

*ITU-D SG2 Workshop on Adoption of ICTs and Digital Skills Development
1 June 2023, Geneva*

GSMA

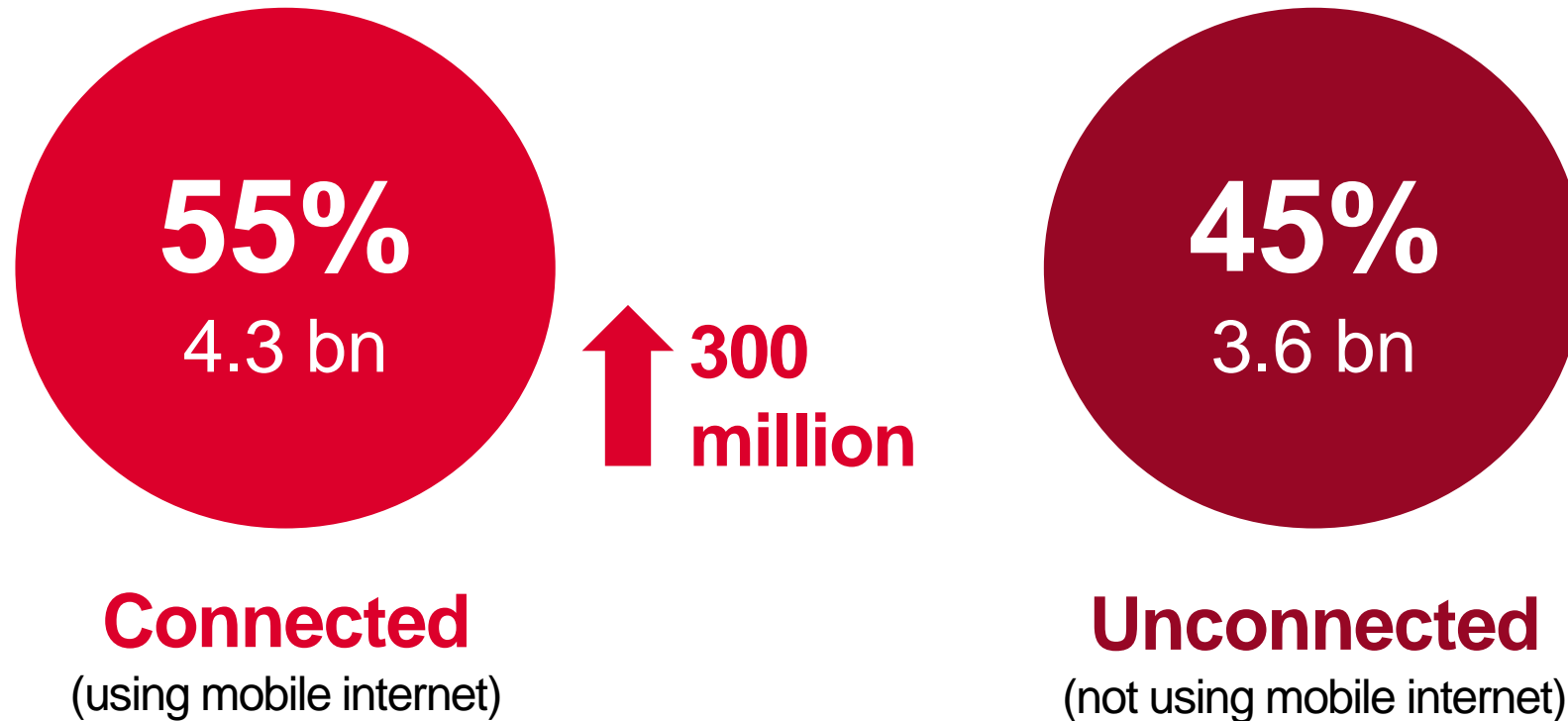
The Usage Gap and Demand Side Barriers to Internet Adoption

Tamara Dancheva

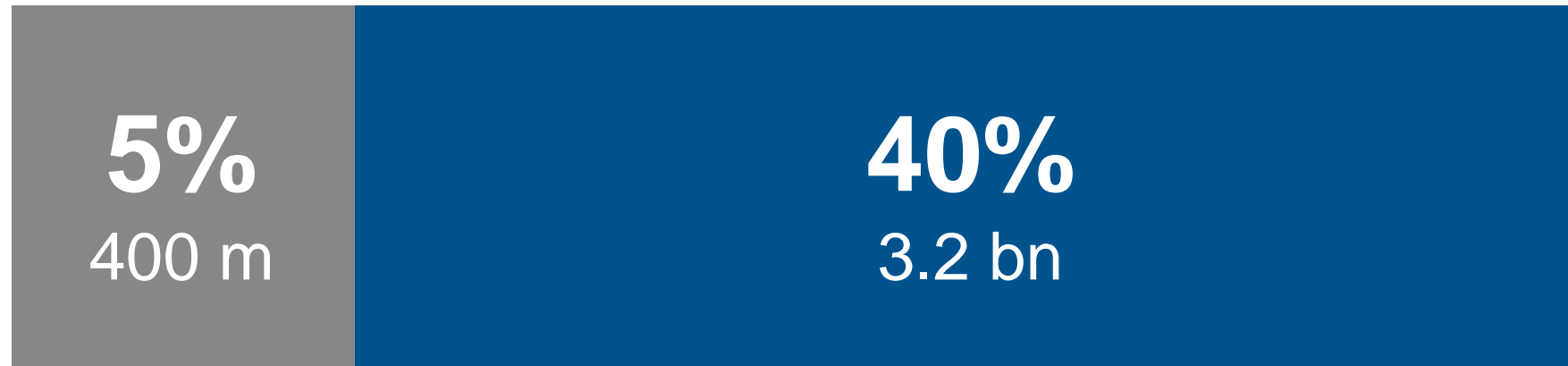


What is the Usage Gap?

Mobile internet use has reached 55% of the world's population



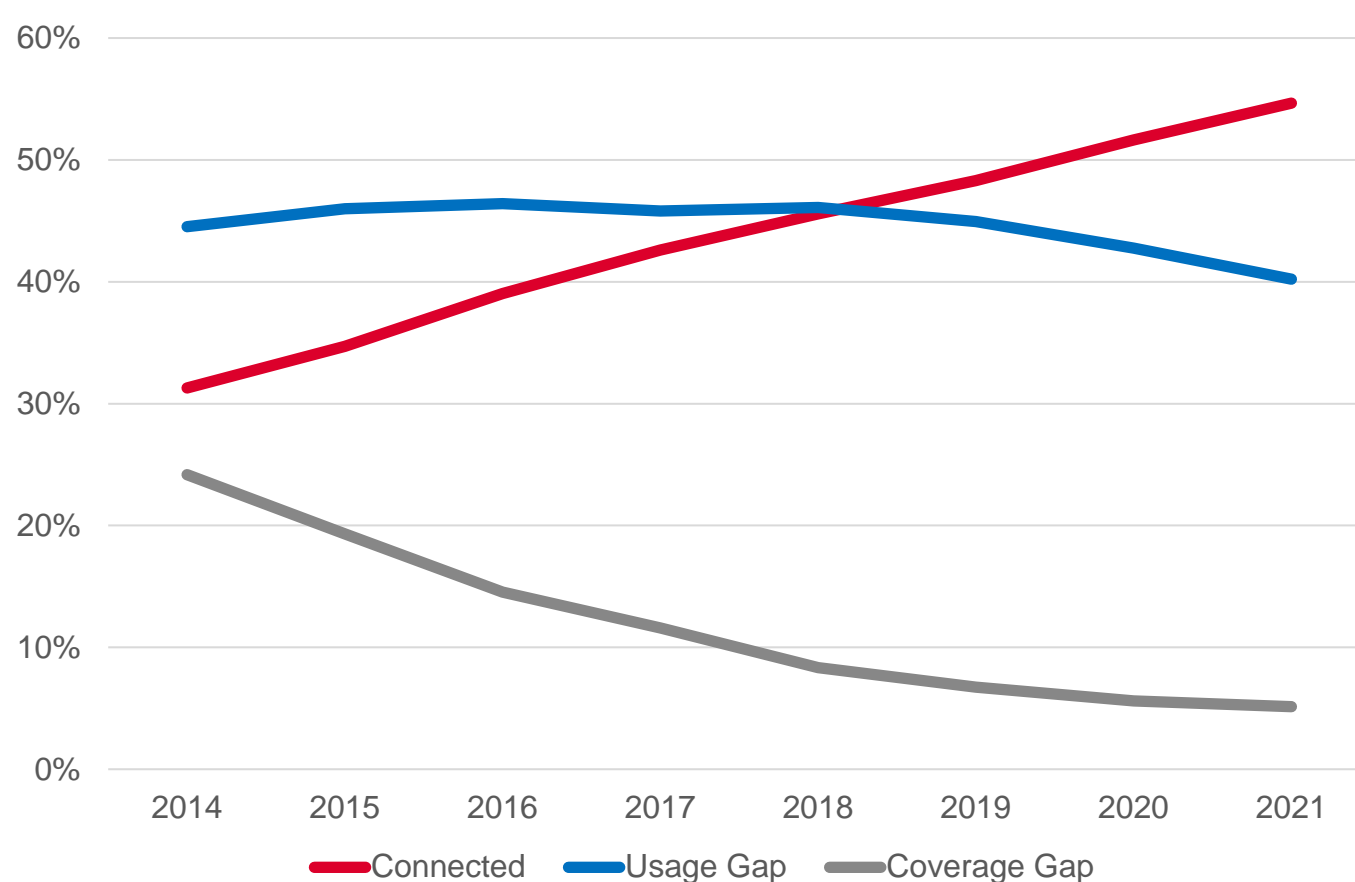
The unconnected primarily live in areas covered by a mobile broadband network



Coverage gap
(not covered by mobile
broadband network)

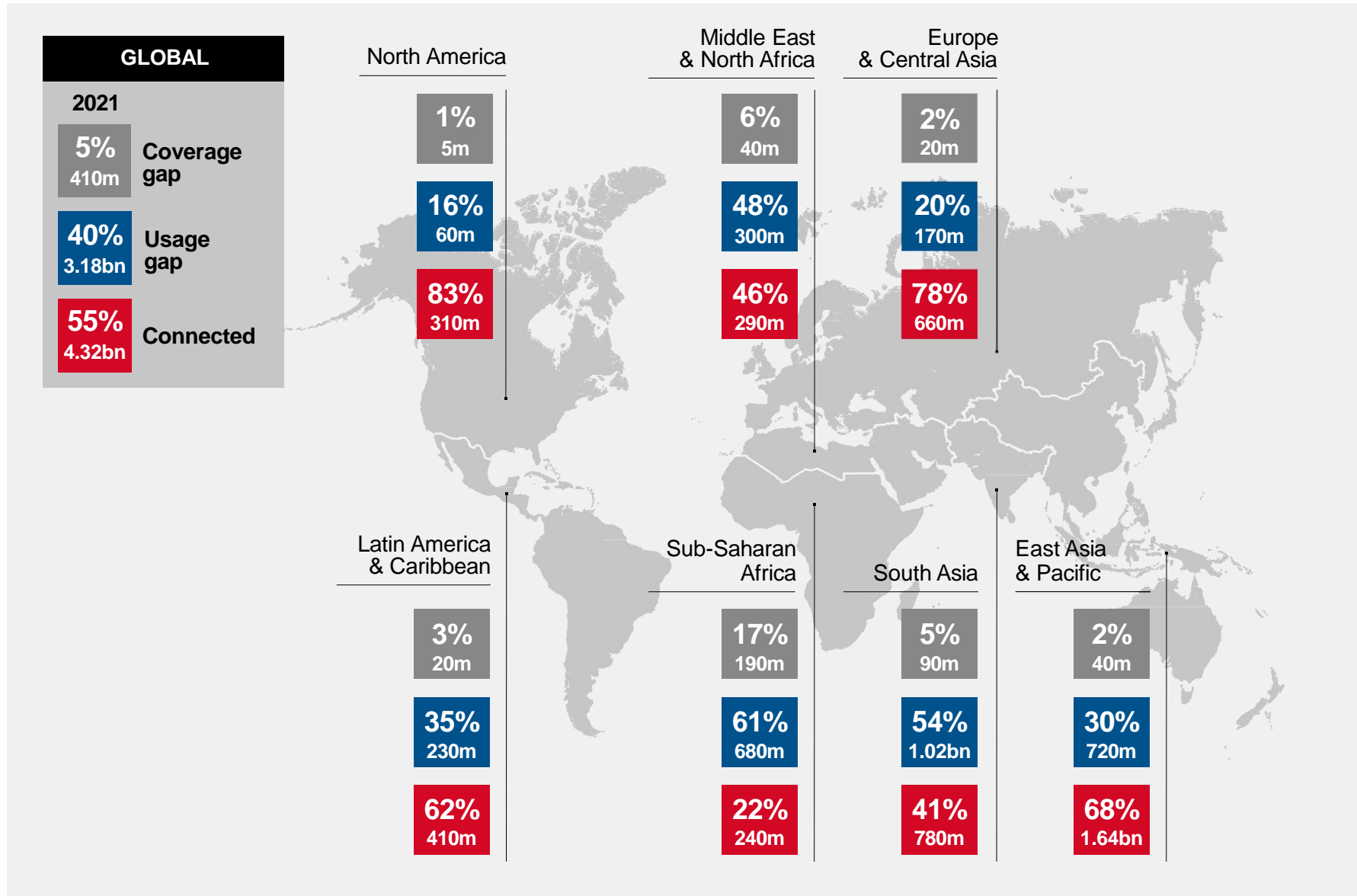
Usage gap
(living in areas covered by a mobile broadband
network but not using mobile internet)

The share of the population using mobile internet continues to steadily increase



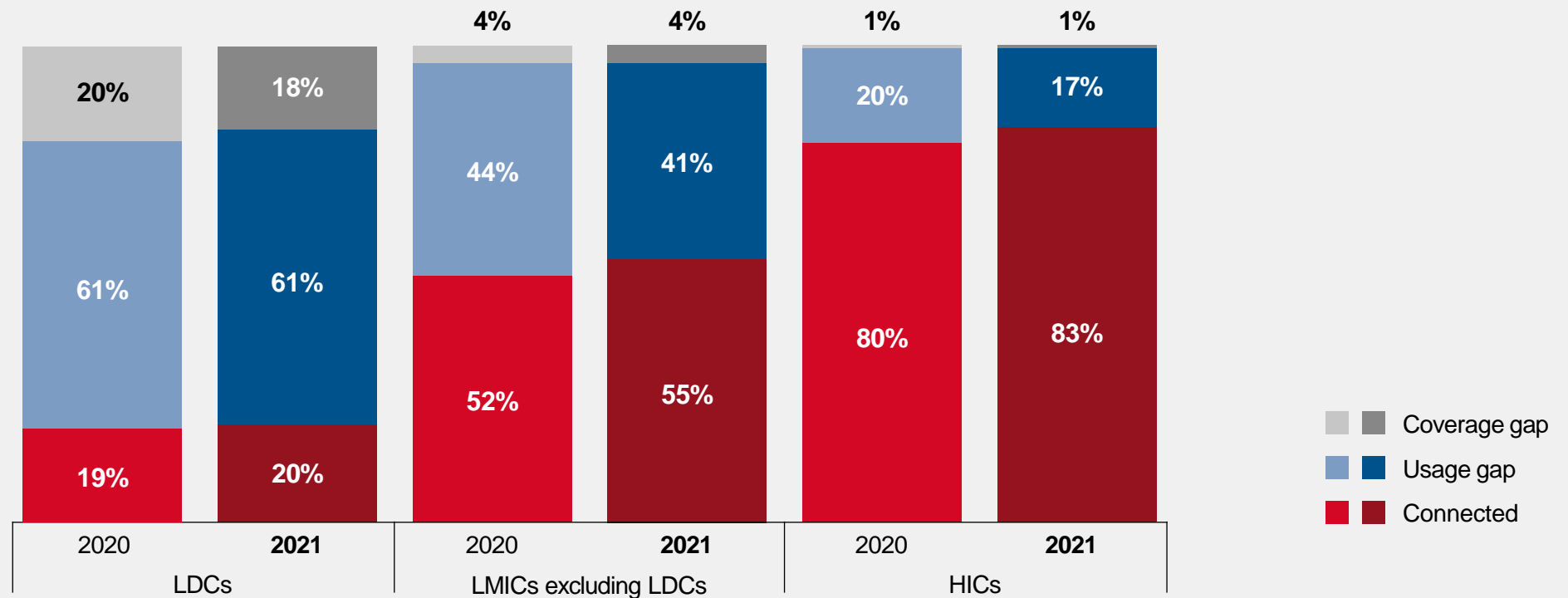
- Half of all people living in LMICs now use mobile internet
- Mobile broadband coverage continues to slowly expand
- The usage gap is decreasing but remains substantial

Connectivity varies by region



Only 20% of the population in LDCs are using mobile internet, compared to 55% in other LMICs

Mobile connectivity in LDCs, LMICs and HICs, 2020–2021



Across LMICs: Connectivity varies by gender, location and income groups

Adults living in rural areas are



33%

less likely than those living in urban areas to use mobile internet

In low- and middle-income countries:



Women are still

19% less likely

than men to use mobile

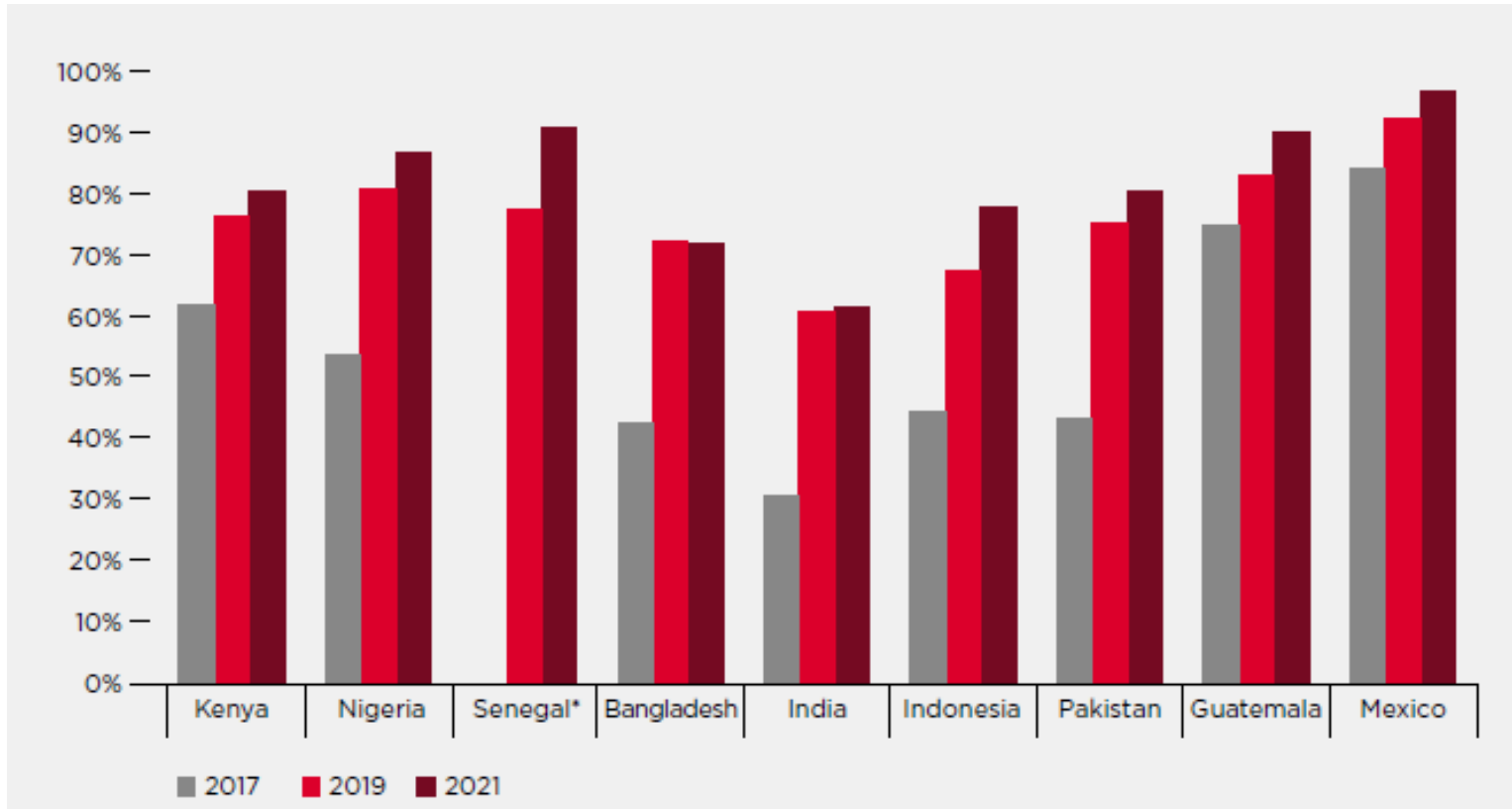


94% of the unconnected live in LMICs

The poorest 20% are 49% less likely to be connected than the richest 20%

Key Barriers to Mobile Internet Adoption

Awareness of mobile internet is increasing but is unequal




In most countries, 80% of the population are aware of mobile internet

- In India and Bangladesh, awareness is lower than other countries and hasn't changed in the last few years
- Women are increasingly aware but less than men
- More people in rural areas are aware but disproportionately less than their urban counterparts

Literacy and digital skills is a key barrier to mobile internet adoption

Among mobile users who are aware of mobile internet but don't use it, the top three reported barriers in surveyed LMICs are:

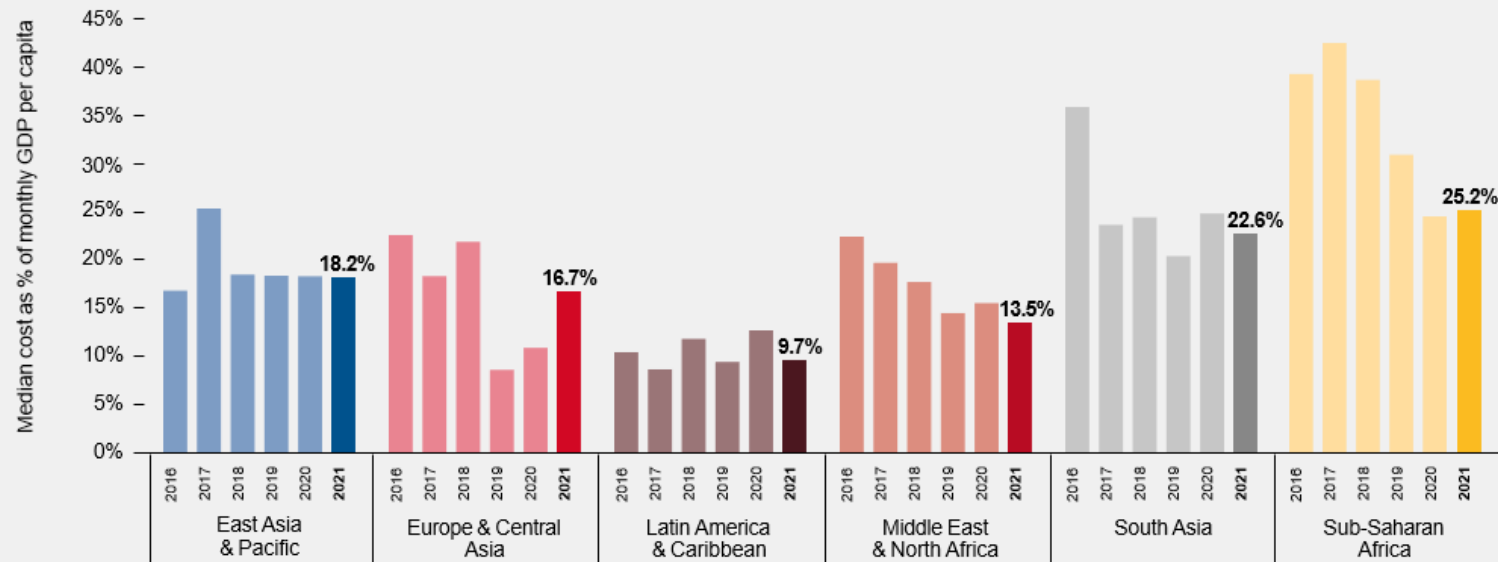
Ranking	All countries	
1		Literacy and digital skills
2		Affordability
3		Safety and security

Literacy and digital skills:

Women, rural populations, those on low income and people over 35 years old are disproportionately affected by this barrier

Affordability of entry-level internet-enabled handsets is a key barrier

Affordability of an entry-level internet-enabled handset in LMICs (by region), 2016–2021



- For the poorest 20% of the population, the cost of a handset represents 54% of their monthly income
- Affordability of entry-level internet-enabled handsets has remained relatively unchanged

Defining Affordability

Cost of a handset or data

GDP per capita

Mobile Digital Skills Alliance: Best Practices and Lessons Learnt



- **Monitoring and Evaluation:** Systematically Capture Data
- **Buy In:** Generate Buy In from target learners and trainers
- **Gender Inclusion:** Acknowledge the Heterogeneity of Experience Among Women
- **Delivery:** Localisation is Key
- **Content:** Avoid One Size Fits All Solutions

Thank You