



Connected Women

The Mobile Gender Gap Report 2018

ICT for Women in the Arab Region - 27th November
2018



Agenda

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Introduction

2

Research background

3

Findings from the study

4

Recommendations





GSMA Connected Women:

Driving increased female digital and financial inclusion

Focus

Reduce the gender gap in
mobile internet

Reduce the gender gap in
mobile money

Approach

1

Advocacy

2

Market Engagement

3

Insights

Desired Outcomes

Increased access to,
and use of, life-
enhancing mobile
services by women

Growth of the industry
and economy more
broadly

Achieving the
Sustainable
Development Goals
(SDGs)



Connected Women: Active across the globe

86 Working Group
participants
at Group and OpCo level

Represented across
45 Countries

over **25M** women
reached
by offerings from Working
Group participants since 2010

51 Commitments
by operators to reach
millions of new women with
mobile internet and mobile
money by 2020





The Connected Women Commitment Partners



AIRTELINDIA



DIALOG AXIATA PLC



DIGI TELECOMMUNICATIONS



ECONETLEO BURUNDI



ECONET WIRELESS
ZIMBABWE



GRAMEENPHONE
BANGLADESH



INDOSAT OOREDOO SDN BHD



MOBITEL



MTN GHANA



OOREDOO MALDIVES



OOREDOO MYANMAR



ORANGE COTED'IVOIRE



ORANGE MALI



ORANGE SONATEL



ROBI AXIATA



SAFARICOM LTD. KENYA



SMART BURUNDI



SMART TANZANIA



SMART UGANDA



TELENOR PAKISTAN



TIGO BOLIVIA



TIGO CHAD



TIGO COLOMBIA



TIGO EL SALVADOR



AIRTEL-TIGOGHANA



TIGO GUATEMALA



TIGO HONDURAS



TIGO PARAGUAY



AIRTEL- TIGORWANDA



TIGO SENEGAL



TIGOTANZANIA



TURKCELL



VODACOM

VODACOM TANZANIA



VODACOM SOUTH AFRICA



VODAFONE

VODAFONE INDIA



ZANTEL



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Objectives of the research



Quantify the **persistent gender disparity** in access to mobile technologies including mobile ownership and mobile internet use



Identify the **different services used by men and women on mobile** and mobile internet



Outline the complex set of social, economic and cultural **barriers to mobile ownership and mobile internet use that women face**



Estimate the **commercial opportunity for the mobile industry** in closing the gender gap in phone ownership and mobile internet



Research methodology



- **23 countries surveyed**
- Nationally representative sample
- Adults aged 18+
- At least 1,000 individual face-to-face interviews per country
- Covering **73% of the adult population** in low- and middle-income countries
- Extrapolation model used to estimate values for non-surveyed countries

Defining the gender gap

**Gender gap in
ownership / use
(%)**

=



Male owners / users
(% of male population)

-



Female owners / users
(% of female population)



Male owners / users
(% of male population)



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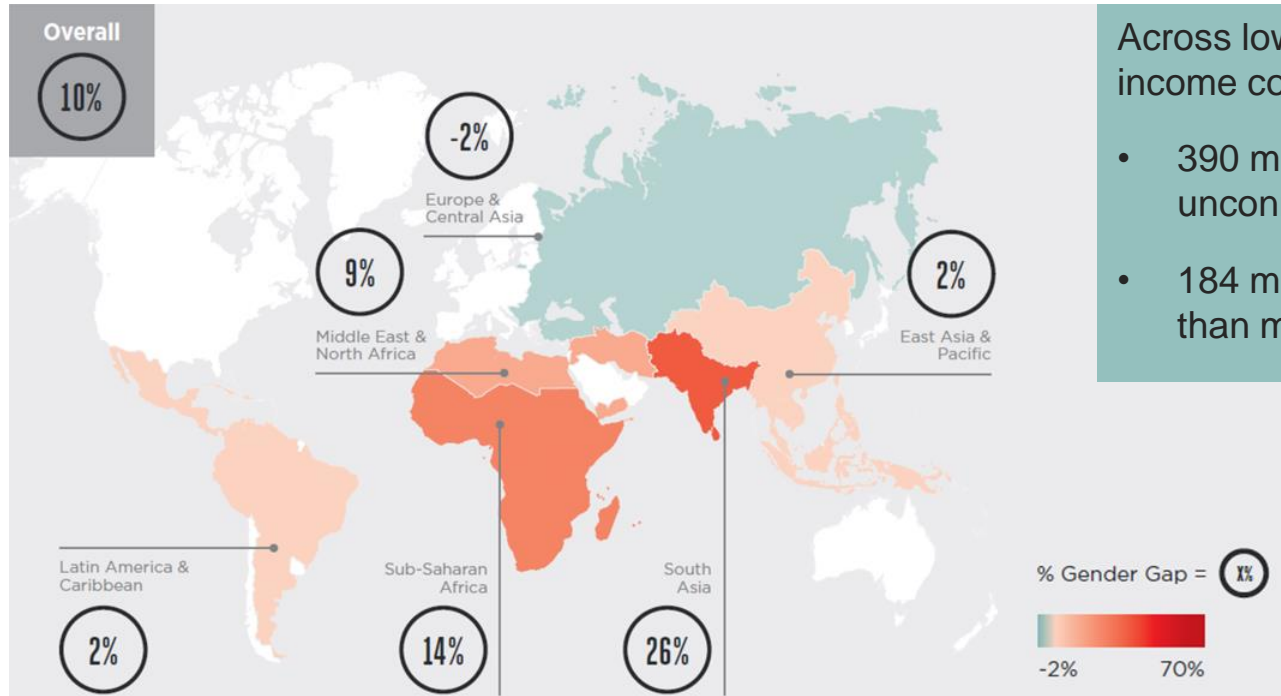
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Women are 10% less likely than men to own a mobile in low- and middle-income countries

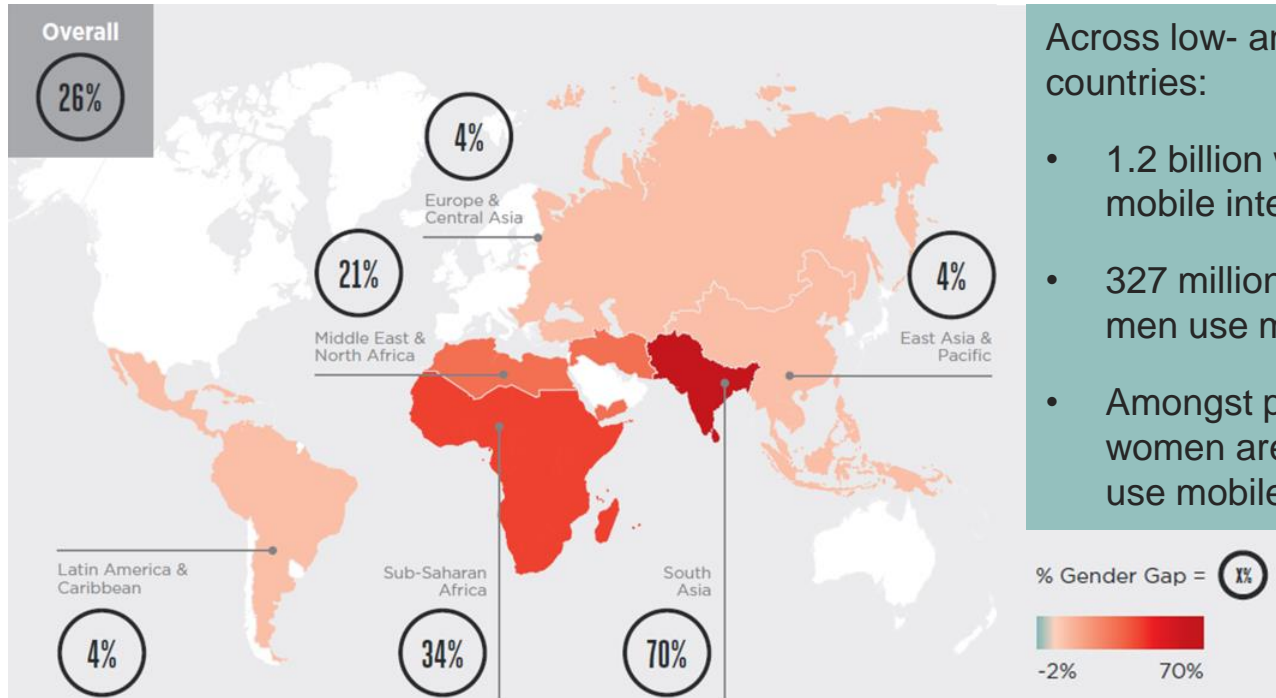


Across low- and middle-income countries:

- 390 million women are unconnected
- 184 million fewer women than men own a mobile



The gender gap in mobile internet use is wider than in mobile ownership in all regions



Across low- and middle-income countries:

- 1.2 billion women do not use mobile internet
- 327 million fewer women than men use mobile internet
- Amongst phone owners, women are 18% less likely to use mobile internet

Country example: in **Jordan** women drop off along the stages of mobile access and usage

GENDER GAP IN OWNERSHIP

21%

Barriers to mobile access and usage



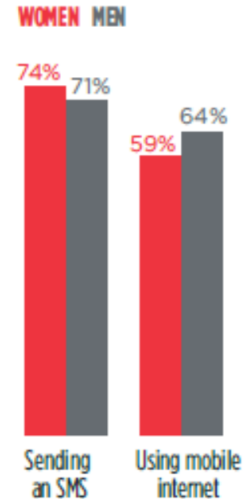
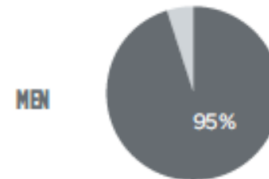
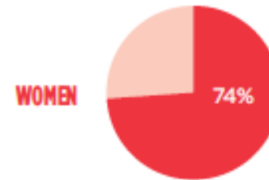
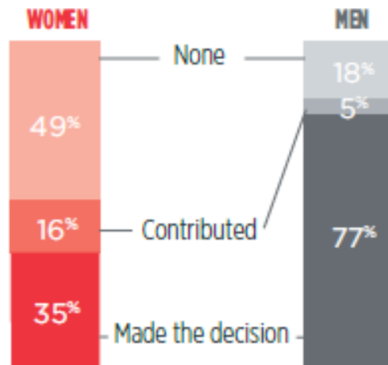
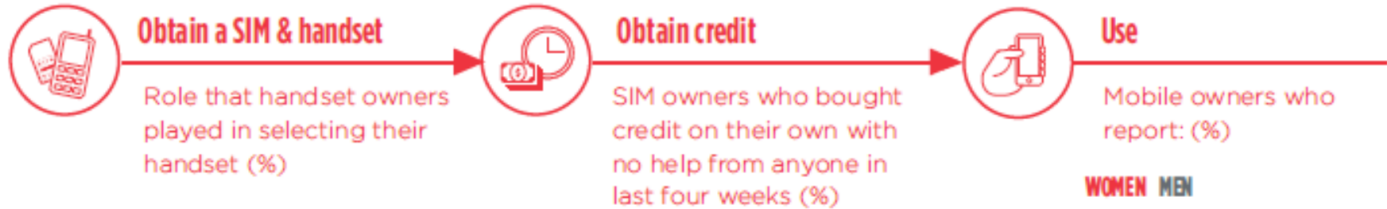
HANDSET & CREDIT COST



NETWORK QUALITY & COVERAGE

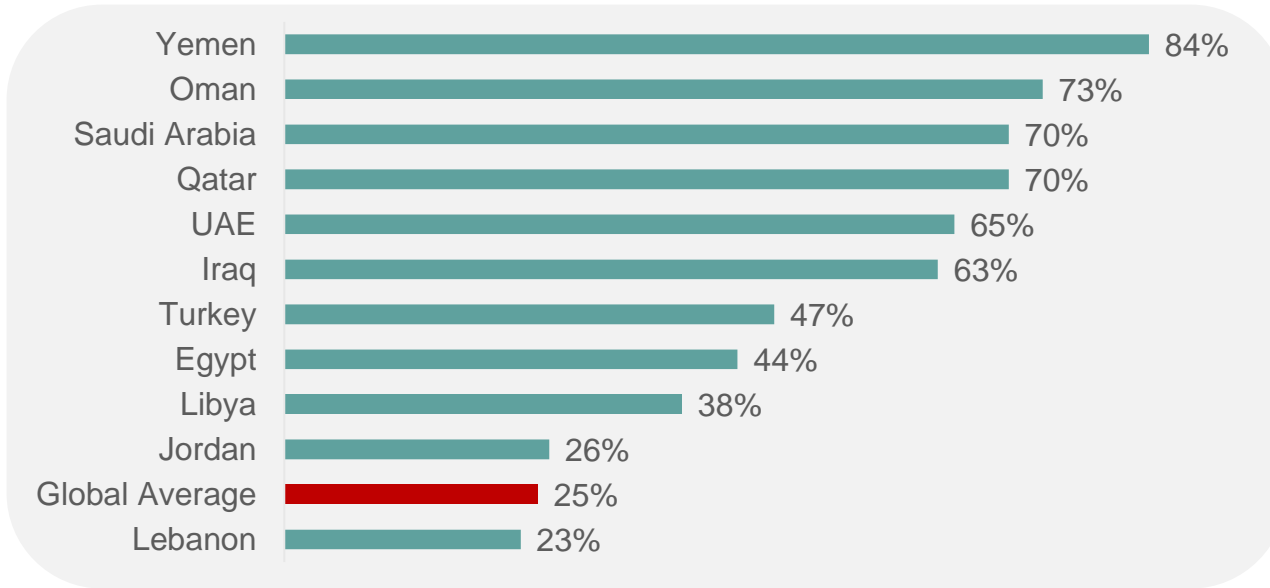


SECURITY & HARASSMENT



Facebook account data shows substantial country-level gender gaps in the Arab Region

Gender gap in active Facebook account ownership





Women are less aware of mobile internet than men

% of male / female population aware of mobile internet



Source: GSMA, 2017. Base: total population, aged 18+. A person is considered 'aware' of mobile internet if they have either used mobile internet before, or have not used mobile internet, but are aware they can access the internet on a mobile phone (n= from 480 to 980 for women and n= from 474 to 1048 for men).

To shrink the mobile gender gap 5 areas must be focused on



Accessibility

including to quality network coverage, handsets, electricity, agents and formal IDs



Affordability

including handsets, tariffs, data and transaction fees



Usability and skills

including of handsets and services and addressing a lack of awareness and understanding



Safety and security

including addressing harassment, theft, fraud and data protection



Relevance

of policies, content, products and services

Operator case study: Orange Egypt Private Recharge

Orange Egypt Private Recharge:

Our research identified that a perceived key driver of voice and SMS harassment is when women recharge their mobile phones at points of sale and either the reseller or a bystander overhears a customer's number, which is often required to add credit to their account.

In 2016, Orange Egypt launched its Private Recharge service, which enables customers to top-up anonymously in-store through a unique and reusable 11-digit code. This eliminates the need to disclose a phone number when topping up and reduces the risk of an unknown party getting access to the number. The free service has attracted over 600,000 subscribers since its launch.*

Orange Egypt anticipates that the service will deliver:

- Positive impact on customer acquisition, particularly for women
- Increased top-up frequency and reduction in periods of 'zero balance'
- Increased call, SMS and data usage
- Potential for cost savings as scratch card use is reduced

Sara's story

Sara is a 22-year-old female. She avoids sharing her number as much as possible as she has previously experienced harassing calls, including from her local mobile agent.



"I recharge my phone every three to four days at a local mobile outlet and I used to give my phone number to the shop assistant so he could add credit to my phone; the shop assistant used to call me repeatedly."

Sara started typing her phone number directly into the agent's system or asking the shop assistant to give her the top-up code so that she could enter it herself, but she still experienced problems. Sara looked online for a way to stop this and found out about the Private Recharge feature from Orange.

"It's great, I no longer have to give my phone number out when recharging my phone. I've even recommended it to my cousin."





Closing the gender gap will require concerted effort, but will bring substantial benefits

- It will bring benefits to **society** and the **economy**
- Will also bring benefits to individual women, and prevent them from being **excluded** as societies and economies digitise
- Contributes to the achievement of the UN Sustainable Development Goals



\$15
Billion

The incremental 12-month **commercial opportunity** for mobile operators of closing the gender gap in low- and middle-income countries



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Top 3 recommendations by stakeholder type



For the mobile industry



For development community



For policy makers and regulators

1

Understand your gender gap and the women in your market by conducting consumer insights research and collecting and analysing gender disaggregated data

Embed activities that **drive women's mobile access and use** in your initiatives

Ensure **appropriate policy and regulation** to lower access barriers for women

2

Make women part of your business strategy including setting KPIs to target women

Invest in **research** to better understand women's mobile access and use and how to reduce the gender gap

Promote **gender equality in education** and invest in programmes that improve digital literacy for women and girls

3

Ensure your products, services, marketing and distribution consider women's needs and the barriers they face to mobile access and use

Raise awareness of the barriers to women's mobile access and use

Improve women's safety on mobile through effective policies and strategies including legal frameworks and awareness campaigns



Thank you



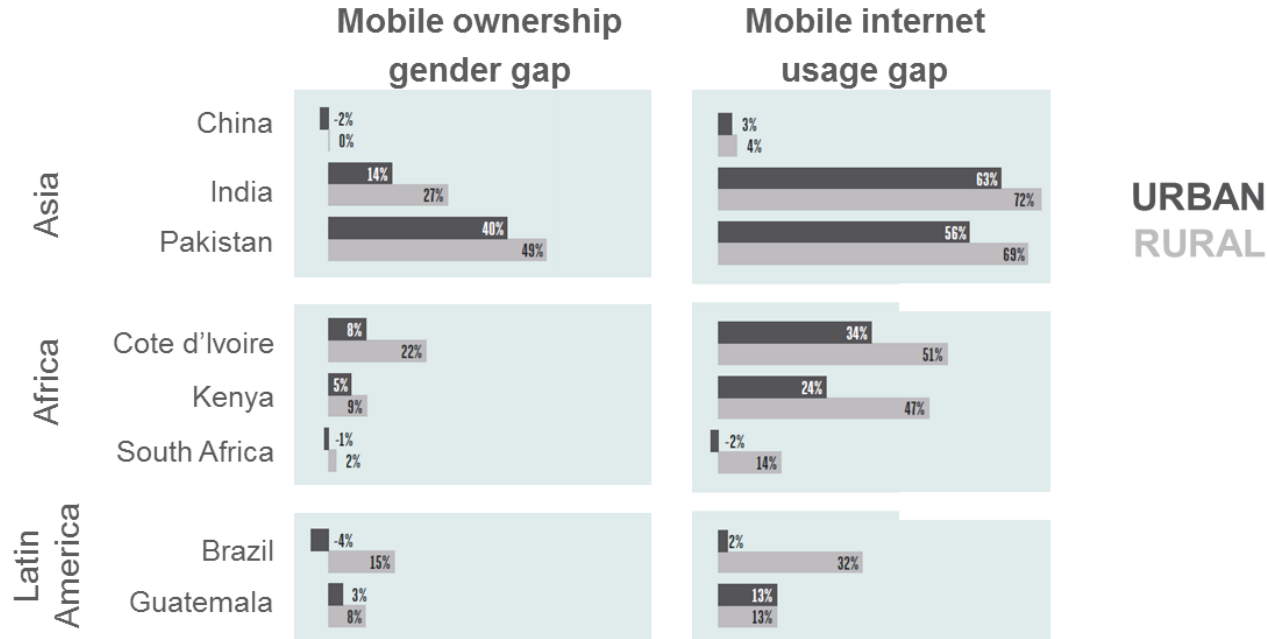


Appendix





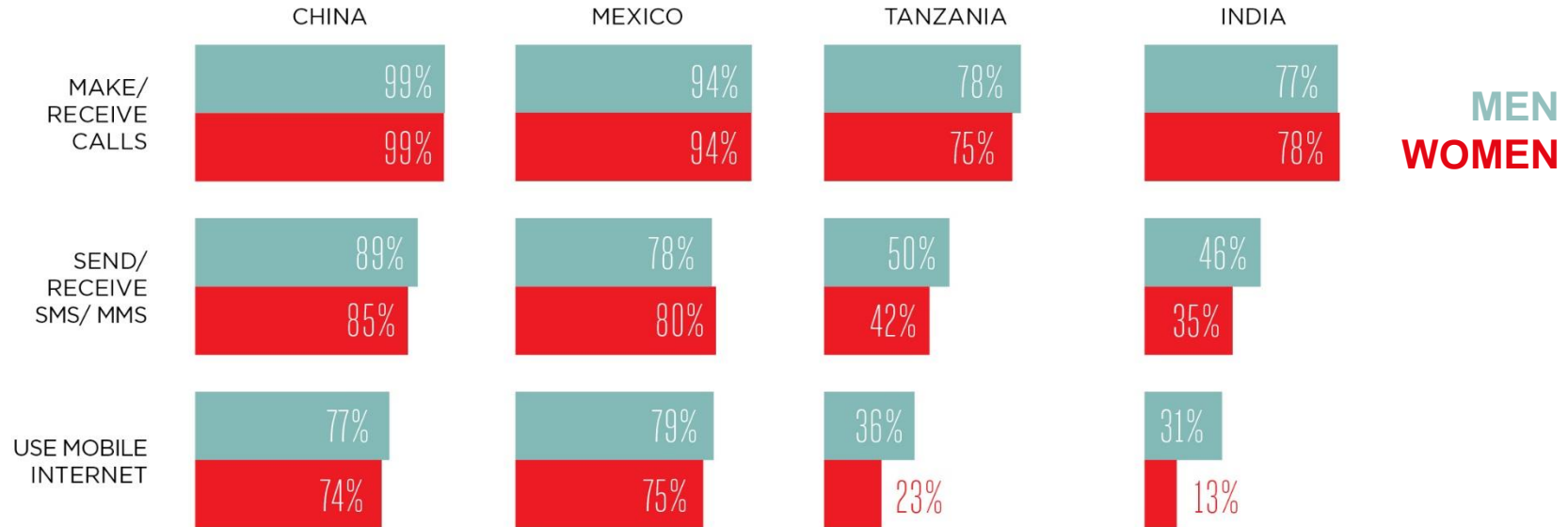
The gender gap in mobile ownership and internet usage is consistently higher in rural areas



Source: GSMA, 2017. Base: 'Mobile ownership gap': mobile owners aged 18+; 'Mobile internet usage gap': mobile internet users aged 18+. Mobile ownership is defined as a person having sole or main use of a SIM card (or a mobile phone that does not require a SIM), and using it at least once a month. Mobile internet users do not have to personally own a mobile phone (includes using mobile internet on somebody else's phone). Gender gap in mobile ownership (mobile internet use) refers to how less likely a woman is to own a mobile (use mobile internet) than a man (n= from 480 to 980 for women, n= from 476 to 1048 for men).

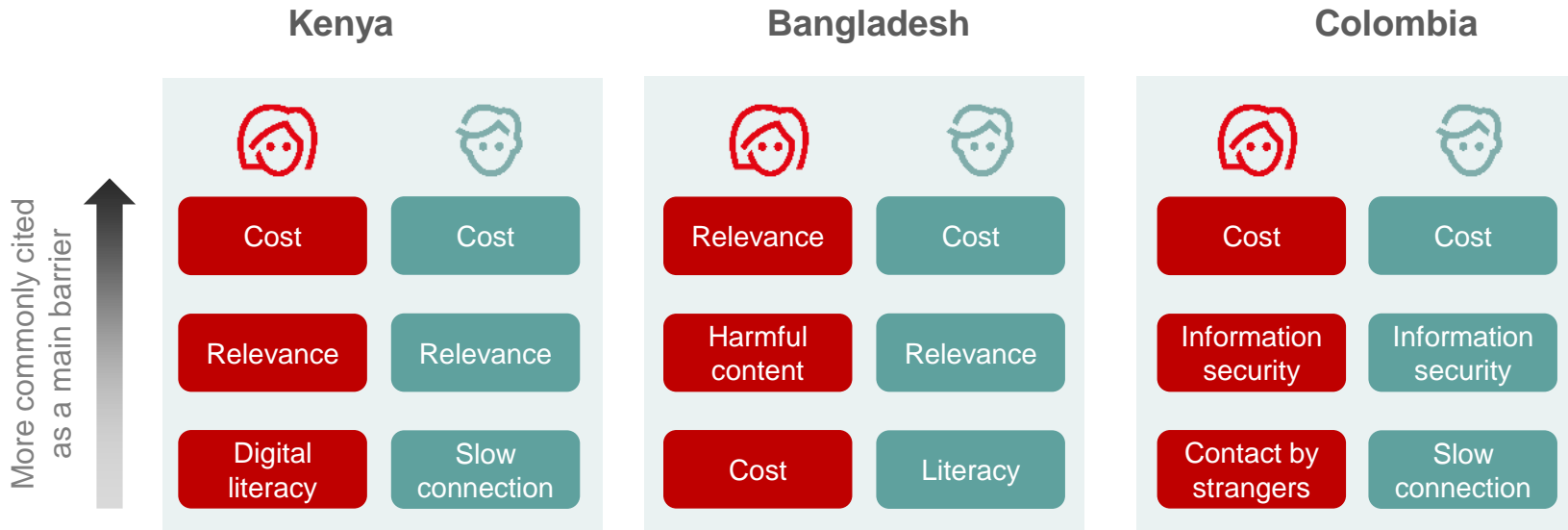
Even when women do use mobiles, they use the more transformative services less than men

% of mobile owners who...





The biggest barriers to mobile internet use for both female and male phone users are cost-related



Women often experience these barriers more acutely than men, which is likely due to underlying social norms