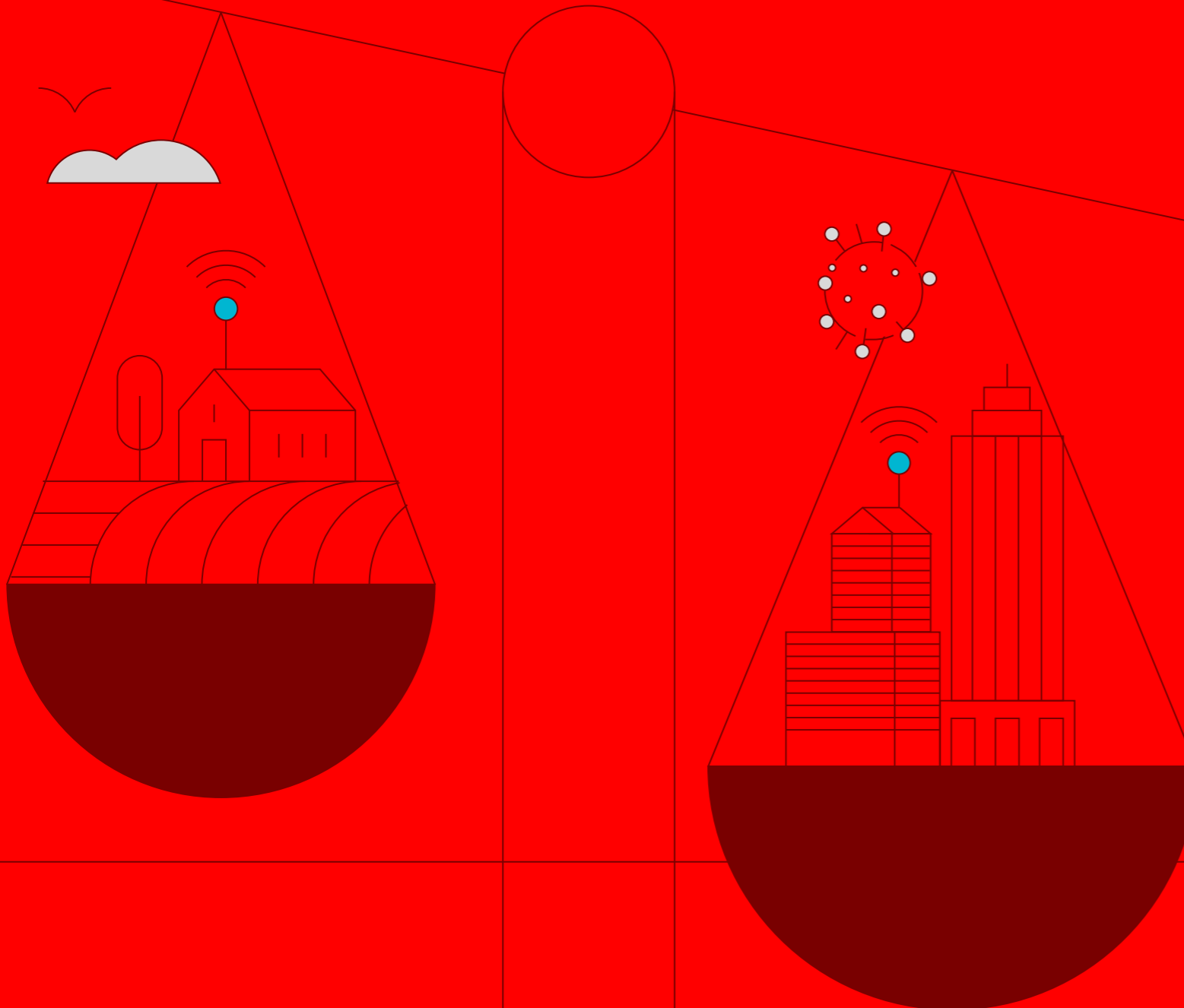


August 2021



# Digitising Europe Pulse Shifting Perceptions on Rural Living

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Vodafone Institute  
for Society and  
Communications



**digitising  
europe**

## Executive Summary

# A fundamental shift?

For more than a year, COVID-19 has been impacting the lives of people around the world. There are virtually no areas of public life that have not been affected in one way or another. The pandemic has hit the health sector hard, created political tension, and affected specific economic sectors such as tourism.



On a more micro level, the pandemic has fundamentally shifted many people's views on how and where they work and live. In fact, according to this latest report, the experience of working from home has led many urbanites to reconsider whether they want and need to continue living in cities.

The idea that the pandemic has resulted in new economic potential for rural areas is slowly gaining credence. The Deloitte “Enhancing Rural Connectivity” (2021)<sup>1</sup> report, commissioned by Vodafone and prepared by Deloitte, recently examined this question. The Vodafone Institute also worked with the Carbon Trust to take a closer look at the ecological effects of teleworking in the just-released “Homeworking report” (2021)<sup>2</sup>.

But while initial studies seem to confirm that attitudes are shifting when it comes to rural living, hard data remains difficult to come by. To address this paucity, the Vodafone Institute decided to dedicate its most recent “Digitising Europe Pulse” – the fifth report in the series – to the potentially growing willingness of city dwellers to move to the countryside.

Has the pandemic changed Europeans' minds about rural living? Is access to nature, more space and less noise enough to make people consider a move? What infrastructure needs to be in place to make the countryside more attractive? And what are some of the factors that might deter citizens from making the transition to rural life?

We have found that many people are, in fact, interested in moving out of the city. But it remains to be seen whether this is a temporary phenomenon due to COVID-19 or whether it could actually mark the beginning of the reversal of the urbanisation trend that has been ongoing for decades.

Should that be the case, it could be a unique opportunity to more effectively address many pressing challenges – like housing shortages and overloaded public transport systems on the one hand, and urban blight and migration on the other. Not surprisingly, digitisation can play a crucial role – as a pivotal player in softening the rural-urban divide. It could, in fact, emerge as the key factor in our decisions about where we want to work and live.



<sup>1</sup>[https://www.vodafone.com/sites/default/files/2021-06/Enhancing\\_Rural\\_Connectivity\\_Report.pdf](https://www.vodafone.com/sites/default/files/2021-06/Enhancing_Rural_Connectivity_Report.pdf)

<sup>2</sup>[https://www.vodafone-institut.de/wp-content/uploads/2021/06/CT\\_Homeworking-report-June-2021.pdf](https://www.vodafone-institut.de/wp-content/uploads/2021/06/CT_Homeworking-report-June-2021.pdf)

Key findings:

# Changing attitudes about rural living



Among urban residents, 38% of those surveyed say that the pandemic influenced or **changed their views on living in the countryside.**

Among people **living in large cities** of more than 500,000 inhabitants, this figure is even higher, at **45%.**

**By far the most important precondition for a life in the countryside is a good internet connection, with 72% of urbanites saying it is a must-have and an additional 21% saying it would be nice to have.** This finding is consistent across Europe, with some small differences. People in Estonia (87%) and Ireland (77%) view reliable internet as a must-have, while respondents in France (62%) and Britain (66%) view a good internet connection as slightly less important.

Among urban residents, **56% could imagine moving to the countryside** in the next one or two years, with 16% saying they could “definitely” imagine such a move and 40% saying “maybe”. Responses were similar across Europe, except for the Netherlands, where only 36% could imagine moving to the countryside. Among rural residents, meanwhile, 59% are happy with where they live and only 35% could imagine moving to the city in the near future.

When asked about the **primary advantage of country life**, **69% of urbanites mention proximity to nature** and 68% cite health benefits. Only 35% mention cheaper rents as a benefit of rural living, despite recent real-estate price increases in European cities.

Regarding the disadvantages of rural life, urban residents do not overwhelmingly point to a single factor, though possible drawbacks identified include insufficient health-care infrastructure, inadequate public transportation, long commutes, and poor shopping opportunities. Still, the advantages of rural life predominate for a plurality of urbanites (41%).

Overall, **56% of urban respondents identify good health-care infrastructure as a must-have**, with 43% saying the same about good public transportation. Only 36% identify good educational facilities as an essential precondition. The latter value, however, varies significantly between countries, with 48% of urban Estonians and 46% of urban Romanians citing good educational facilities as a must-have, whereas only 26% of their counterparts in Germany, Sweden, the UK, and the Netherlands say the same.

**Every third respondent is already taking advantage of remote learning and working opportunities**, with that share weighted slightly towards city dwellers. Another third would like to make use of these technologies in the future. E-health services are least used so far, but show the greatest future potential.



Introduction

# Shifting perceptions on rural living



## Introduction

The COVID-19 pandemic has shifted attitudes about rural living. In the new world of teleworking, **a growing number of people are considering turning their backs on cities** in favour of a life in the countryside. But there's one major prerequisite: **fast internet connections**.

One of the biggest changes brought about by the COVID-19 pandemic is that it forced students and workers to learn and do their jobs remotely from home, giving a large share of people some of the advantages enjoyed by digital nomads. **If our lives and work can be conducted digitally, the importance of our offices and physical locations diminishes.**

Our most recent Digitising Europe Pulse survey found that, after over a year of periodic lockdowns combined with remote learning and teleworking, **attitudes among urban dwellers towards life in the countryside appear to be shifting**, with fewer as deeply tied to cities – at least if they have access to a good internet connection.

Almost four-in-ten urban dwellers in our survey, which included interviews conducted with at least 1,000 residents in each of the 15 countries in Europe polled, say the pandemic has influenced or changed their views on living in rural areas. Among people living in cities of 500,000 or more, the rate is even higher, at 45%.

A key driver of these changed perceptions is the massive shift towards teleworking. Whereas only **5% of Europeans worked remotely in 2019, that share ballooned to 40% in 2020.**<sup>3</sup>



56%

**Fully 56% of respondents living in cities say they could “definitely” or “maybe” imagine moving to the countryside in the next two years.**



<sup>3</sup><https://www.bruegel.org/2021/03/self-employment-covid-19-and-the-future-of-work-for-knowledge-workers/>

**INTRODUCTION**

# Key differences among European countries

**Solid internet a must for teleworking**

The bandwidth needs created by remote working and learning are also a key concern of those surveyed. A majority say that a **good internet connection is paramount** for living in rural areas.

Of urbanites considering a move to a rural area,

**72%**

say solid internet access is a “must have,” trumping all other factors, such as health infrastructure and public transportation. Respondents identify it as the **No. 1 precondition** for rural life in all the countries surveyed.



There are, of course, key differences among European countries, with some appearing to have embraced teleworking and online health services to a greater degree than others. And many are willing to pay more for better internet access while others are not.

Overall, however, the significant interest in rural living among European urbanites appears to provide a unique opportunity for the European Union as it moves towards meeting the European Commission’s Digital Decade targets. With 30% of the total EU population already living in rural areas,<sup>4</sup> the findings of this Digitising Europe Pulse survey underscore the increasing importance of expanding rural digital infrastructure down the road.



<sup>4</sup>[https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas/eu-rural-areas-numbers\\_en](https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas/eu-rural-areas-numbers_en)

**Shifting attitudes about urban living**

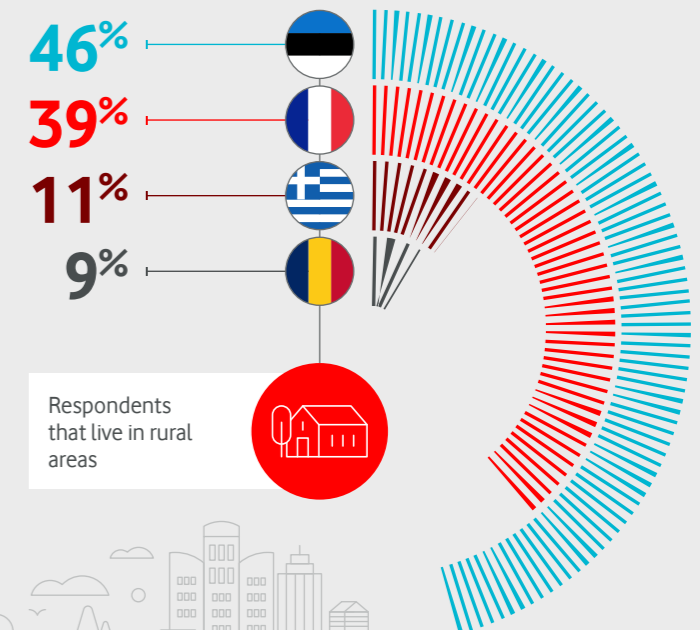
Since the outbreak of the SARS-CoV-2 pandemic, many in the media have heralded a “renaissance of rural areas”. This trend could potentially have a much greater impact on Europe than other regions. **A far larger share of the European population lives in urban areas** than the global average of 55%<sup>5</sup>, with **77% of the 15,000 respondents to our survey reporting that they live in an urban area**. Broken down further, 27% say they live in a large city with a population of 500,000 or more; 50% live in small- to medium-sized cities with between 10,000 and 500,000 inhabitants; and 23% live in places with fewer than 10,000 inhabitants.

**77%**

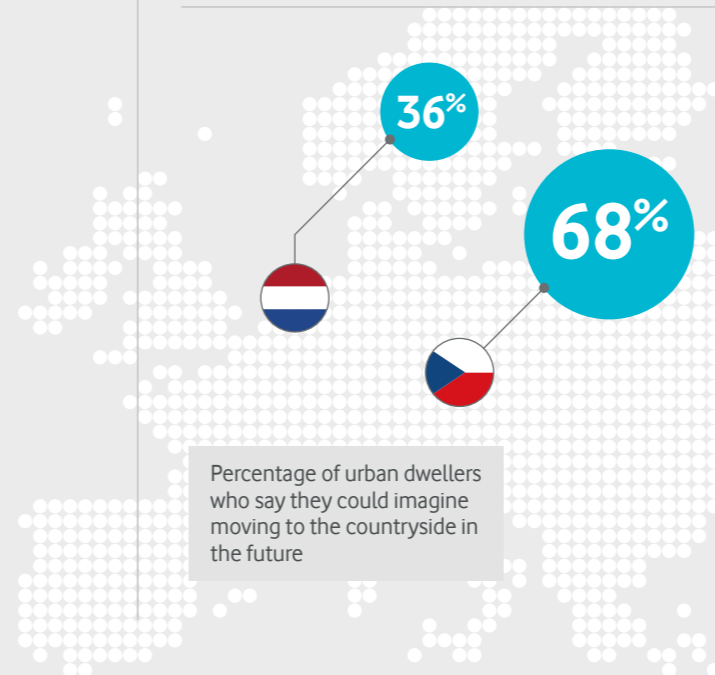
report that they live in an urban area



The degree of **urbanisation varies strongly by country**. Whereas 46% of Estonians and 39% of respondents in France say they live in rural areas, the same is true of just 11% of Greeks and 9% of Romanians. Interestingly, Greece is also home to the largest population percentage concentrated in large cities, at 46%; whereas in Romania, the urban population tends to be spread among medium-sized population centres, with 62% of respondents saying they live in small- to medium-sized cities.



Although the survey found that urbanites are warming up to the idea of living in less densely populated areas, rural residents seem more contented, with just 35% indicating a possible interest in moving to the city.



The largest percentage of urban respondents who say they could imagine moving to the countryside in the near future are in the Czech Republic, at 68%. Moreover, 25% of urban respondents in the country say they could “definitely” picture such a move, also the highest result in the poll. Over 60% of the urban populations of Greece, Romania, and Sweden are also eyeing the countryside. Urban dwellers in the Netherlands, meanwhile, seem happy where they are, with just 36% saying they could “definitely” or “maybe” imagine a move to rural areas, by far the lowest value in the countries surveyed.

<sup>5</sup><https://www.destatis.de/EN/Themes/Countries-Regions/International-Statistics/Data-Topic/Population-Labour-Social-Issues/DemographyMigration/UrbanPopulation.html>

**INTRODUCTION**

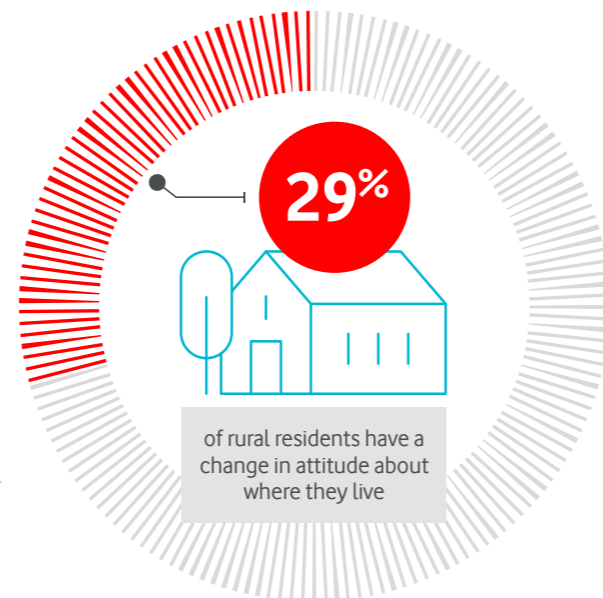
# How the pandemic is influencing people

The pandemic is a significant factor

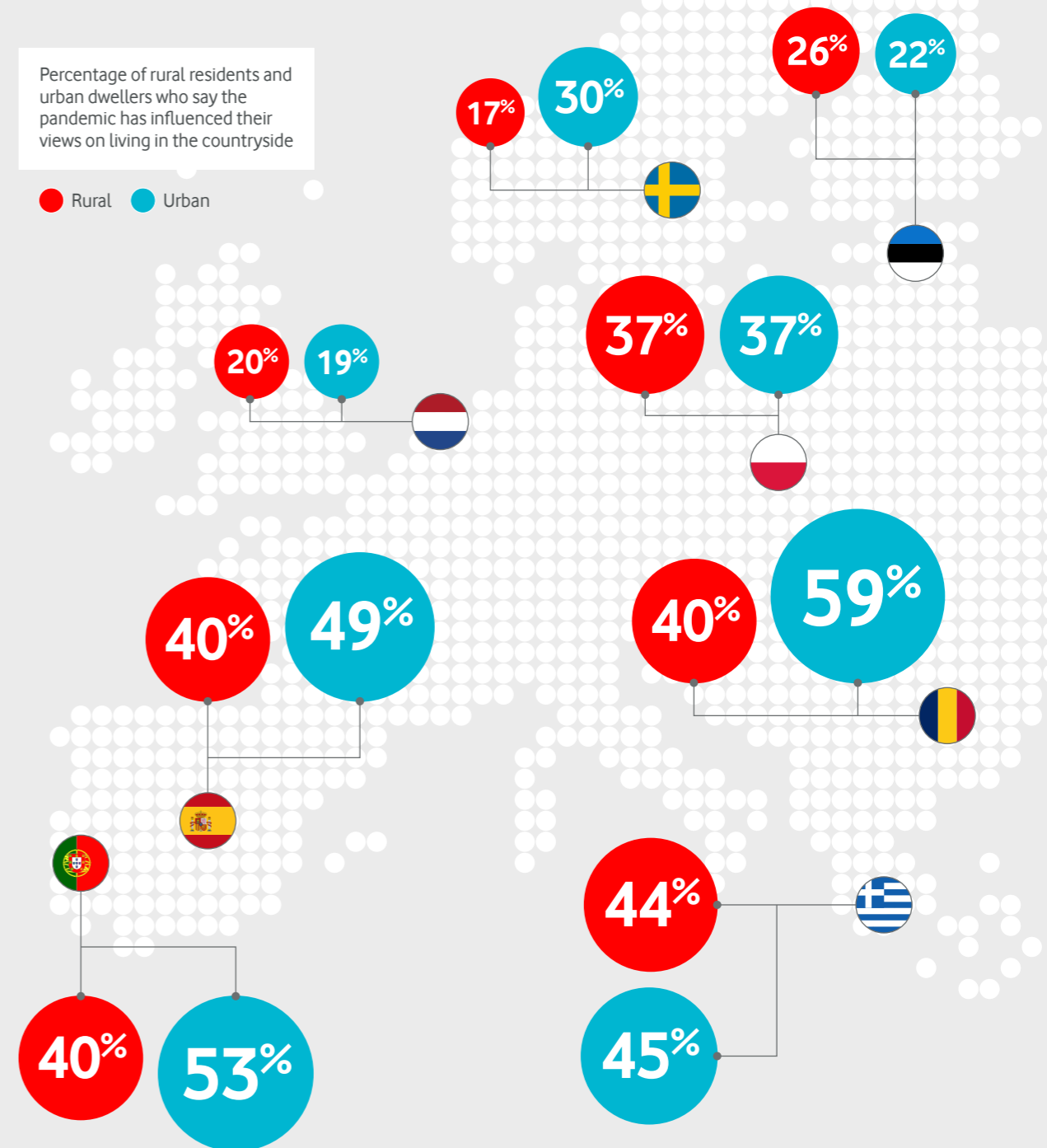
While not all of those considering the countryside are doing so because of the pandemic, our poll found that it is a factor for a significant number of respondents. Overall, **38% of urbanites say the COVID-19 pandemic has “influenced or changed” their views on rural living.**



For people already living in the countryside, only 29% report a change in attitude about where they live.



Still, that split isn't universal. In Estonia (26% to 22%) and the Netherlands (20% to 19%), more rural residents than city dwellers say the pandemic influenced their views on living in the countryside. In Poland, the two groups are the same size, at 37%. Everywhere else, though, the pandemic seems to have more broadly shifted urbanites' way of thinking than their country cousins'. Again, city residents in Romania top the list, with 59% saying COVID-19 has influenced their views, followed by 53% in Portugal and 49% in Spain. Of people living in rural areas, the figure is highest in Greece (44%) and lowest in Sweden (17%).



# 1

PART 1

## The attraction of country living





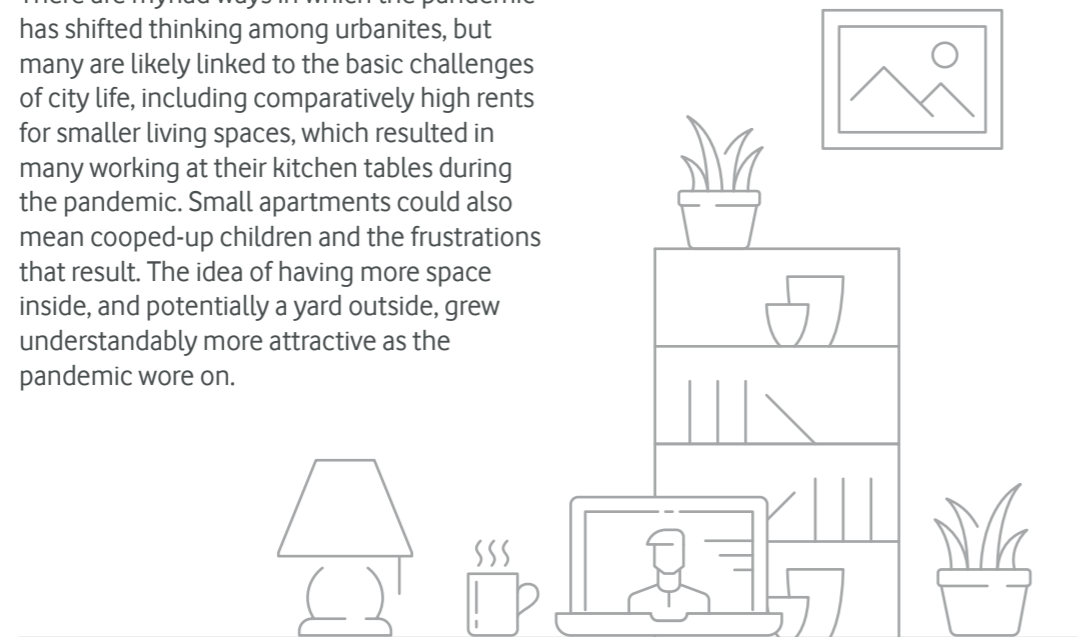
# 1.

PART 1

## Rural areas becoming more attractive

### City life frustrations

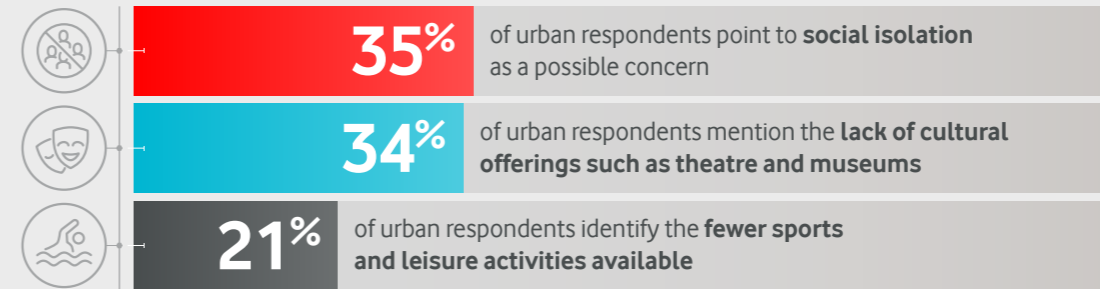
There are myriad ways in which the pandemic has shifted thinking among urbanites, but many are likely linked to the basic challenges of city life, including comparatively high rents for smaller living spaces, which resulted in many working at their kitchen tables during the pandemic. Small apartments could also mean cooped-up children and the frustrations that result. The idea of having more space inside, and potentially a yard outside, grew understandably more attractive as the pandemic wore on.



In a recent report, the German Property Federation (ZIA) noted how the coronavirus pandemic has “strengthened” an already existing trend of rural areas becoming more attractive.<sup>6</sup> ZIA also wrote that the measures imposed to contain the coronavirus have made many of the things that make city life so attractive inaccessible during long stretches of the pandemic – restaurants, cafés, museums, nightclubs, concert halls, and many stores.



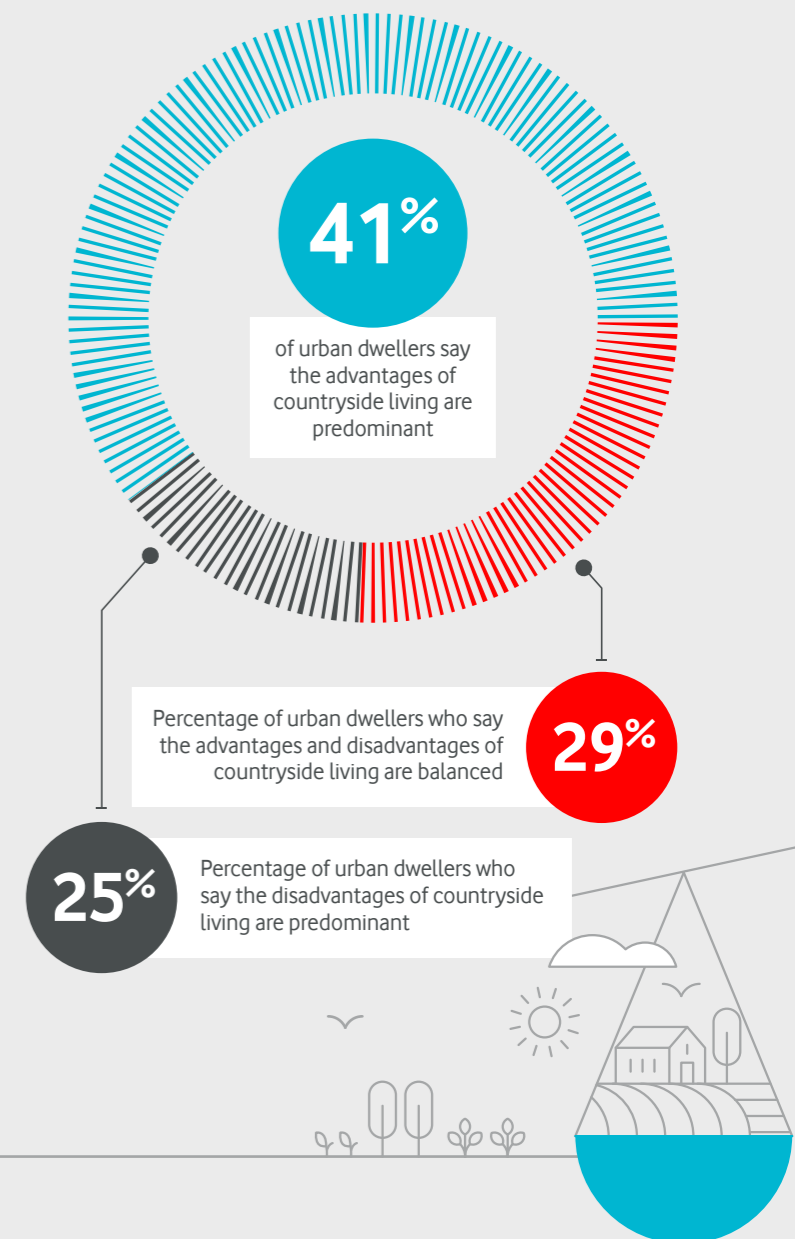
When urban residents in the Vodafone survey were asked about the disadvantages of rural living, those attractive aspects of city life did make an appearance. Among urban respondents, **35% point to social isolation as a possible concern**, 34% mention the lack of cultural offerings such as theatre and museums, and 21% identify the fewer sports and leisure activities available. No potential pitfalls were flagged by a majority of respondents, though **48% say they are concerned about health infrastructure**. Longer commutes, poor public transportation, and fewer shopping opportunities are also identified as potential downsides.



### Weighing advantages vs. disadvantages

Still, in no country did urban respondents say that the disadvantages of living in the countryside outweigh the advantages, and across the countries surveyed, **41% of urbanites say the advantages are predominant while just a quarter say the disadvantages of country living dominate (29% say they are “about the same”)**. The countries where city dwellers have the most negative perceptions of the countryside are Spain, at 32%, and Estonia and the Netherlands, at 31% each. On the other end of the scale, over half of Greek urbanites (52%) think the advantages of rural life are predominant, as do 48% of Portuguese and 49% of Poles.

Interestingly, city dwellers in Europe identify quality-of-life factors, and not just cheaper living costs, as being the greatest benefits of country life. Fully **69% of urbanites and 76% of rural residents identify proximity to nature as the chief advantage of life outside the city**. A similar share – 68% of city dwellers and 75% of those in rural regions – point to the healthier environment offered by rural areas. Over half of urban respondents also say the countryside offers less stress and less traffic. Only 35% of urban respondents identify cheaper rents as an advantage.



<sup>6</sup><https://zia-deutschland.de/wp-content/uploads/2021/05/Fruhjahrungutachten-2021.pdf>

# 2

PART 2

## Essential rural infrastructure



# 2.

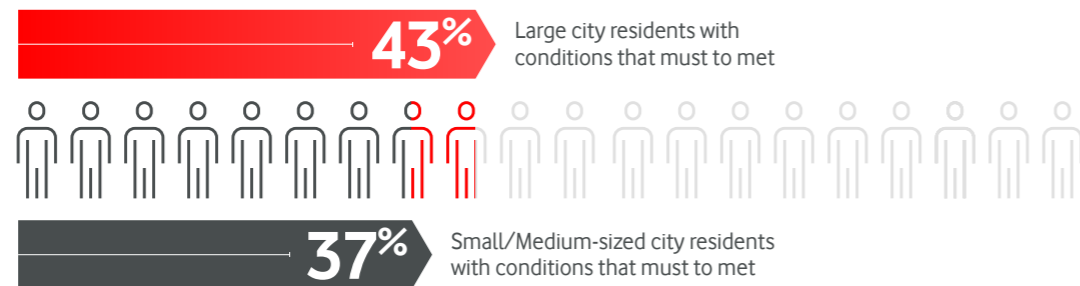
PART 2

## More pronounced urban rural divide

Rural requirements

The advantages of country living may be clear, but even if many city dwellers in Europe are attracted by the idea of the rural life, that does not guarantee they will follow through.

Indeed, 43% of our respondents living in metropolises with more than 500,000 residents identify conditions that must be met for them to make a move to a non-urban area, as do 37% of those living in small- and medium-sized cities (with populations of 10,000 to 500,000).



The requirements range from decent shopping opportunities and health infrastructure to adequate public transportation services and good educational institutions. The responses, though, are clear-cut on one issue: In every single country surveyed, participants overwhelmingly identify a **good internet connection as a “must have”** if they are to relocate to the countryside.



There is good reason for identifying a solid internet connection as a precondition for moving to the countryside. Across the EU, only 59% of rural households have a high-speed internet connection, compared to 86% in the bloc as a whole.<sup>7</sup> Furthermore, as laid out in the EU’s 2020 “Annual Regional and Local Barometer”, a report released in October: **“The prominent role of digital technology in COVID-19 resilience and response has highlighted shortcomings in digital infrastructure and digital literacy, and has made the divide between cities and regions ever more pronounced”**.<sup>8</sup>

<sup>7</sup>[https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas\\_en](https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas_en)  
<sup>8</sup><https://cor.europa.eu/en/our-work/EURegionalBarometerDocs/4370-Barometer%20optimized.pdf>

Indeed, the emphasis on adequate connectivity identified by survey respondents reaffirms the findings outlined in “Enhancing rural connectivity”, a report released in May by Vodafone and produced by Deloitte<sup>9</sup>.

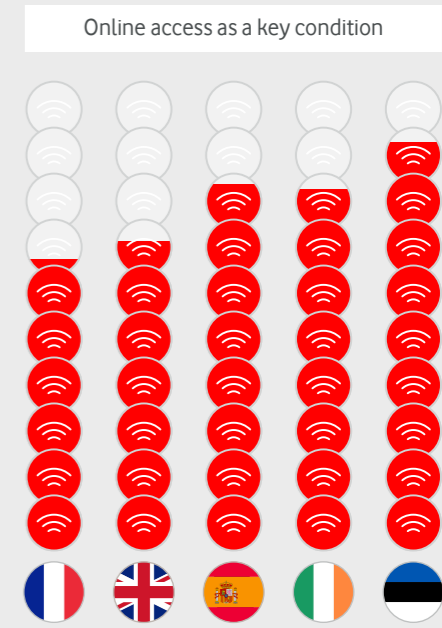


**“Rural digitalisation, enabled by better rural connectivity, will bring a broad range of benefits”, the report notes. “It will enable improved quality of life in rural communities, with more flexibility in where people live and work ... increased productivity and more sustainably delivered growth”.**

Consistently high emphasis on good internet connections

That also helps explain why the emphasis on good internet connections is relatively consistent across the surveyed countries, although there is a noticeable gap between France and Britain on the low end, with 62% and 66% respectively identifying reliable online access as a key condition, and countries like Spain (78%) and Ireland (77%) on the high end.

Estonians, though, are even more adamant. Of respondents in the country, 87% identify a good internet connection as a key condition for moving out of an urban area. Given the emphasis the country has placed on shifting towards digital public services, with a full 99% of public services available online 24 hours a day, seven days a week, such attitudes are perhaps not surprising. Indeed, the nation claims to be “the most digital country in the world”.<sup>10</sup>



Data volumes

Romanian and Hungarian urbanites likewise indicate that they would need a robust internet connection, with 84% and 86% respectively saying they want medium or high data volumes. In Poland, meanwhile, over a third of urban respondents (36%) say they would require high data volume, the greatest such value found in the countries surveyed.



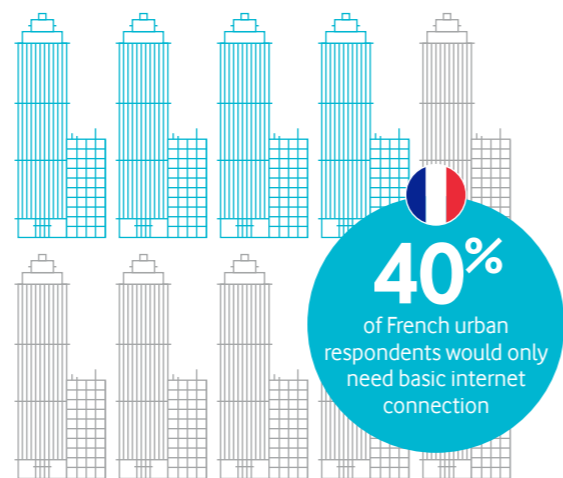
<sup>9</sup>Enhancing rural connectivity (Deloitte – Vodafone study)  
<sup>10</sup><https://e-estonia.com/solutions/e-governance/#:~:text=Voting%20e%2DCabinet-,Government%20Cloud,digital%20country%20in%20the%20world.>

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PART 2

## Negative impacts of poor internet connection

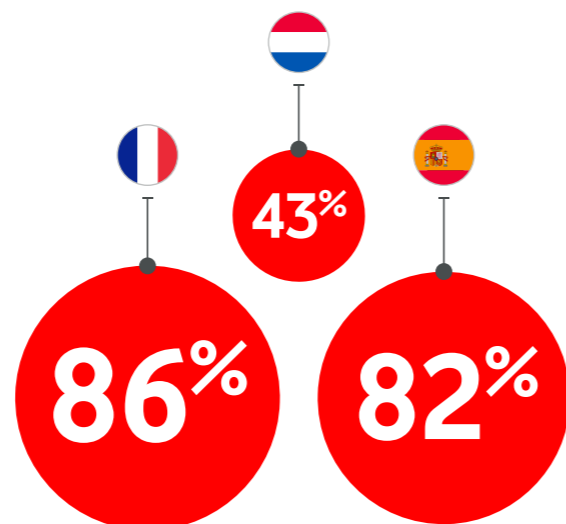
Once again, France finds itself at the other end of the spectrum, with four-in-ten urban respondents saying that a basic internet connection – sufficient for emails, reading the news, online shopping, and online banking – is all they would need if they were to move to the countryside. Among Germans, 32% agree. Interestingly, only 22% of urban respondents in the Netherlands express a need for high data volume if they were to move to a rural area, though that may be a function of the country already enjoying one of the fastest internet speeds in the world.<sup>11</sup>



It is even more interesting, then, that when it comes to the potential negative impacts of a poor internet connection, respondents in the Netherlands seem unconcerned. **Only 9% of Dutch respondents “totally agree” with the sentiment that people who have a poor internet connection at home are at a disadvantage in society, with an additional 34% saying they “rather agree”.** That total of 43% – against 42% saying they disagree – is vastly lower than the average across the countries surveyed, with 71% saying they “totally agree” or “rather agree” that a poor internet connection at home led to societal disadvantages, a number that is consistent whether respondents live in cities or in rural areas.

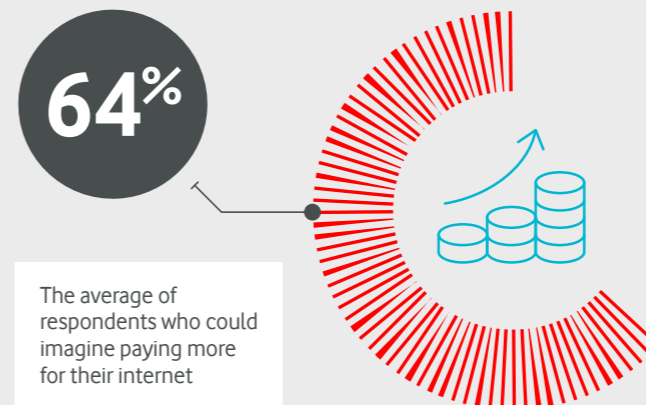
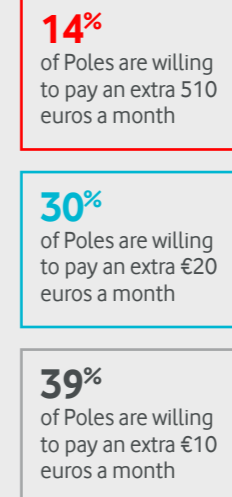
Respondents who totally/rather agree that people with a poor internet connection are at a disadvantage in society

French respondents are most concerned about the potential deleterious effects of a poor internet connection, with 86% saying they “totally agree” or “rather agree” that connectivity is crucial, followed closely by Spain, with a total of 82%. Aside from the Netherlands, other less concerned countries include Greece, with 35% saying they disagree that poor internet translates to societal disadvantages, and Romania, at 33%.



### Are consumers prepared to pay for better internet?

Concern about the disadvantages that may come with a poor internet connection, however, does not necessarily translate into a readiness to pay for improved connectivity. A total of 43% of French survey respondents and 40% of Romanians say they would not be willing to pay more for better internet connectivity, far higher than the 30% average. On the other end of the scale, 39% of Poles say they would be willing to pay up to €10 euros a month more for improved connectivity, 30% say €20 a month more would be acceptable, and 14% express a willingness to pay prices of €50 more each month. Respondents in the Czech Republic aren't far behind, with 76% of respondents saying they would be willing to pay more.



Despite the differences between rural and urban internet connectivity discussed above, Europeans living in rural areas express far greater unwillingness to pay more for internet connectivity than city dwellers. Among those living in the countryside, 37% say they are opposed to paying more than they currently do, compared to 29% of urbanites. On average, **64% of those surveyed say they could imagine paying more for their internet connection to bolster connectivity.**

### Giving Europe's rural areas a boost



90% say improving connectivity in rural areas is important



92% say medical infrastructure in rural areas is important

Slower average internet connections aside, rural areas in the EU have long been struggling to keep up with the cities they surround. In 2018, the average per capita gross domestic products in rural areas of the EU was just 75% of the bloc average, while cities were at 125% of the average.<sup>12</sup> **But with the pandemic now potentially nudging more city dwellers to consider a move to the countryside, the ideas being discussed for overcoming the rural-urban divide in Europe have become much more pertinent.**

The most frequently discussed proposals include eliminating the internet-speed gap between urban and rural areas. Among the 15,000 people interviewed as a part of this survey, nine-in-ten say that improving connectivity in the countryside is either “very important” (57%) or “rather important” (33%).

As high as that share is, though, other proposed measures match or even exceed it. A total of 92% of respondents say that support for medical infrastructure and hospitals in rural areas is critical, with 61% saying it is “very important”. Fully 90% agree that supporting the educational system in rural areas is critical, and 89% say that improving transportation connections is vital.

<sup>11</sup><https://ceoworld.biz/2020/02/21/revealed-countries-with-the-fastest-internet-speeds-2020/>

<sup>12</sup>[https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas\\_en](https://ec.europa.eu/info/strategy/priorities-2019-2024/new-push-european-democracy/long-term-vision-rural-areas_en)

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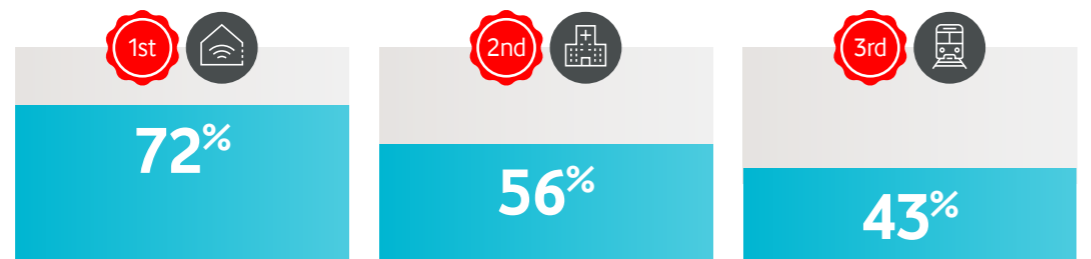
PART 2

## Priorities for rural living

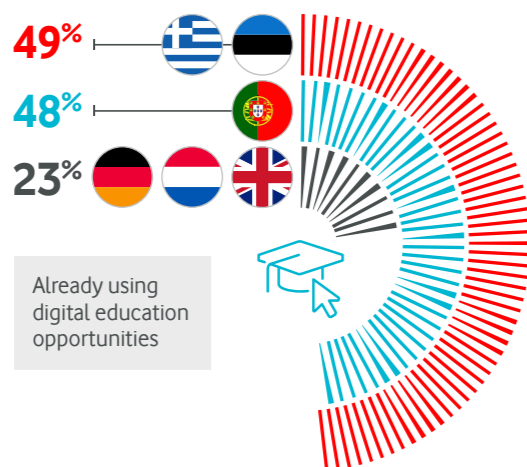
Health infrastructure is the second most important issue

While connectivity is the top priority, respondents in 12 of the 15 surveyed countries identify **health infrastructure** as the second most important factor.

**Good public transportation** is second or third on the country-living wish list for respondents from eight of the 15 countries. (Interestingly, only city dwellers from Estonia and Romania identify good educational institutions as one of their top three conditions for moving to the countryside.)



Many of the measures identified as being crucial for rural development are, of course, linked. A fast internet connection may not get you from point A to point B, but it can connect you to your job virtually, your schooling, and even your healthcare online. **Digital education and teleworking have both, of course, received a strong boost as a result of the pandemic.** Across the survey region, 36% of respondents say they are already making use of digital education opportunities, and 33% say the same about teleworking, with roughly three-in-ten saying they are interested in taking advantage of such opportunities in the future.

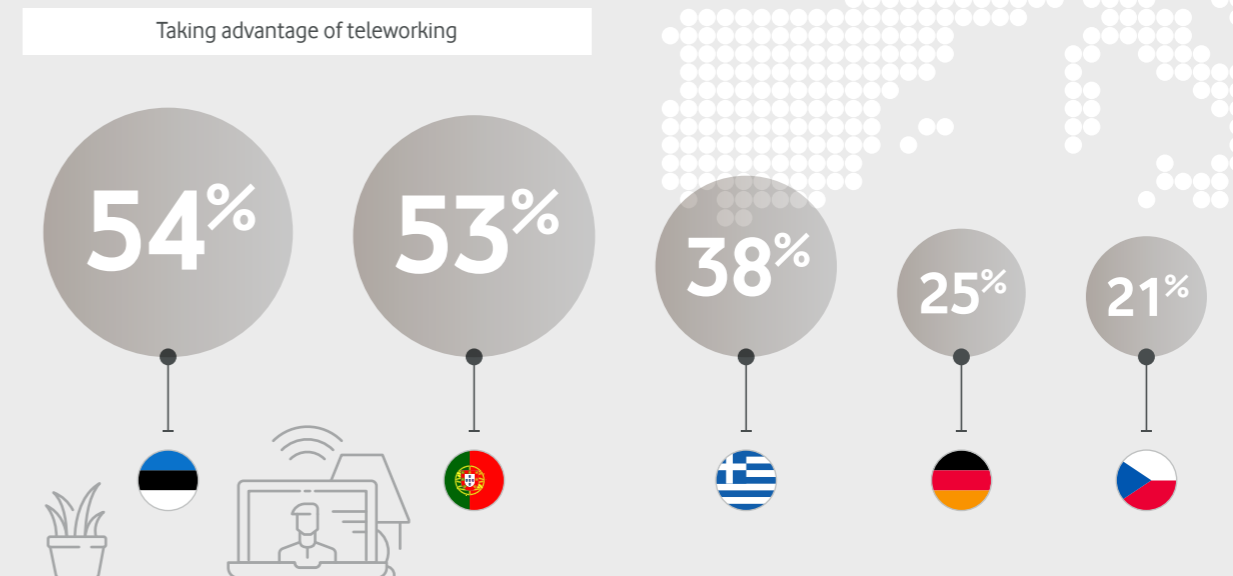


**Usage of digital education and remote working opportunities does, however, vary widely across Europe.** Whereas 49% of Greeks and Estonians, and 48% of Portuguese say they are already using digital education opportunities, only 23% of people in Germany, the Netherlands, and Britain say the same. Furthermore, interest in digital education is also low in Germany (23% say they would be interested in using the technologies in the future) and in the Netherlands (17%), while in Romania, interest in digital education, at 37%, is almost as high as the share already using it (39%).

Some embrace digital labour, others shy away from it

The story is similar when it comes to teleworking, with **some countries standing out for their embrace of digital labour** and others shying away from it. Fully 54% of Estonians and 53% of Portuguese say they currently take advantage of

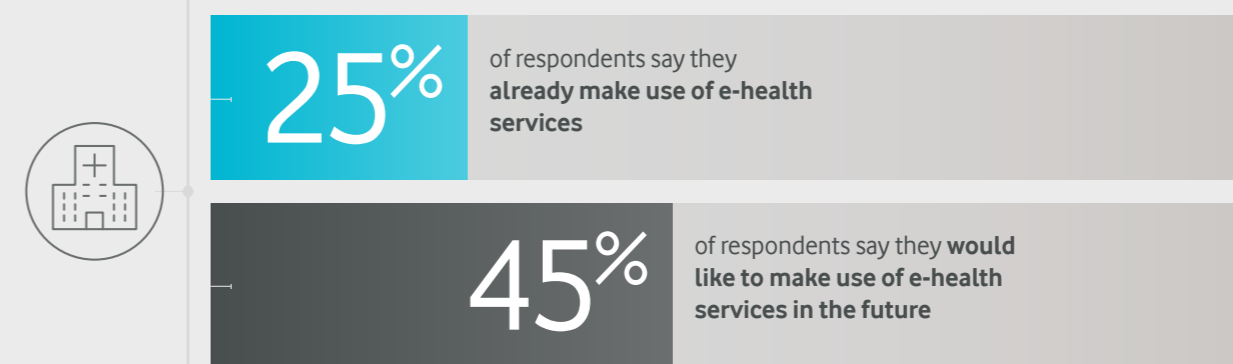
teleworking, with Greece a distant third at 38%. On the other end of the spectrum, only 21% of Czechs and a quarter of Germans do so. Romanians, again, are eager to take advantage of teleworking in the future, with 46% showing an interest, a far higher share than in other countries.



When it comes to digital connectivity and its potential for improving the lives of rural residents, by far the most potential is shown by e-health services. Whereas only 25% of respondents say they already make use of e-health services, fully 45% say they would like to do so in the future. That gap between usage and interest is constant across the countries surveyed. Though Hungary and Poland, at 41% and 39% respectively, show relatively high rates of telemedicine usage, the

technology remains in its infancy in most other countries. In Germany and the Netherlands, just 14% of respondents use e-medicine, while only 9% do so in the Czech Republic, and 17% in France.

Interest, though, is huge, with well over 50% of respondents in the Czech Republic, Greece, Italy, and Romania saying they would be interested in using such services and 45% on average saying so.



Conclusion

# A bright future for rural regions



## Conclusion

After decades of gradual depopulation and lagging infrastructure investment in many of Europe's rural areas, **opportunity may now be knocking**. The pandemic has opened people's eyes to the possibilities of working remotely, and **many companies appear to be embracing the concept as well**.

A recent report from the OECD noted that **“the COVID-19 outbreak may incentivise the growth of new firms and jobs that offer digital solutions and connect cities and rural areas in a more integrated way”**. The use of remote distributed networks, meanwhile, **“could increase the linkages between rural and urban areas”**.<sup>13</sup> That sentiment was echoed in the EU's recent “Annual Regional and Local Barometer” report, which noted that **“an increased use of teleworking may cause demographic and economic shifts from the cities towards suburban or rural areas”**.<sup>14</sup>

Our own survey has found that there is indeed a significant willingness among people living in cities and large towns across Europe to consider a move to the countryside. There is also a widespread feeling that the advantages of country living outweigh its disadvantages.

The concerns many people have about rural living, however, should not be discounted. While the vast pandemic-prompted experiment with teleworking and e-learning has led many people to rethink where they live, it has also reinforced the importance of adequate connectivity, no matter where they choose to reside.

Given the potential revealed in this survey and the magnitude of the interest shown in moving to the countryside, there is considerable room for greater intervention. To quote a key finding of the “Enhancing rural connectivity” report: **“European governments have a unique opportunity to kick-start the regeneration of their rural regions by enhancing connectivity”**.<sup>15</sup>

As this survey makes clear, doing so won't just make life in Europe's rural regions more attractive. It will, for many people, make it a viable option. Jobs, education, health: All those issues have been more challenging for rural residents in the past. **But if this pandemic has taught us anything, it is that adequate connectivity can help overcome many of those challenges**.



<sup>13</sup><https://www.oecd.org/coronavirus/policy-responses/policy-implications-of-coronavirus-crisis-for-rural-development-6b9d189a/>

<sup>14</sup><https://cor.europa.eu/en/our-work/EURegionalBarometerDocs/4370-Barometer%20optimized.pdf> (page 68)

<sup>15</sup>Enhancing rural connectivity; page 5 ([https://www.vodafone.com/sites/default/files/2021-06/Enhancing\\_Rural\\_Connectivity\\_Report.pdf](https://www.vodafone.com/sites/default/files/2021-06/Enhancing_Rural_Connectivity_Report.pdf))

## Methodology

**This report is based on an online survey conducted by Kantar of over 15,000 citizens from the following 15 European countries:** Czech Republic, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden and the UK.

There was a sample size of at least 1,000 interviews per country (in total 15,008 interviews) and all participants were aged 16 years or older.

This research was conducted between May 5 and May 16, 2021.

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