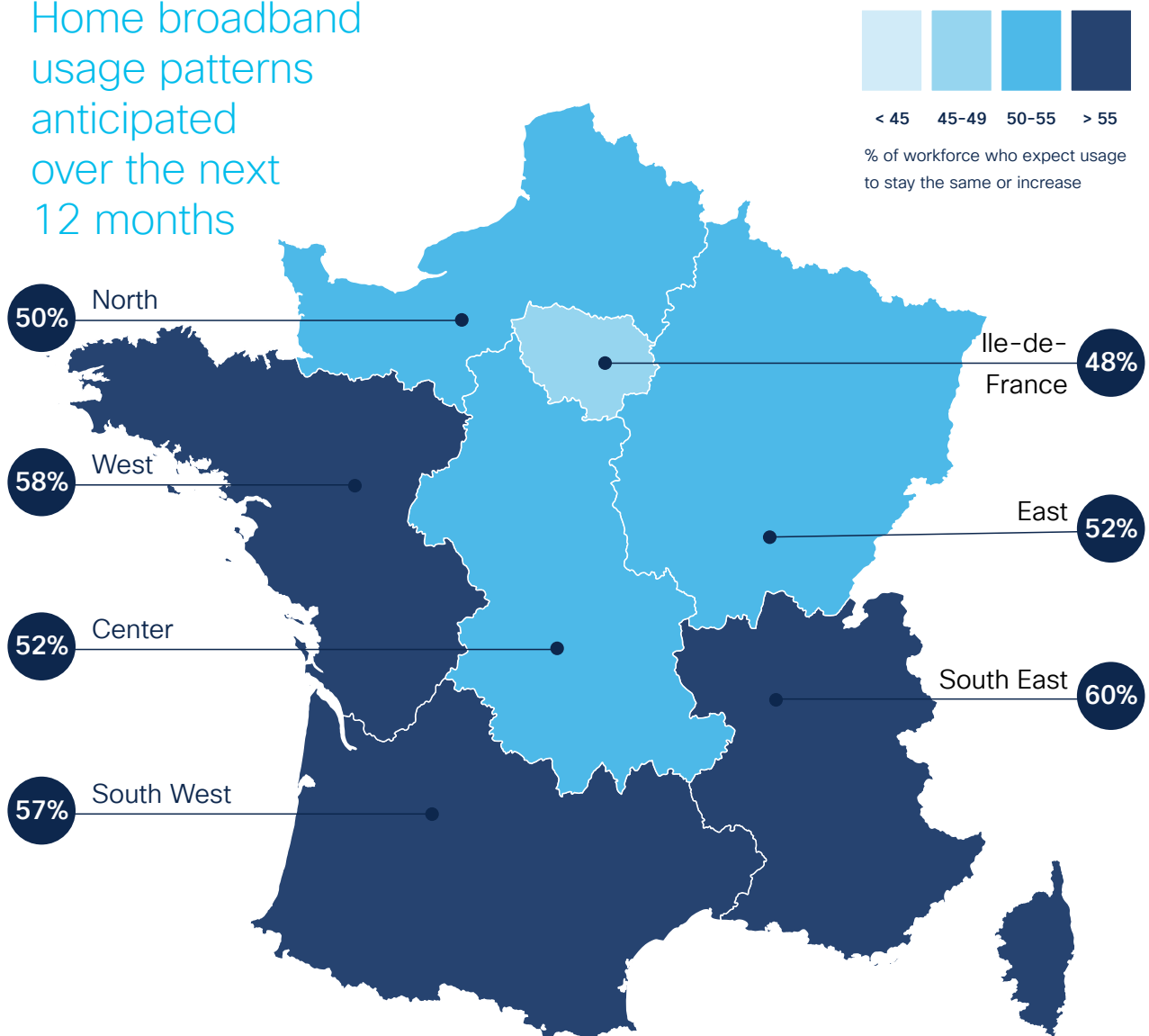
and utility services during lockdown, due to an unreliable broadband connection.

Securing the future

Alongside the desire for cost-effective and accessible Internet service provision, workers are keen to enjoy safer connections when they go online. More than 3 in 4 (77%) respondents feel connecting securely should be a given – regardless of location.

Meanwhile, 42% of workers would be willing to pay more for a safer broadband connection, including more than half (53%) of those who work remotely all of the time.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Germany

Workers in Germany share a range of concerns about connectivity – from affordability to the network’s ability to support a shift to hybrid working



Almost 2 in 3 workers (65%) of a total 2,008 respondents in Germany state the reliability and quality of their broadband connection is important to their way of life. In addition, 66% believe everyone should be able to securely connect to fast, reliable Internet in all public places, regardless of location.

Nearly as many (63%) claim the German Government must accelerate its plans for universal access to speedy, stable connectivity. Officials have set a target of installing gigabit-capable networks nationwide by 2025.

Policymakers have also developed a 5G strategy, with the goal of extending the fibre infrastructure in every region and community. In April 2021, the federal Parliament voted for the right to fast Internet, particularly in rural areas.

Better connections

A similar proportion of respondents (63%) remain concerned about the ability of Germany’s current Internet infrastructure to support a shift to hybrid working, saying broadband services must dramatically improve for this emerging employment model to be a success.

At present, 65% of respondents say reliable and quality broadband is important to them.

Half (50%) also claim three or more people are online in their home simultaneously, putting further pressure on connections.

Key takeaways



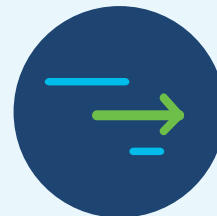
65% of workers in Germany state reliable, quality broadband is important to them



More than 6 in 10 respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



Almost 2 in 3 say fast, reliable Internet connections are cost-prohibitive for low-income households



63% of respondents believe plans should accelerate to ensure high-speed and reliable Internet is available to everyone

With 33% of respondents already using their household’s Internet service to work, or even run their own business, growing importance is placed on home broadband reliability.

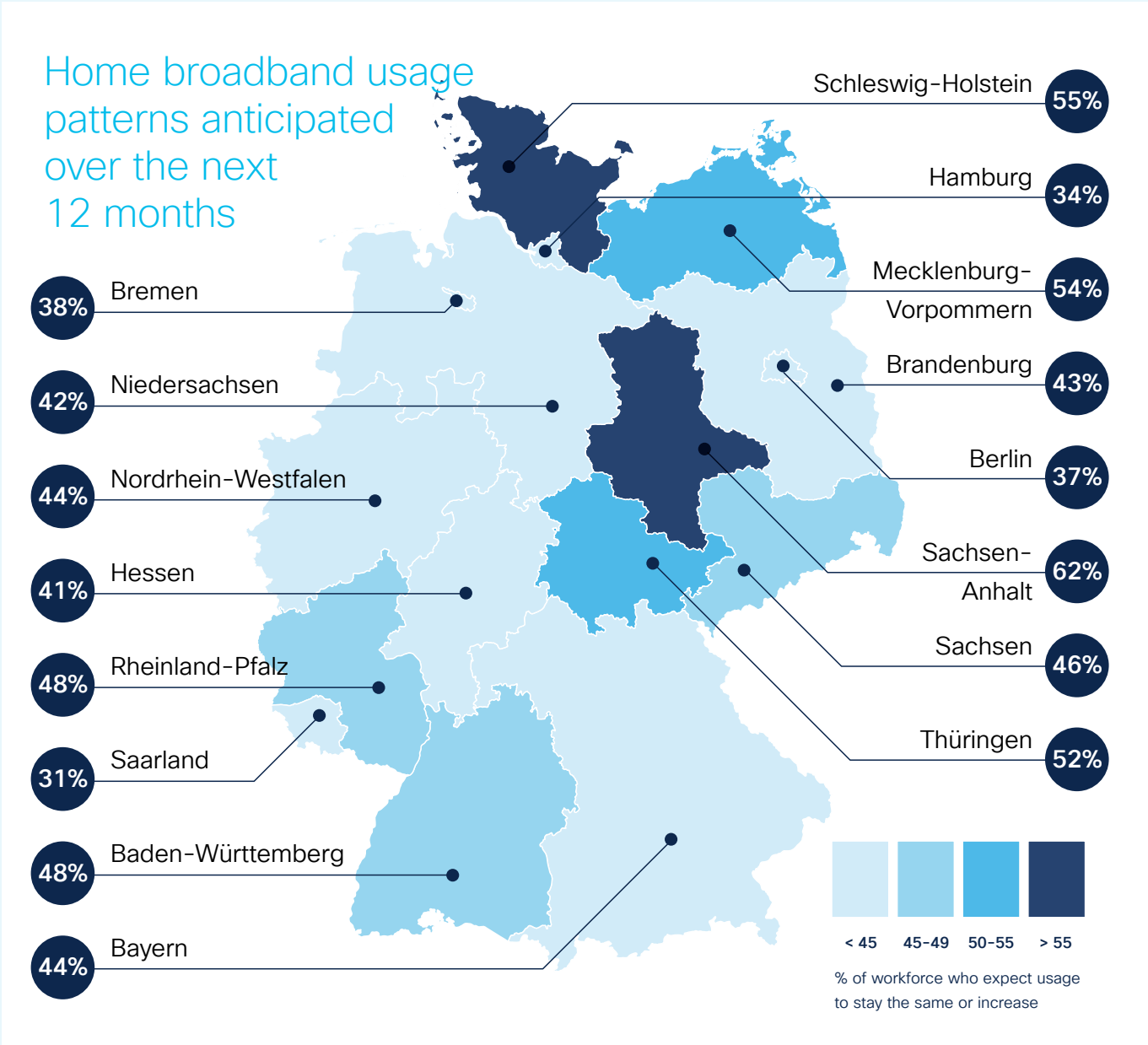
More than 4 in 10 (44%) state their household’s Internet usage is expected to increase or stay the same in the year ahead. Over 1 in 3 (36%) would like to upgrade their service in the next 12 months, but close to 1 in 5 (18%) say they won’t because it’s too expensive.

Affordability is seen as an issue generally, with 64% claiming access to affordable, reliable broadband is set to become a major issue for the population.

Inclusive Internet

A total of 61% of respondents suggest low-income families in particular are being priced out by the cost of broadband Internet access. This is important to many people, as 47% believe Germany’s future economic growth depends on access for all to fast, reliable services.

A further 50% share the opinion that such access is also critical to developing and maintaining a well-educated and informed population.



Spotlight: Hong Kong

Hybrid workers have high demands of Internet infrastructure in the market, with over 4 in 5 seeking improvements



More than 8 in 10 (81%) hybrid workers think Internet services must get dramatically better if their mode of work is to be fully supported in future. This compares to 72% of workers overall who believe the same.

The Hong Kong Government launched a subsidy scheme in 2018 to extend fibre-based networks to small settlements and outlying islands, covering 235 villages. The goal for this scheme is to expand the telecommunications services, such as 5G and Wi-Fi, to remote areas by 2026, and support the smart city development of Hong Kong.

Service providers have launched commercial 5G services since April 2020 in Hong Kong. Within a year, subscription to 5G services already exceeded one million.

Coverage for all

A majority of Hong Kong workers envisage a future of affordability issues for the market's citizens: 69% say access to affordable and reliable broadband will become a major problem for people. Almost 2 in 3 (65%) state low-income families find the cost of connecting particularly difficult.

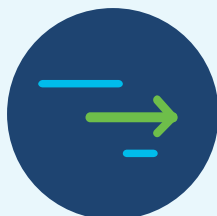
Workers have strong views on a range of aspects of online infrastructure. Nearly three-quarters (73%) think secure connection to fast and reliable Internet in public places, regardless of location, should be universal.

Nearly three-quarters of respondents (72%) indicate a desire to accelerate plans to make high-speed, reliable Internet available for everyone in the market.

Key takeaways



81% of hybrid workers claim their roles can only be fully supported with dramatic improvements in service



72% say accelerating plans to create better connectivity across the market is vital



60% of workers expect their Internet use to increase or stay the same in the year ahead



88% of respondents actively use their broadband at home for four hours or more each day

Nearly 6 in 10 (59%) respondents say three or more people simultaneously use the Internet in their household. With more than 4 in 10 (45%) also revealing they connect at home to work or run their own business, the need for a reliable and fast service is apparent.

While 6 in 10 (60%) expect their Internet use to increase or stay the same in the year ahead, fewer than half (41%) plan to upgrade their service in the next 12 months.

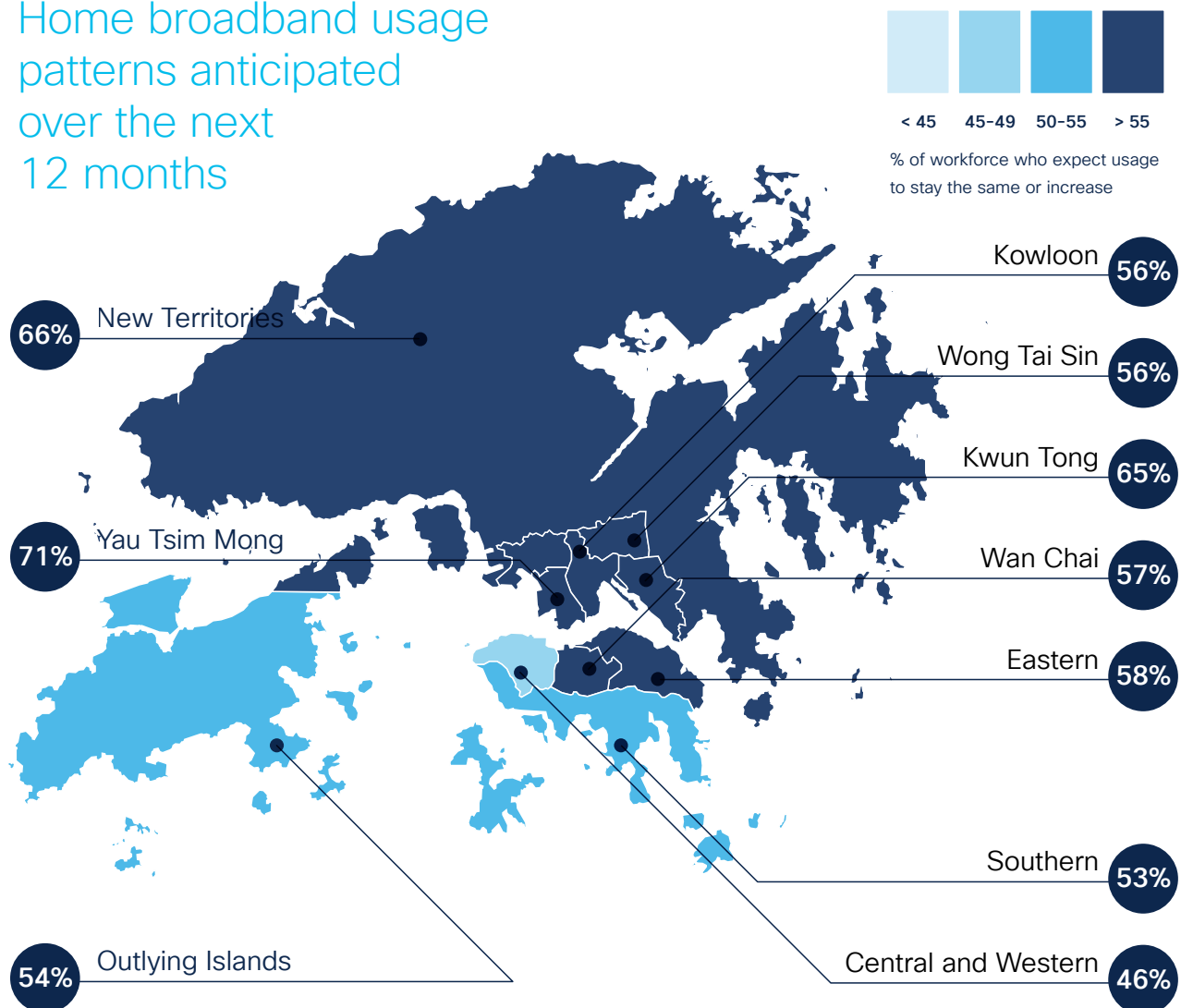
Better working world

While the cost of connecting is front of mind for the majority of Hong Kong's workers, they're also under no illusions about the need to have accessible and secure services.

Nearly half (48%) of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Additionally, more than half (53%) are willing to pay more for a safer broadband Internet connection, including 65% of workers doing their entire job remotely and 58% of hybrid workers.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: India

Large-scale improvements to Internet services are under way, but will they satisfy a population with high expectations of their nation's networks?



A large majority (77%) of the vast workforce in India seem to agree with the Government that a focus on 'connection anywhere, anytime' is key to the country's future economic prosperity.

In fact, 4 in 5 (80%) respondents claim policymakers need to speed up implementation of grand plans to improve Internet services, and provide high-speed, reliable online access in all locations.

The Prime Minister's Wi-Fi Access Network Interface scheme is intended to deliver millions of Wi-Fi hotspots in public spaces around India, promising affordable access for all. This aspect is crucial, because 3 in 4 (75%) workers suggest availability of cheap, reliable broadband is set to become a big issue.

Building better connections

TRAI recommendations to enhance broadband speed - even wrapping in plans for satellite-based connectivity - are on the table.

A majority (56%) of workers in India report using their household's Internet service to perform their role or run their own business. Meanwhile, 23% expect their household's online activity to increase or stay the same in the next 12 months.

The desire for better connectivity is clear to see in the 77% of workers who say they want to upgrade their Internet service during the year ahead. Of the minority who won't, almost 1 in 5 (18%) state it would be too expensive; while nearly 1 in 3 (31%) think they already access the best service offered.

Key takeaways



More than 3 in 4 workers in India say Internet services are vital for future economic growth



Three or more people use the internet at the same time in 62% of households



75% : the proportion of workers who think affording access to broadband is becoming an issue



82% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity

More than 8 in 10 (82%) workers consider there is a need for broadband services to dramatically improve to fully support the shift to a hybrid working model. In addition, a similar proportion (81%) believe secure, fast, reliable Internet must be available in all public places.

The security point is key, particularly with a high proportion of workers using their home Internet service for professional purposes. A large majority (77%) – rising to 81% of those working from home full-time – would be comfortable paying for safer services.

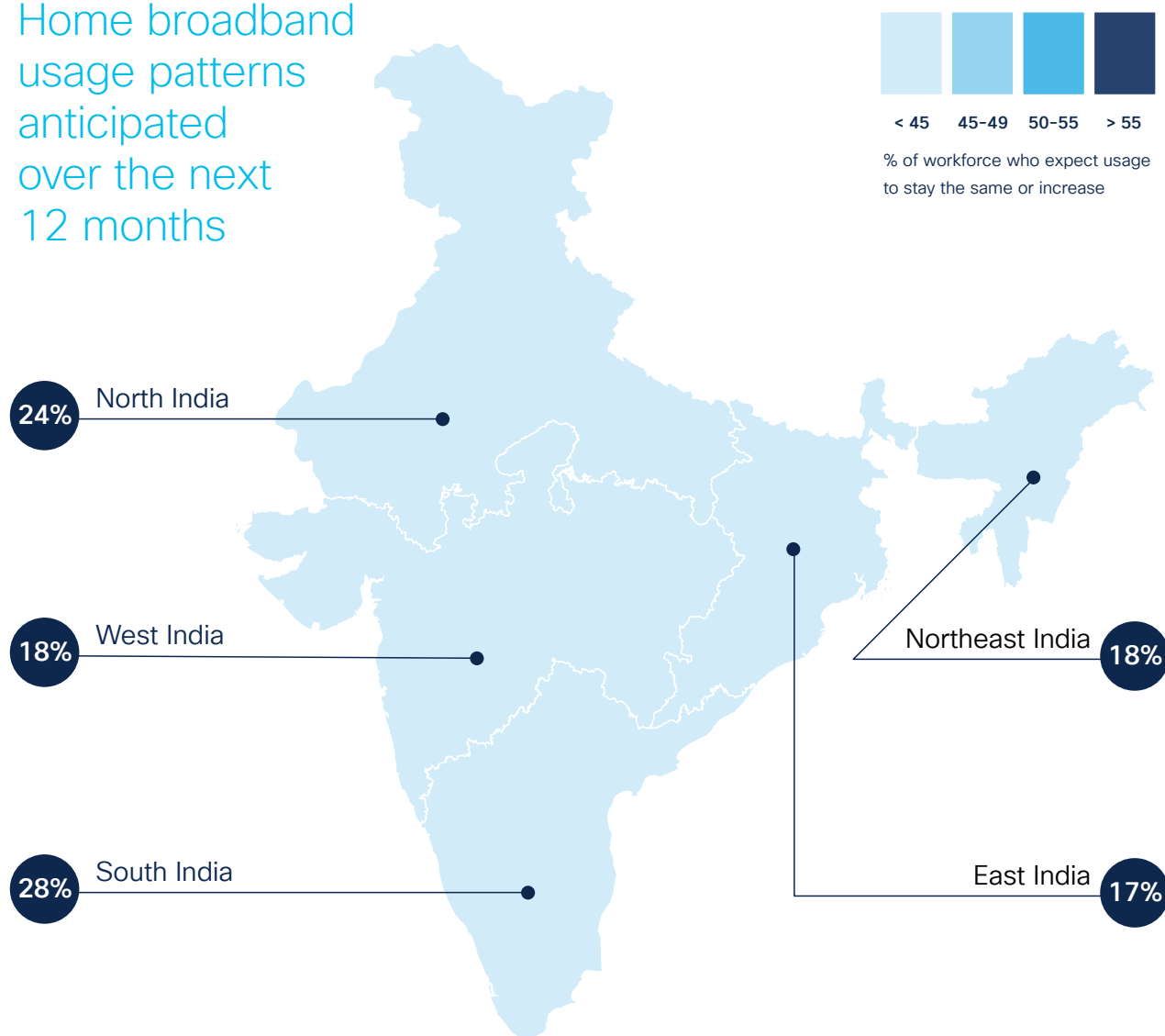
Empowering the population

Workers in India hold strong views when it comes to the effect of Internet access on the wider population. Just short of 8 in 10 (79%) say fast, reliable services are needed to maintain a well-educated population.

Moreover, when asked to prioritise the most important future critical service using a broadband connection, 28% of respondents cite education and a further 23% say social care.

Overall, more than 8 in 10 (82%) respondents reveal the quality and reliability of their broadband Internet connection is important to them. It will be interesting to see whether expectations of online services will be met by the efforts of service providers and politicians.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Indonesia

Despite efforts to address connectivity issues, the vast majority of workers feel policies to improve Internet infrastructure across the nation should be sped up



Small and medium size enterprises play a critical role in the country, highlighted by 62% of workers across the country who say they use their household's Internet connection to do their job or run their own business.

And according to 87% of workers, the entire population should be able to securely connect to fast, reliable Internet services whenever they are in public places or on the move.

Demands for better connectivity don't stop there. Almost the same proportion (86%) want plans to ensure high-speed, reliable Internet is available to all, including remote villages, to accelerate. This is something both service providers and policymakers are working towards.

These requests are set against the backdrop of 85% of respondents stating the reliability and quality of their broadband Internet connection is important to them.

Digital services are believed to be critical for a range of reasons; including economic growth (87%), and maintaining a well-educated and informed population (84%)

A better network

In comparison to some other markets, the cost of connecting is not seen as being such a serious problem. Fewer than half (44%) say reliable broadband will become a major issue for people. However, 3 in 4 (75%) workers say the cost of broadband is preventing low-income families from getting online.

Key takeaways



62% of respondents in Indonesia say they use the Internet at home to either work or run their own business



76% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



87% of workers in Indonesia state fast, reliable Internet is critical to future growth of the nation's economy



75% think low-income families are being priced out of Internet services by the cost of broadband

More than two-thirds (69%) state that three or more people concurrently use the Internet at home throughout the day.

Around 1 in 3 (33%) respondents expect their and their household's Internet usage to increase or stay the same in the next 12 months.

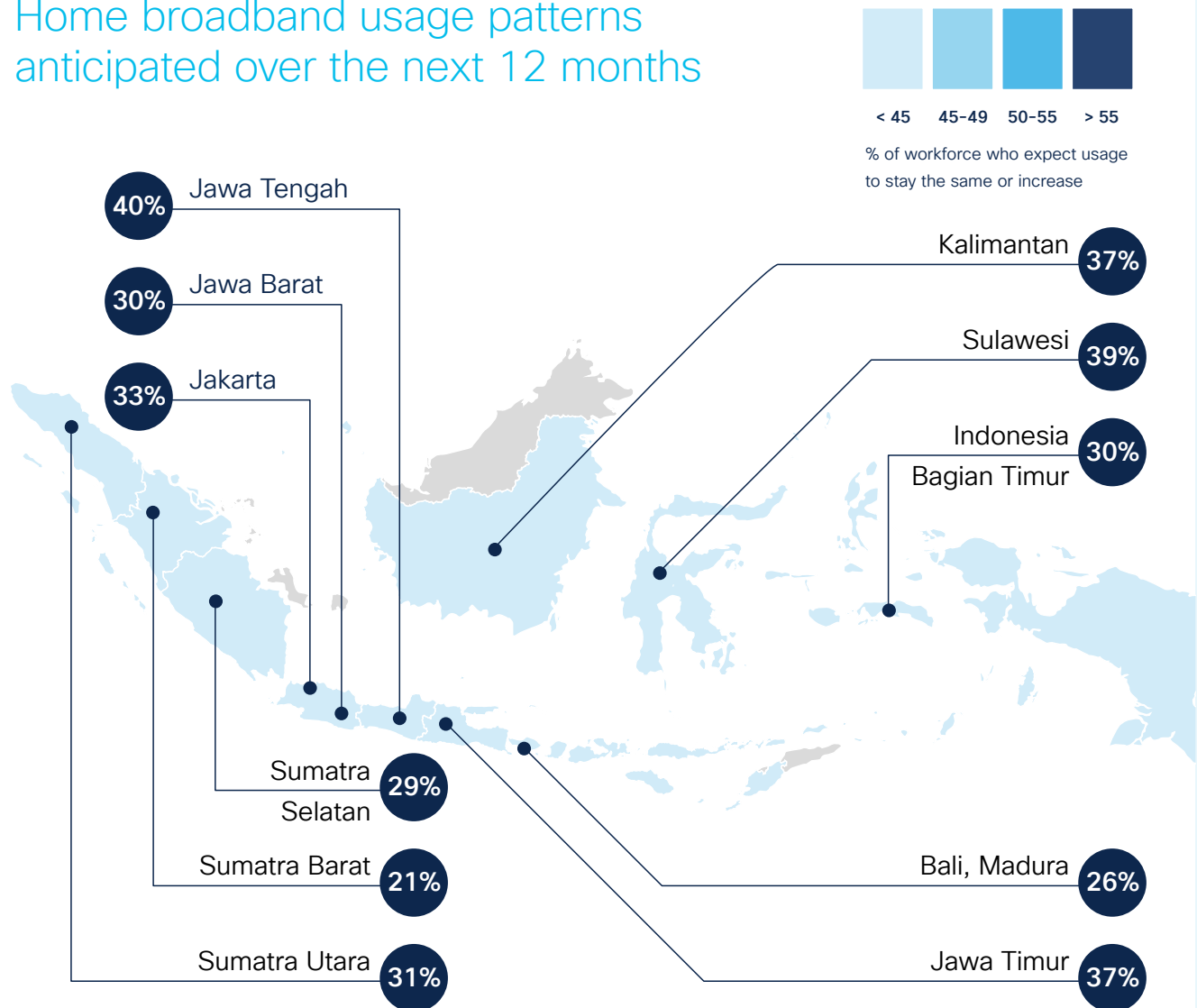
Amid this demand for quality domestic services, a sizeable majority (64%) say they'd like to upgrade their Internet connection in the next 12 months. However, more than 1 in 4 (27%) claim cost is an inhibitor.

Secure services

The pressures of hybrid working on Indonesia's Internet services - at least in the eyes of workers - are laid bare by the 76% of respondents who state broadband services across the country must dramatically improve if networks are to keep pace with the demands of new employment models.

Interestingly, nearly 2 in 3 (63%) claim they'd be willing to pay more than they do at present if service providers promised to offer more secure Internet connections.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Italy

Italy's Government and service providers are trying hard to connect the whole country, with workers asking for high-quality internet to support hybrid jobs



A total of 71% of Italian workers believe broadband services must dramatically improve to support fast and secure working from anywhere. Meanwhile, the same proportion (71%) say the Italian Government must step up its efforts to improve the network and make a fast, reliable service available for all.

Boosting Broadband

More than half those polled (56%) report three or more people use the internet simultaneously at their home, so the need for reliable connections is clear - particularly when factoring in 44% of respondents use the internet in their household either to work or run their own business.

Also telling is the revelation that 44% of knowledge workers expect their household's internet use to rise or stay the same in the next 12 months. With almost 3 in 4 (73%) saying reliable and quality broadband is important to them, the pressure is on for strong service provision.

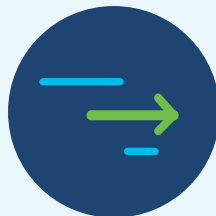
Italian workers strongly believe that the country's prosperity relies on fast, reliable internet: 70% state this must be implemented to enable future economic growth.

Furthermore, 68% of respondents say having access to fast and stable internet is critical to developing and maintaining a well-educated and informed population.

Key takeaways



Almost 3 in 4 knowledge workers in Italy state fast, reliable internet service is important to them



71% say accelerating plans to create better connectivity across the country is vital



44% : the proportion of workers whose internet use will increase or stay the same in the next year



71% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity

Overall, more than half (53%) would like the government to prioritise investing in internet services ahead of public utilities such as water, heating and electricity.

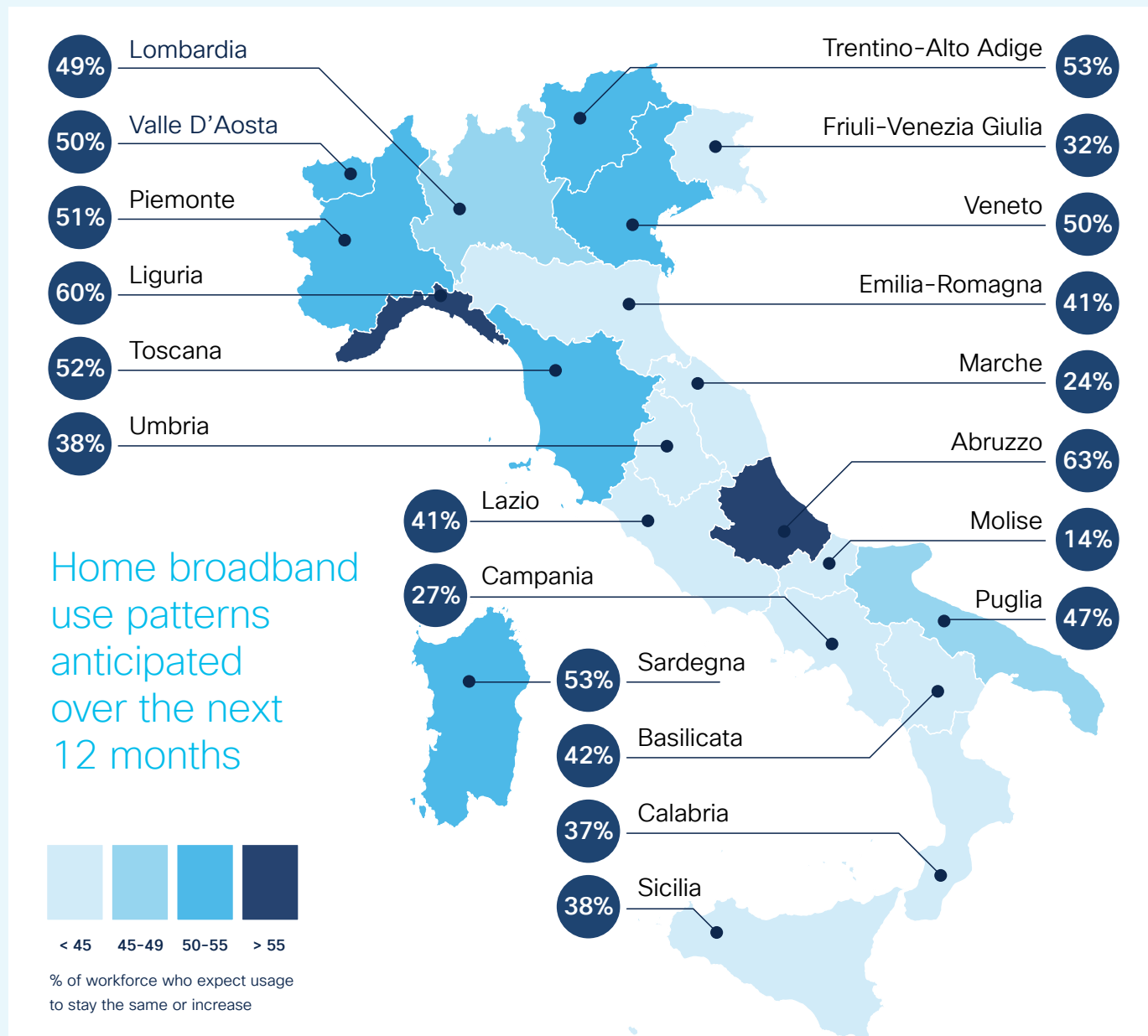
Despite the importance placed on digital networks, Italians also cite affordability as an emerging issue. Some 72% think access to cheap, reliable broadband is set to be a problem, with only slightly fewer (68%) asserting the cost of connecting prices out low-income families.

A safer service

Investing in internet services is a key consideration across the board, with 63% thinking broadband should be free. Just over half (51%) would like their employer to pay for their online connection including 61% of full-time remote workers and 51% of hybrid workers.

Yet there's also a recognition among respondents that paying extra for a safer broadband connection is fair, with 47% agreeing and fewer than 1 in 5 (19%) disagreeing with this aspect.

There's a wider role for policymakers and service providers here: 75% of workers believe everyone should be able to securely connect to fast, reliable internet in public places - regardless of their location.



Spotlight: Japan

While not as forthright as workers globally about needing a more rapid roll-out of services, Japanese workers value reliable connectivity amid shifting work habits



More than half (54%) of hybrid workers say dramatic improvements to the digital network are needed if the nation's evolving way of working is to succeed.

That's the view of more than 6 in 10 (61%) respondents currently counting themselves as hybrid workers, and 56% of those who work from home full-time. Meanwhile, 59% state improvements to connectivity across the nation should be accelerated to provide a reliable and speedy service for all.

This is an interesting view since the Japanese Government hailed near-100% broadband coverage by 2020, and continues to invest in enhancing networks. Employers have also taken time during the pandemic to re-evaluate working models and connectivity, with a permanent trend towards work-from-home expected to take root.

Cost of connection

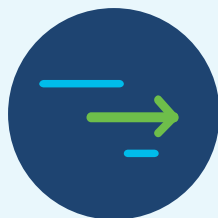
Further competition between domestic and non-Japanese service providers is being actively encouraged by officials.

In the meantime, citizens question the expense of connecting: almost half (49%) of respondents think access to affordable, reliable broadband is becoming an issue. Nearly as many (46%) think low-income families will be inhibited by cost.

Key takeaways



61% of respondents say everyone should be able to securely connect to fast and reliable internet regardless of location



59% say accelerating plans to create better connectivity across the country is vital



54% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



56% of respondents actively use their broadband at home for four hours or more each day

Perhaps due to cost concerns, fewer than 1 in 4 (23%) would be happy to pay for safer broadband services. That said, 61% believe secure, fast, reliable services should exist in all public places.

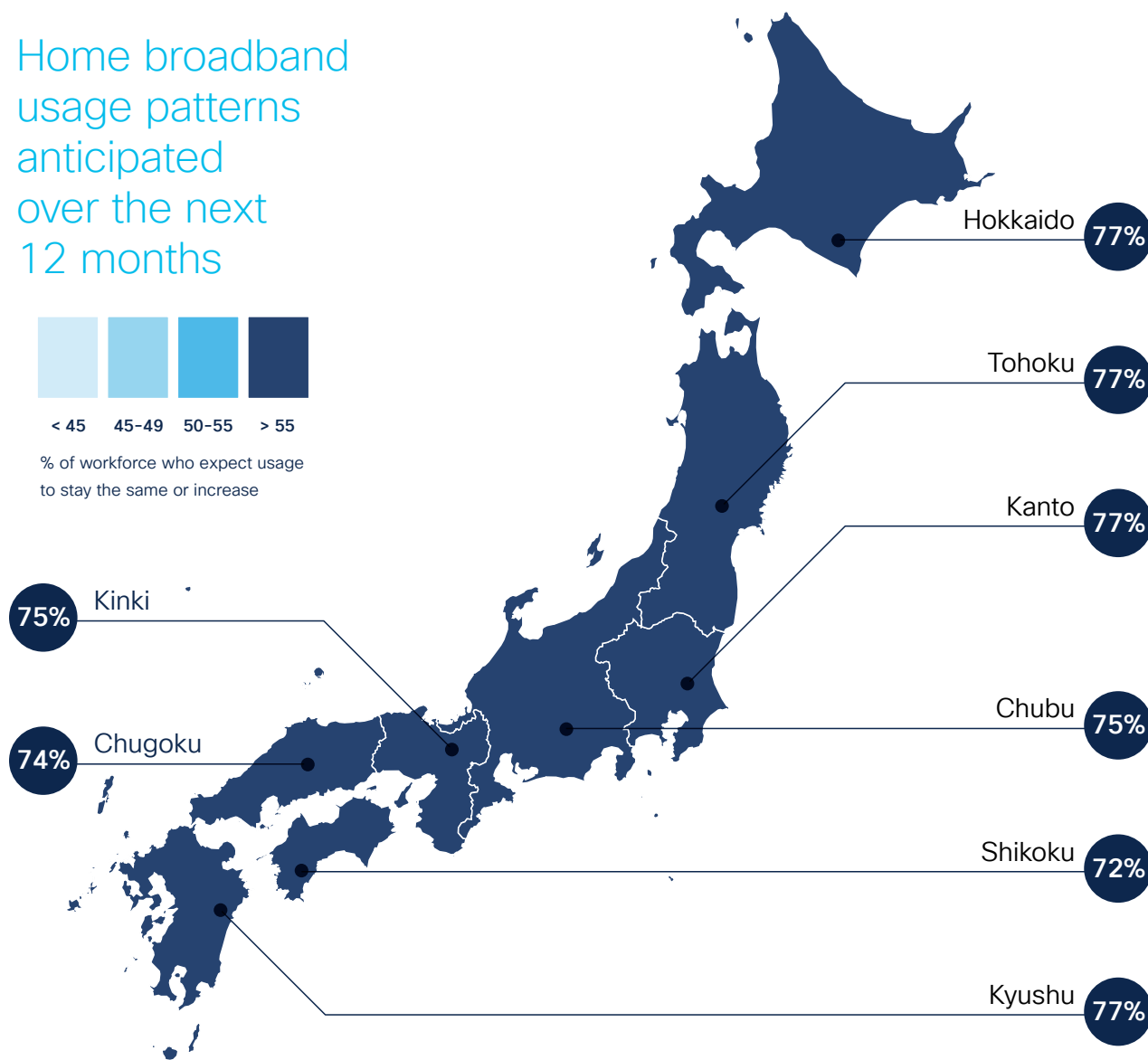
A majority (58%) feel reliable, quality broadband is important to them. Moreover, around 6 in 10 (61%) workers think it is critical for future economic growth. However, fewer (51%) state stable connectivity is vital to produce a well-informed wider population.

Hindered hybrid work

With 1 in 4 workers (25%) using their home Internet service to do their job or run their own business, it's clear reliable connectivity will remain a crucial policy and service consideration.

Furthermore, more than 1 in 10 (11%) workers expect their household's Internet use to grow in the next 12 months. A large majority (65%) expect their usage to stay the same. Despite this, only 14% plan on to upgrade their service.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Malaysia

Connectivity for all is a key requirement for workers in Malaysia, as lawmakers and service providers ramp up digital improvements



More than 8 in 10 (81%) workers in Malaysia feel fast, reliable Internet services are vital to the country's future economic growth. A further 80% believe it's also crucial to the creation of a system to develop and maintain a well-educated and informed population.

A similar proportion (80%) of respondents think everyone should be able to connect to fast, secure and reliable Internet in all public places or while on the move, regardless of location. Furthermore, 81% believe plans to boost speedy and stable networks across the nation should accelerate.

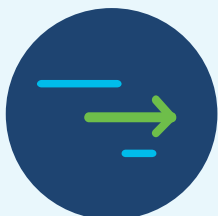
For its part, the state has unveiled Jalinan Digital Negara (JENDELA), a program formulated to provide wider coverage and better quality of broadband, while preparing the ground for a full roll-out of 5G services.

A focus on hybrid

Almost 8 in 10 (79%) workers think broadband services must dramatically improve to facilitate home, hybrid and frontline roles. Working from home is a case in point: already, more than half (54%) use a domestic Internet connection to do their job or run their own business.

Pressure on networks is evident: a total of 67% of workers in Malaysia claim at least three people use the Internet simultaneously during the day. Almost half (48%) think their household's Internet activity will increase or stay the same in the 12 months to come.

Key takeaways



81% say accelerating plans to create better connectivity across the country is vital



More than 8 in 10 respondents say good connectivity is vital to support future economic growth



79% of Malaysian workers think broadband must dramatically improve to support hybrid roles



80% of respondents in Malaysia think everyone should be able to connect to fast, secure, reliable Internet in public places and on the move

Due to these demands, more than half (52%) the professionals polled expect to seek an upgrade to their domestic Internet service at some point in the next 12 months.

Of those who will not, nearly 1 in 4 (24%) say this is because it would cost too much to do so. Meanwhile, a further 28% believe they currently access the best Internet service available for their home.

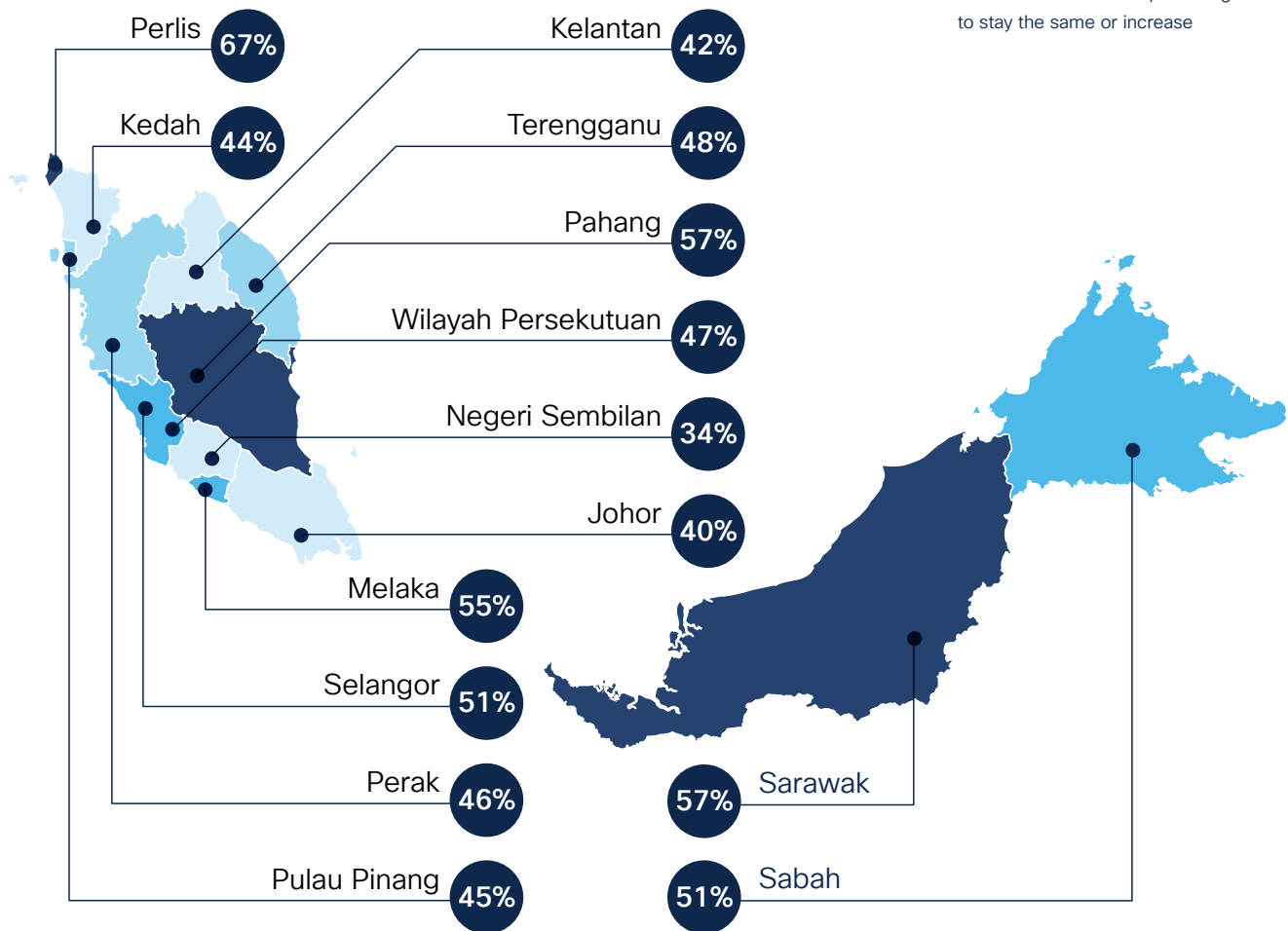
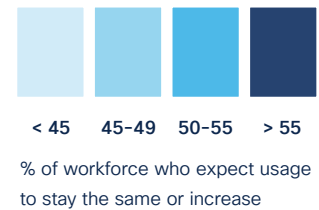
The top priority

A strong majority of respondents (67%) agree that access to affordable, reliable broadband will become a major issue for people.

Over half (56%) agree they would be willing to pay higher charges for a safer broadband connection.

Almost 8 in 10 (78%) of workers feel low-income families in particular are being priced out of connecting to the Internet, while 60% of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Mexico

Workers in Mexico seek affordable connectivity and acknowledge the importance of Internet infrastructure.



Judging by the 87% of workers who said the reliability and quality of their broadband internet connection is important to them, coupled with a similar total (86%) who believe broadband must dramatically improve to support hybrid employment, connectivity is a key concern across the country.

Mexicans are already going online in great numbers: by June 2021, the nation counted 84.1 million internet users – representing 72% of the population aged six or over – active online. This total grew by 10% compared to usage in the preceding year.

Meanwhile, 35% of this study’s respondents – including 38% of hybrid workers – claim their household’s internet usage will either increase or stay the same in the year ahead.

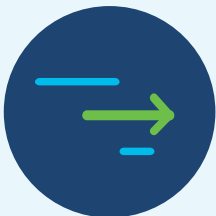
Modernising networks

Against this backdrop of pressure on the networks, more than 8 in 10 (84%) state plans to ensure fast, reliable Internet is available for all should accelerate.

Slightly more (86%) suggest everyone should be able to connect to speedy, stable, secure Internet services in public or on the move, regardless of location.

There is an effort to provide universal connectivity, with a particular focus on rural and underserved communities. They goes along with defining online regulations for cybersecurity, server localisation, data privacy, and more.

Key takeaways



84% say accelerating plans to create better connectivity across the country is vital



More than 8 in 10 respondents are demanding dramatic improvements in connectivity to support hybrid roles



Three or more people use the Internet at the same time in 80% of households



90% of respondents actively use their broadband at home for four hours or more each day

Industry experts predict Mexico is two to three years from finalising a fully operational 5G telecoms network.

With more than 6 in 10 (61%) workers saying they use the Internet at home to do their job or even run their own business, and 78% claiming three or more people are simultaneously online under their roof throughout the day, there is clear demand for quality services.

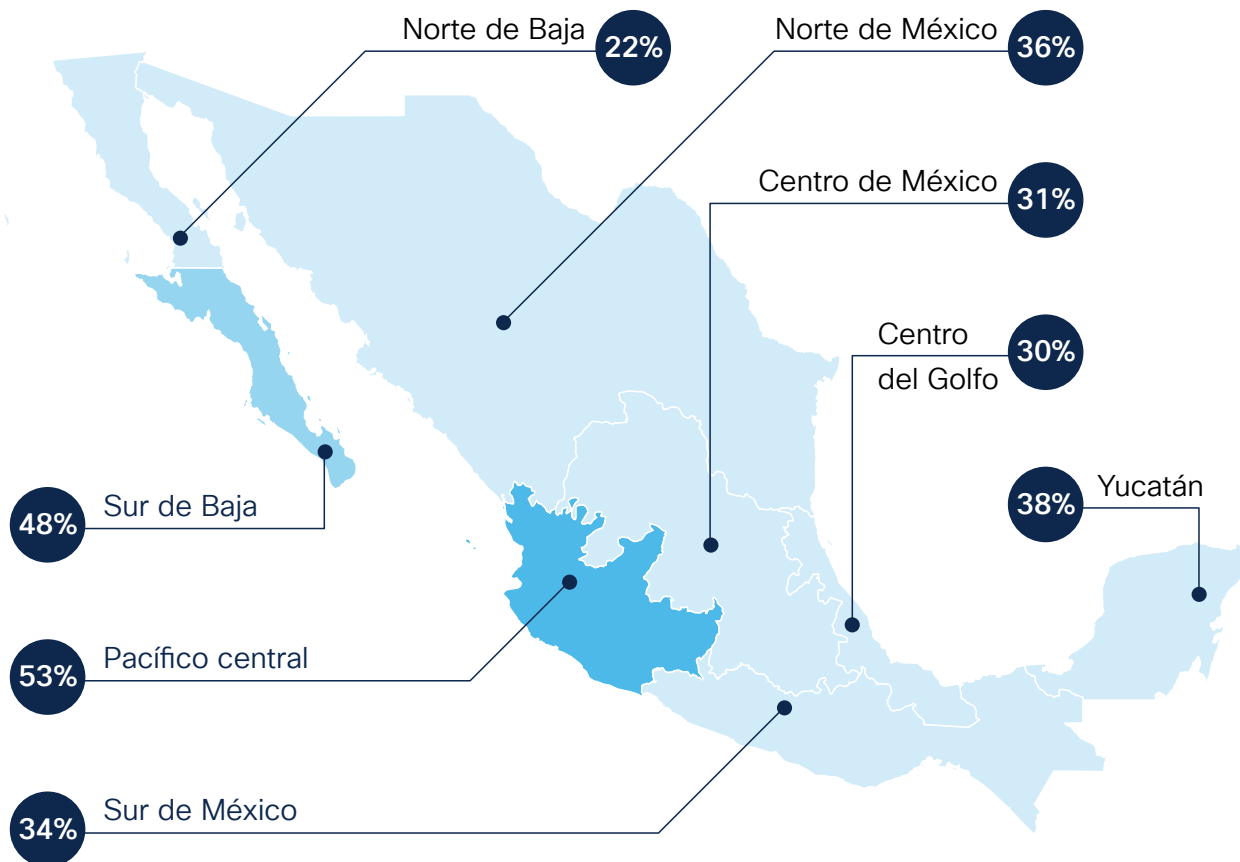
Meeting workers' demands

With all of these issues in mind, almost 6 in 10 (59%) professionals expect to seek an upgrade for their domestic Internet connection in the next 12 months. Of those who will not, close to 1 in 6 (16%) claim it's too expensive to seek a better service.

In fact, 82% of respondents think affordability of reliable broadband is set to become a major problem for the population of Mexico.

Meanwhile, more than 8 in 10 (81%) workers declare the cost of broadband is too high for low-income families to be able to get online.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Netherlands

Workers in The Netherlands have embraced a shift in working, but seek improvements to meet high levels of demand



Remote and hybrid working is more prevalent than ever, with a total of 46% logging on at home to do their job or run their own business. This includes 59% of hybrid workers who say they connect under their own roof for professional purposes, along with 55% of full-time remote workers.

A similar proportion - 58% of respondents overall, including 60% of full-time remote workers and 55% of hybrid workers - warn broadband services must dramatically improve to support these shifts in working practice.

Meanwhile, more than 6 in 10 (61%) believe the country's Government should accelerate its digital improvement drive to ensure everyone has access to fast, reliable Internet.

Better connections

Policymakers in The Netherlands have set a goal of providing all citizens with fast, fixed-connection broadband of at least 100MB/s by 2023 - with a majority of the population enjoying 1GB/s, or 10 times the target speed in the same year.

With almost 2 in 3 (65%) workers stating secure, fast and reliable Internet connections should exist in all public places, the Government has also committed to offer additional support to municipalities where coverage remains patchy, such as rural areas.

Key takeaways



44% use some form of mobile technology to connect to the Internet from home



87% of actively use their broadband at home for four hours or more each day



65% of respondents say everyone should be able to securely connect to fast and reliable Internet, regardless of location



61% believe access to fast and reliable Internet is critical to economic growth

A majority (58%) say access to fast, reliable Internet is critical to having a well-informed population; 61% also claim it's vital to future economic growth.

Furthermore, 46% of respondents indicate that they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Despite indicating less concern than their European counterparts, security is still top of mind. Over one third of respondents (37%) would be willing to pay more for a safer broadband Internet connection.

Domestic demands

At present, 63% surveyed stated that the reliability and quality of their broadband connection was important to them.

More than half (51%) of workers say at least three people in their household are online simultaneously throughout the day; the same amount of respondents (51%) expect their household's Internet usage to climb or stay stable during the next 12 months.

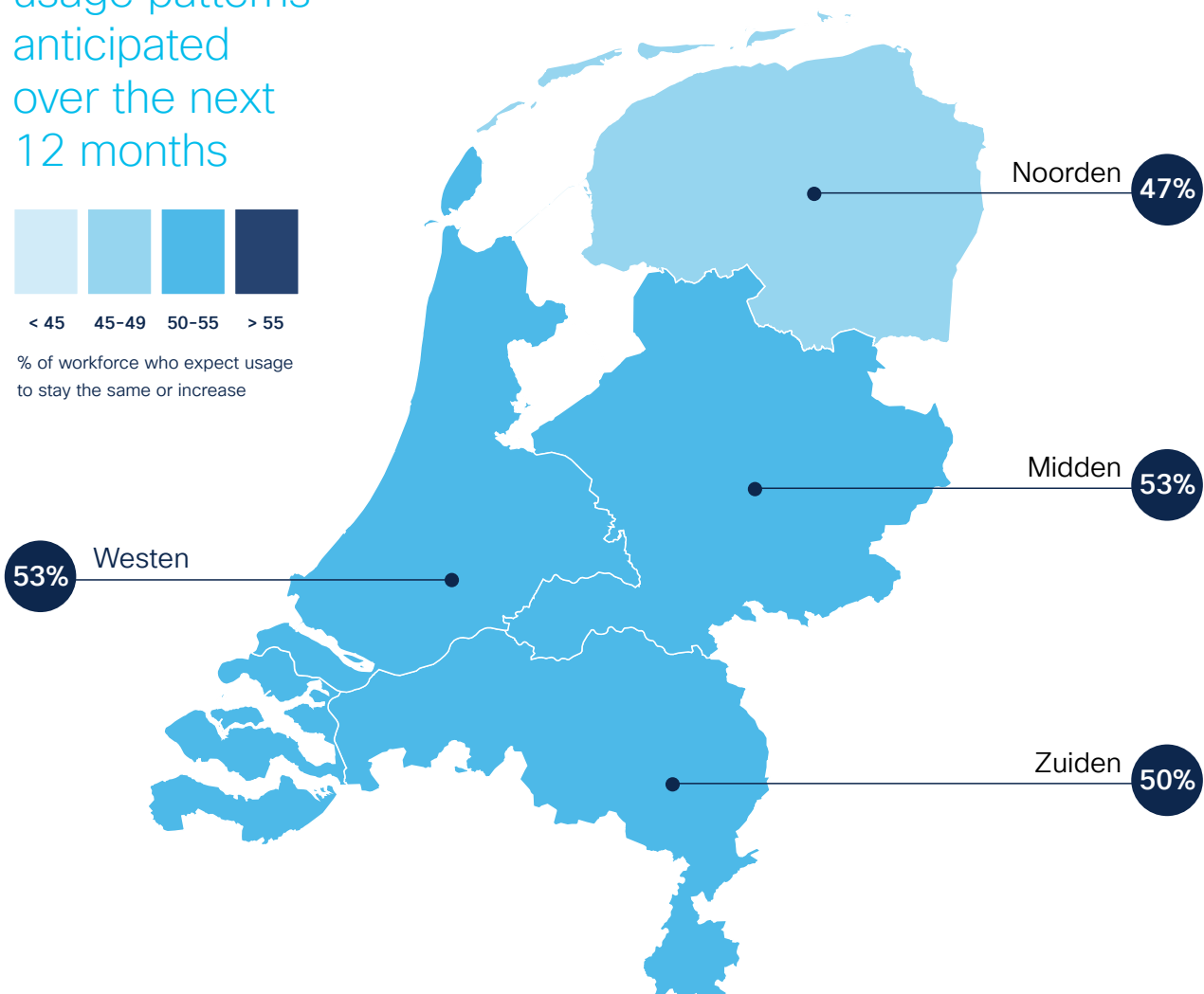
Despite emerging connectivity habits, fewer than a quarter (24%) intend to upgrade their service in the year ahead, with 15% of workers worried about the cost of doing so.

Home broadband usage patterns anticipated over the next 12 months



< 45 45-49 50-55 > 55

% of workforce who expect usage to stay the same or increase



Spotlight: New Zealand

Amid widespread recognition that connectivity is crucial to economic growth, workers value reliable and accessible connectivity to support new employment models



Almost 3 in 4 (73%) workers in New Zealand believe the quality of connectivity in the country is crucial to their nation's future growth. A further 71% state fast, reliable internet is needed to support a well-educated and informed population.

Meanwhile, around two-thirds (67%) of respondents believe plans to upgrade to fast, reliable services for all citizens should accelerate. Policymakers are already implementing a major upgrade of telecoms infrastructure for better broadband and mobile coverage.

While the Government doesn't own or operate any telecom networks, it sees the prospect of becoming a leading digital nation being dependent on combining its efforts with the private sector.

Ideal infrastructure

A sizeable majority (69%) of workers suggest broadband must dramatically improve to bolster hybrid working models - including 72% of current hybrid workers.

As more than half (57%) of workers claim at least three people are simultaneously logged on to the Internet at home during the day, and half (50%) are working or running their business from home, the pressure is on to deliver upgrades that will support this demand.

Key takeaways



50% of workers in New Zealand already work or run their business from home using the internet



Almost 7 in 10 respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



73% of workers say fast, reliable internet is needed for economic growth



84% of respondents actively use their broadband at home for four hours or more each day

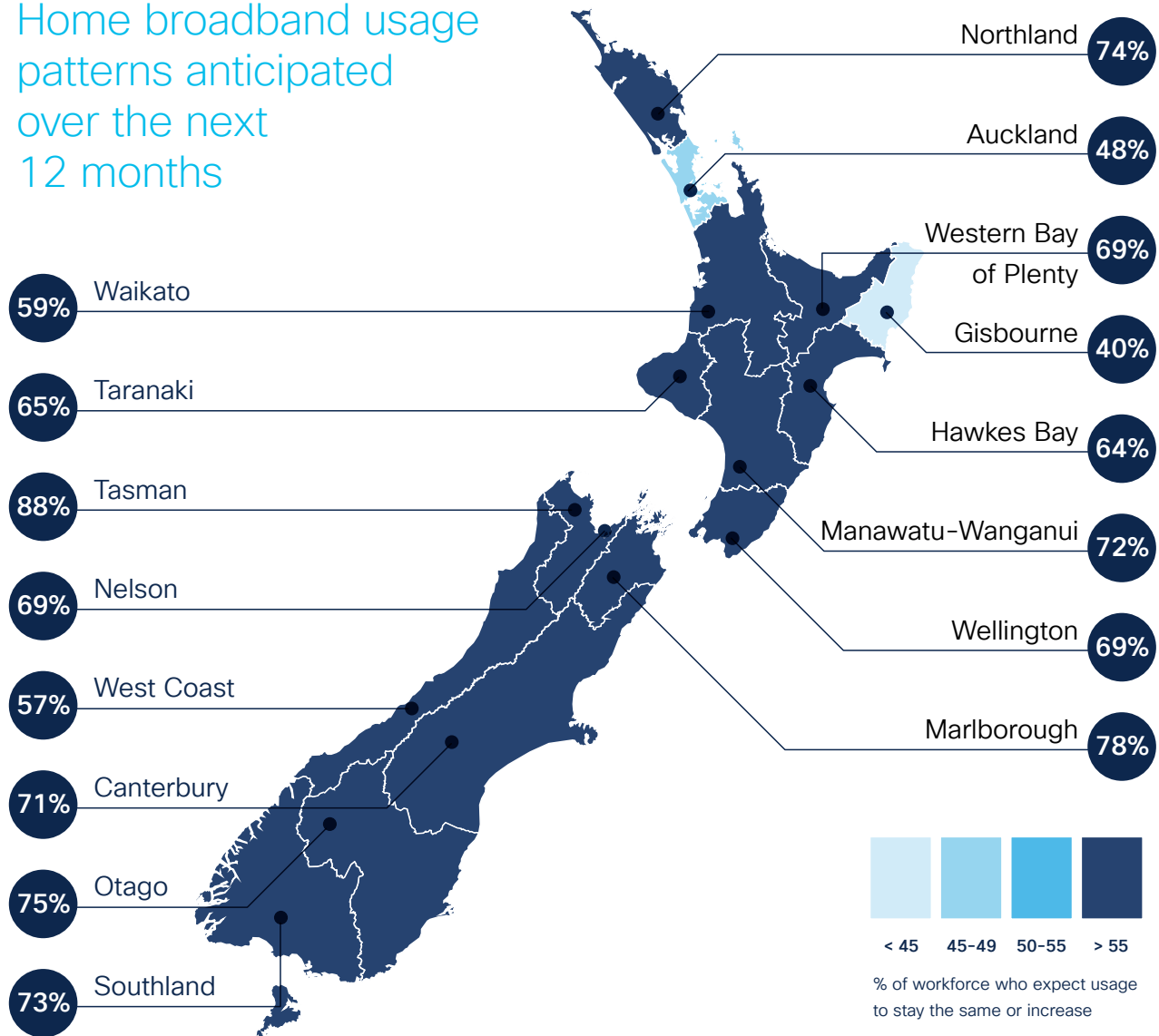
A total of 6 in 10 (60%) workers expect their household's Internet usage to either increase or stay the same in the next 12 months. Despite expected usage increases, fewer than a quarter (24%) intend to upgrade during that timescale - with around 1 in 6 (17%) saying cost is an inhibitor.

Affordable upgrades

Cost is a concern generally. Some 6 in 10 (60%) respondents think access to affordable, reliable broadband is set to become a major issue in New Zealand. An even higher proportion (71%) state the high cost of broadband Internet access is prohibitive for low-income families.

Secure connectivity is also front of mind. Almost three-quarters (72%) of respondents feel everyone should be able to connect to fast, reliable and safe Internet coverage in all public places regardless of location. Only 43% would be willing to pay more for a safer broadband connection.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Philippines

A majority of workers would like to see faster improvements in Internet services to support the switch to hybrid and remote employment



More than 9 in 10 (91%) respondents believe plans to improve the Internet infrastructure of the Philippines should be sped up to meet demands from citizens.

An equal number (91%) think broadband services must dramatically improve if workers are to be fully supported working from home, while in public places, or on the move.

In addition, just under 9 in 10 (87%) respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

With almost half (48%) of workers revealing they use their domestic Internet connection to work from home or run a business, demand for better connectivity everywhere is unlikely to waver.

Domestic pressure

Three-quarters (75%) of workers state three or more people in their households are simultaneously active online throughout the day, for an average of 10 hours per household. In terms of future Internet usage, 28% expect their household to be online more or the same amount during the 12 months ahead, 22% expect it to be used less than they currently do, but not like it was before the pandemic, while 43% expect changes as their household returns to the office or back to school.

Amid all this heavy demand, more than half (52%) respondents say they will seek to upgrade their home Internet service in the year to come. More than 1 in 5 (22%) workers indicate they won't upgrade because it's too expensive to do so.

Key takeaways



More than 9 in 10 respondents say good connectivity is vital to propel future economic growth



91% of workers in the Philippines think broadband must dramatically improve to support hybrid roles and e-commerce services for home/retail and small business



86% of respondents actively use their broadband at home for four hours or more each day



66% of respondents indicate that they would be willing to pay more for a safer broadband connection

A large majority (78%) of professionals in the Philippines feel access to affordable and reliable broadband will become a major issue for people. Respondents believe this is a particular problem for low-income families, with 87% saying the high cost of broadband is pricing those households out of connecting.

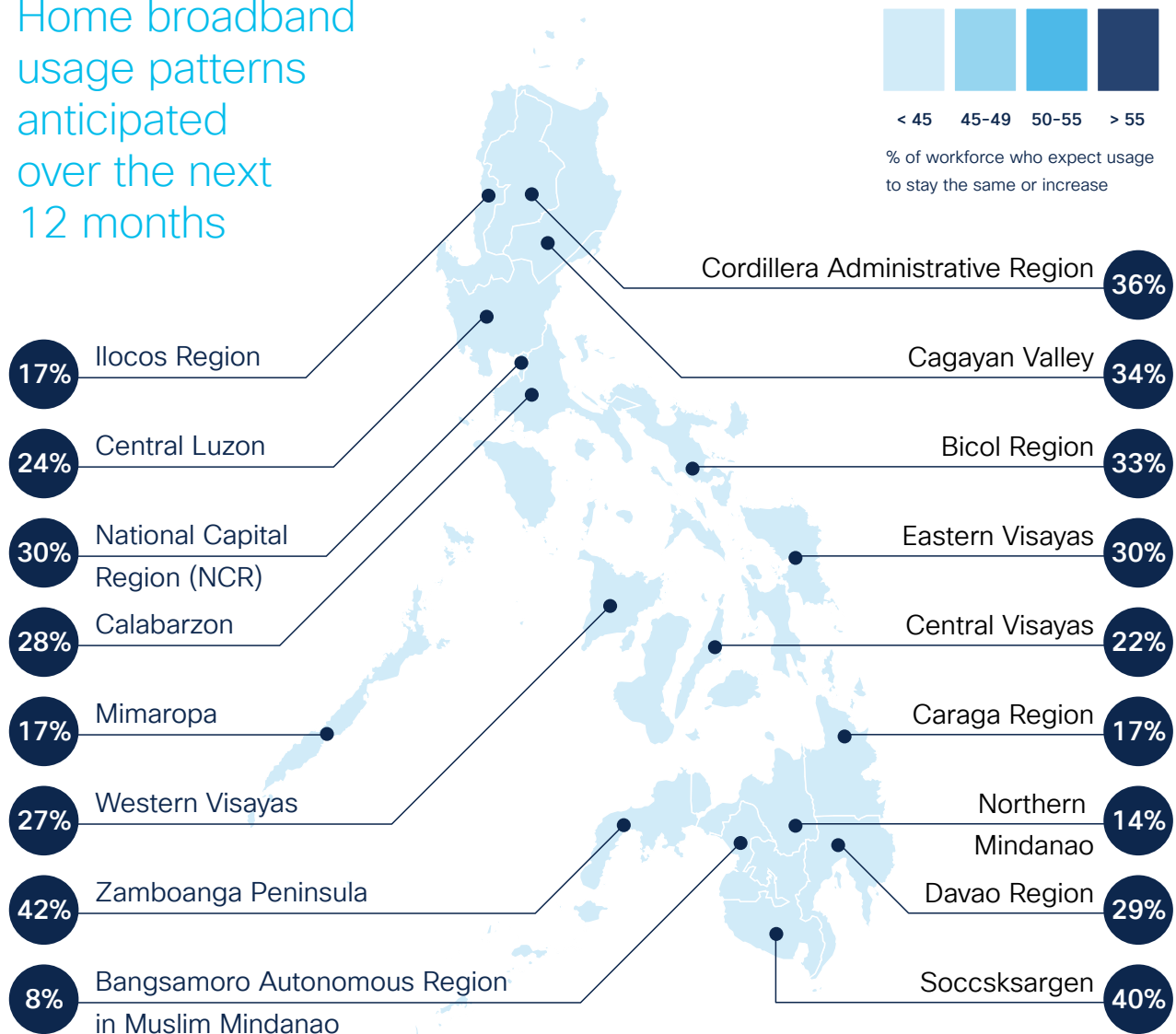
Internet for good

There are good financial and societal reasons to improve digital services across the nation, according to respondents.

More than 9 in 10 (92%) say fast, reliable connectivity is crucial for economic growth in the Philippines; a further 90% say it is the basis of developing a well-educated and informed population.

Besides affordability, workers place importance on reliability of services, with 91% stating stable, quality broadband is important to them.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Poland

Workers are stepping up pressure on the Government and service providers to deliver a digital network that is both affordable and fit for the future



More than 7 in 10 (71%) of workers in Poland state the reliability and quality of their broadband internet connection is important to their way of life.

An additional 71% feel everyone should be able to connect to fast, secure and reliable internet in public places across the country, even while they are on the move; 67% want the Government to speed up moves to improve services.

To meet these demands, lawmakers have committed to expanding FTTH network coverage to every household by the end of 2024.

The state has also agreed to subsidise FTTH broadband roll-out in rural areas where telcos are unlikely to invest. In total, the Government intends to dedicate €3bn to digital transformation.

Connection concerns

Respondents feel there are good reasons for an upgrade to Poland's internet infrastructure.

Almost 7 in 10 (69%) of them see access to fast and reliable connectivity as being critical to the nation achieving future economic growth. A further 67% believe it's crucial to develop and maintain a well-educated and informed population.

At present, however, cost is deemed an issue – even if not always for respondents themselves. Some 64% state the high cost of broadband is preventing low-income families from getting online; and 49% think access to cheap, reliable broadband is set to be a widespread issue in years to come.

Key takeaways



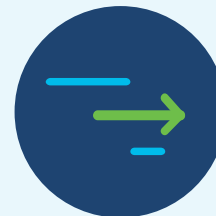
More than 7 in 10 workers in Poland say they need reliable, high-quality broadband to get things done



64% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



69% of respondents say fast, reliable internet is needed for economic growth



67% of workers say Poland's Government should accelerate internet improvements

Nearly 6 in 10 (59%) respondents claim at least three people in their household are online at any one time, spending an average of more than seven hours actively engaged in internet activities.

With 38% of people working or running their business from home, pressure on the networks is intense and many respondents feel they are not getting the service they desire.

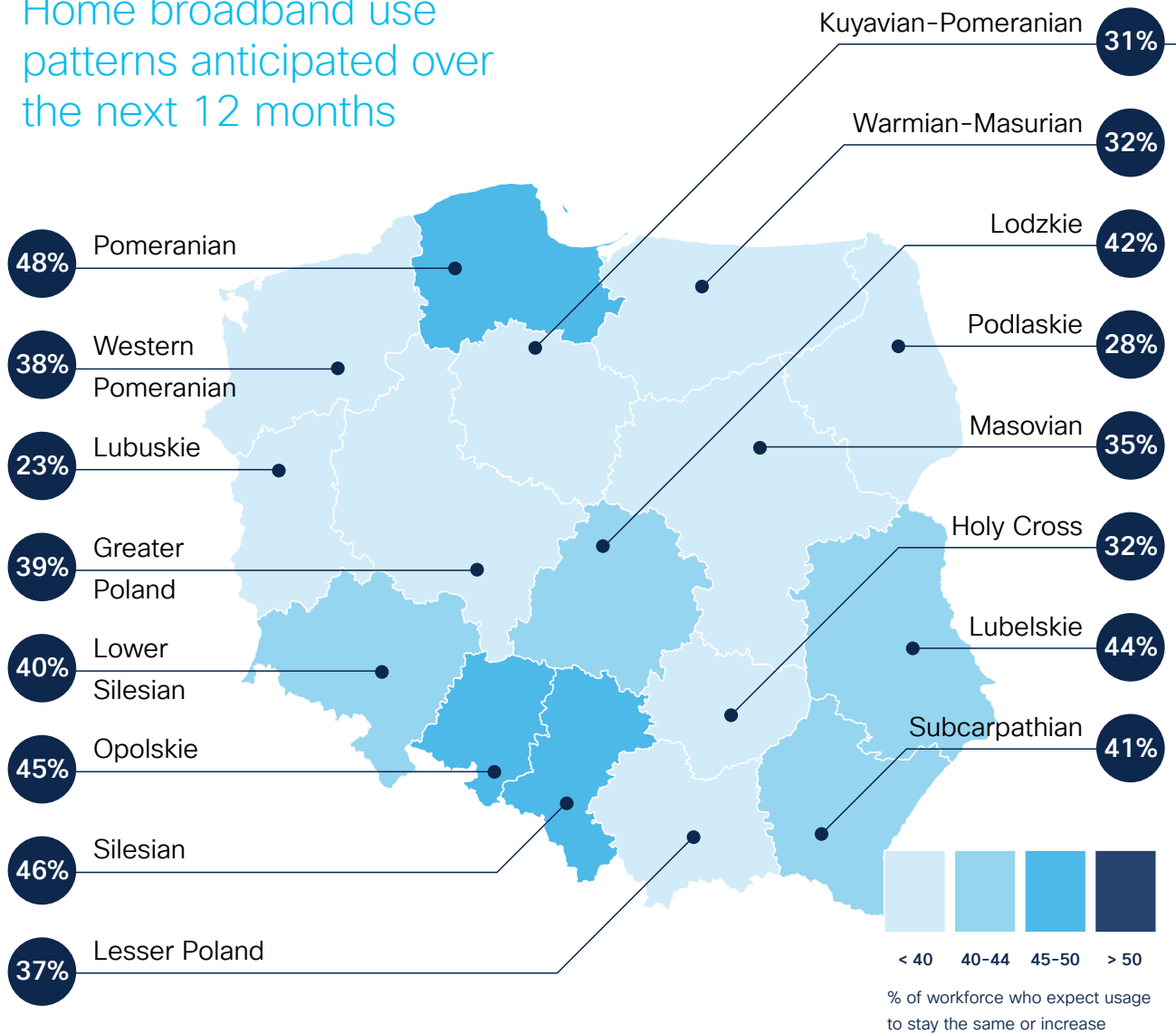
The next network

Almost 4 in 10 respondents expect their household's internet usage to stay the same or increase in the year ahead.

While 3 in 10 (30%) claim they want to upgrade their internet service during the same period, more than 1 in 4 (27%) feel they already have access to the best connectivity on offer and will not seek to upgrade.

Overall, 64% think that broadband services must be made dramatically better if hybrid work is to be fully supported in future.

Home broadband use patterns anticipated over the next 12 months



Spotlight: Russia

Reliability, affordability and security are all vital ingredients of a successful Internet infrastructure according to workers who depend on quality connectivity



Reliable, high-quality broadband Internet connection is a key consideration for workers in Russia, with more than 8 in 10 (82%) respondents saying it's important to them.

That this includes 83% of workers describing their current role as hybrid points to concerns over current connectivity; especially when viewed alongside the 79% of workers overall who state broadband services must dramatically improve to fully support the shift to hybrid and remote work.

The Government of Russia is ploughing on with a multi-pronged information infrastructure upgrade under the banner of its Digital Economy program. This promises to boost 5G coverage, particularly in major cities; connect black spots such as rural Russia; and equip all classrooms with wireless Internet access by 2024.

Cost of connecting

Almost 3 in 4 (74%) respondents believe these efforts should be sped up. An even higher proportion (76%) of them state access to fast, reliable Internet is critical to Russia's future economic growth; and 77% say it's needed as the basis for a well-educated and informed population.

At present, the most prevalent way of workers connecting to the Internet at home is through a fibre-optic broadband subscription (38%), followed by 16% who connect via their mobile phone and 14% who use standard ADSL broadband through a service provider.

Key takeaways



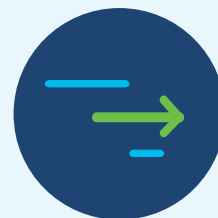
82% of workers in Russia state reliable, quality broadband is important to them



Almost 8 in 10 respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



76% say fast, reliable Internet is needed for economic growth



74% of respondents say Internet improvements must accelerate in Russia

More than half (52%) of workers use their household's Internet connection to work or run their business from home. Meanwhile, a majority (54%) state at least three people are online simultaneously in their household throughout the day.

While 70% think their household's Internet usage will increase or stay the same in the next 12 months, just 28% plan to upgrade their service in that period. More than 1 in 5 who won't seek improvements believe their connection is already the best available to them.

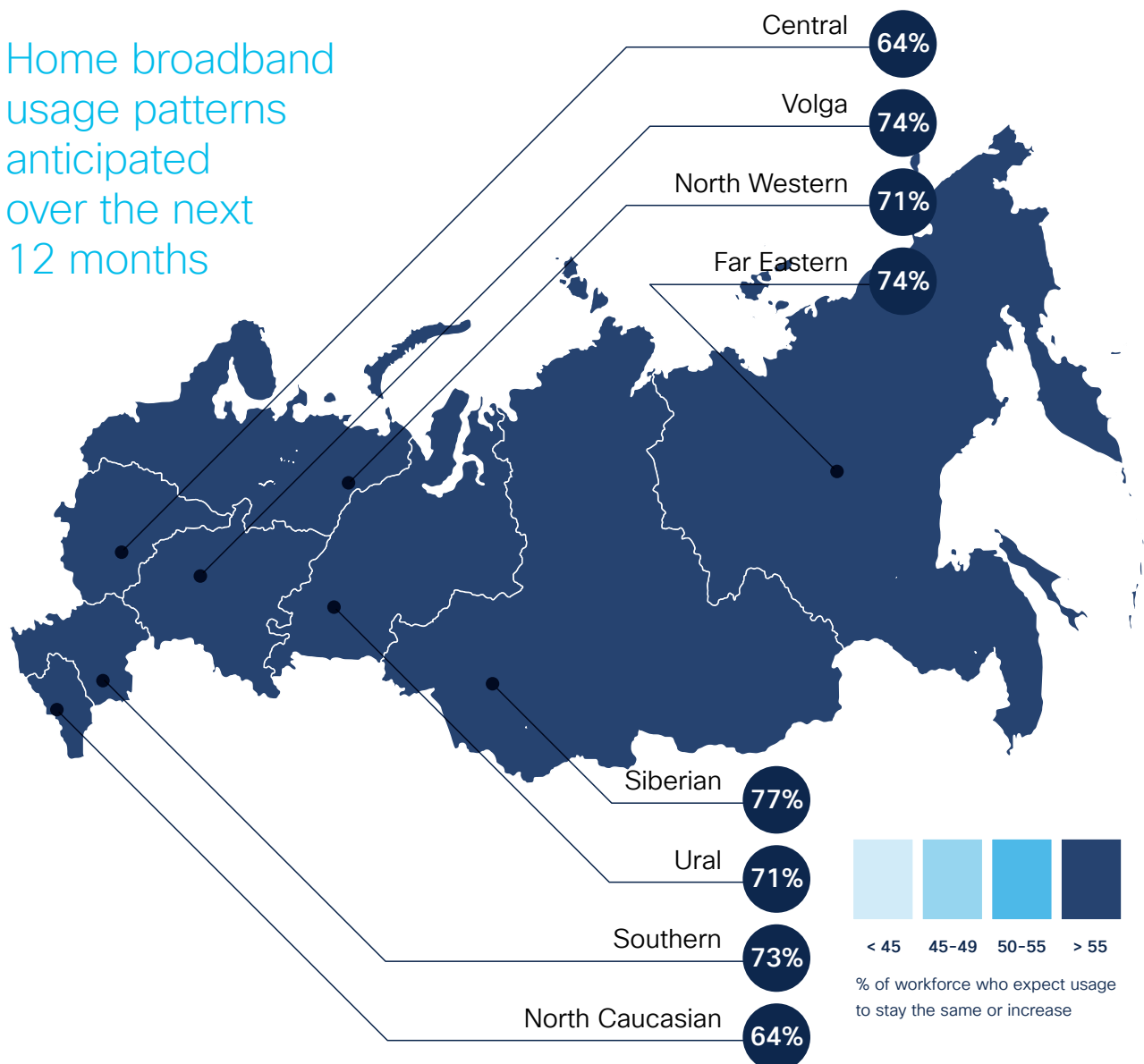
Connecting anywhere

A large majority (82%) of respondents state everyone should be able to connect in all public places, regardless of location, to Internet services that are fast, reliable – and secure.

Almost half (47%) claim they would be willing to pay more for a safer broadband Internet connection, including 49% of those working remotely all the time.

Underscoring this desire, nearly half of respondents (44%) say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Saudi Arabia

The Kingdom enjoys a good reputation for providing high-quality connectivity – and almost 80% of the workforce say their domestic broadband service is good



Saudi Arabia is held in high regard globally for its approach to connecting the whole country. It was ranked second among G20 markets in the 2021 Digital Competitiveness Report, supported by World Economic Forum data.

The Kingdom was also among the first to launch 5G services in a booming telecoms market. In addition, speed of mobile Internet has doubled to more than 57Mbps, while rural wireless broadband coverage has vastly improved.

Mobile connections

Remote and hybrid working is now more prevalent than ever across the nation, with over half (51%) of the workforce relying on their home Internet to do their job or run their own business.

Dependence on high-performance Internet access is further underlined by the fact that almost two-thirds (65%) of respondents actively use their broadband for seven hours or more per day.

That said, nearly 4 in 5 (79%) of workers rate the reliability of their domestic broadband service as good. This is important since 73% of respondents reveal at least three people are online at any one time in their household, inevitably putting some pressure on connection quality.

Key takeaways



82% : the amount of workers in Saudi Arabia stating reliable, quality broadband is important to them



73% of respondents reveal at least three people are online at any one time in their household



51% of the workforce rely on their home Internet connection to do their job or run their own business



Almost 4 in 5 workers rate the reliability of their domestic broadband service as good

A majority of respondents (70%) use some form of mobile technology to connect to the Internet at home, including their mobile phone, or a 4G or 5G hub. Fibre-optic broadband is used by 17%. In the future, 29% would like to connect wirelessly through 5G.

Good connection also matters to people away from their home, with more than 8 in 10 (82%) stating everyone should have access to secure, fast and reliable services in public places and while on the move - regardless of location.

Meanwhile, almost 3 in 4 (73%) workers would be willing to pay extra for a safer broadband Internet connection, showing security is front of mind.

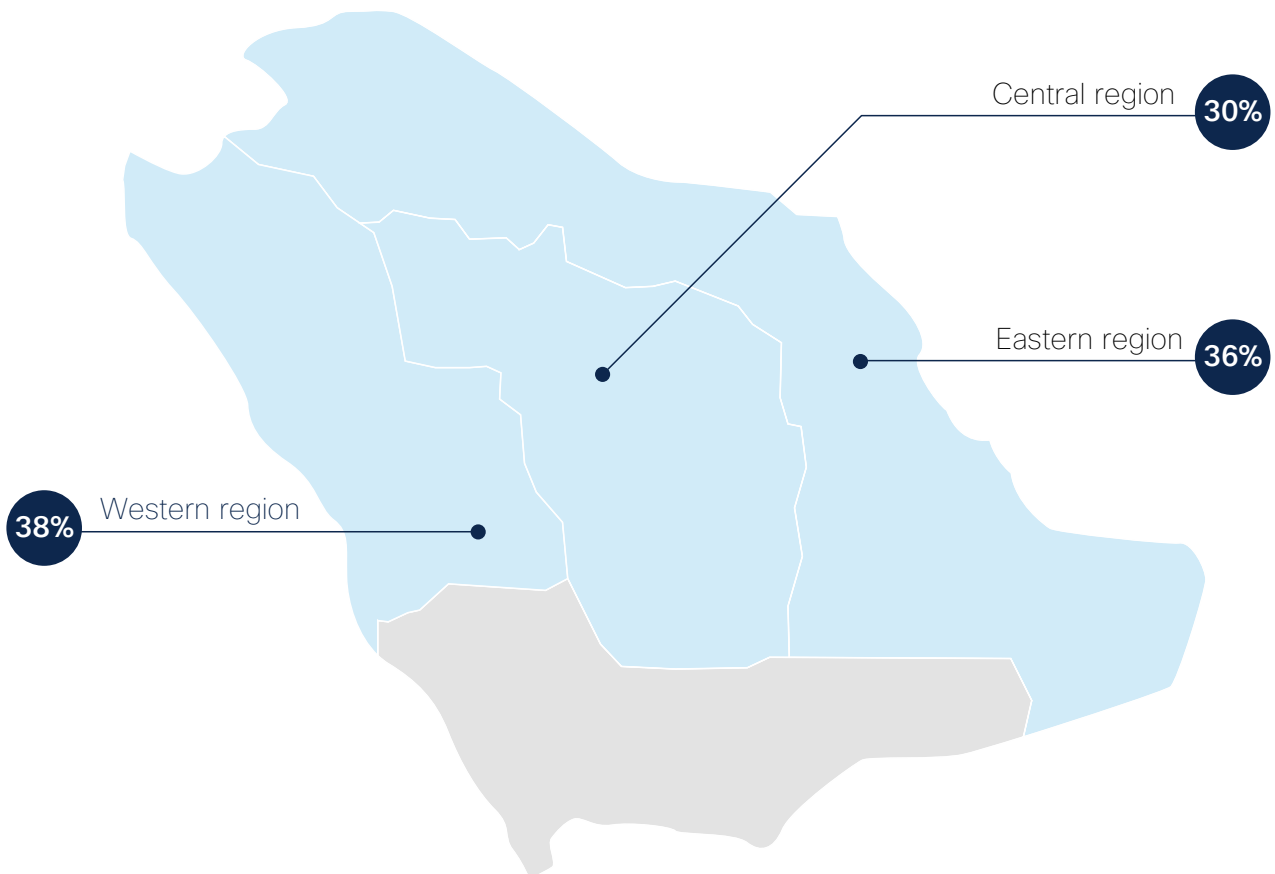
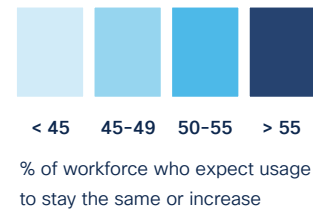
Looking to the future

There are further reasons why respondents believe fast, reliable connectivity is crucial. 82% state access to fast, reliable Internet is crucial to the Kingdom's future economic growth. Meanwhile, more than 8 in 10 (81%) believe it is vital to developing and maintaining a well-educated and informed population.

When asked about what critical service they would prioritise when using their broadband connection in the future, 36% highlighted education.

Also looking ahead, 63% of workers in the country are planning to upgrade their Internet service at some point during the next 12 months.

Home broadband use patterns anticipated over the next 12 months



Spotlight: Singapore

While the nation is already among the most digitised in the world, citizens seek faster connectivity with a shift to new ways of working



Alongside 83% of workers in Singapore stating the reliability and quality of their broadband Internet connection is important to them, 8 in 10 (80%) express concern that services must dramatically improve if the networks are to support new ways of working such as hybrid employment.

In an era when ‘work from anywhere’ is fast becoming a model for many professionals, 81% of respondents state everyone should be able to connect to secure, fast and stable Internet services in public places or while they’re on the move, no matter where they are.

A large majority (78%) feel plans to provide the entire population to access high-speed, reliable Internet should be accelerated.

Supercharging the future

The Singapore government’s Smart Nation plan is designed to foster innovation in pursuit of being the world’s leading digital economy. Singapore’s Infocomm Media Development Authority reported nearly nine million total broadband Internet subscriptions in November 2021, with almost 1.4 million residential wired and 7.2 million wireless broadband subscriptions.

Respondents agree this is vital: 80% say access to fast, reliable Internet is critical to developing and maintaining a well-educated and informed population; a further 80% state it’s crucial to future economic growth.

Key takeaways



90% of respondents actively use their broadband at home for four hours or more each day



8 in 10 respondents in Singapore say having access to fast and reliable Internet is critical to future economic growth



66% of respondents log on at home to work or run their own business



58% of respondents would be willing to pay more for a safer broadband connection

Nearly three quarters (71%) report strong Internet connections at home, with 73% stating their broadband reliability is good.

With 66% of workers in Singapore stating they use their household's Internet service to do their job or run their own business, it's clear why a large majority value the country's workforce being able to connect to reliable services away from professional premises.

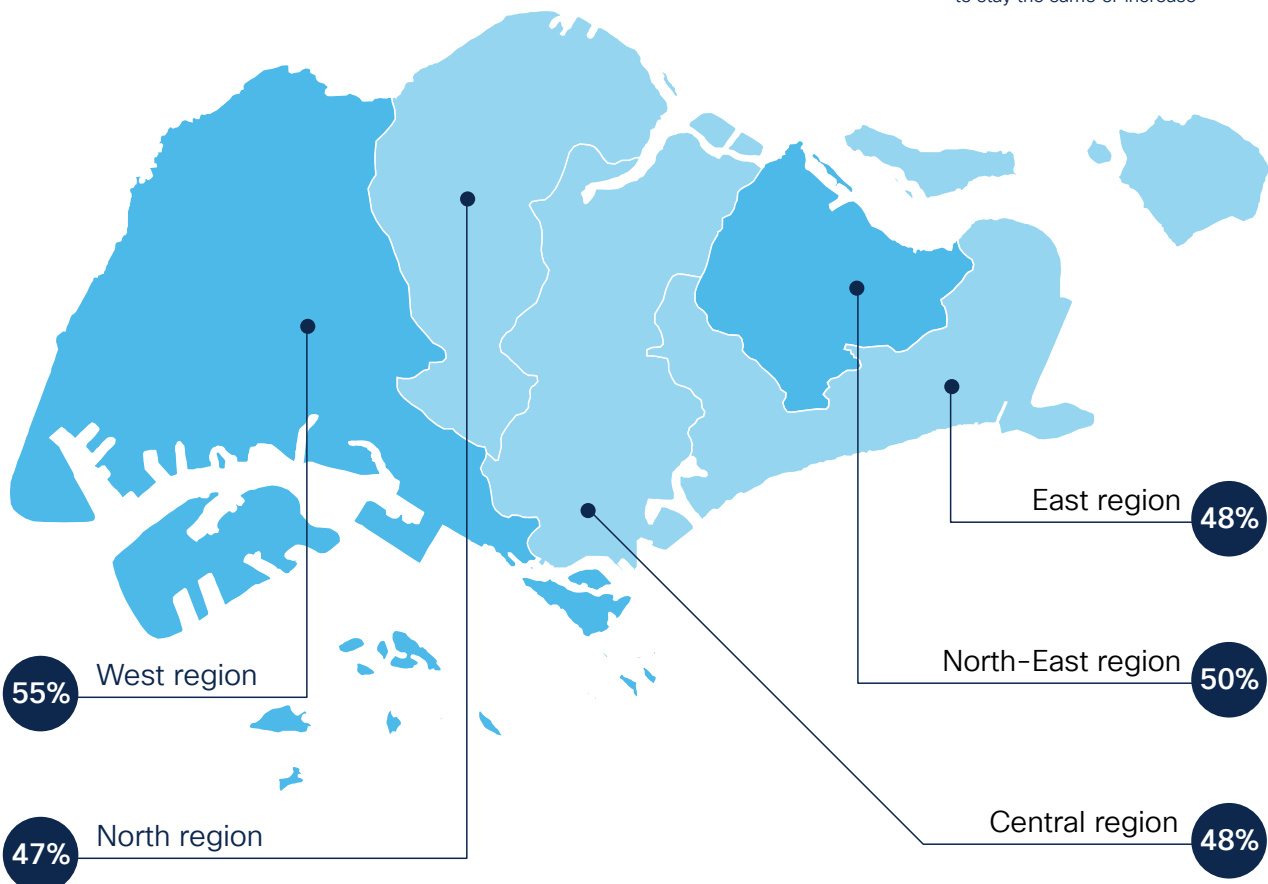
Furthermore, 50% believe their household's Internet usage will increase or stay the same in the next 12 months, and 37% of respondents say they will seek to upgrade their service in the same period.

New worker demands

Affordability is an issue, however: 22% will not upgrade because they feel it's too expensive. That said, well over half (58%) of workers say they would be willing to pay more for a safer broadband connection, revealing security is front of mind for many respondents.

Workers value accessible connectivity as well, as 66% of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: South Africa

The workforce seeks affordable connectivity, regardless of location, to support the emergence of hybrid work



Internet infrastructure is a great concern for the country's growing number of hybrid and remote workers. Some 9 in 10 (90%) respondents who perform their role entirely from home, and 89% of workers saying their job is hybrid, state broadband must dramatically improve if people are to work from anywhere.

For its part, the South African Government's target is to ensure 80% of the population can get online by 2024. Its SA Connect national broadband program focuses on increasing basic minimum speed at 42,000 sites from 10Mbps to 100Mbps to aid the drive for planned universal connectivity.

The stated aim of policymakers is to "forge a new economy in a new global reality," using a mix of public and private finance. Respondents agree: 87% of them say access to fast, reliable Internet is critical to South Africa's future economic growth.

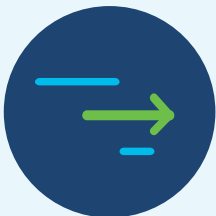
Internet improvement

A further 88% of workers feel speedy and stable networks are vital to develop a well-educated and informed population. Meanwhile, 9 in 10 (90%) declare everyone should be able to securely connect to fast, reliable Internet when in public places or while on the move, regardless of location.

A total of 63% of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Consequently, 86% would like to see the national infrastructure plans sped up to meet growing demand.

Key takeaways



86% say accelerating plans to create better connectivity across the country is vital



90% of respondents performing their role from home are demanding dramatic improvements to connectivity



Three or more people use the Internet at the same time in 62% of households



63% say not being able to access reliable Internet during lockdown prevented them accessing critical services

Affordability of connecting to reliable broadband will become a headache for the population according to more than 2 in 3 (68%) of respondents, while 67% say broadband should be provided free of charge. There is particular concern for low-income families, as 86% of workers believe this group is being priced out of getting online.

While 71% state Internet services cost too much, a large majority (68%) would be willing to pay more for a safer broadband connection - revealing workers are keen to ensure secure online activity.

More than half (52%) of respondents say they will seek to upgrade their service in the next 12 months; but of those who won't, 16% believe it's too expensive to do so.

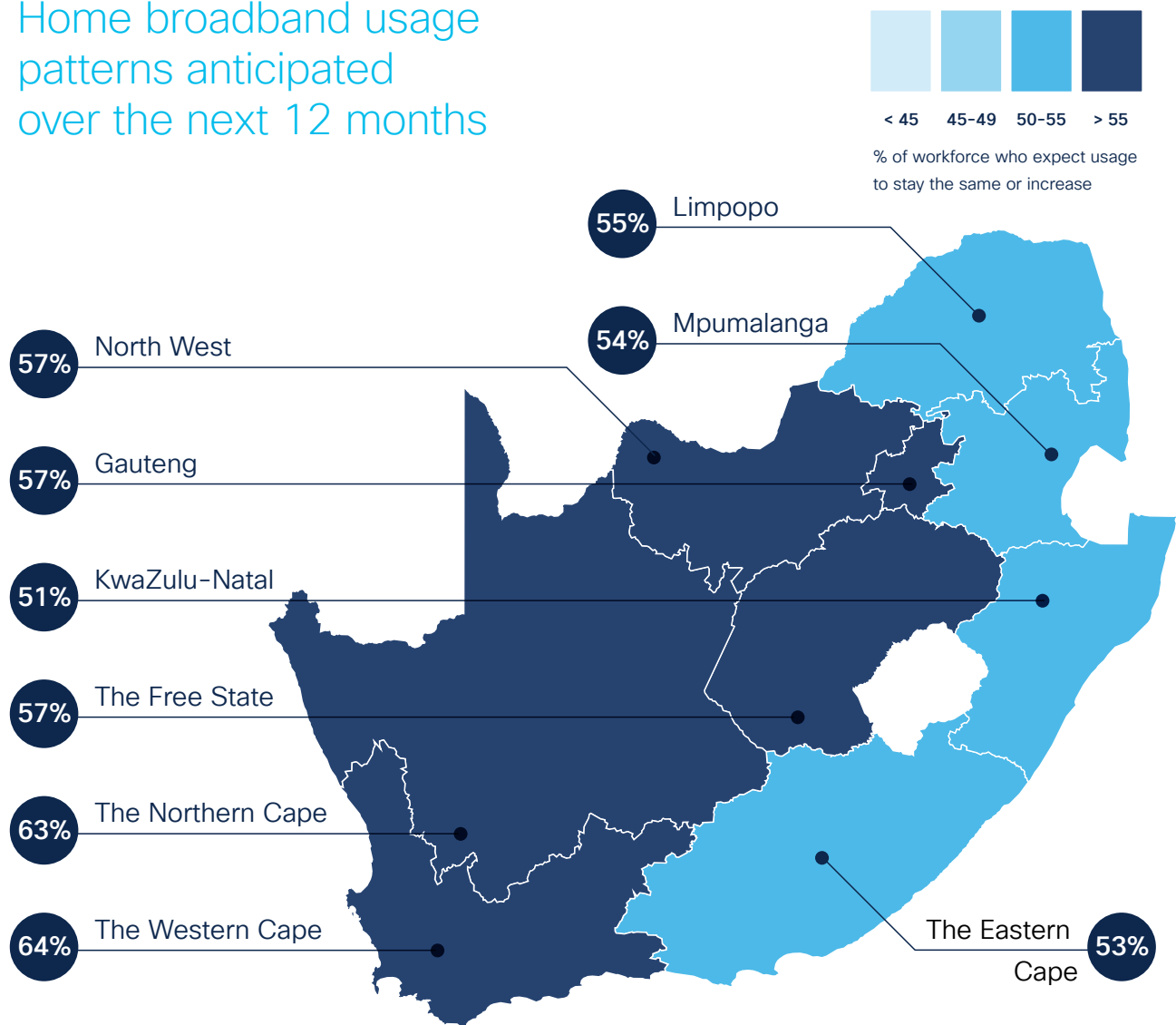
Growing demand

For 3 in 10 (30%) respondents, speed of their domestic connection is a pain, with this proportion saying it is only average or weak. Meanwhile, almost 1 in 4 (23%) grade the reliability of their home broadband service as average or poor.

Household connectivity is clearly under pressure: 60% of respondents claim at least three people under their roof are active online simultaneously throughout the day. This is key when factoring in the 65% of respondents who say they either do their job or run their business from home.

Furthermore, demand is set to grow with 57% of workers overall claiming their household's Internet activity will increase or stay the same during the next year.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: South Korea

While digital transformation is well under way in the country, a large majority of workers want Government and service providers to expedite the promised upgrades



The Korean Government intends to implement a “digital economy transformation”, providing best-in-class data, networks and Artificial Intelligence (AI) throughout society.

As part of its wider Digital New Deal strategy, plans involve further improvements to core infrastructure. This entails a 5G national network spanning all major towns and villages in the country’s 85 cities including Seoul, and a program to continuously improve 5G thereafter.

5G specialised networks will be applied early to core services, with anticipated industrial and social ripple effects so they can be utilised in all areas of daily life. In addition, large-scale projects are on the table for five key areas of AI.

Connectivity for all

With more than 7 in 10 workers (73%) stating connectivity is crucial in their daily lives all eyes are on the Korean Government to implement promised improvements to the national network. In fact, 68% of Korean workers want policymakers to accelerate the program described above.

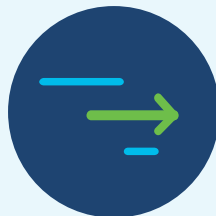
Despite the desire for faster, reliable connection, many respondents are acutely aware it should be affordable for all: around 2 in 3 (67%) believe universal access is set to become a major financial issue.

Workers also observe wider societal issues in the drive for better digital services. The ability of fast and reliable Internet is viewed as critical to economic growth by 74%, while 70% state it’s vital to having a well-educated and informed population.

Key takeaways



73% of workers in Korea say fast, reliable Internet service is crucial to their day-to-day life



68% say speeding up plans to create better connectivity nationwide is vital



68% of respondents actively use their broadband at home for four hours or more each day



52% of respondents would like to see plans accelerate to ensure high-speed and reliable Internet is available to everyone

Around 1 in 3 (33%) people plan to upgrade their Internet service in the next 12 months, although 44% state they would not be willing to pay a higher monthly fee for it. Of the 45% who don't expect to upgrade during the year to come, around 1 in 6 claim increased cost is dissuading them.

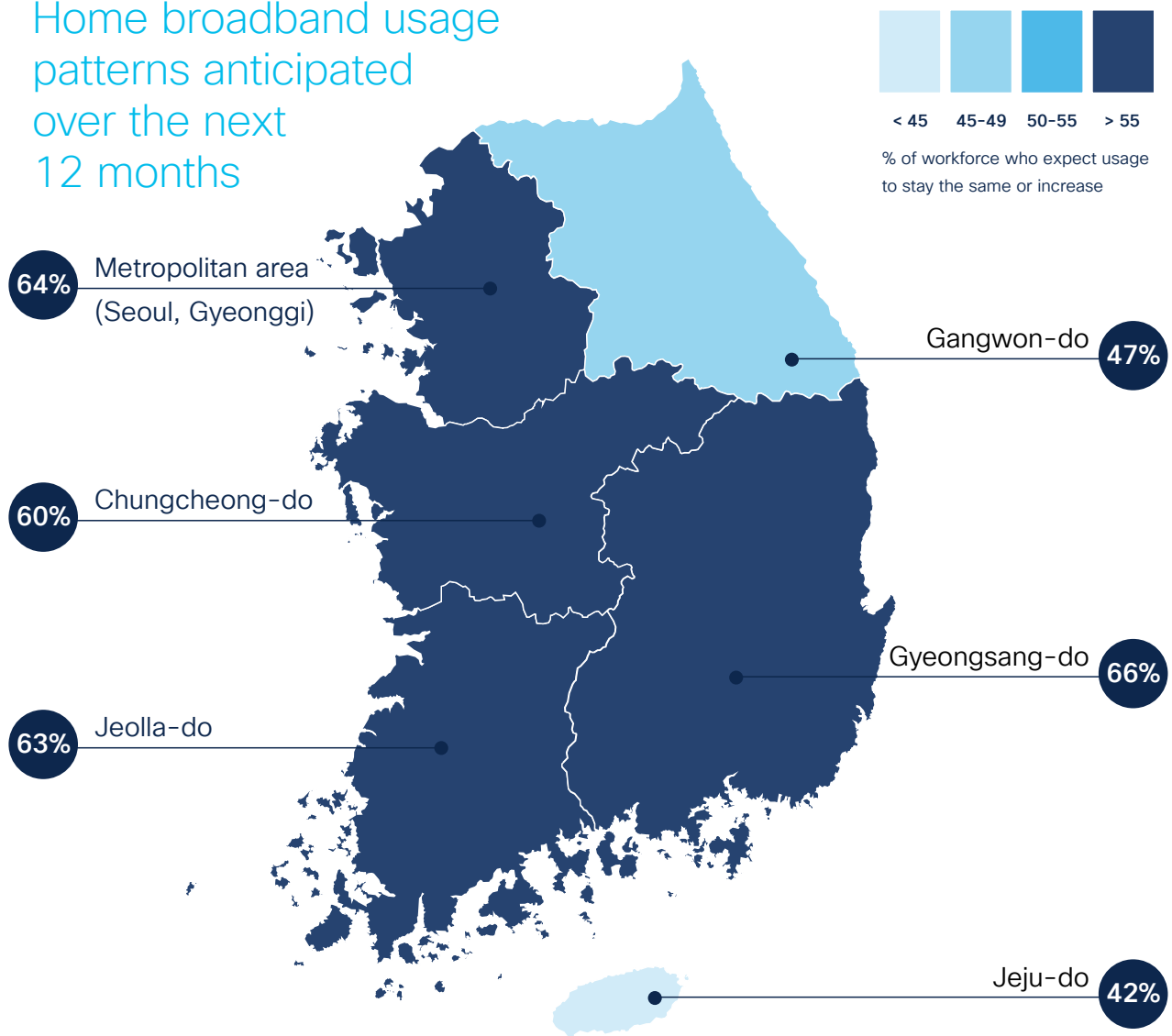
Helping hybrid work

A large majority (70%) believe services must greatly improve to allow people to work from anywhere. With more than 1 in 4 (27%) workers saying they log on at home to work or to run their own business, this is becoming an important consideration for the Government, employers and service providers alike.

Accessibility is a key component too, with 64% of respondents saying they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Security is also key: 49% of workers permanently performing their role remotely - compared to 36% of hybrid employees, and 38% of respondents overall - report they'd be willing to pay more if safer Internet connection was guaranteed.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Spain

Nearly three-quarters of workers in Spain want network upgrades to be delivered faster as Internet access becomes crucial to society and the economy



With almost 3 in 4 (74%) workers stating the reliability and quality of their broadband Internet connection is important to them, it's perhaps unsurprising that a similar proportion (73%) think everyone should be able to connect to secure, fast, reliable services in public or on the move, regardless of their location.

But respondents also feel Internet infrastructure has a critical role to play in Spain's stability. More than 7 in 10 (71%) think it's vital for future economic growth in the country, while nearly as many (70%) say it's crucial to developing and maintaining a well-informed, educated population.

With these factors in mind, 72% want plans to ensure fast and reliable Internet for every citizen to accelerate.

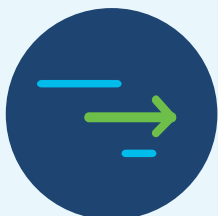
Tackling blackspots

Almost half (49%) of Spanish workers say they were unable to access critical services such as online medical appointments, online education, social care, and utility services during lockdown, due to an unreliable broadband connection.

One of the biggest areas of digital discrepancy remains the gap between coverage in urban and rural areas, which affects those living in the countryside as well as major industries such as agriculture. Almost 7 in 10 (69%) respondents living rurally want speedier upgrades to services.

When asked how respondents would most like to connect from home in the future, 34% of Spanish professionals would like to connect via fibre-optic broadband, while 19% would like to connect wirelessly through 5G broadband.

Key takeaways



72% say accelerating plans to create better connectivity across the country is vital



72% of workers claim hybrid working patterns must be aided by dramatic improvements to connectivity



84% actively use their broadband at home for four hours or more each day



73% of respondents believe everyone should be able to securely connect to fast and reliable Internet when in public places or while on the move regardless of location

A large majority of professionals in Spain want to ensure Internet infrastructure continues to support the shift to new working models: 72% feel broadband must dramatically improve to support people doing their job from anywhere.

With more than 4 in 10 (41%) stating they use the Internet at home to do their job or run their own business, Spanish workers place great value in the speed and stability of Internet services.

Affordable connections

Further pressure on connections comes in the form of 61% of respondents highlighting three or more people are simultaneously online at their home throughout the day. Almost half (49%) believe their online activity will increase or stay the same in the next 12 months.

With an eye on these factors, more than 4 in 10 (41%) claim they will upgrade their Internet service in the year to come, while more than a fifth (21%) feel they won't do so because a better service than their existing connection is not available.

Prioritising critical services is another key issue. More than a quarter (26%) of respondents would prioritise using their broadband connection for education, while 16% chose social care such as child support services, mental welfare and counselling.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Sweden

With an eye on the future, hybrid and remote workers are demanding a rapid upgrade to Internet services across the country



Around 2 in 3 (67%) workers in Sweden say the reliability and quality of their broadband Internet connection is important to them, with fewer than 1 in 10 (9%) disagreeing.

With 4 in 10 (40%) stating they use home Internet connection for working, or to run their own business, and 55% of workers saying three or more people are online simultaneously in their domestic setting, it is clear that emerging habits require quality Internet.

Connecting for work

Sweden's national broadband plan, adopted in 2016, encapsulates the Government's vision of an entirely connected country. It presents goals for both mobile coverage and high-speed broadband connections for households and businesses.

Efforts seem to be bearing fruit: since 2020, 95% of all households and companies have enjoyed access to broadband at a minimum capacity of 100Mbps. By 2025, almost everyone (98% of homes and commercial premises) should have access to 1Gbit/s broadband.

In spite of this program, 6 in 10 (60%) workers in Sweden think the roll-out of Internet improvements should accelerate. Furthermore, 59% believe the broadband network must get dramatically better to support a future that looks set to depend on hybrid working patterns. This applies to 60% of full-time remote workers and 54% describing their role as hybrid.

Key takeaways



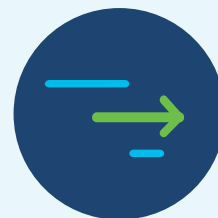
2 in 3 workers in Sweden say the reliability and quality of their broadband connection is key



59% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



55% of workers in Sweden say at least three people use their domestic connection at the same time



60% of respondents would like to see plans accelerate to ensure high-speed and reliable Internet is available to everyone

Fast, reliable Internet is essential if the economy is to grow in future, according to 6 in 10 (60%) respondents in Sweden. A higher proportion (65%) suggest it is also critical to developing and maintaining a well-educated and informed population.

62% of workers think access to affordable, reliable broadband is a growing issue for many people, and 59% claim low-income families in particular can't afford it.

This is underscored by nearly half of respondents (42%) who say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

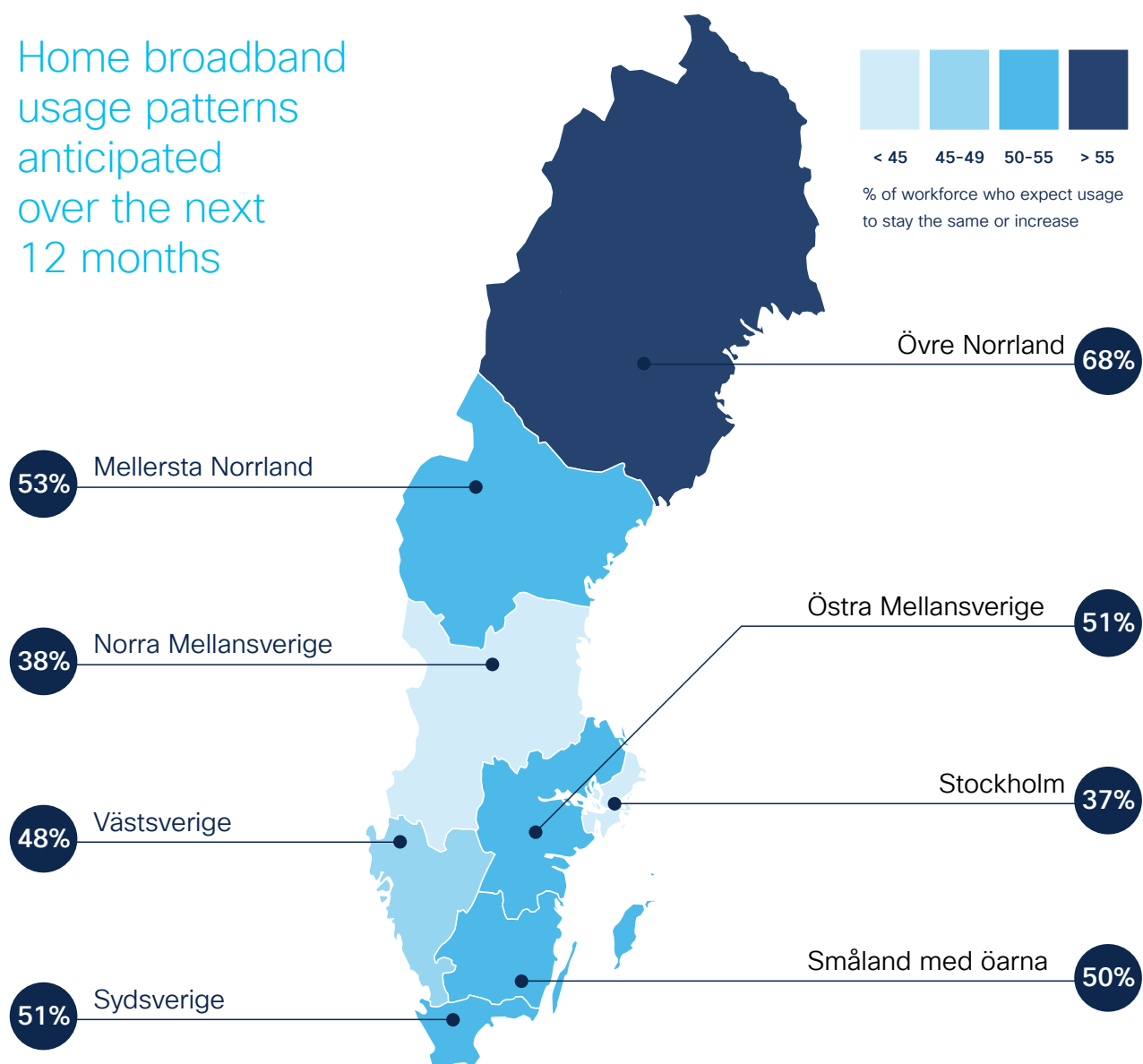
Hybrid help

Security of connections is a concern. More than 6 in 10 (63%) respondents say everyone should be able to securely connect to fast, reliable Internet in public, regardless of location.

In addition, 41% of workers would be willing to pay more for the promise of a safer broadband connection. This includes 52% of people who work remotely full-time.

Meanwhile, more than 1 in 4 (27%) respondents would like to upgrade their Internet service in the forthcoming 12 months, including 37% of those who work remotely all the time. However, 16% of hybrid workers who won't upgrade claim it's cost-prohibitive to do so.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Taiwan

As a global manufacturing hub and high-tech supply chain centre, Taiwan is experiencing significant demands to speed up Internet service improvements



Nearly 9 in 10 (88%) hybrid workers in Taiwan say the reliability and quality of their broadband Internet connection is important to them. With an overall figure of respondents in Taiwan that isn't far short of that figure (83%), people clearly view strong connectivity as a vital aspect of their working lives.

Furthermore, 82% of workers - rising to 85% of current hybrid workers - state broadband service must dramatically improve to support a national shift to hybrid employment.

In 2019, the Executive Yuan approved a Taiwan 5G action plan - due for completion in 2022 - to improve telecom and Internet services throughout market. It is expected to boost the supply chain by US\$43bn.

Despite Government programs promising an additional US\$1.8bn for 5G technology, 8 in 10 (80%) workers want policymakers to accelerate plans for improvement.

Eye on the future

A large majority (83%) of respondents state access to fast, reliable Internet is critical to future economic growth in Taiwan. The same proportion of workers (83%) suggest it's also needed to underpin a well-educated and informed population.

Yet around 2 in 3 (67%) cite cost concerns, saying access to affordable, reliable broadband will become a major issue for the population. Even more (74%) believe low-income families are being priced out of online connection.

Key takeaways



Almost 9 in 10 hybrid workers in Taiwan say the reliability and quality of their broadband connection is key



82% of respondents claim hybrid working patterns must be aided by dramatic improvements to connectivity



83% of workers say fast, reliable Internet is needed for economic growth



84% of respondents actively use their broadband at home for four hours or more each day

Meanwhile, more than 8 in 10 (81%) workers claim everyone should be able to connect to fast and reliable Internet in public spaces, regardless of location – and do so securely.

Better online security is something a majority (56%) of respondents would be willing to pay more for, including 62% of those in a hybrid role.

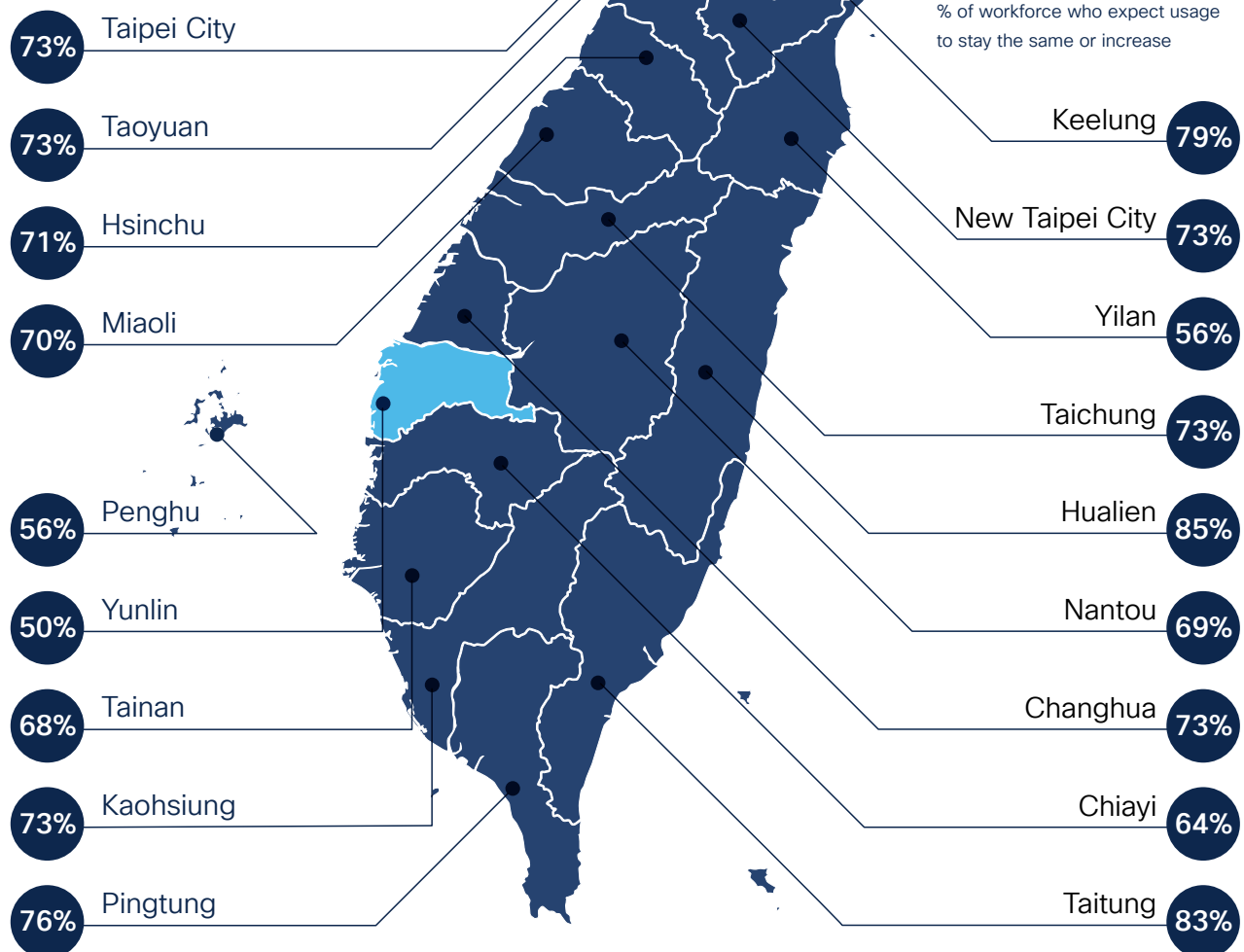
With more than 1 in 3 (34%) already using their household's Internet connection to do their job or run their own business, reliable connectivity remains a priority.

Digital decisions

Demand for improved Internet services is therefore likely to increase. The strain is highlighted by 57% of workers who state three or more people in their household use the Internet simultaneously.

Almost 3 in 4 (72%) expect their household's Internet usage to increase or stay the same in the 12 months to come. While 28% are committed to upgrading their connection during the same period, more than 1 in 5 (22%) who won't upgrade have been put off by the perceived cost of doing so.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: Thailand

A large majority of workers see the value of improved Internet services but worry about how people can afford to enhance the quality of their online experience



A large majority (87%) of respondents think everyone should be able to securely connect to fast, reliable Internet in public places or while they are on the move, regardless of location.

An equal number (87%) think having access to fast, reliable connectivity is crucial to the country's future economic growth, while slightly more (88%) say it's necessary for developing a well-educated and informed population.

Service requirements

The desire for better Internet services is clear among workers in Thailand: 87% feel the plans to boost infrastructure should accelerate, matching the proportion of respondents (87%) who state the reliability and quality of their broadband Internet connection is important to them.

Since 2016, the Thai Government has issued subsidies for fixed-broadband infrastructure, and universal service obligation. The "Thailand 4.0" initiative seeks to transform

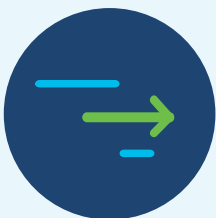
the country into a knowledge-based economy, with investments to foster technological innovation, sustainability practices and growth in SMEs.

Its Digital Economy and Society Development action plans have several key targets: expand fixed broadband to all villages by 2022, with access to speeds above 100Mbps; also in 2022, increase household fixed-broadband penetration to more than 70% of the total.

There is an additional affordability goal to reduce prices of fixed broadband to 2.5% of GNI per capita in 2022; and the final target is to expand digital economy contribution to 25% of overall Thai GDP by 2027.

Now respondents seek faster improvements to support emerging post-pandemic working patterns: 86% say broadband networks must get dramatically better if hybrid and remote employment is to succeed.

Key takeaways



87% say accelerating plans to create better connectivity across the country is vital



More than 8 in 10 respondents say good connectivity is vital to support future economic growth



86% of Thai workers think broadband must dramatically improve to support hybrid roles



63% of respondents in Thailand indicate that at least three people use the Internet simultaneously during the day

The cost of connecting is another key challenge according to respondents, and 85% believe access to affordable, reliable broadband is becoming an issue for the entire population. A total of 8 in 10 (80%) indicated that this is a major problem for low-income families in particular.

Furthermore, 75% of respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

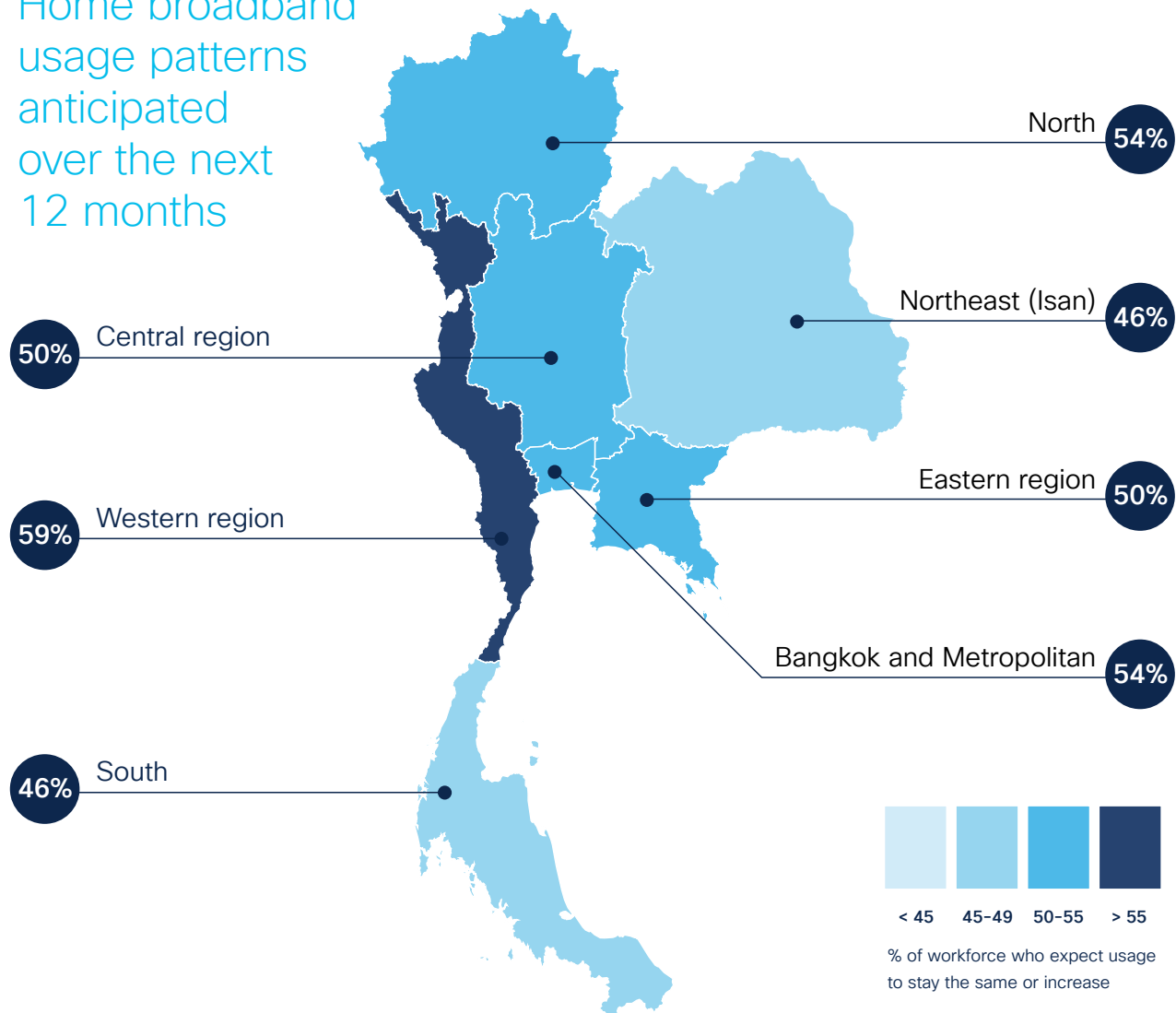
59% of respondents indicate that they spend seven or more hours per day actively on the Internet, with 76% of respondents recognising the need for online security, saying they would be willing to pay more to access a safer broadband service.

Hybrid connections

Already, more than half (54%) of respondents log on at home to do their job or run their own business. With a total of 62% saying three or more people are active online simultaneously under their roof, and more than half (51%) anticipating their household's combined online usage will increase or stay the same in the next 12 months, the pressure on services is clear.

More than 6 in 10 (64%) say they will seek to upgrade their home Internet service in the next 12 months, but over a fifth (23%) say doing so would be too expensive.

Home broadband usage patterns anticipated over the next 12 months



Spotlight: UAE

Workers across the country rely on fast and stable Internet services for many aspects of their lives and also state it's key to the nation's economic fortunes



Almost 3 in 4 (74%) respondents in UAE state the reliability and quality of their broadband connection is important to them.

The nation has a generally positive opinion towards existing Internet service provision, with 77% of respondents saying they rate the reliability of their broadband service as good.

The survey revealed that remote and hybrid working is more prevalent than ever, with 52% of the UAE workforce now relying on their domestic Internet service to either work from home or run their own business.

Dependence on high-performance Internet access is further underlined by the fact that more than 6 in 10 (63%) respondents actively use their domestic broadband service for seven hours or more each day.

Meanwhile, a similar proportion (60%) of respondents state they use some form of mobile technology to connect to the Internet at home; this includes using their mobile phones, or a 4G or 5G hub. Fibre-optic broadband is used by 16%.

Looking ahead, 29% would like to connect wirelessly using 5G.

Investing in the future

UAE was the first country in the region – and the fourth globally – to launch 5G and by the end of 2023 an estimated 16 million 5G-enabled smartphones will be operational. Service providers are preparing pilots of 6G, expected to be 100 times faster than 5G.

There are additional benefits of upgrading UAE's digital network. Access to speedy and stable services is critical to future economic growth, according to 75% of respondents.

Key takeaways



74% of respondents in UAE state the reliability and quality of their broadband connection is important to them



75% also say fast, reliable Internet is essential for economic growth



2 in 3 workers actively use their home broadband for seven hours or more each day



74% think everyone should be able to securely connect in public places or while on the move, wherever they are

Similarly, 73% claim access to fast and reliable Internet services is vital for maintaining a well-educated population. This is a cornerstone of the UAE Government's ambitious AI vision 2031 program, as well as Abu Dhabi Vision 2031.

A look to the future

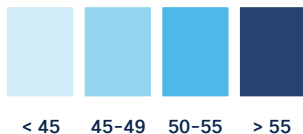
More than 7 in 10 (74%) respondents think everyone should be able to securely connect to fast, reliable Internet services in public places or while on the move, regardless of where they are at the time.

When asked about their future connectivity needs, almost 60% of UAE workers say they are planning to upgrade their Internet service at some point in the next 12 months.

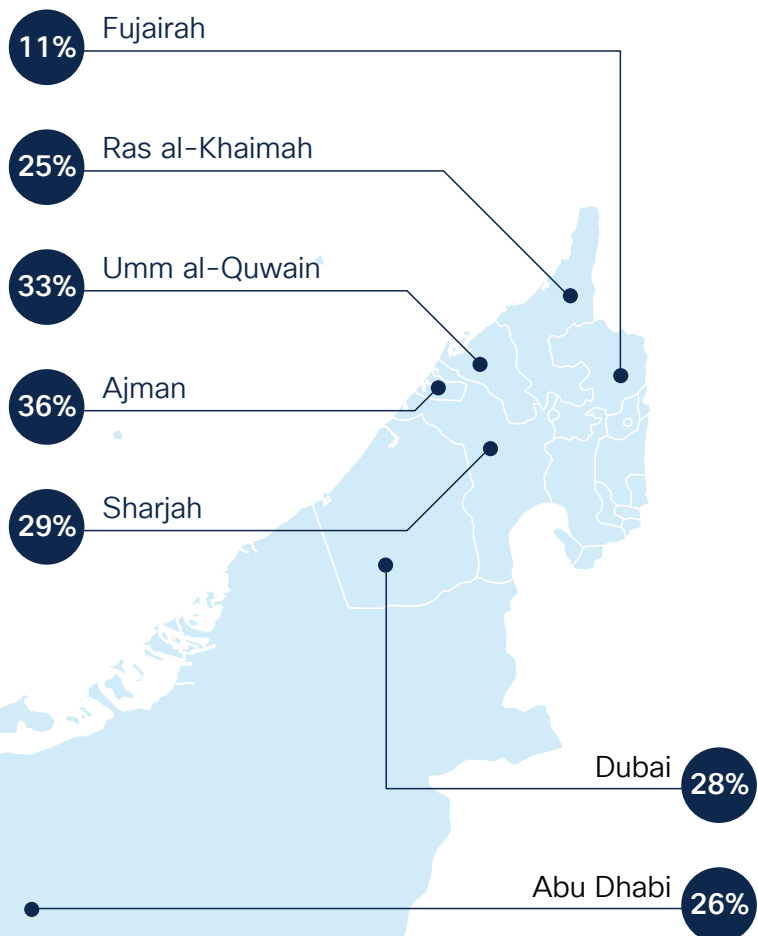
Meanwhile, security is a key consideration for many workers as 64% reveal they would pay more than their current Internet tariff to access a safer broadband connection.

When asked about which critical service they would prioritise when using their broadband connection in the future, 24% highlighted education as a major requirement.

Home broadband usage patterns anticipated over the next 12 months



% of workforce who expect usage to stay the same or increase



Spotlight: United Kingdom

Gigabit broadband for all is in sight, but demand is already high for an affordable service that supports the whole population



As part of its Levelling Up the United Kingdom white paper, published in February 2022, the UK Government has committed to providing access to gigabit broadband of at least 1000 Mbps to all premises by 2030.

Already, 96% of homes in the country enjoy super-fast broadband connection with speeds from 30 Mbps. The Government's stated aim is to rapidly fill in coverage gaps - not least in remote rural areas as many people choose to live and work more flexibly.

These pledges come amid demand for more reliable Internet among a large majority of the UK population. With 47% of households already able to access to gigabit-capable connections there is still some way to go to future-proof the UK's digital infrastructure.

Digital demands

It's clear from the research that most people see the importance of delivering a digitally inclusive recovery alongside investment to propel the economy.

Some 78% of respondents agree everyone should be able to securely connect to fast, reliable broadband regardless of where they live or work.

Meanwhile, 76% say excellent connectivity is crucial for economic growth. For the Government, this means considering even more ways to boost coverage and choice for consumers; by offering incentives to service providers to help maximise access and prioritise under-served areas, for example.

Key takeaways



76% of workers claim fast, reliable Internet is critical for economic growth



88% of respondents actively use their broadband at home for four hours or more each day



70% believe Internet services must get better to fully support a switch to hybrid working



More than 1 in 3 workers plan to upgrade their connectivity in the next 12 months

Notably, many UK workers are prepared to make investments of their own to improve connectivity. More than 1 in 3 (36%) plan to upgrade their Internet service in the next 12 months.

A further 15% would upgrade but claim it's too expensive. In fact, the price of Internet access is a hot topic: 55% of respondents think broadband should be free in the UK, and 60% suggest access to affordable yet reliable connectivity is set to become a major issue throughout the population.

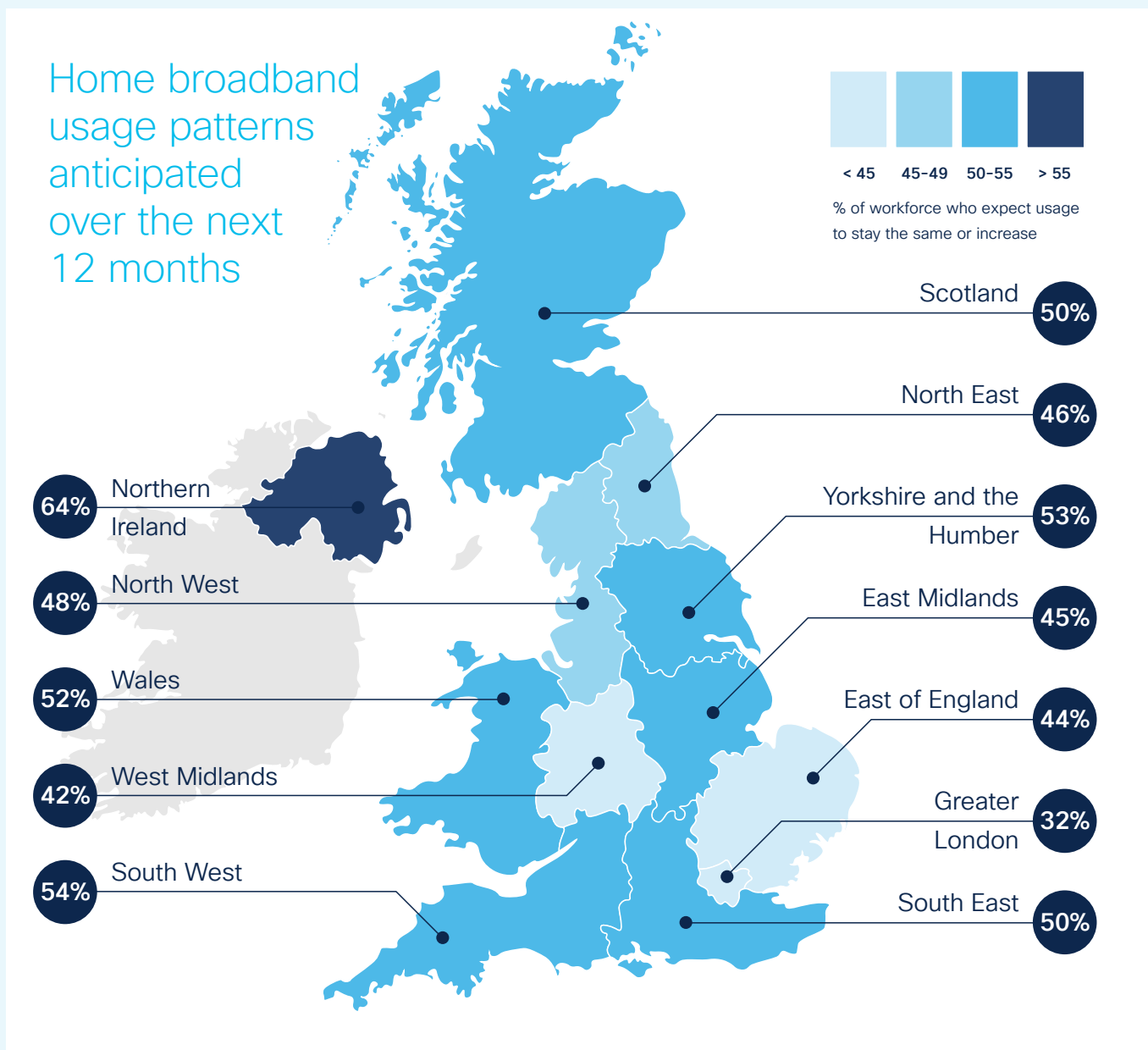
With 73% stating broadband quality and reliability is important to them, connectivity is front of mind for most workers as well as Government officials and service providers.

Embracing hybrid

A sizeable majority (70%) believe services must greatly improve to allow people to work from anywhere. This is key, because more than 4 in 10 (44%) already log on at home to work or to run their own business.

Security is also a concern: 53% of workers overall - along with 50% of hybrid workers and 63% of people permanently performing their role remotely - admit they'd pay more for a guaranteed safer Internet connection.

Furthermore, 67% of respondents would like to see policymakers accelerate plans to ensure high-speed and reliable internet is available to everyone.



Spotlight: Vietnam

Future economic growth, access to critical services and educating citizens depend on faster installation of better networks, according to workers across the country



Access to fast, reliable Internet services is key to the country's future economic growth according to 87% of workers in Vietnam.

Three-quarters (75%) of them also state access to affordable and stable broadband is becoming a major issue for the population. Around two-thirds (67%) also feel affordability of connecting is a particular issue for low-income households.

While 67% would like to upgrade their broadband in the next year, more than 1 in 7 (15%) claim it would be too expensive for them to do so. More than 4 in 10 (41%) expect their household's Internet usage to

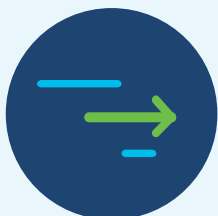
completely change during the next year, compared to during the pandemic, as they return to the office and to educational settings.

Upgrade demands

Demand is high: at present, more than three-quarters (79%) of workers claim three or more people are online in their home at the same time, with households active for an average of more than 9.5 hours per day.

As a total of more than 6 in 10 (61%) say they work from home or run their business via their domestic connection, the race is on to secure better Internet services.

Key takeaways



83% say accelerating plans to create better connectivity across the country is vital



87% of workers in Vietnam say good connectivity is vital to propel future economic growth



More than 6 in 10 respondents log on at home to work or run their own business



79% of respondents say three or more members of their household use the same Internet connection at the same time throughout the day

Against this backdrop, 83% of workers in Vietnam would like improvements to Internet infrastructure accelerated.

Policymakers can point to an upgrade program published in response to demand. The Government is digitising public services and also rolling out widespread 5G.

Internet subscriptions continue to rise, with 18.8 million fixed and close to 71 million mobile broadband subscriptions accounted for in 2021.

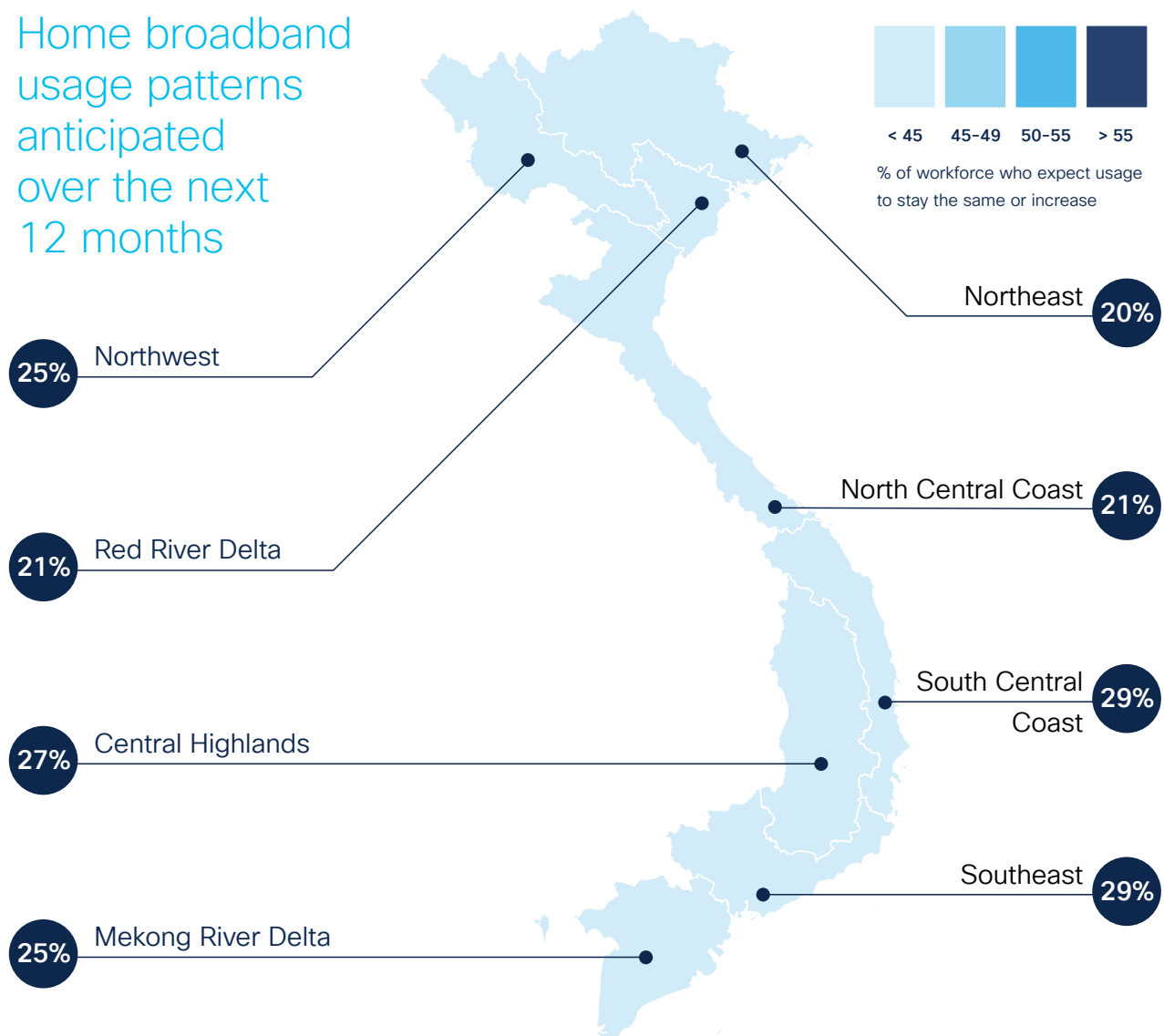
Some 85% of respondents think everyone should be able to access secure, fast and reliable Internet in all public places and when on the move, regardless of their location.

Internet for all

More than 8 in 10 (82%) state fast, reliable Internet is critical to developing and maintaining a well-educated and informed population, and 83% say the reliability and quality of their Internet connection is important to them.

Additionally, 3 in 4 (75%) respondents say they were unable to access critical services such as online medical appointments, online education, social care and utility services during lockdown, due to an unreliable broadband connection.

Home broadband usage patterns anticipated over the next 12 months



Methodology

Cisco Broadband Index is based on a survey of 59,796 workers across 30 markets: UK, Germany, France, Italy, Poland, Russia, Japan, Hong Kong, Taiwan, Australia, New Zealand, Korea, Singapore, Thailand, Malaysia, Indonesia, Philippines, Vietnam, India, Canada, Brazil, Mexico, China, USA, Spain, Saudi Arabia, South Africa, Sweden, UAE and Netherlands.

It was completed in December 2021. The sample included respondents based in every region of each market, who either work full-time remotely; full-time in an office; hybrid, between home and the office; or on the frontline. The poll was conducted by independent research consultancy Censuswide, who abide by and employ members of the Market Research Society - which is based on the ESOMAR principles.