



Impact of COVID-19 on New Internet Users

Research with the Next Billion Users

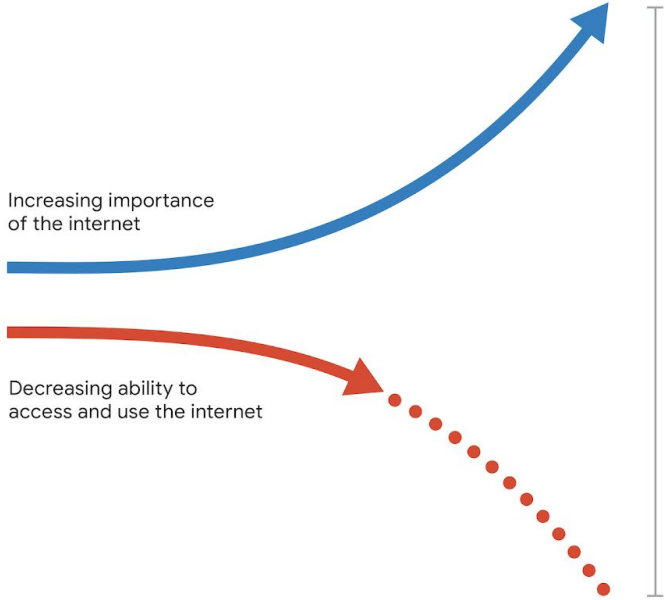
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Google's Next Billion User initiative, which prioritizes building for emerging markets, has spent the last three years researching a specific population called New Internet Users. New Internet Users will make up a significant portion of the next billion people to use the internet.

In our research, we spoke with 200 New Internet Users across 5 countries and kept in touch with more than 70 for a year while they learned to use their first smartphones. Over the course of this year, we see COVID-19 compounding existing challenges faced by New Internet Users. As more essential services shift online, the problems of low digital literacy and low confidence become more acute and pervasive.

Essential services are quickly moving online...



COVID is widening the gap of who benefits from the internet

Which can set back the internet usage and life quality of our largest group of potential users.

These problems hamper use and engagement with the internet and may create a long-term negative impact on their online journeys. We'll dive deeper into some of the key needs of New Internet Users that has been compounded by COVID-19, as well as new challenges stemming from COVID-19:

Key need #1: Increase income, lower costs

New Internet Users have seen their incomes decrease amidst an increase in cost of living

- Widespread job loss from COVID-19

15 out of 21 NIU participants in Brazil and Mexico have experienced job loss or reduced income due to COVID-19 lockdowns

- Inflated prices for essential goods

Overall prices are trending upwards but with big and frequent fluctuations. Fluctuations are hard for those who often buy smaller amounts of food more often.

- Difficult access to government financial aid

From online only registration forms to unclear eligibility criteria to middlemen taking a cut, users are challenged by awareness and digital literacy issues to get aid.

Key need #2: Make my internet data go farther

Less money means harder choices. For New Internet Users this often means less data.

- Food and shelter outweigh data

With reduced income, New Internet Users are prioritizing absolute essentials. But data, though a basic need, is often a close second. Some are even buying less expensive food so they can afford data.

- More time and more members at home

There's less data to satisfy the needs of more members at home. WhatsApp, YouTube, Facebook are active stand ins for a local community, classrooms and more.

- Data availability is impacted

In India, getting data during a lockdown is hard when many users recharge monthly in person.

In Mexico, simply affording data is hard - only 2 out of 9 users had consistent access.

In Brazil, a majority of users were able to afford the internet with the help of government aid.

Key need #3: Support children's education

Mobile apps have become the new classroom, and data the new cost of tuition.

- Limited data for online education

Since limited data is prioritized towards education, there's less leftover for online exploration. Ironically, more exploration could lead to discovering new education tools like Google's Read Along.

- WhatsApp is the new classroom

Users are relying on familiar services to meet their essential needs. While WhatsApp isn't ideal for these tasks, alternatives are hard to discover and learn.

- Parents are struggling "substitute" teachers

New Internet Users worry that their children are experiencing lower quality education, and many don't have the digital or subject matter expertise to help with homework questions.

Key need #4: Keep mis-information at bay

Is it real? Is it a conspiracy? How does it affect me?

- Contradictory information

Messages from governments, local authorities, friends, social media, religious groups don't always align, leaving users feeling overwhelmed and unsure. Filtering fake news is especially difficult when it comes from trustworthy sources like family.

- Bad actors poised to exploit the underserved

Deliberate scam and misinformation campaigns are common, causing distrust of vital infrastructures (i.e. government, hospitals)

Key need #5: Find reliable healthcare options

Fear, uncertainty, lack of awareness or mistrust can stop users from seeking care

- Limited access and understanding of telemedicine

Low discovery of online tools, data constraints and awareness challenges mean more reliance on in-person medical attention.

- Unknown availability and cost of care

There's no central source for healthcare. Fragmented services make healthcare options hard to explore and consume.

- Exponential benefits with higher digital literacy

Those with higher digital literacy have been able to leverage the internet—learning about COVID-19 prevention, sanitization strategies and more—illustrating the internet's potential to slow COVID-19.

Key need #6: Ensure emotional wellbeing

COVID-19 fatigue is real

- No clear paths to rest and relaxation

As New Internet Users work with smaller quantities of data, they minimize or cut out entertainment completely. In Mexico, some users are relying on less expensive sources of entertainment, like TV and radio.

- Interrupted support systems

New Internet Users rely heavily on in-person networks (neighbors, churches) for emotional support. They are now turning to digital workarounds (i.e. texting prayers to preachers,

tuning into sermons) to tap into their existing support networks

- Adjusted aspirations

COVID-19 has caused many users to adjust or delay their aspirations, like home improvements. The stress of COVID-19 doesn't afford the mental capacity to work towards these dreams.

Key need #7: Find a bridge to online essential services

Some governments have moved some essential services to 'online-only'. This can have the effect of limiting access based on digital literacy

- Difficulty claiming benefits

Many New Internet Users aren't registered in online databases. Others don't even have consistent internet access causing them to miss distribution of government aid.

- Higher digital literacy and confidence hurdles

Those with internet access must still surmount digital literacy hurdles. It can be daunting to navigate the sites that host financial aid information, further reinforcing the belief that the internet is "not for me".

- Real life support networks impacted

New Internet Users tend to rely on access to people in order to troubleshoot problems, like calling telephone hotlines or walking to local government offices. During COVID-19, these support networks may be closed.

Key need #8: Find a new normal in the post COVID-19 world

New Internet Users have less resources to adapt to impending changes to their jobs, communities, and way of life.

- COVID cognitive overload

With daily struggles to make ends meet, many users have less bandwidth to think about and plan for the future.

- Elusive digital resources remain elusive

New Internet Users who predicted long-term effects (e.g. prolonged unemployment) are not aware of digital resources that could help them meet these challenges.

With COVID-1, trends accelerated, needs are felt more acutely, and consequences are more serious.

Data Source

We conducted a one-year longitudinal study with New Internet Users across five countries (Brazil, India, Indonesia, Mexico, Nigeria).

During the study, they acquired their first smartphone, and we kept in touch with them between 6 to 12 months total. Each participant (N=73) was met with in-person up to eight times. Between visits, we kept in touch with participants via phone calls and multimedia messages.

From all these interactions, we manually logged 2,500+ instances where New Internet Users reported learning something about their new smartphones and/or the internet. The denominator of the percentages in this paper is the 2,500+ reported learning instances.

To ensure accuracy, each logged activity was triangulated as much as possible between: self-reports by the participant, interviews with the participant's teacher(s), direct observation by Google employees in-person, and cross-checking with others present (partner research agencies: D'Well India, D'Well Indonesia, Kantar Millward Brown Nigeria, INSITUM Mexico, Mercedes Sanchez Brazil) in each interaction.