



The State of Mobile Internet Connectivity 2020

ITU -ADB Joint webinar on advances in closing the ICT
connectivity gap

September 23, 2020





THE GSMA



Has represented the interests of mobile operators worldwide for more than

30 YEARS

Unites more than **750** mobile operators



with almost

400

companies in the broader mobile ecosystem



Convenes more than **200,000** people annually from across the globe to **industry-leading** events



Focuses on activities where collective action can deliver significant benefits



Led the mobile industry to formally commit to the Sustainable Development Goals



Mobile for Development (M4D)



93 million lives impacted to date



We drive innovation in digital technology to reduce inequalities in our world



SUSTAINABLE DEVELOPMENT GOALS



Reducing inequalities in our world

CLEAN TECH

Identifying innovation, facilitating scale and reducing the fragmentation of the clean tech space

ASSISTIVE TECH

Improving the accessibility and affordability of mobile services for persons with disabilities

M4D UTILITIES

Unlocking access to affordable and improved energy, water and sanitation services

MOBILE FOR HUMANITARIAN INNOVATION

Accelerating the delivery and impact of digital humanitarian assistance



MOBILE MONEY

Accelerating the digital financial ecosystem for the underserved

CONNECTED SOCIETY

Addressing access and usage barriers to increase mobile internet adoption

CONNECTED WOMEN

Reducing the gender gap to increase digital and financial inclusion for women

DIGITAL IDENTITY

Enabling robust and unique digital identity for greater inclusion

ECOSYSTEM ACCELERATOR

Delivering social impact and scale through mobile innovation

AGRITECH

Digitising the agri value chain to drive mobile financial inclusion for small holder farmers



Changes in usage and coverage over the past 5 years

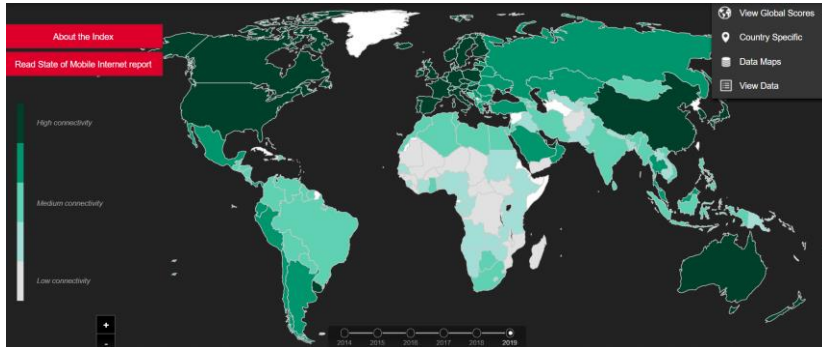


Findings based primarily on two bespoke analytical tools

Mobile Connectivity Index

Barriers to mobile internet use measured across four enablers in 170 countries over six years, covering 99% of global population

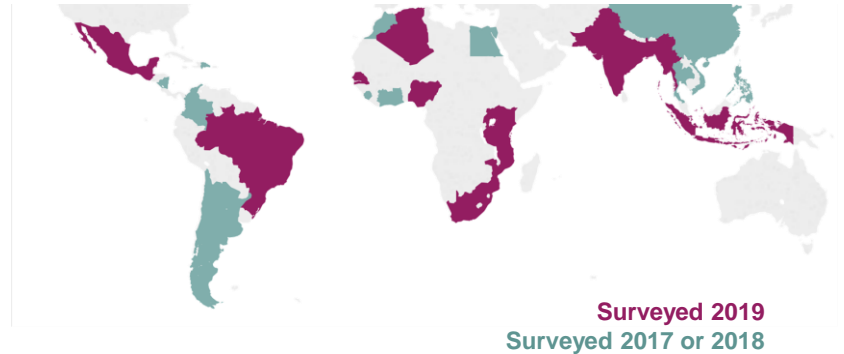
Sources data from GSMA Intelligence, Ookla, the ITU and UN, World Bank, Tarifica and Gallup, among others



Consumers in Focus Survey

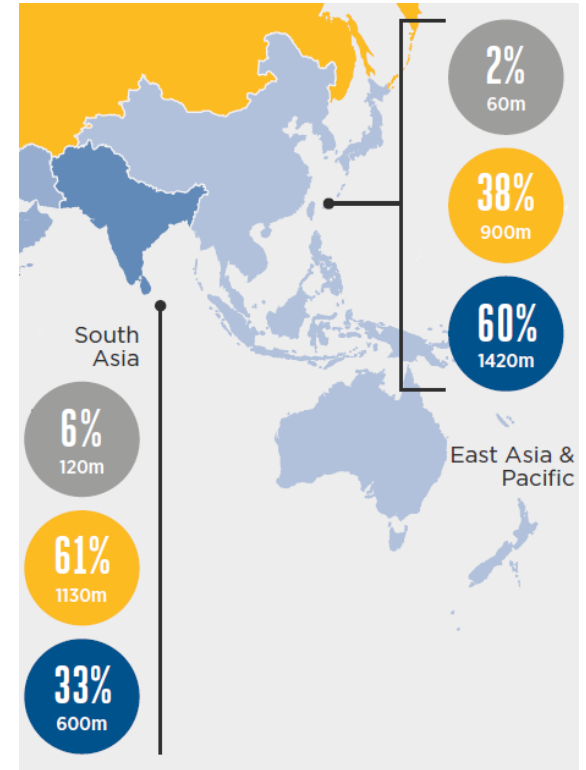
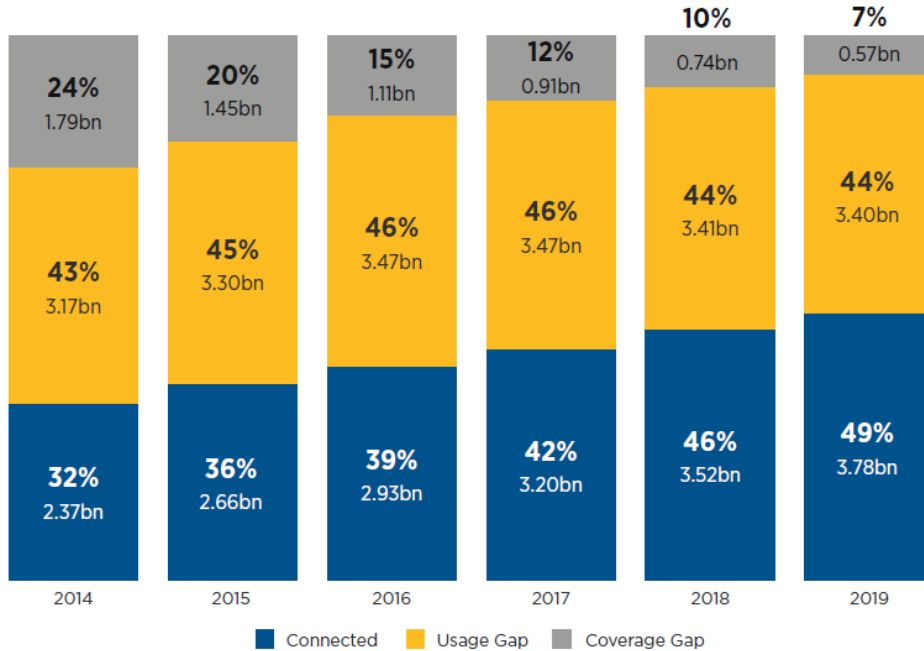
15 countries surveyed in 2019 (incl. 6 countries across Sub-Saharan Africa)

Covering 75% of adult population in low- and middle-income countries, across three survey year.



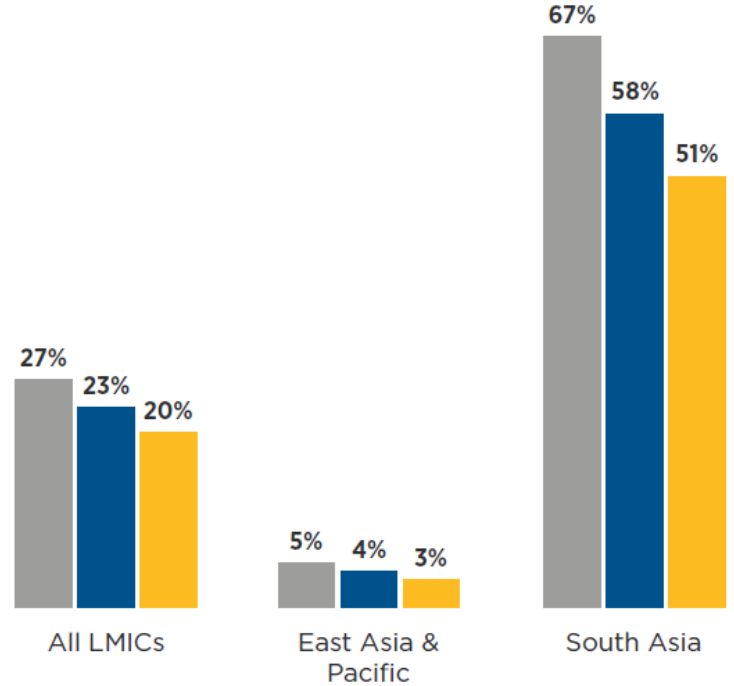
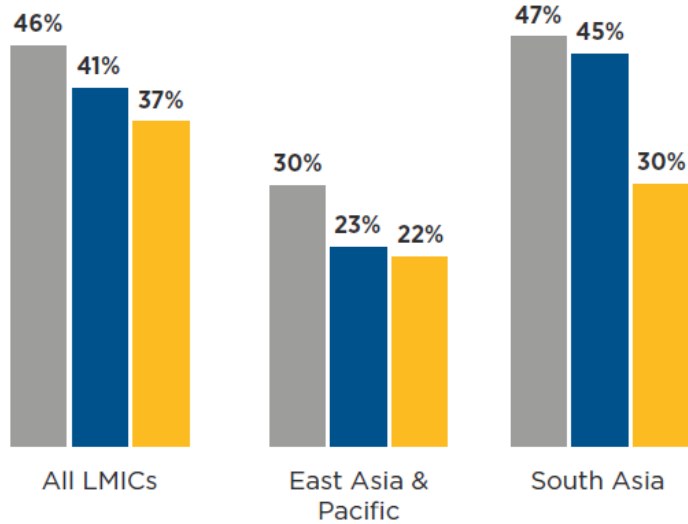


The coverage gap narrows but the usage gap is still significant





Rural-urban and gender gaps in mobile internet use



2017 2018 2019

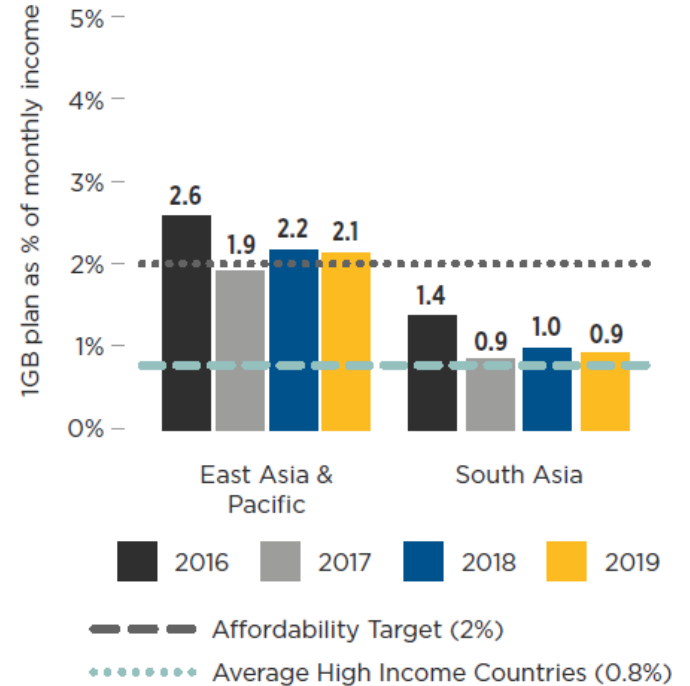
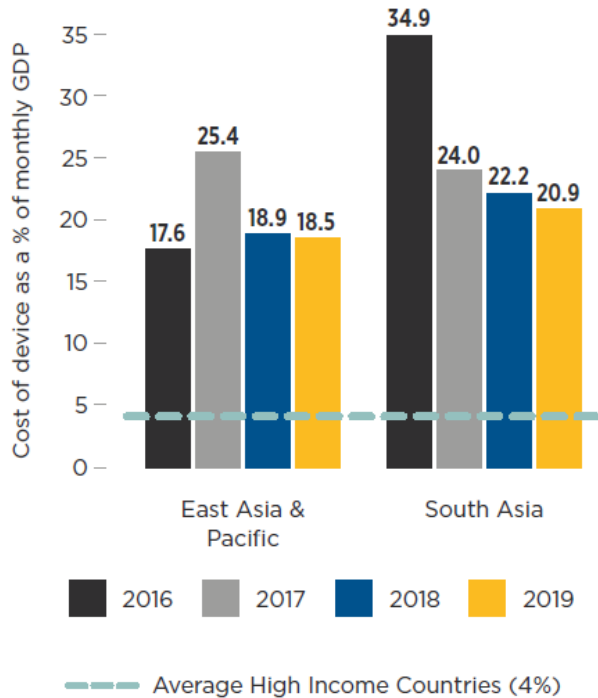


Adoption and use: barriers and drivers

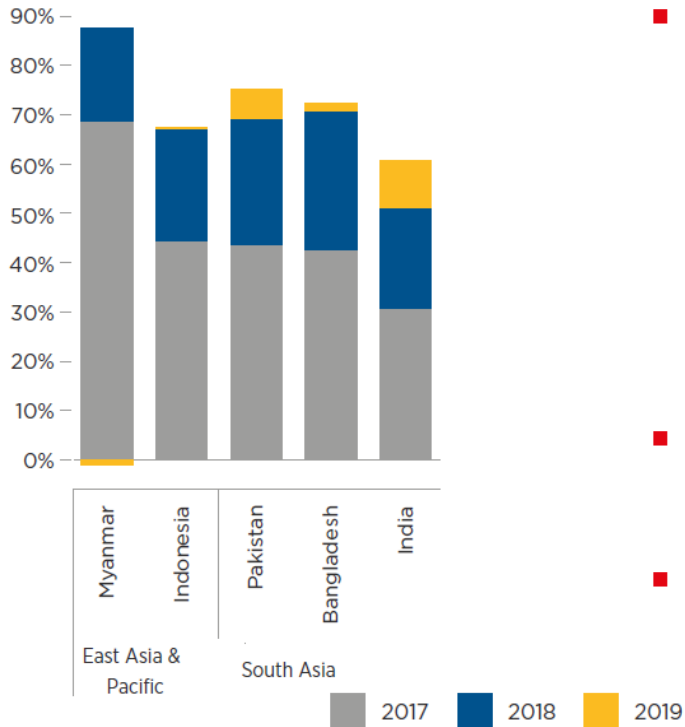




Barriers: Affordability of internet enabled devices and data



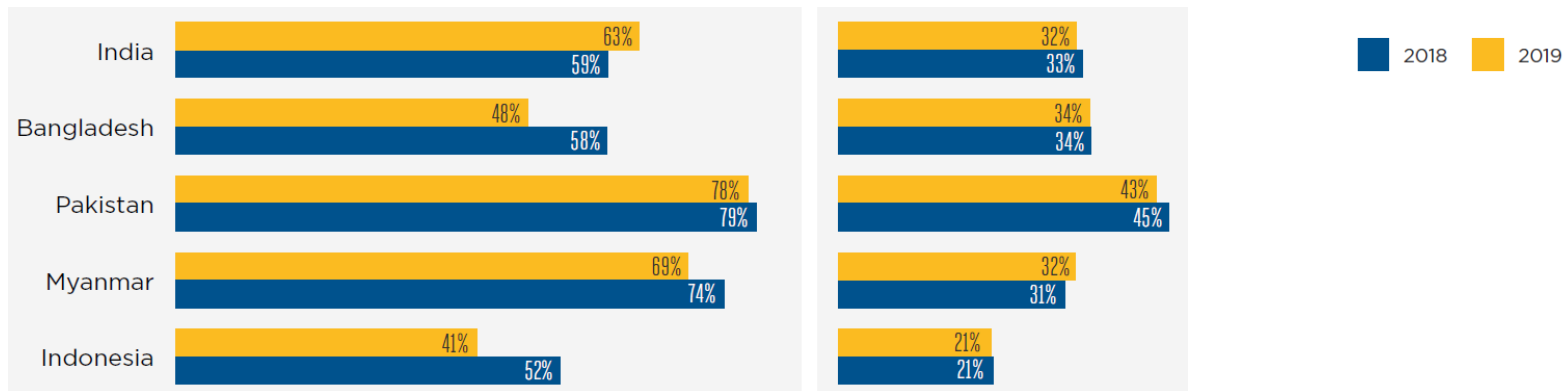
Barriers: Lack of awareness



- 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
- Awareness of mobile internet is increasing but is far from universal
- Encouragingly, awareness is growing disproportionately for rural populations and for women



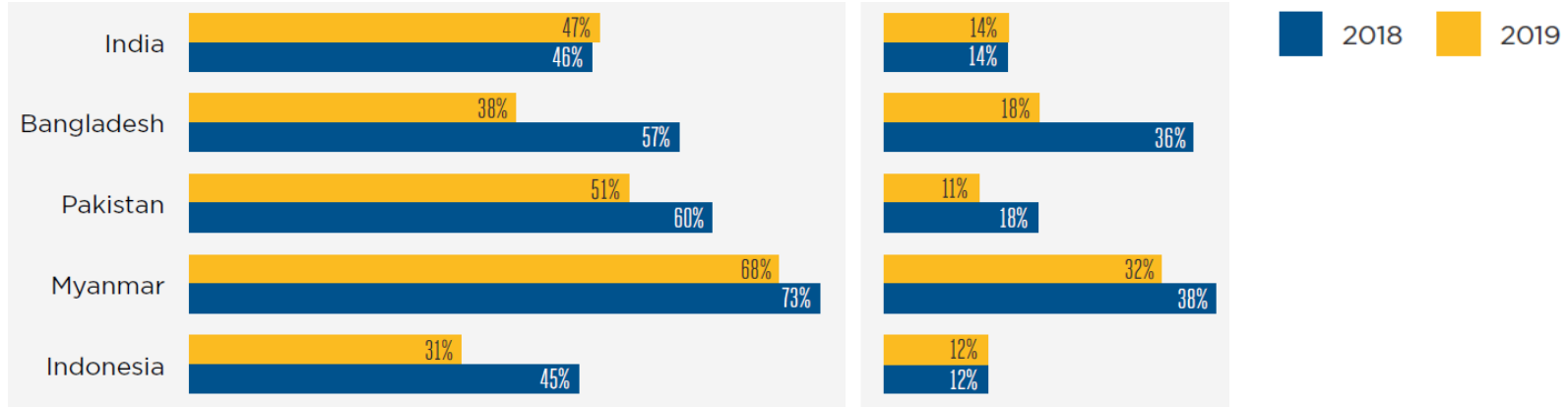
Barriers: Literacy and digital skills



- A lack of literacy and digital skills is the biggest perceived barrier to mobile internet adoption. In 2019, it was reported as the top barrier by a third of respondents.
- Literacy and digital skills are becoming less of a barrier in Bangladesh and Indonesia

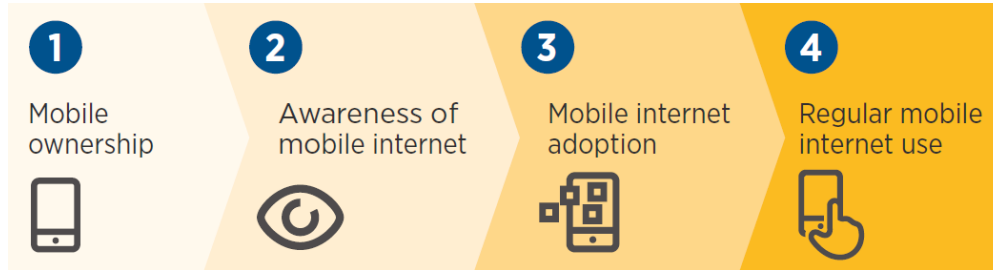


Barriers: Lack of relevance



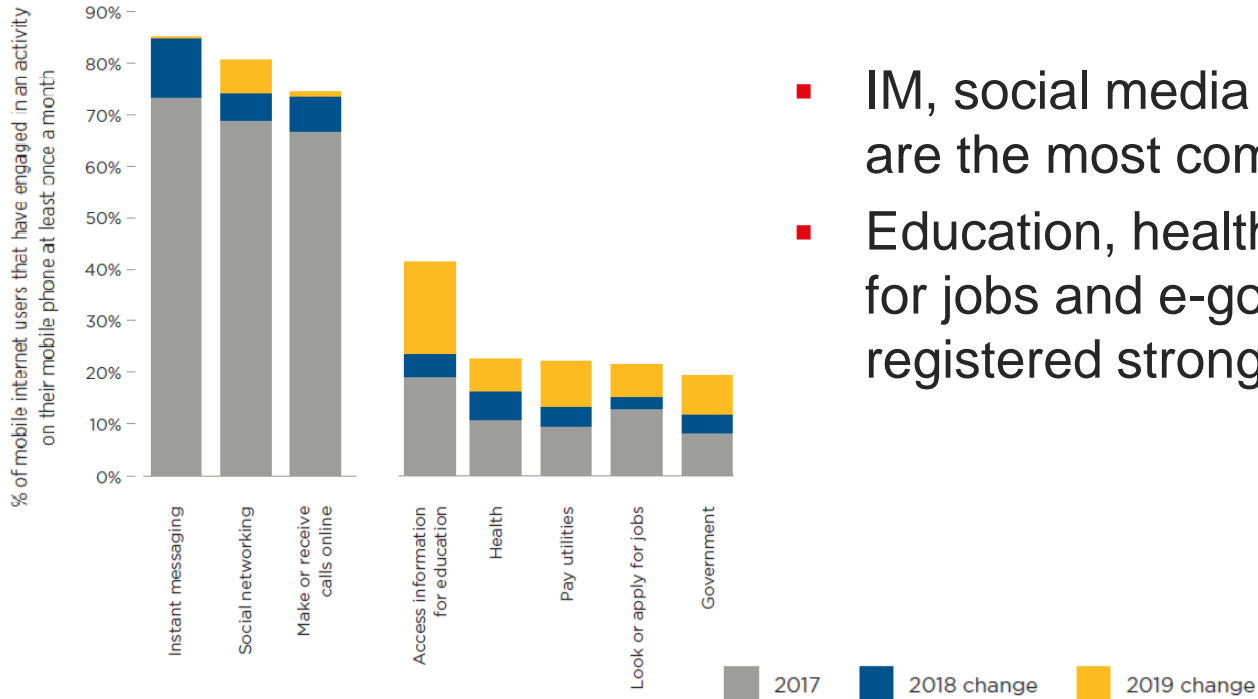
- In LMICs, mobile users increasingly see mobile internet as relevant to their lives and are using a wider range of services
- One reason for why perceived relevance is increasing is the availability of locally developed mobile apps, especially in Asia

Barriers summary



- Affordability of mobile-internet enabled devices is largest barrier to ownership
- Awareness of mobile internet is improving but is far from universal
- Lack of digital skills and literacy is largest barrier to usage
- Affordability of smartphones and data bundles is second largest barrier to usage
- Lack of relevance is still an important barrier but is receding

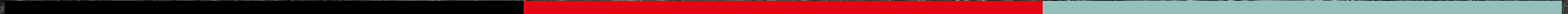
Drivers: usual suspects dominate but...



- IM, social media and making calls are the most common uses
- Education, health, bill pay, looking for jobs and e-gov services registered strong growth last year

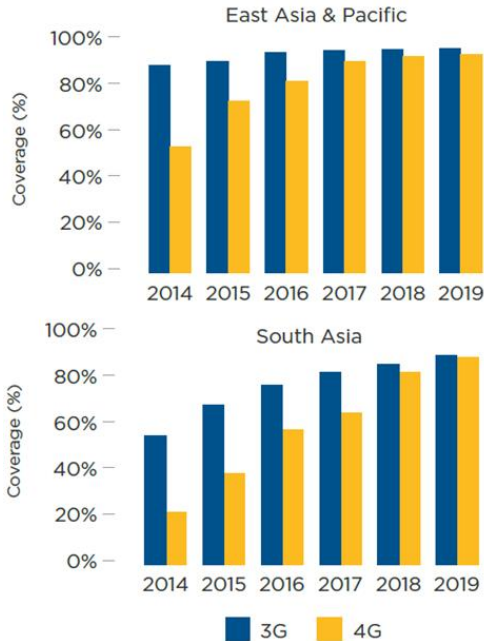


Expanding mobile broadband coverage





3G and 4G coverage



- 4G coverage is catching up with 3G coverage but challenges remain to reach rural and remote areas
- Since 2014, operators in LMICs have invested around \$320 billion in expanding and upgrading networks
- In rural and remote areas, it can cost up to twice as much to deploy base stations compared to urban areas. Rural sites can also be more than three times as expensive to run



The digital dividend

- Reducing the coverage gap will require affordable and sufficient amounts of technology-neutral spectrum for operators, particularly frequencies in the digital dividend bands as these allow wider area coverage with fewer cells deployed
- Average 4G coverage for LMICs that have assigned digital dividend spectrum for mobile use since 2014 is higher than that for countries yet to assign them (73% versus 56% respectively)
- The Mobile Connectivity Index shows that countries that have allocated more spectrum for mobile are more likely to have higher levels of mobile broadband coverage



Further action is needed to close the coverage and usage gaps

Closing the coverage gap

- Use innovative technologies that reduce the cost of deploying and operating networks in remote areas
- Increase industry collaboration (e.g. infrastructure sharing) to extend the reach and capacity of mobile broadband networks
- Develop proactive policies that target rural areas

Closing the usage gap

- Develop innovative pricing models to improve affordability of devices and data
- Build literacy and digital skills training that can be implemented in schools and other learning programmes
- Invest and facilitate the creation of local digital ecosystems to increase availability of relevant content



Connected Society

The State of Mobile Internet Connectivity 2020

September 2020

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Useful links:

- [State of Mobile Internet Connectivity 2020 Report](#)
- [GSMA Mobile Connectivity Index](#)
- [Innovation Fund for Assistive Tech](#)
(deadline Oct 16)

To continue the conversation:

- [GSMA Thrive APAC](#)

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The GSMA represents the interests of mobile operators worldwide, uniting more than 750 operators with almost 400 companies in the broader mobile ecosystem, including handset and device makers, software companies, equipment providers and internet companies, as well as organisations in adjacent industry sectors. The GSMA also produces the industry-leading MWC events held annually in Barcelona, Los Angeles and Shanghai, as well as the Mobile 360 Series of regional conferences.

For more information, please visit the GSMA corporate website at www.gsma.com

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