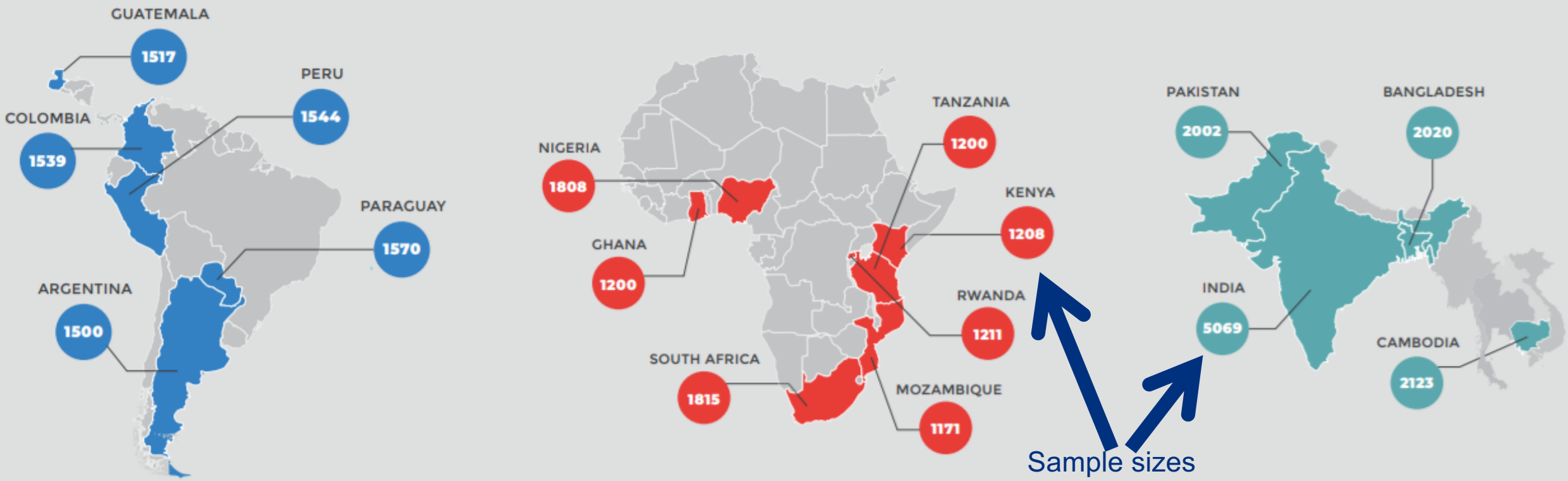
Session 16- Access and Affordability in Africa

Chenai Chair and Carlos Rey Moreno

AFRISIG 2018

Zanzibar 15 October 2018

Nationally representative surveys of ICT access and use by households & individuals aged 15-65; In 16 developing countries; Data represents 30% of the global population; 28,900 face-to-face interviews; +/-3 margin of error



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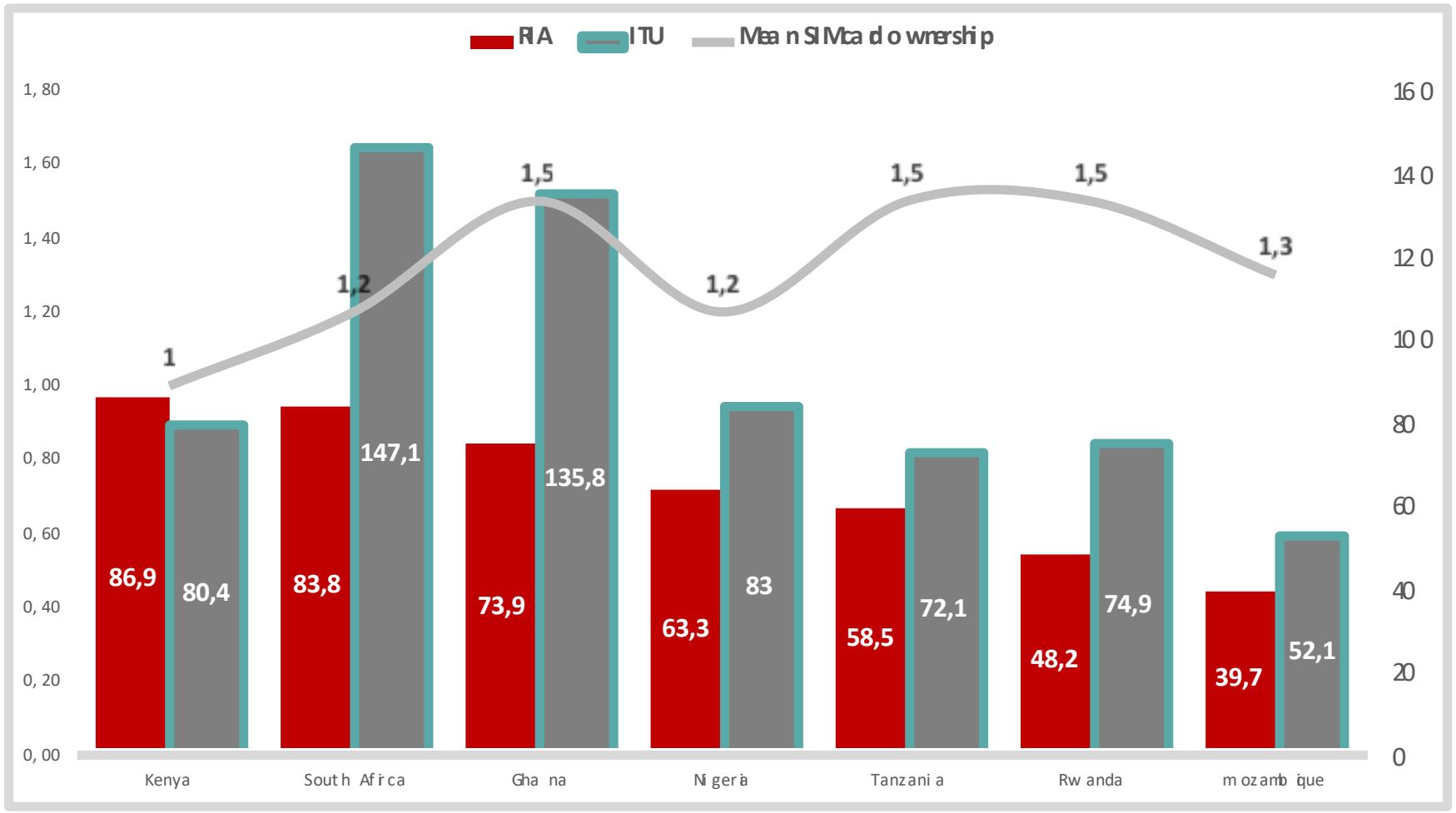
Note: Pakistan excludes AJK, FATA, Gilgit-Baltistan (~2% of population)

Supply vs Demand-side indicators what's the story?



- Active SIMS vs Unique subscribers.
- Disaggregation by gender, income, education, location.

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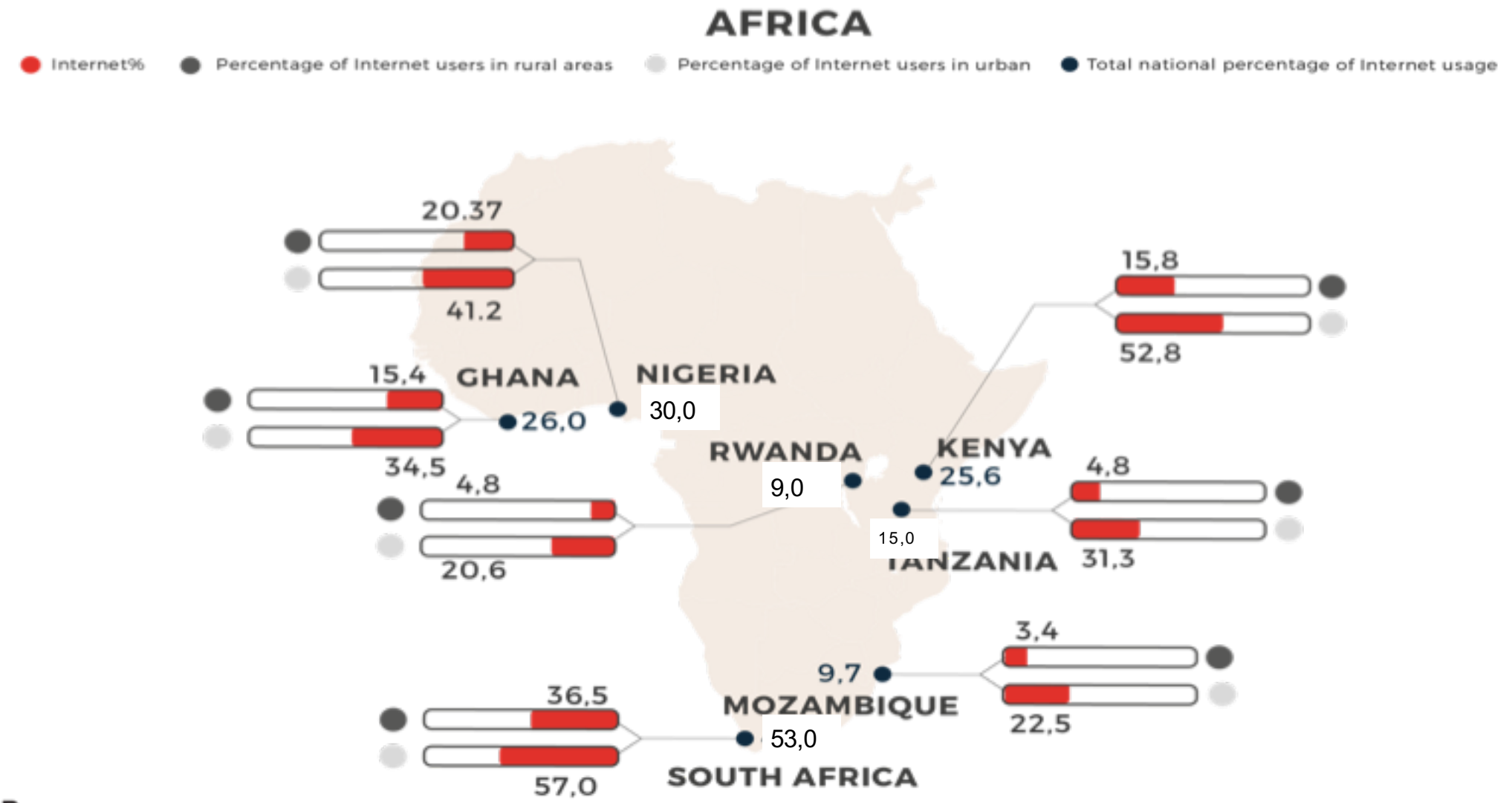
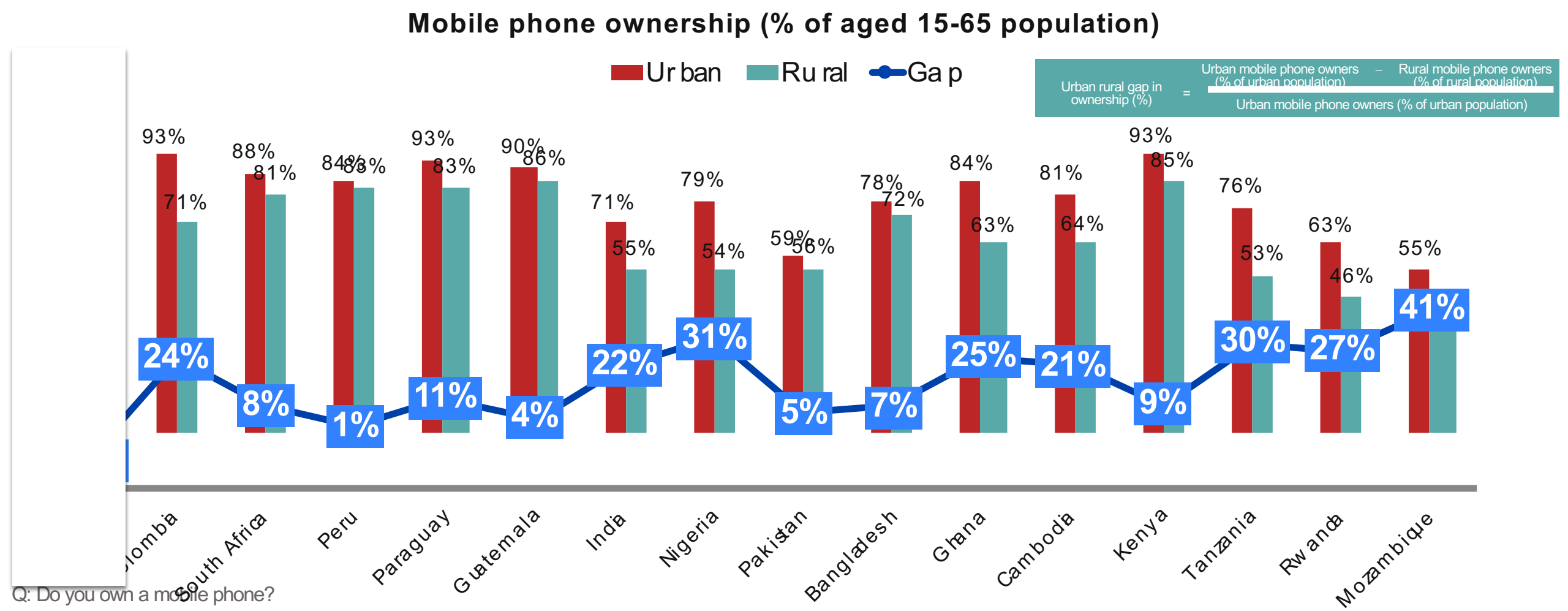
What is the state of After Access?

Internet use across Africa



The urban-rural divide in mobile ownership



Q: Do you own a mobile phone?

Base	Argentina		Colombia		South Africa		Peru		Paraguay		Guatemala		India		Nigeria		Pakistan		Bangladesh		Ghana		Cambodia		Kenya		Tanzania		Rwanda		Mozambique	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
All respondents	1,208	32	986	439	1,050	765	1,178	300	824	533	550	857	2,200	2,869	1,147	661	793	1,209	808	1,212	721	479	897	1,226	727	481	720	480	711	500	718	453

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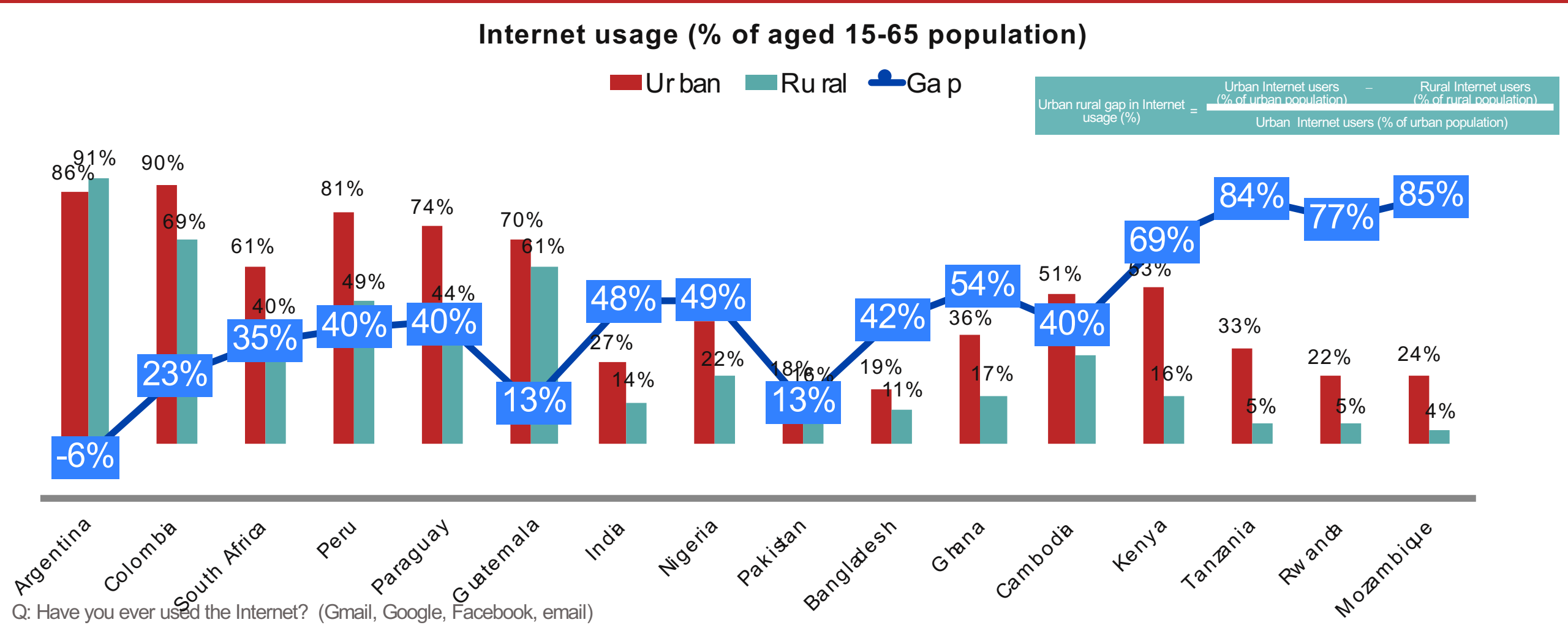
.....and an even higher urban-rural divide in Internet use



Q: Have you ever used the Internet? (Gmail, Google, Facebook, email)

Base	Argentina		Colombia		South Africa		Peru		Paraguay		Guatemala		India		Nigeria		Pakistan		Bangladesh		Ghana		Cambodia		Kenya		Tanzania		Rwanda		Mozambique	
	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban	Rural
All respondents	1,208	32	986	439	1,050	765	1,178	300	824	533	550	857	2,200	2,869	1,147	661	793	1,209	808	1,212	721	479	897	1,226	727	481	720	480	711	500	718	453

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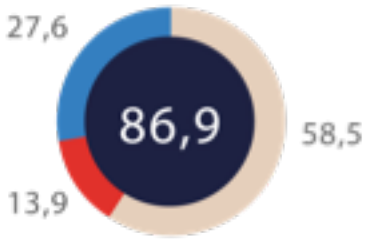
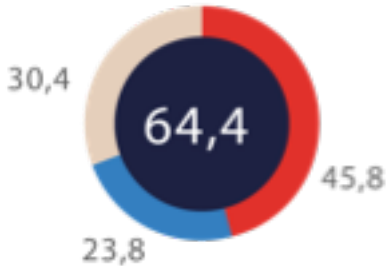
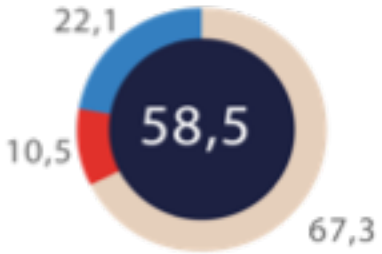
Mobile phone type



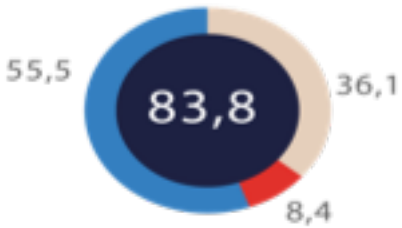
KENYA



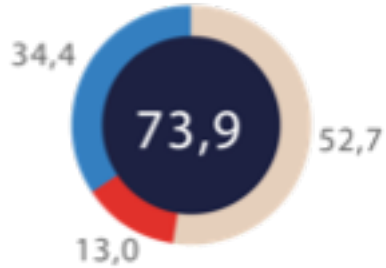
NIGERIA



TANZANIA



SOUTH AFRICA



GHANA

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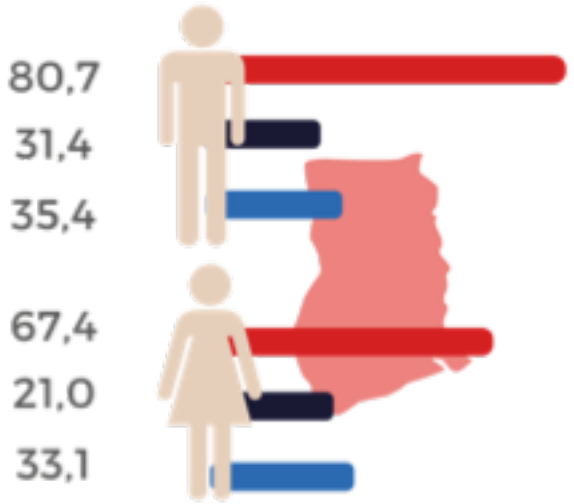
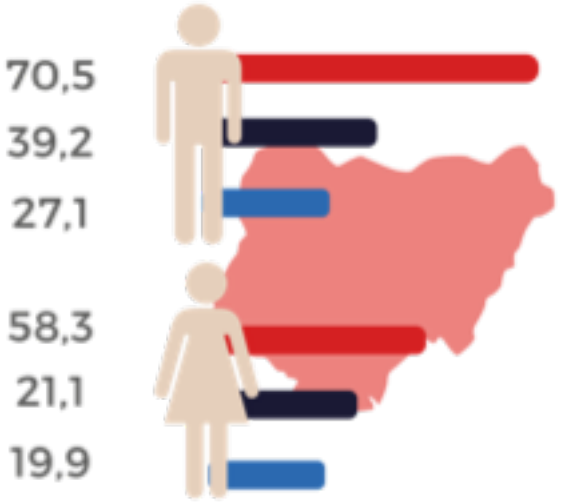
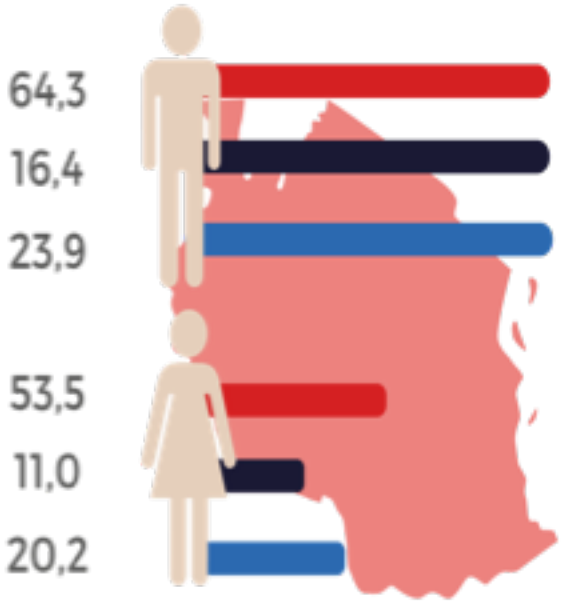
Access and the gender gap



GHANA
26,0% total Internet users



NIGERIA
30,2% total Internet users

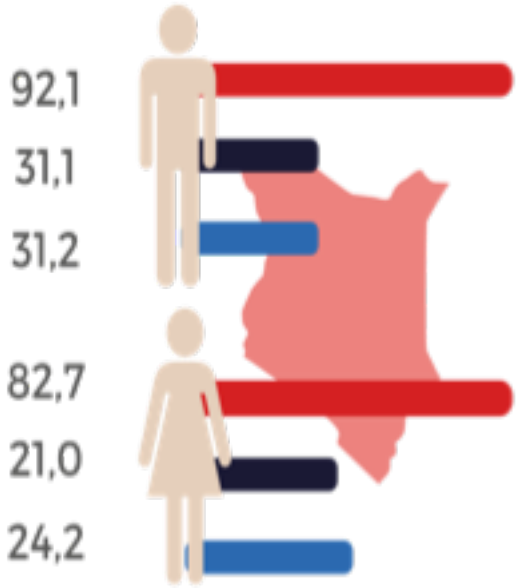


TANZANIA
13,5% total Internet users

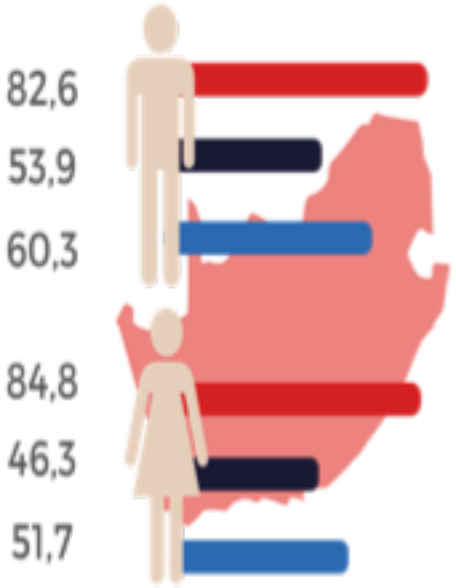
Percentage of mobile owners
Percentage of Internet users
Percentage of mobile users with a smartphone

AFTER ACCESS

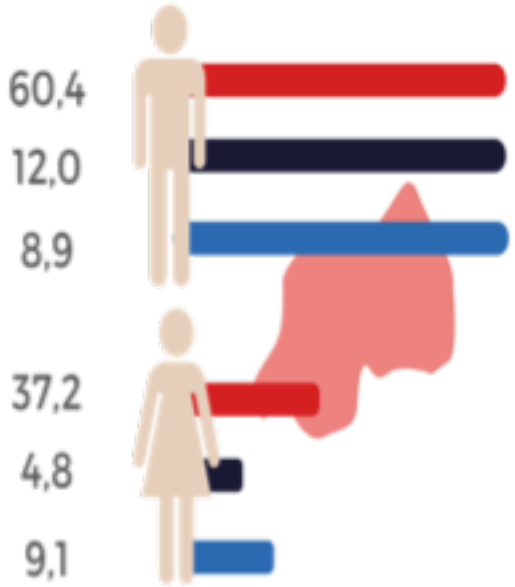
Access and the gender gap



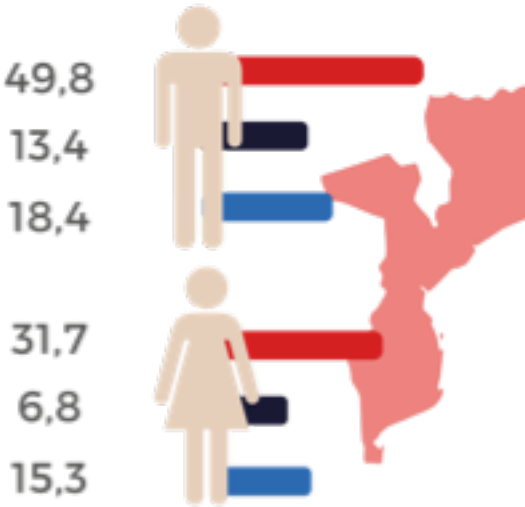
KENYA
25,6% total Internet users



SOUTH AFRICA
49,7% total Internet users



RWANDA
8,2% total Internet users



MOZAMBIQUE
9,7% total Internet use

Percentage of mobile owners
Percentage of Internet users
Percentage of mobile users with a smartphone

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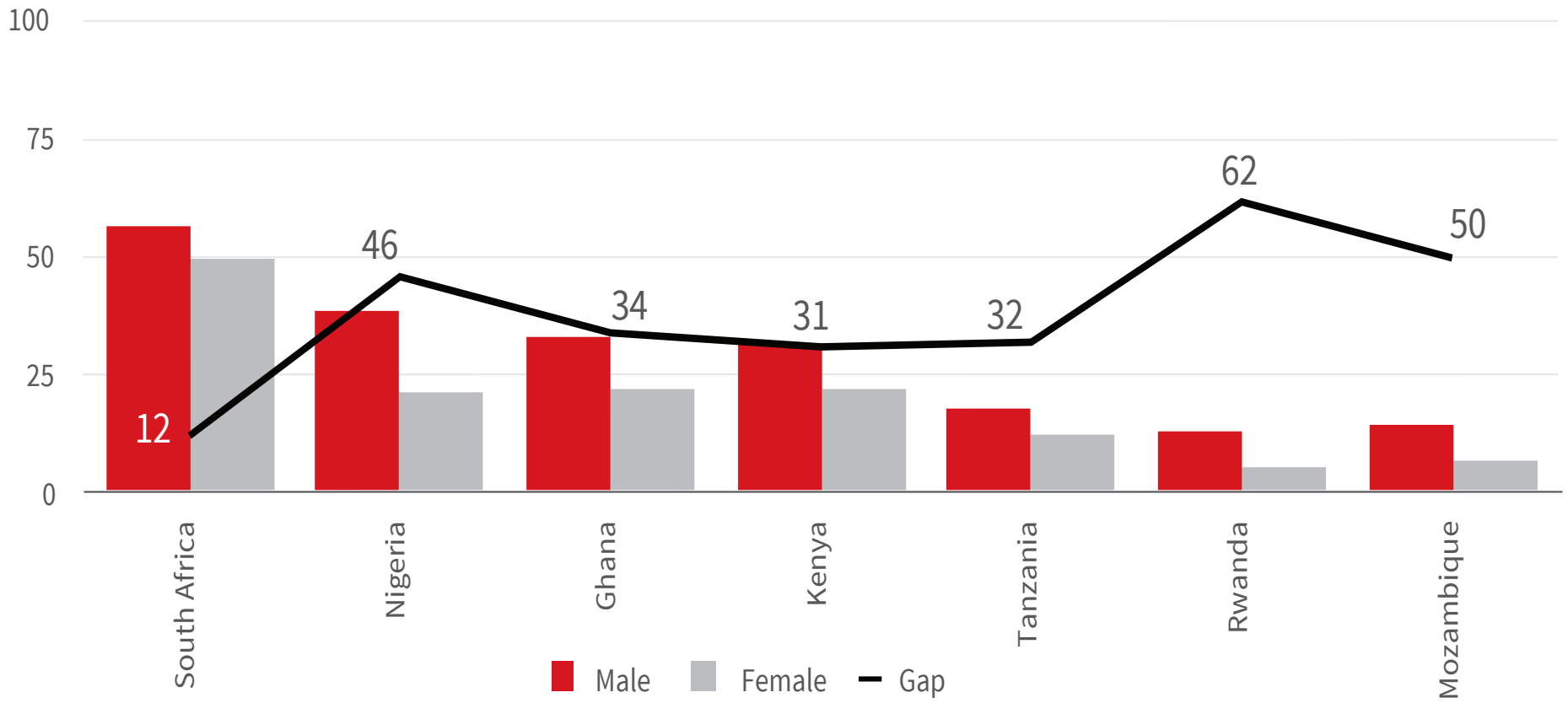
Gender gap in Internet in Africa



- As markets become saturate greater parity in ownership
- Smaller gap than Internet
- But other cultural, demographic, urbanisation, factors at play

Figure 21: Gender disparity in Internet use in South Africa and other African countries

Source: RIA After Access Survey data, 2017

Ownership and use of ICTs by income

Digital paradox that more people come online greater inequality there is:

INCOME (ZAR)	MOBILE PHONE	SMARTPHONE	INTERNET
0 – 1 583	82%	45%	51%
1 584 – 7 167	81%	38%	37%
7 168 – 7 167	95%	74%	74%
7 168 – 1 6418	100%	93%	98%
16 419 – 33 333	100%	100%	100%
33 334 – 57 333	100%	100%	100%
57 334 – 123 417	100%	100%	100%
>123417	100%	100%	100%

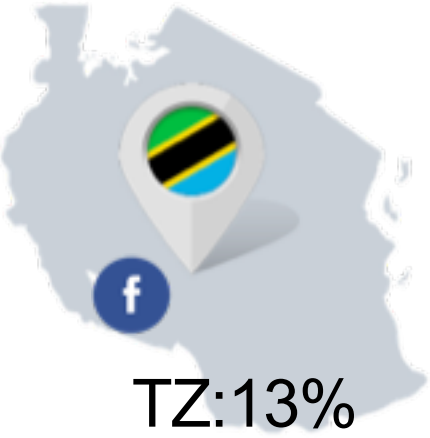
Source: RIA After Access Survey data, 2017

Social media use in Africa

Ke:26%

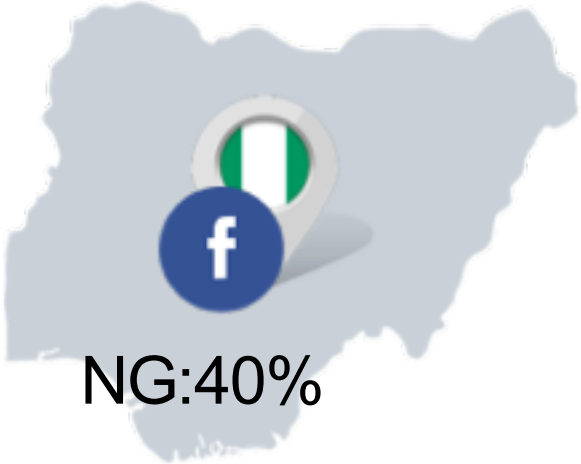
Moz:10%

RW:6%

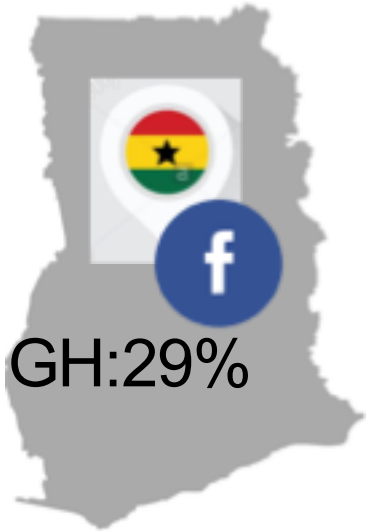


TZ:13%

ZAR:45%



NG:40%



GH:29%

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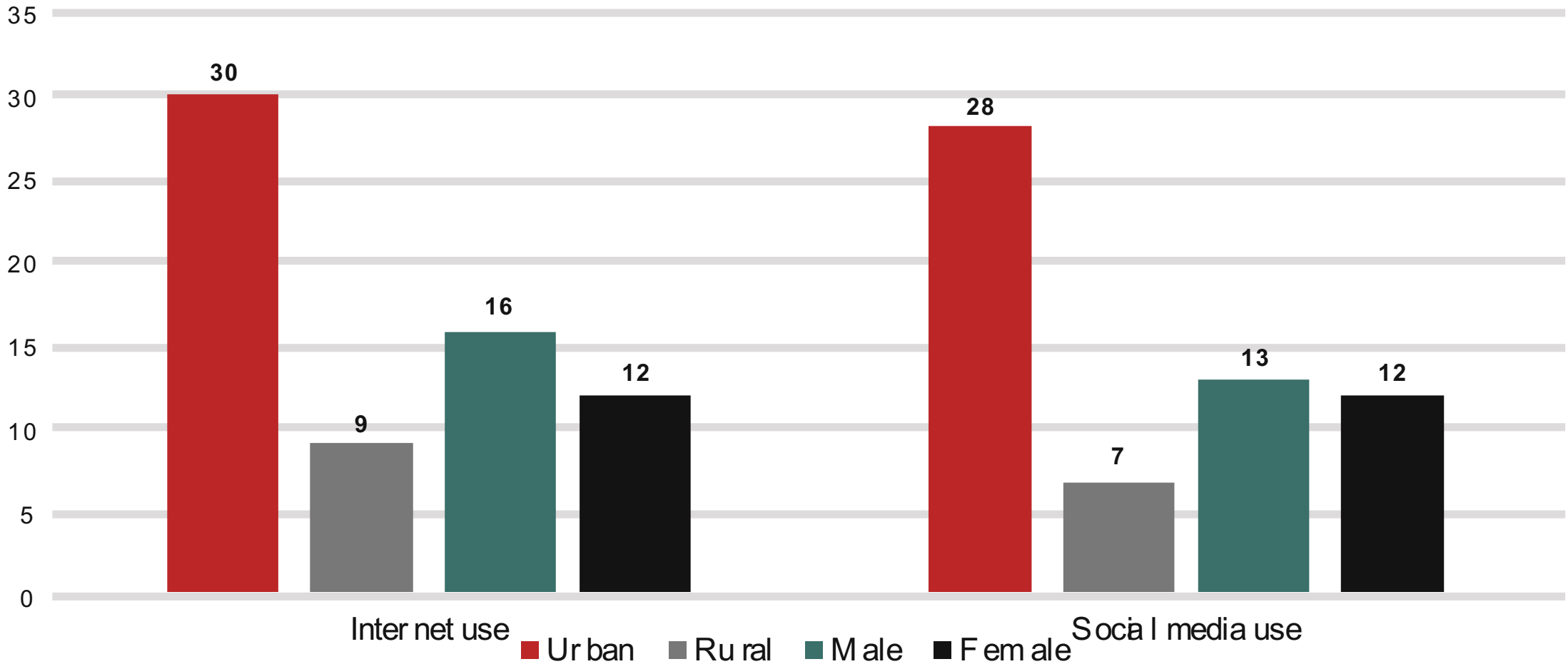
Uganda's Internet (14%) and social media use (12%)



Unintended consequences of social networking tax

- using Research ICT Africa Mobile Pricing (RAMP) index, the cheapest 1GB of data in Uganda is USD2.77.
- Even though this makes Uganda one of the cheapest countries in terms of data products, majority of Ugandans do not use the internet (78%, ITU, 2016).
- Effecting this tax will increase the price of the cheapest data product by a margin of USD1.5 to USD4.27, making it even more unaffordable.
- Furthermore, those who marginally afforded Internet services will be priced out of the market, increasing the percentage of the unconnected.
- Those who are connected are educated and employed and in a position to monitor, mobilise and critique

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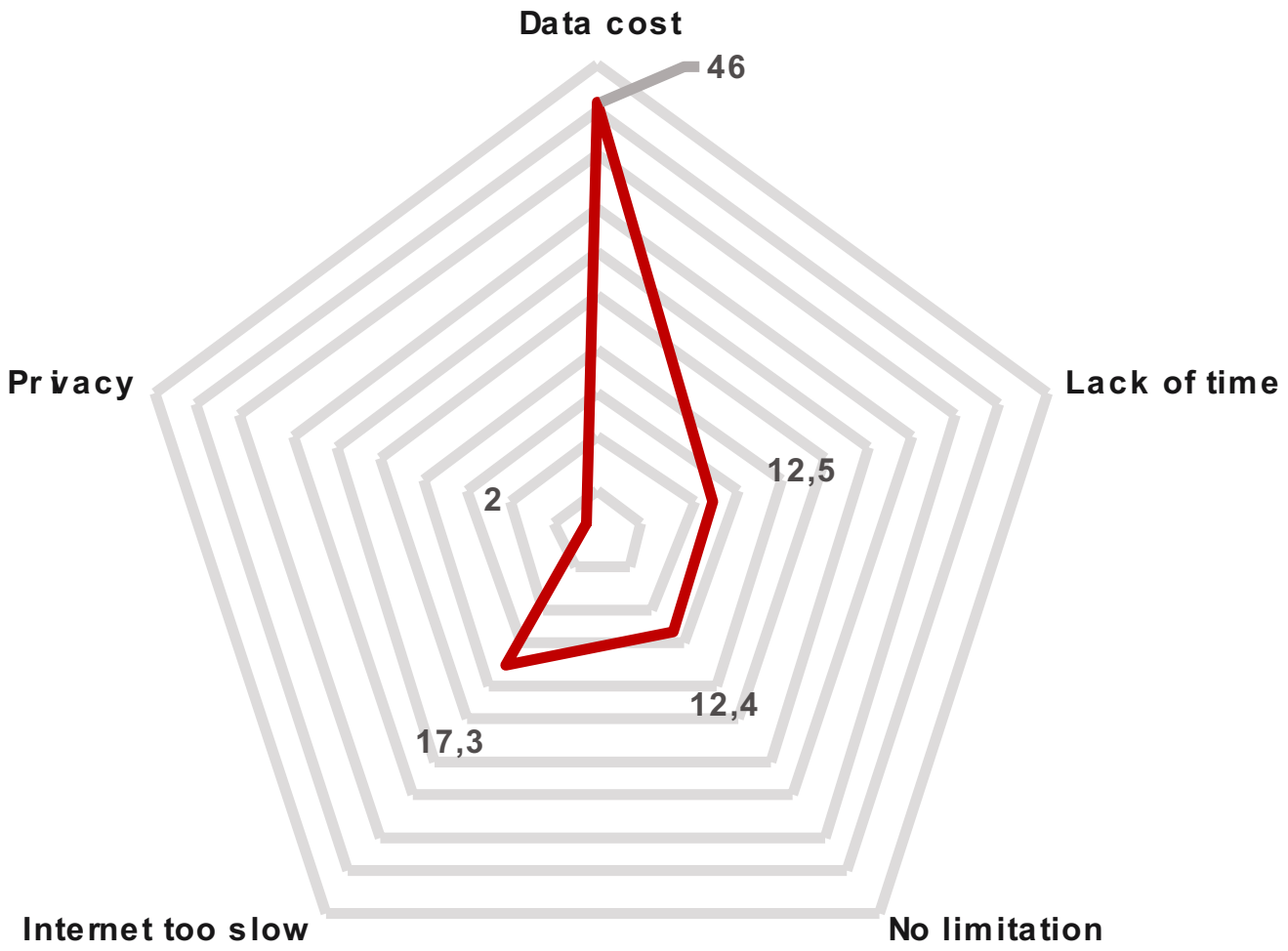
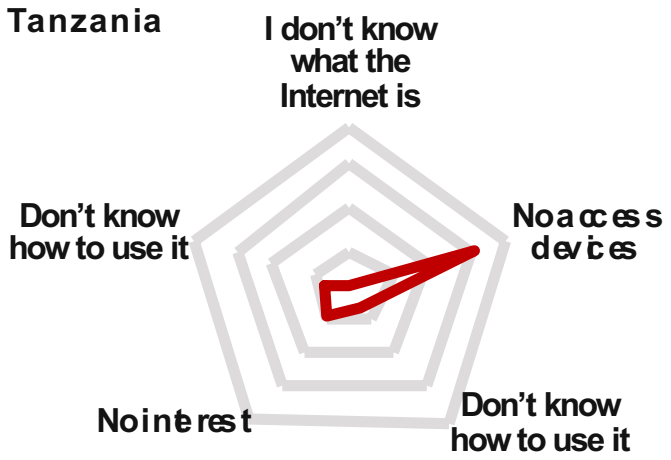
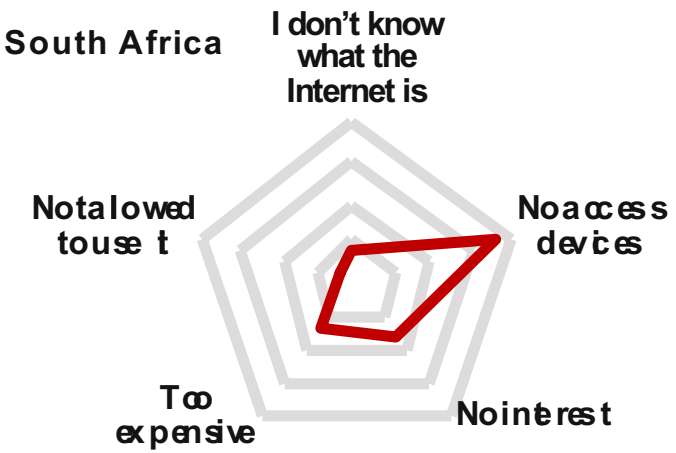
WHAT ARE THE BARRIERS TO GETTING ON LINE? AND STAYING ONLINE?

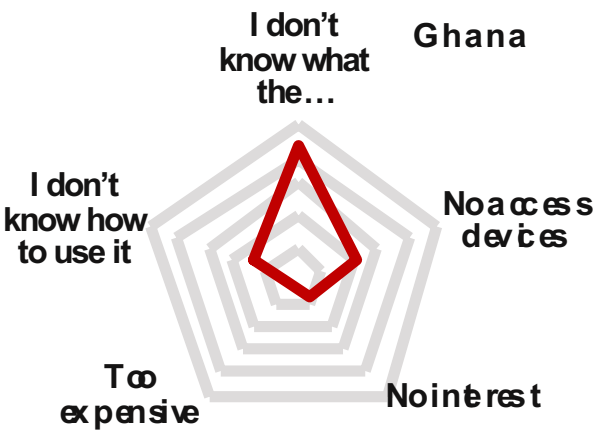
Constraints to internet use

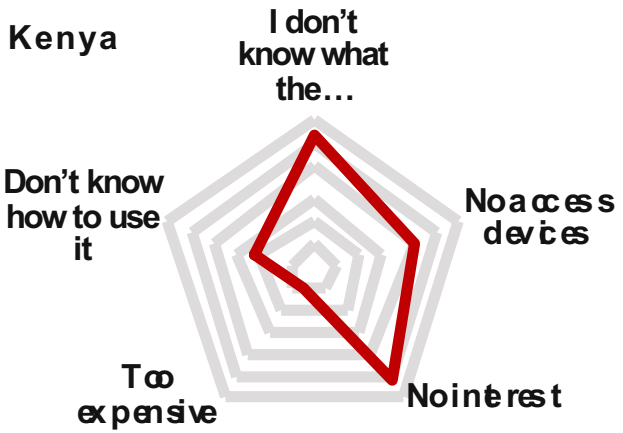


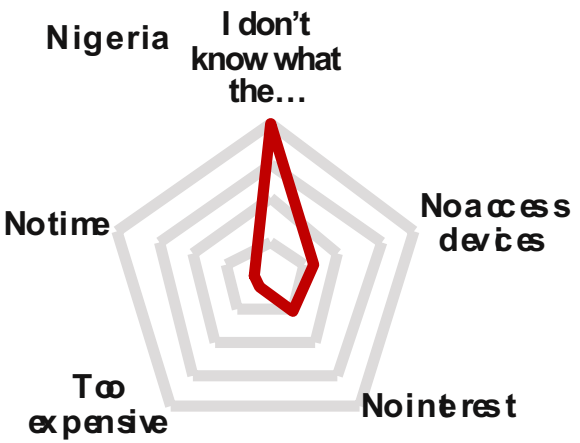
Reason for not using the Internet











- Lack of devices and internet illiteracy are main inhibitor of Internet use

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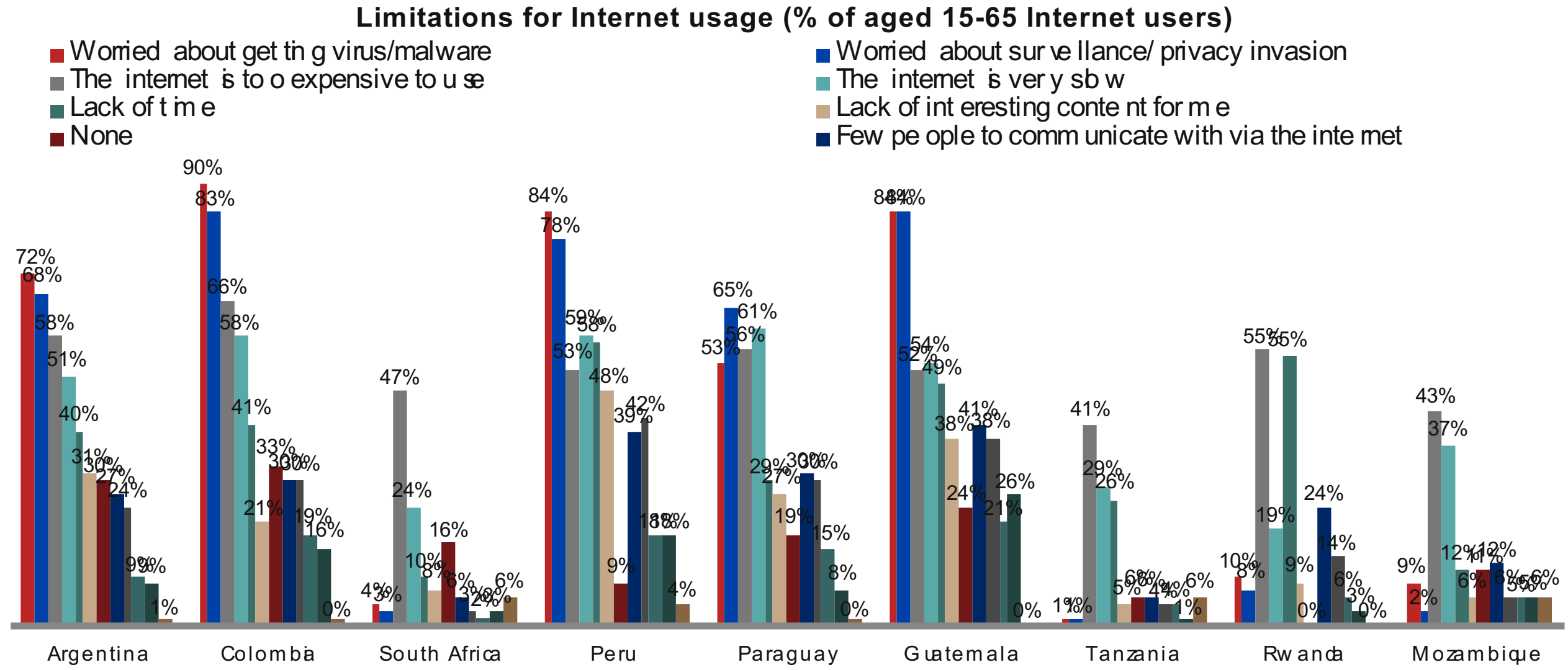
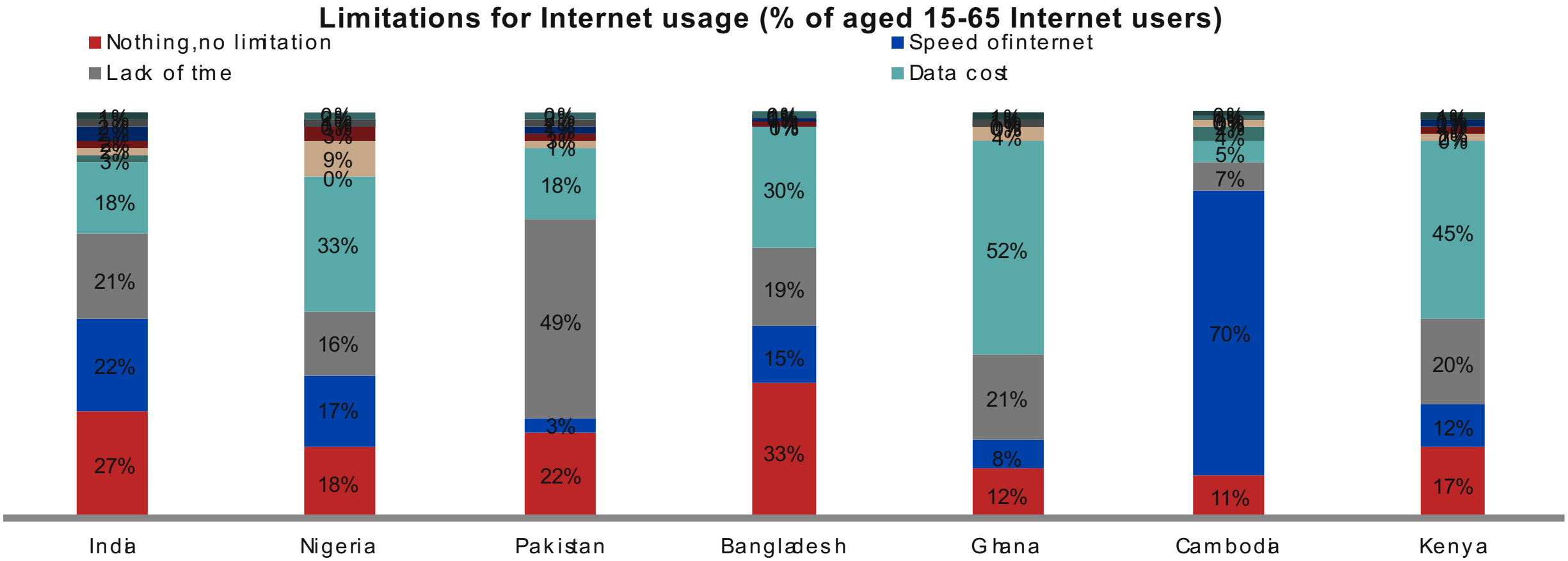
6. Barriers for MORE internet use



- *What limits more use among current users?: Cost & Speed in most African countries; malware & privacy concerns in LatA*

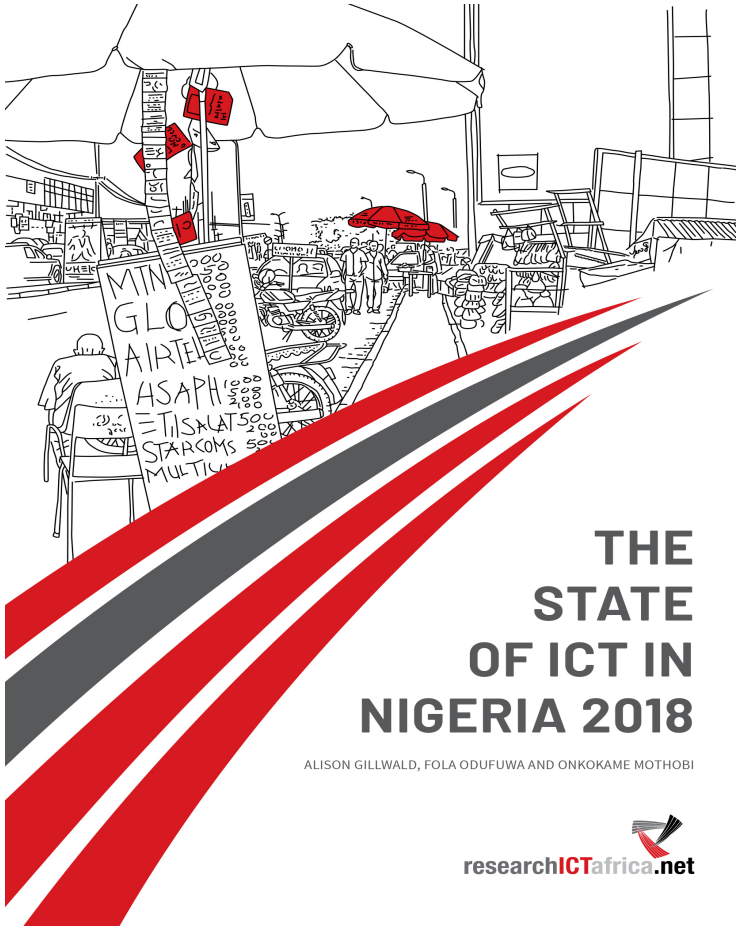
....Lack of time & data costs in Asian countries; and in the remaining African countries

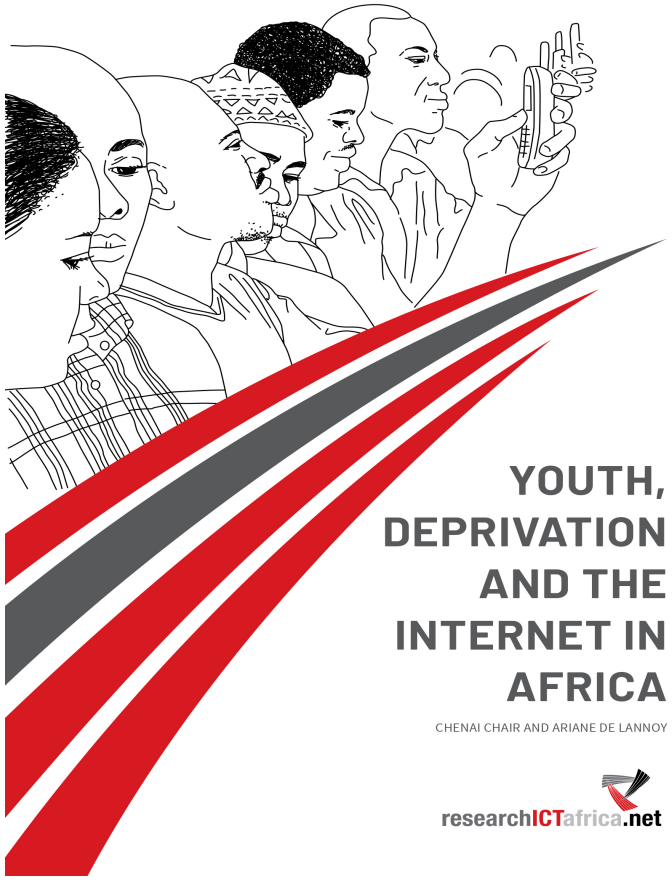


Q: What is your main limitation for your use of the internet? (Single response question)

Base	India	Nigeria	Pakistan	Bangladesh	Ghana	Cambodia	Kenya
Internet users	919	529	427	266	311	804	440

In depth assessment of access in Africa





- Sourh Africa: https://researchictafrica.net/after-access-south-africa-state -of-ict-2017-south-africa-report_04/
- Nigeria: https://researchictafrica.net/after-access-nigeria-state-of-ict-2017/
- Youth: https://researchictafrica.net/after-access-survey papers/2018/After_Access:_youth_and_digital_inequality_in_Africa.pdf

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Digital Paradox

- More people connected greater digital inequality
- Determinants of gender inequality - education and income
- Cultural factors not revealed directly by quantitative data
- Intersectionality
- Reduce digital inequality – structural inequality
- Short term strategies

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Recommendations

Long terms solutions lie in demand stimulation, short term things can be done…

- Reduce secondary taxes, make services more affordable drive usage, more profitable, greater company an general taxes, reinvest in network extension, improve quality more favourable conditions for digital economy
- Scrap USO and enable secondary spectrum use and community, micro networks
- **remove all excise duties** on feature and entry level smart phones
- adopt wider digital economy approach – create **open data, access to big data**
- enable **public and private extension of free public Wi-F**i to towns and rural with the connection of all public buildings;

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