

Not all price points are the same

Availability of mobile broadband plans with alternative data allowances around the world

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ITU Expert Group on Telecommunication/ICT Indicators, Day 1



**Pricing data at
multiple volumes**



**Comparisons
of affordability**



**Context and
trends**



**Considerations
for future work**



WE ARE THE
**WORLD'S BROADEST TECHNOLOGY
SECTOR ALLIANCE**

WORKING TO
**DRIVE DOWN THE PRICE OF
BROADBAND**

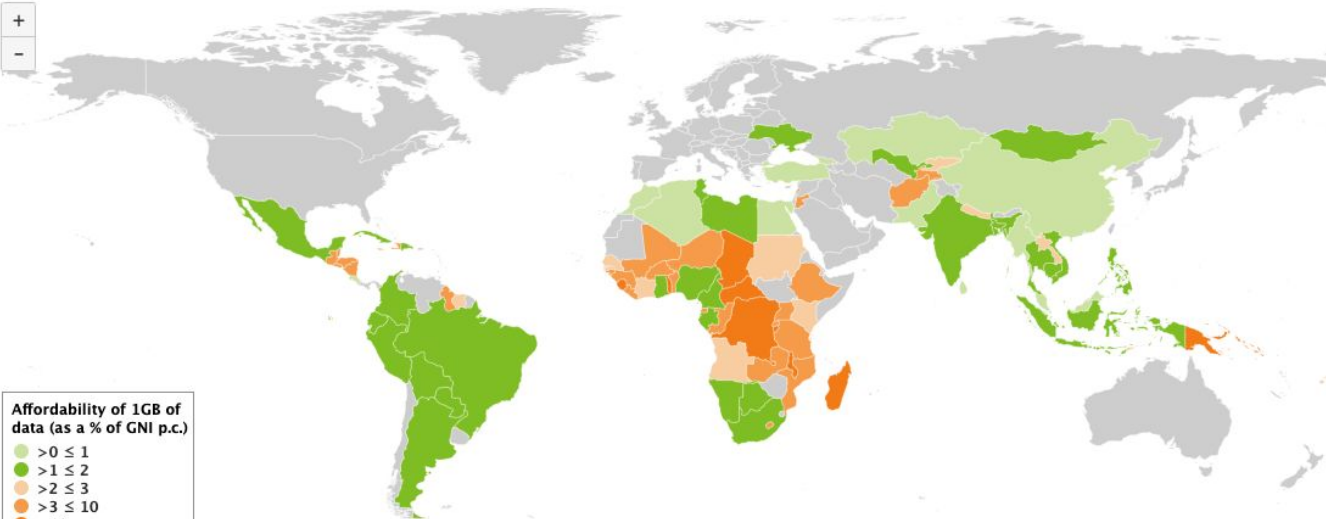
BY
**TRANSFORMING POLICY AND
REGULATORY FRAMEWORKS**



Cost of 1GB of broadband data in USD

Affordability as a % of Average Income

Affordability of 1GB of broadband data - GNI p.c. - 2020



Affordability of 1GB of data (as a % of GNI p.c.)

- >0 ≤ 1
- >1 ≤ 2
- >2 ≤ 3
- >3 ≤ 10
- >10

Source: A4AI

Search by country...

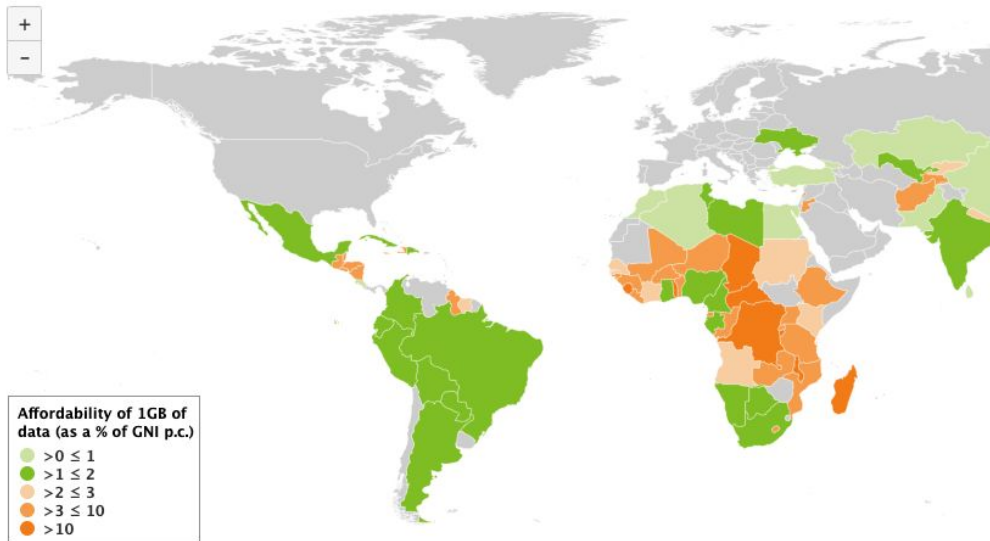
	100MB	500MB	1GB	2GB	5GB	10GB
Countries	GNI per capita	GNI per capita	GNI per capita	GNI per capita	GNI per capita	GNI per capita
Afghanistan	5.46%	5.46%	5.46%	8.49%	10.31%	18.16%



Cost of 1GB of broadband data in USD

Affordability as a % of Average Income

Affordability of 1GB of broadband data - GNI p.c. - 2020



Features of A4AI data —

- Annual data collection since 2015
- 100 countries, six data volumes since 2018
- Focus on low- and middle-income countries
- Prices in USD and GNI per capita

















Source: A4AI

Search by country...
















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 Egypt	0.12%	0.23%	0.47%	0.94%	1.88%	3.52%
 El Salvador	3.01%	3.01%	3.01%	3.01%	3.01%	4.52%
 Equatorial Guinea	4.67%	5.67%	6.67%	13.34%	26.67%	53.34%
 Ethiopia	2.76%	2.76%	5.01%	9.52%	20.05%	35.09%
 Fiji	2.72%	2.72%	2.72%	2.72%	2.72%	2.72%
 Gabon	0.72%	0.72%	1.29%	2.01%	2.87%	4.30%
 Gambia	1.29%	4.69%	8.08%	16.00%	24.89%	42.02%
 Georgia	0.28%	0.28%	0.46%	0.65%	1.39%	2.79%
 Ghana	0.21%	0.45%	1.36%	2.71%	6.78%	10.67%
 Guatemala	3.40%	3.40%	3.40%	3.40%	3.40%	5.15%
 Guinea	5.21%	5.21%	5.21%	6.51%	12.76%	24.08%
 Guinea-Bissau	4.38%	5.48%	6.57%	10.96%	24.65%	41.09%
 Guyana	4.08%	4.08%	4.08%	4.08%	6.88%	12.25%
 Haiti	3.42%	3.42%	3.42%	3.42%	5.48%	9.36%
 Honduras	8.23%	8.23%	8.23%	9.78%	11.63%	20.58%
 India	1.05%	1.05%	1.05%	1.05%	1.62%	1.62%

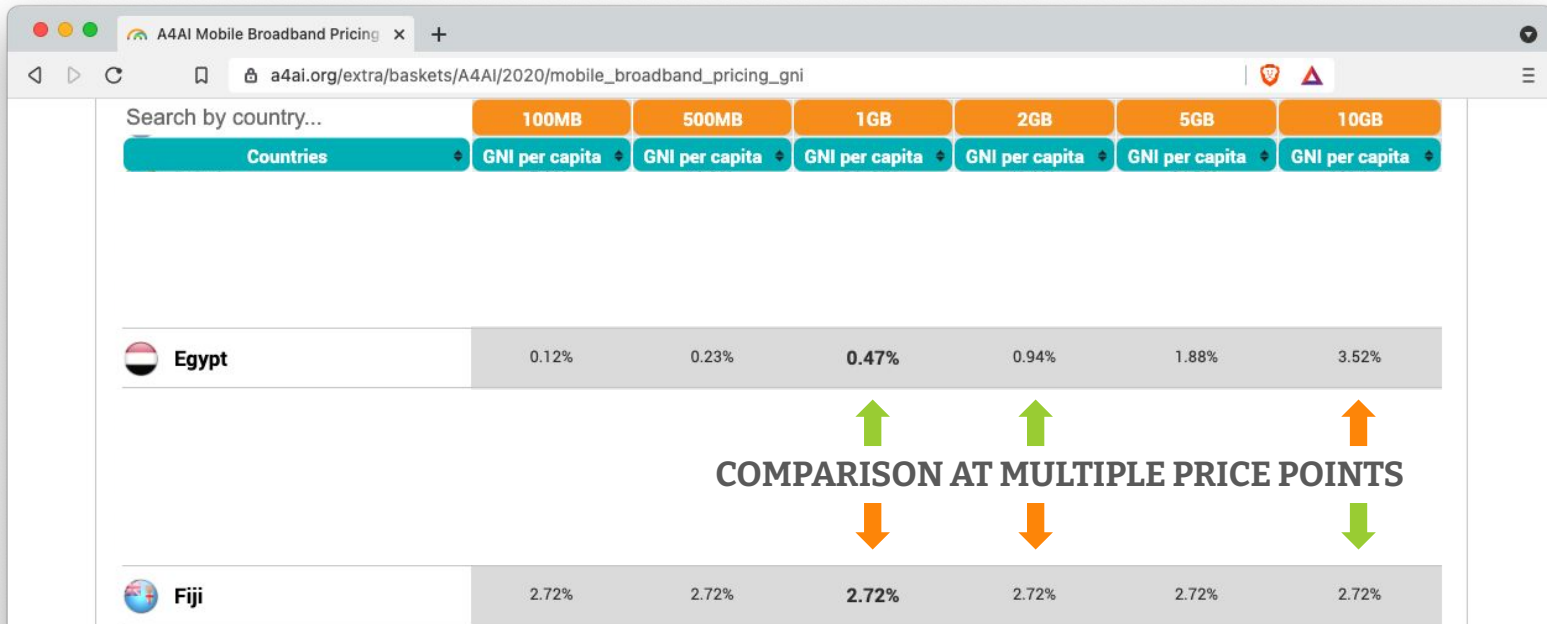
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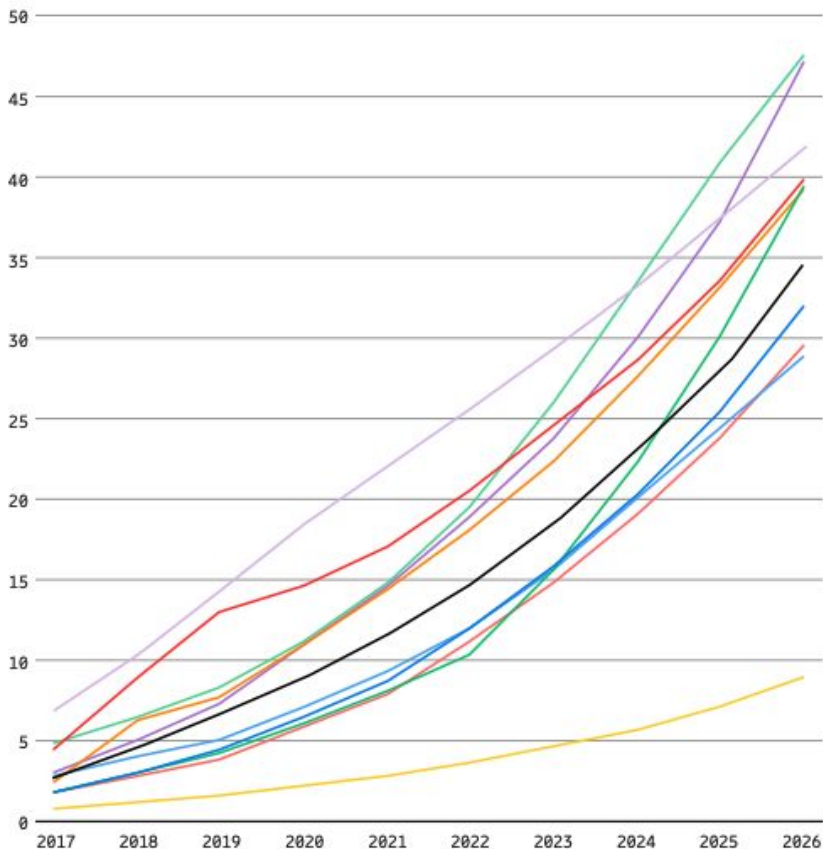
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COMPARISON AT MULTIPLE PRICE POINTS						
 Fiji	2.72%	2.72%	2.72%	2.72%	2.72%	2.72%



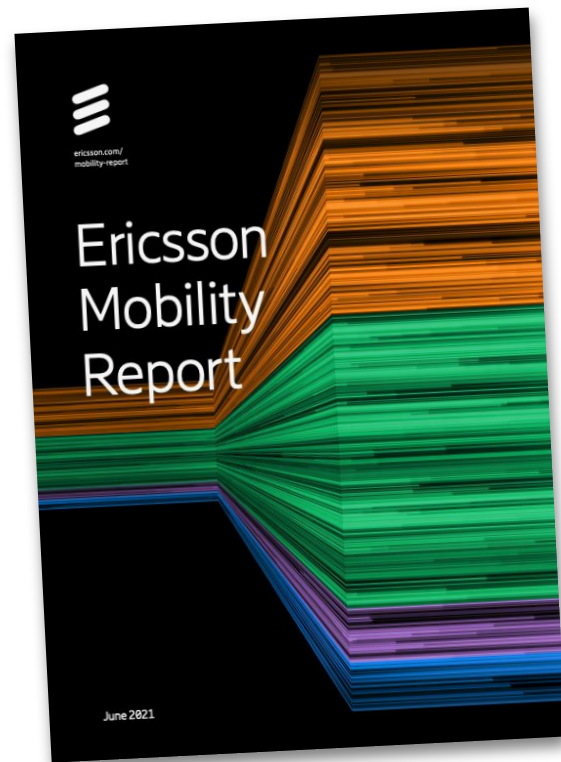


- Multiple data points help expose potential price barriers for low income market segments.
- Real “market offer” data offers a better picture of data affordability.

Figure 14: Mobile data traffic per smartphone (GB per month)



Regions	2020	2026	CAGR 2020— 2026
North America	11.1	48	27%
Western Europe	11	47	28%
GCC	18.4	42	15%
India	14.6	40	18%
South East Asia and Oceania	6.2	39	36%
North East Asia	10.9	39	24%
Global average	9	35	25%
Middle East and North Africa	6.5	32	30%
Latin America	5.9	30	31%
Central and Eastern Europe	7.2	29	26%
Sub-Saharan Africa	2.2	9	26%



When we look at market offers, it's a world of 1s, 2s, and 5s...

Countries with an available data plan by volume, December 2020 — Limited to 46 markets in Africa

GBs	0.5	1	1.5	2	2.5	3	4	5	6
<i>Any operator:</i>	37	43	25	33	14	28	18	35	18
<i>Largest operator:</i>	24	32	12	21	11	16	10	22	9

Source: Alliance for Affordable Internet



Considerations on data volume for mobile broadband pricing:

- Real “market offer” data reveals potential affordability barriers for low-volume internet users.
- Combining multiple price points allows for deeper analysis of consumer power in mobile broadband market.
- Data consumption, in general, is increasing.
- But vast regional and income disparities remain.
- EGTI recommendations should focus on universally relevant targets (not too high, not too low).
- In matching market practices, look to 1s, 2s, and 5s.





For further questions, please email:

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