

Rural Connectivity: A Market Reset in Motion

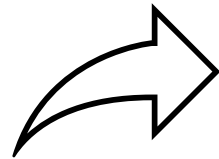
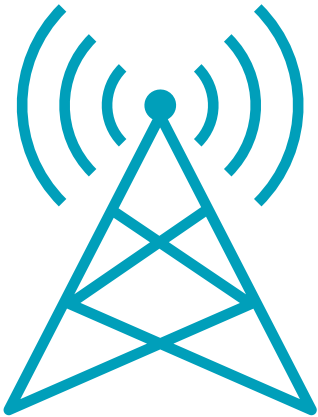
Tristan Gilbertson

May 2026



Rural has entered a second wave of change

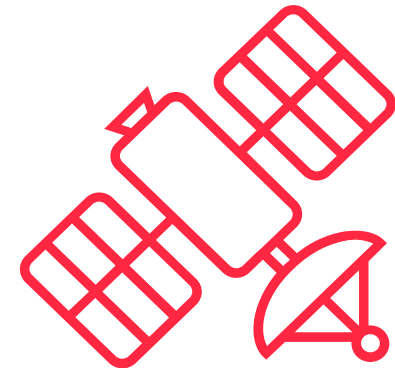
First Wave RBI



- RBI has expanded FWA coverage to **93%** of rural households
- WISPs have expanded rural coverage to **62%** of rural households



Second wave Satellite

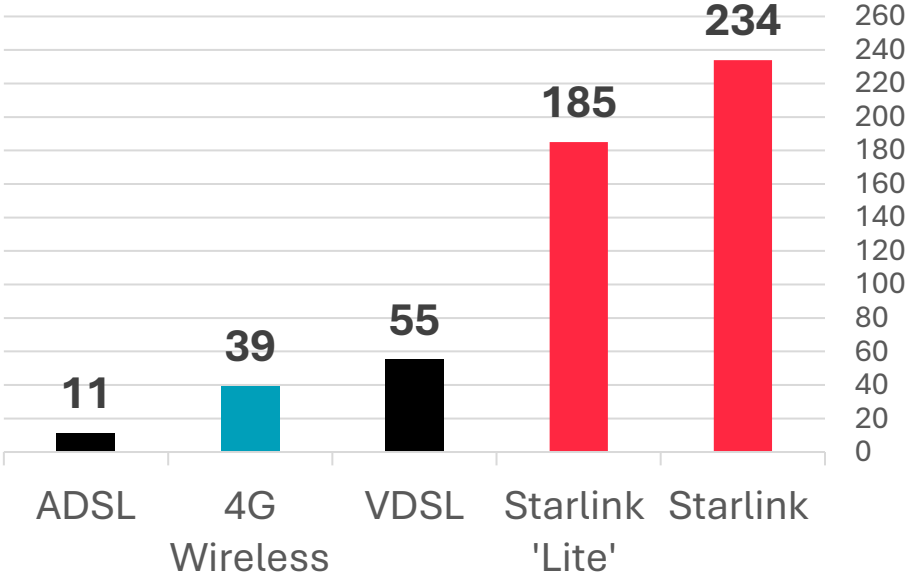


LEO

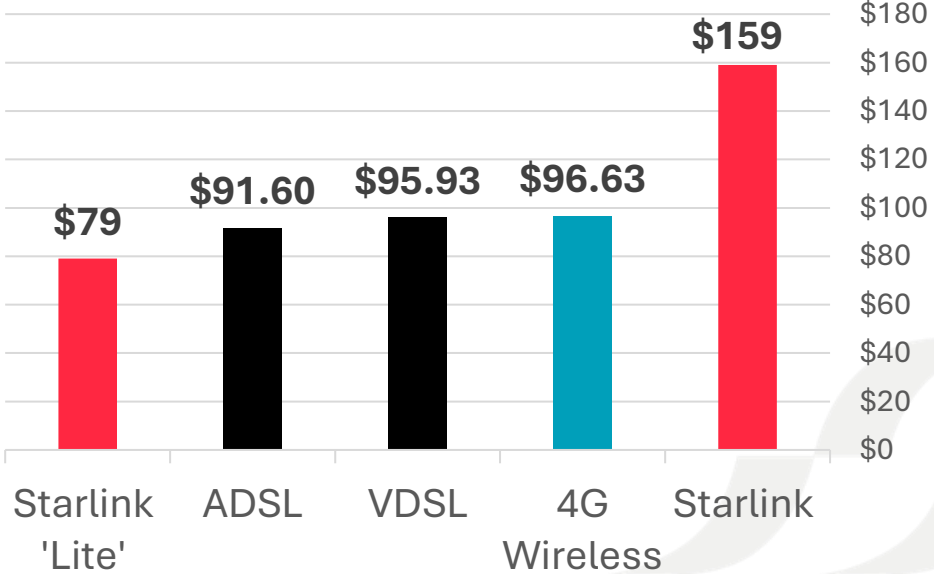


The performance frontier is shifting

Download speed by technology (Mbps)



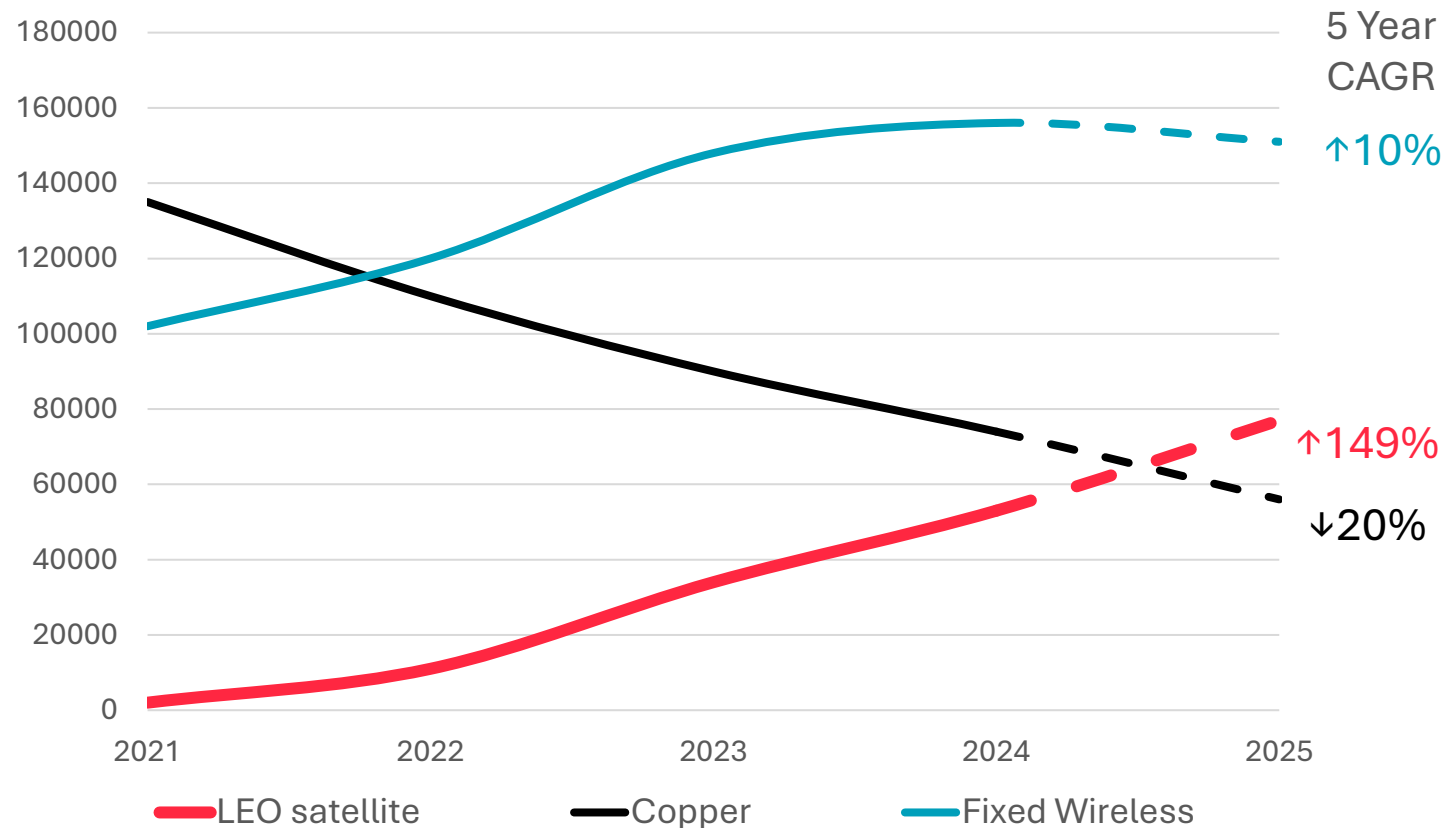
Retail price by technology (per month)



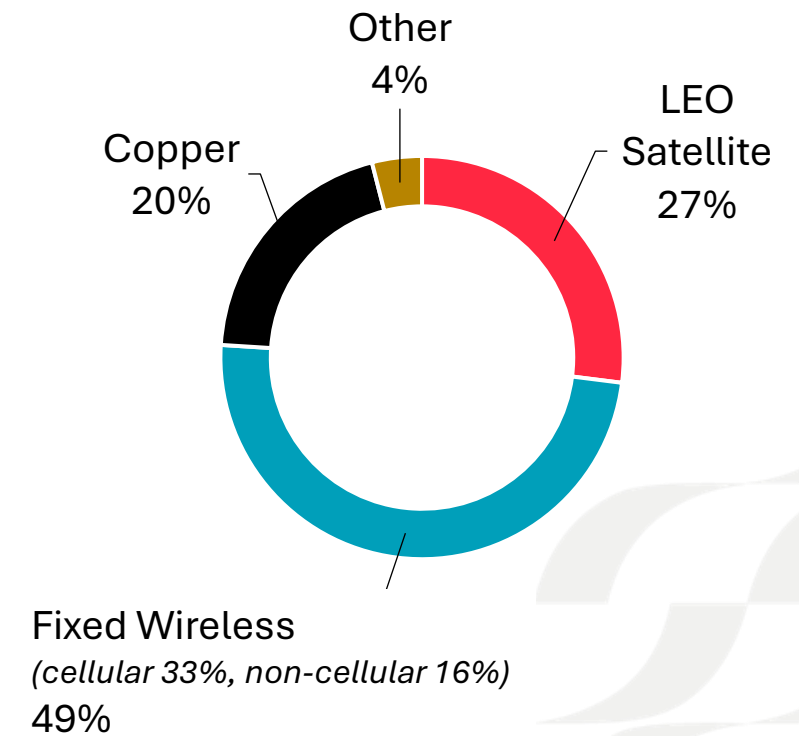
Source: MBNZ report January 2026. Starlink plan performance measured before recent plan changes to 100 Mbps, 200 Mbps, and Max plans. Non promotional pricing for the top and bottom tiers remains \$79 and \$159 at the current time.

Market shares are shifting

Rural connections by technology



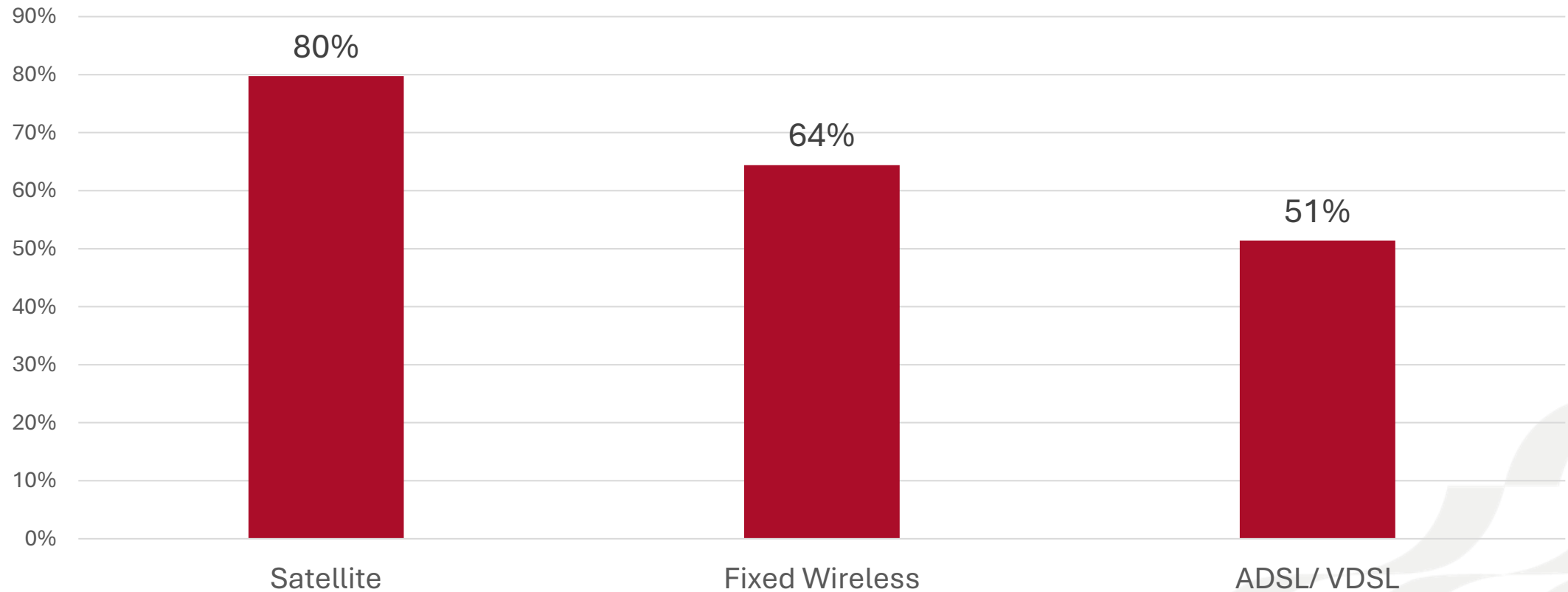
Market share



Source: Commission data June 2025.

Satisfaction reflects performance

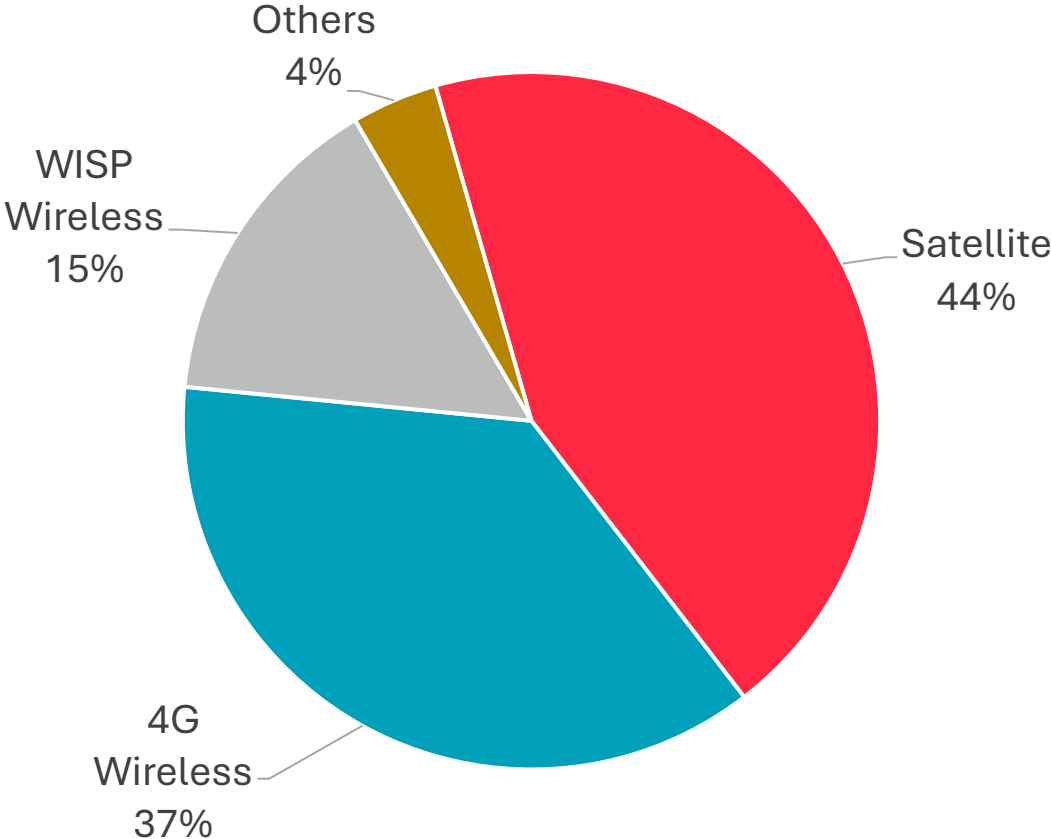
Overall customer satisfaction



Source: Commission data year to December 2025

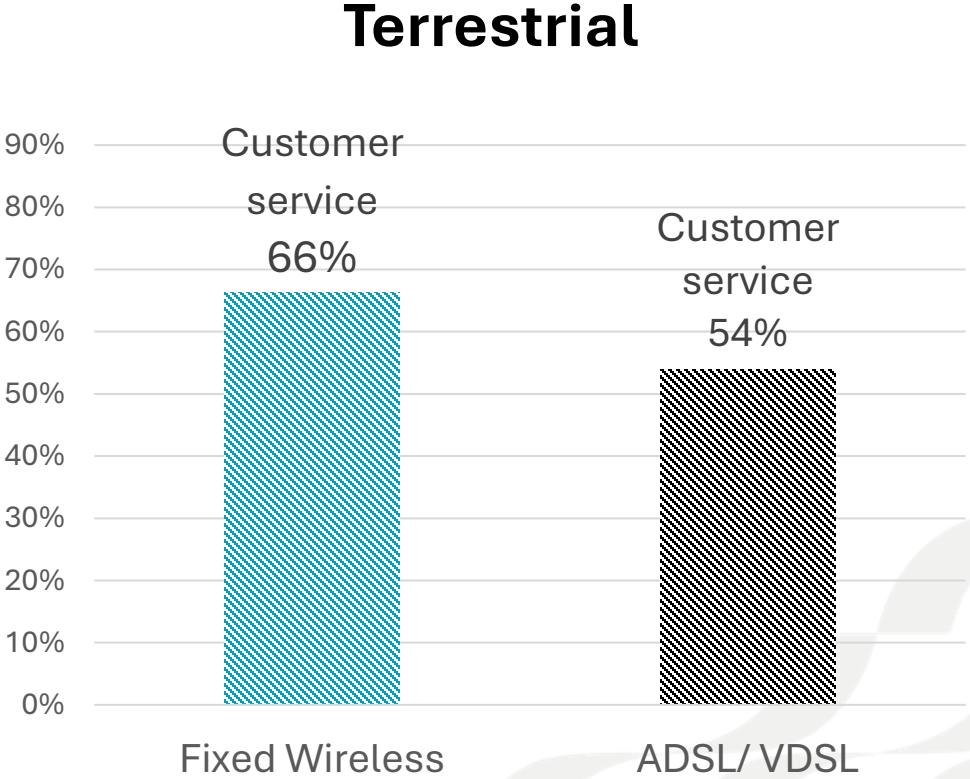
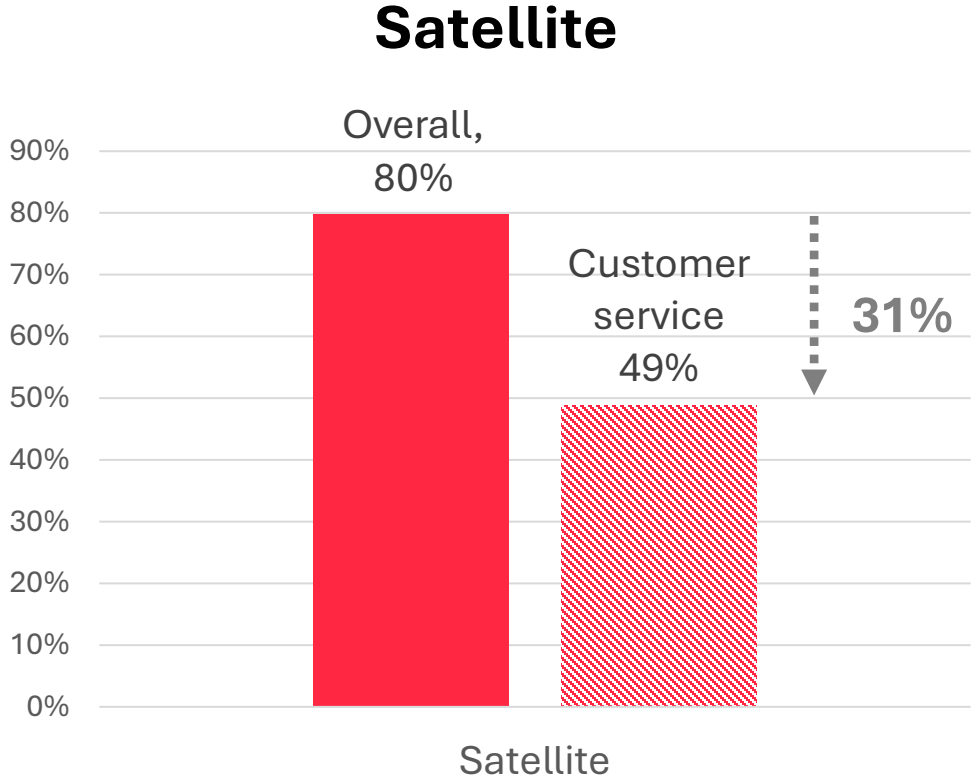
But speed isn't everything

Movement of rural consumers coming off copper



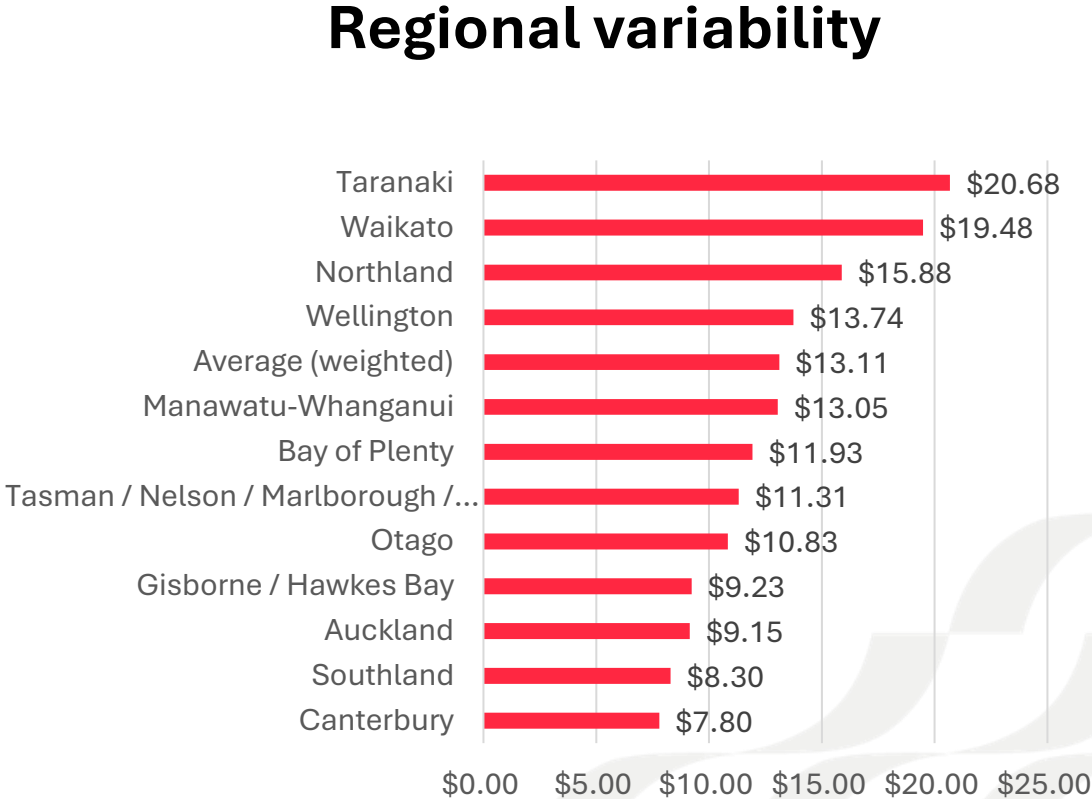
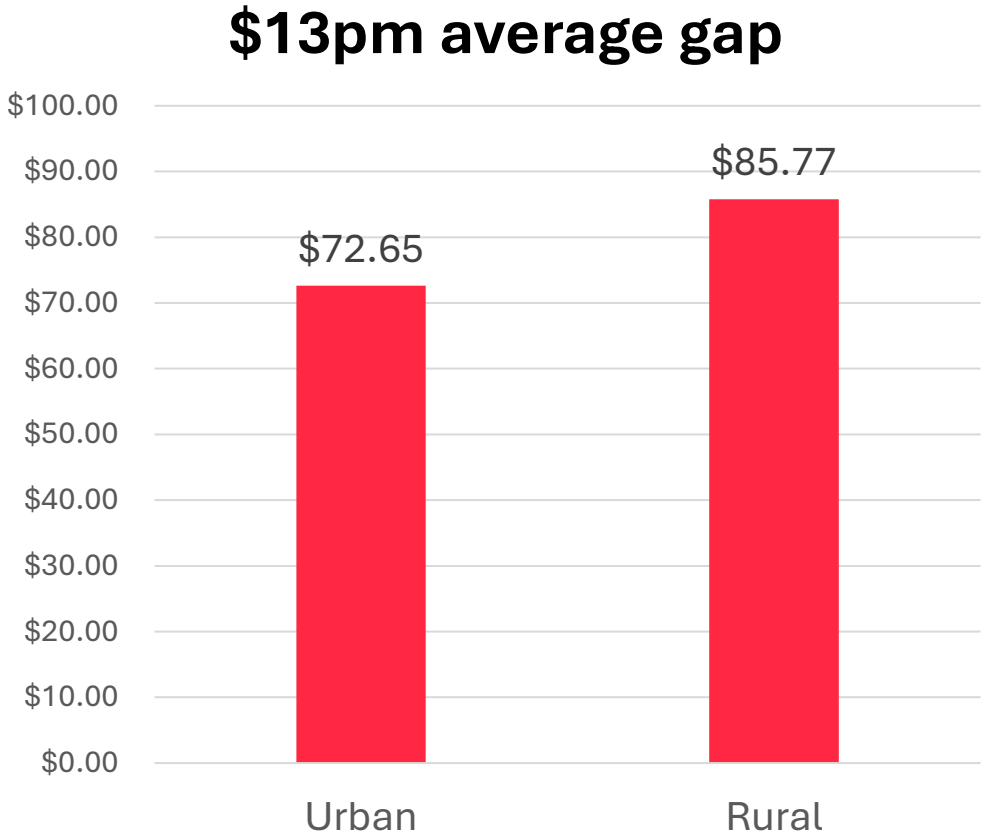
Source: Commission data June 2025. Note: this is address-based switching and can include changes to a change in householder

Local presence matters



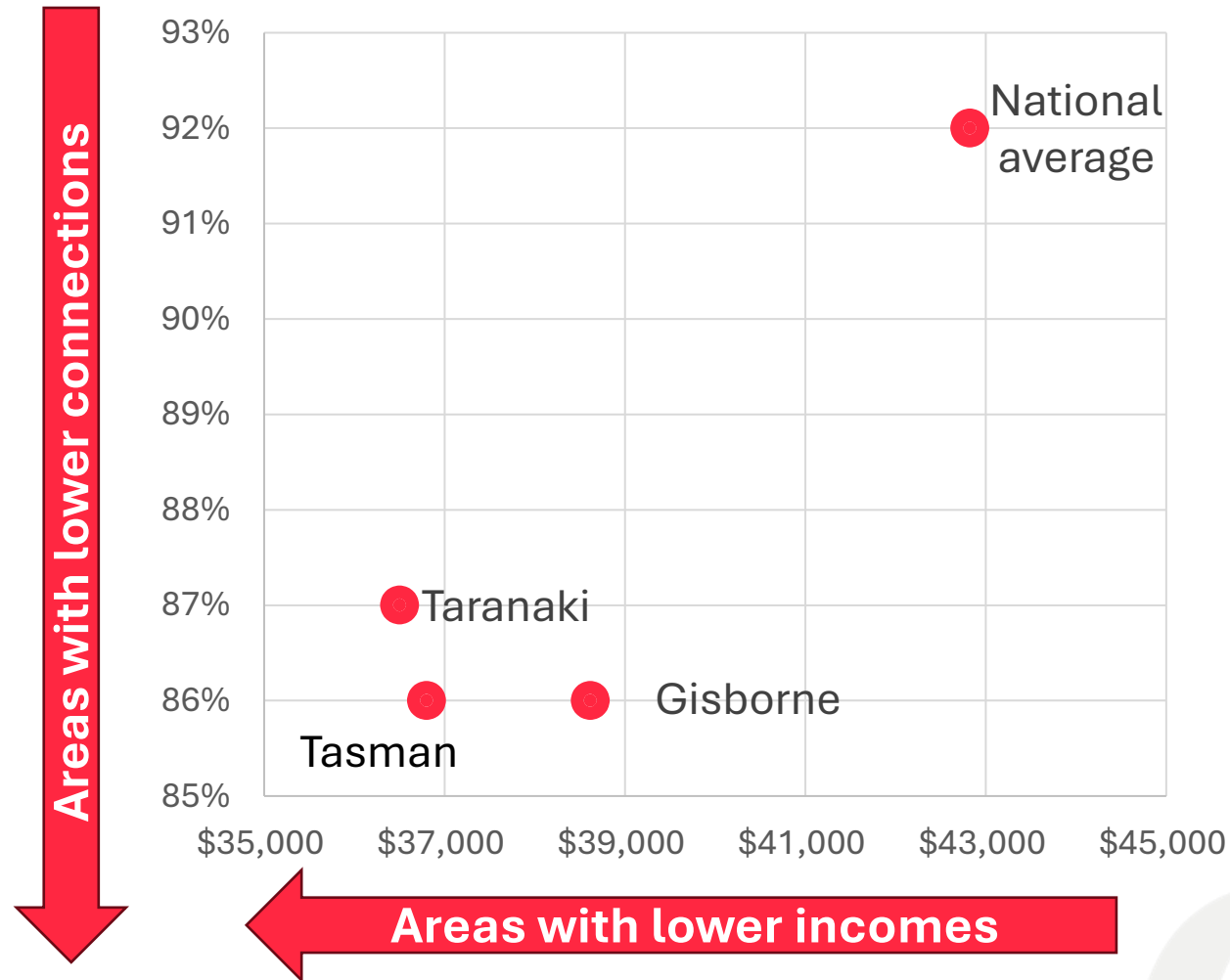
Source: Commission data year to December 2025

Rural consumers are still paying more



Source: Commission data June 2025

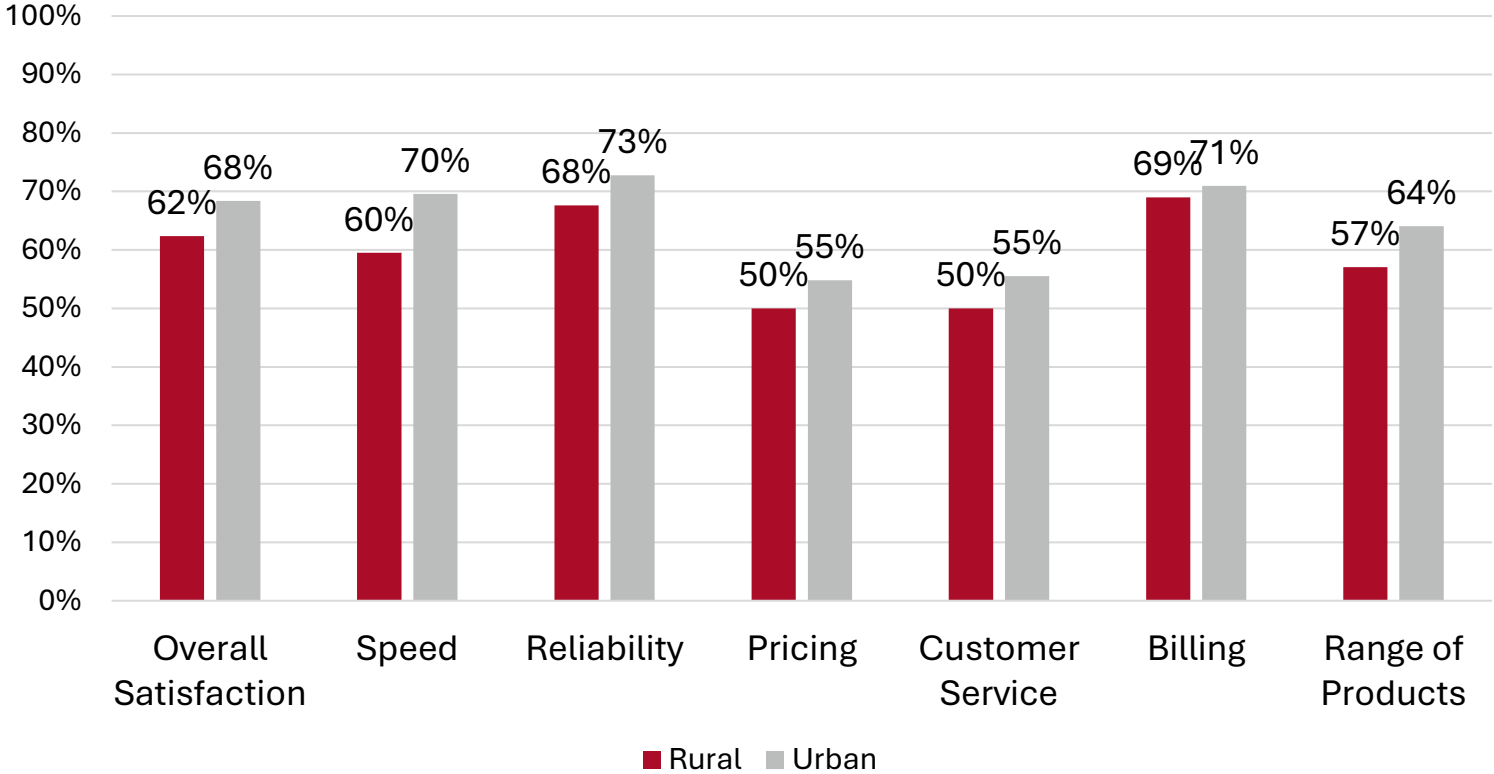
Rural equity issues still persist



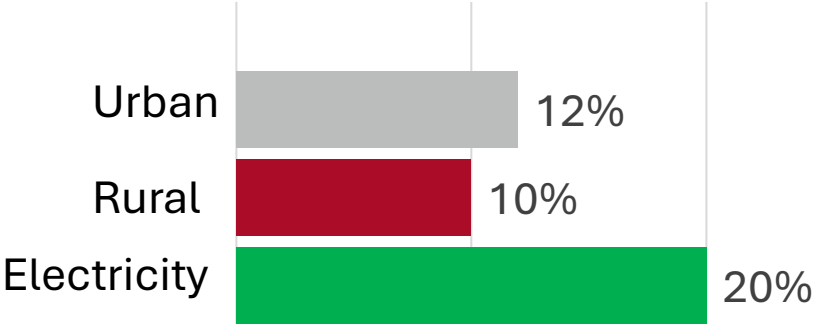
Source: Commission data June 2024

Rural satisfaction and switching still lower

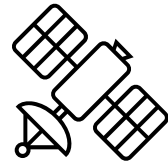
Customer Satisfaction



Switching



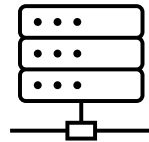
Emerging risks



- Monopoly risk

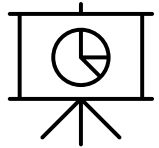


- Displacement risk

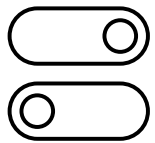


- Sovereign risk

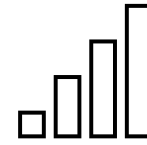
Our role



Sharpen monitoring and reporting



Improve industry switching process



Measuring broadband programme review



Satellite provider compliance

