

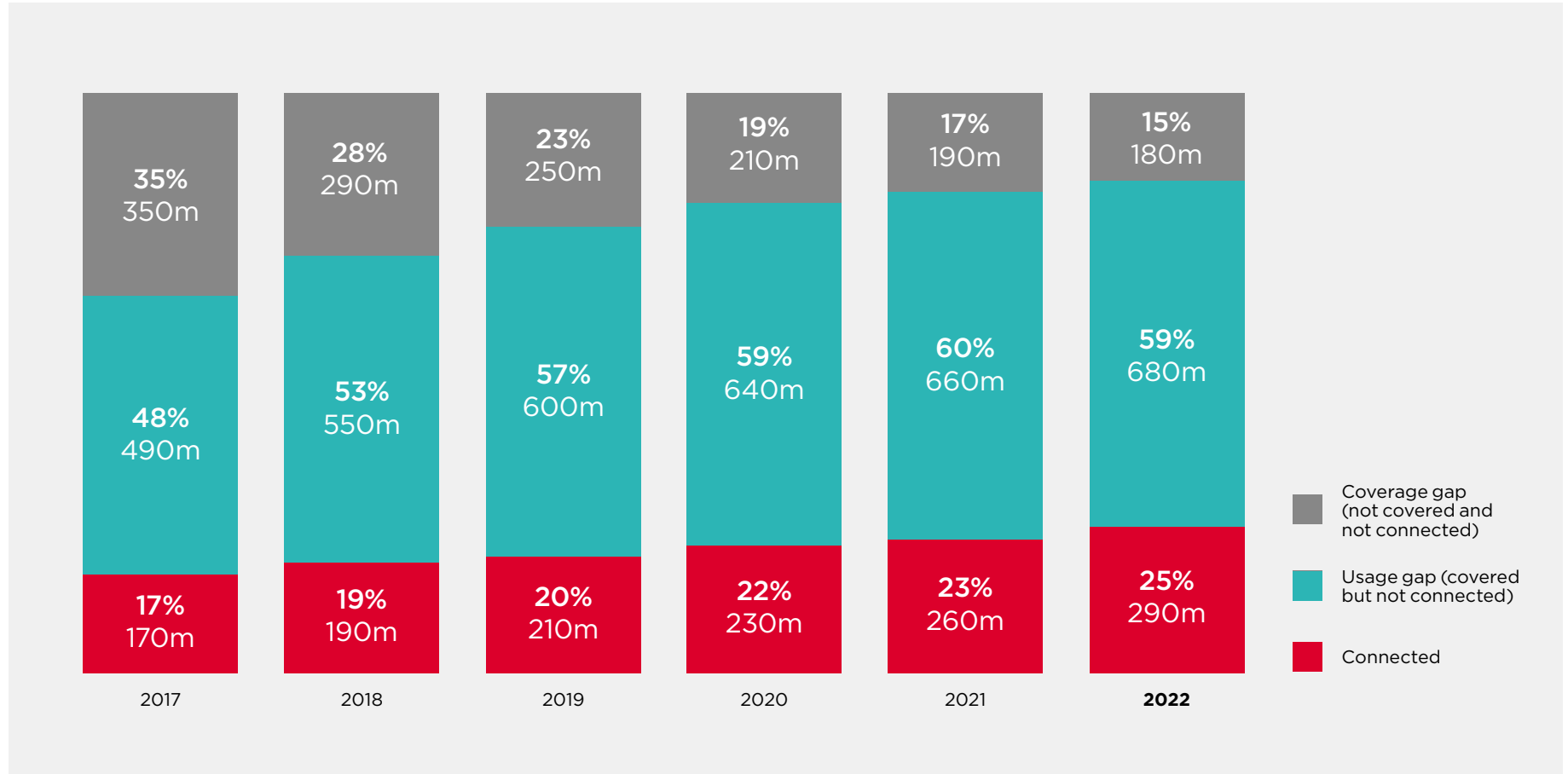


The State of Mobile Internet Connectivity 2023

Sub-Saharan Africa key trends

Mobile internet connectivity in Sub-Saharan Africa

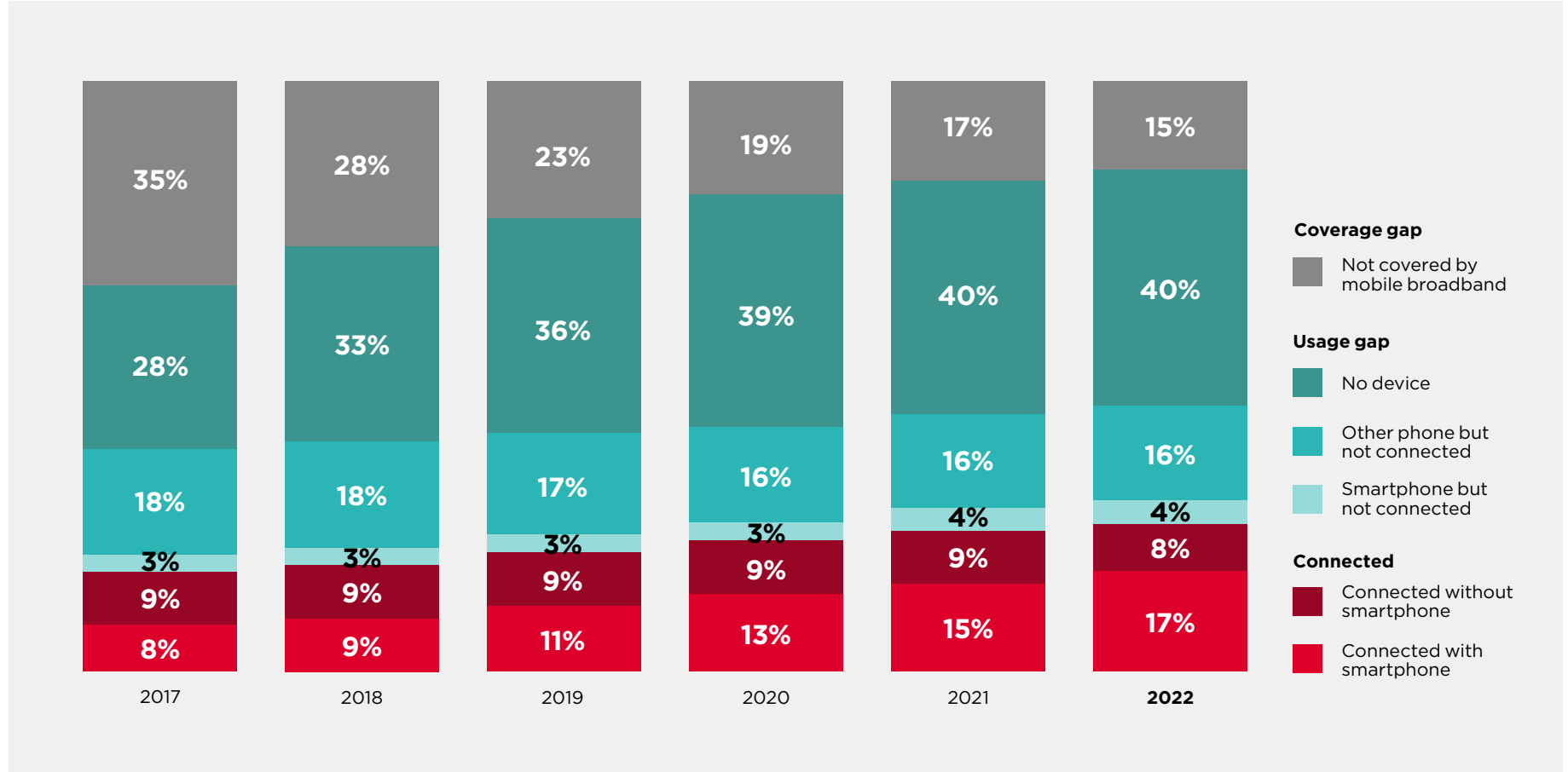
- A quarter of the population now uses mobile internet in Sub-Saharan Africa, with an increase of almost 30 million new mobile internet users in 2022.
- As a result of continuing mobile broadband investments in the region, the number of people not covered by mobile broadband has continued to reduce.
- Despite this progress, Sub-Saharan Africa still has the largest coverage and usage gaps.
- Regional patterns mask disparities within and between regions. In 2022, mobile internet adoption ranged from 33% in Southern Africa to 17% in Central Africa.



Source: GSMA Intelligence. 'Usage gap' refers to populations that live within the footprint of a mobile broadband network but who are not using mobile internet. 'Coverage gap' refers to populations that do not live within the footprint of a mobile broadband network (3G or above). NB: totals may not add up to 100% due to rounding.

Mobile internet connectivity breakdown in Sub-Saharan Africa

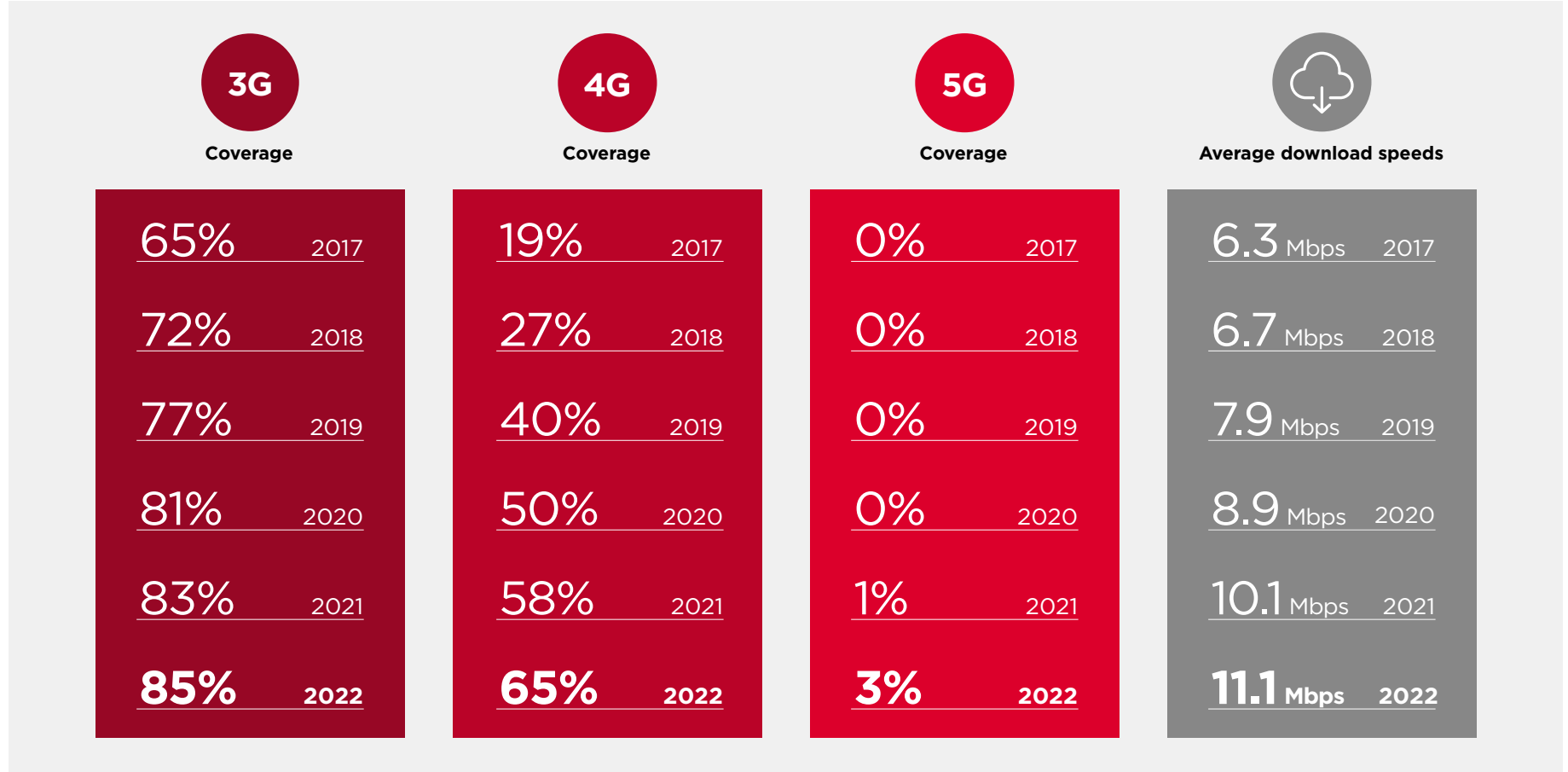
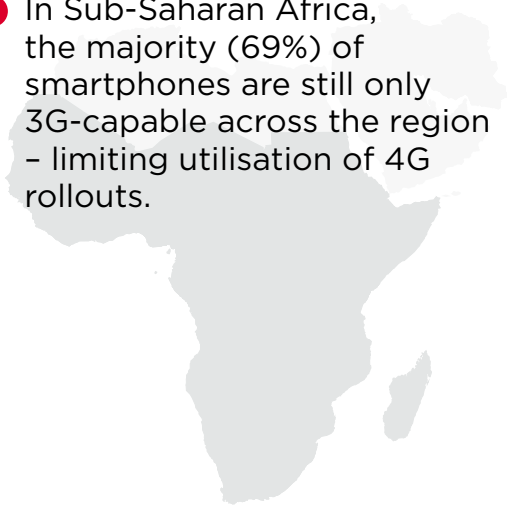
- ➔ By the end of 2022, 17% of the population in Sub-Saharan Africa were using mobile internet on a smartphone.
- ➔ 40% of the population live within mobile broadband network coverage but do not yet have a device.



Source: GSMA Intelligence. 'Usage gap' refers to populations that live within the footprint of a mobile broadband network but who are not using mobile internet. 'Coverage gap' refers to populations that do not live within the footprint of a mobile broadband network (3G or above). NB: totals may not add up to 100% due to rounding.

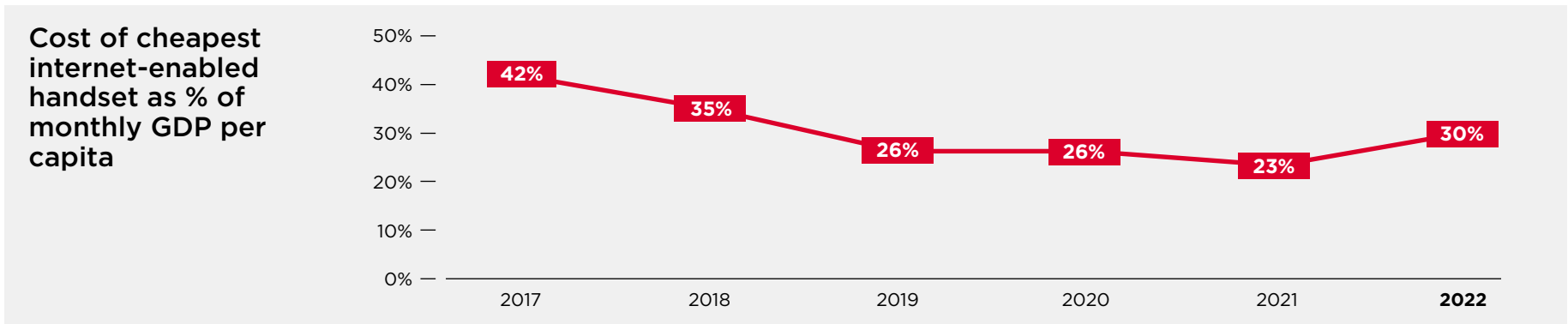
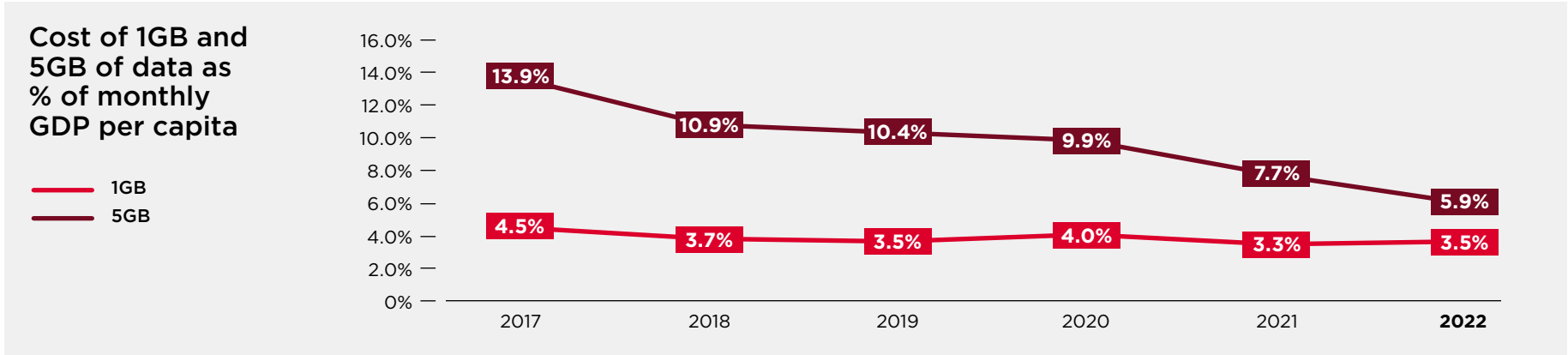
Coverage and download speeds in Sub-Saharan Africa

- In 2022, more than half of global 4G network expansion was in Sub-Saharan Africa, where it increased from 58% in 2021 to 65% in 2022.
- Average download speeds have nearly doubled over the course of 2017 to 2022, but remain the lowest of all regions.
- In Sub-Saharan Africa, the majority (69%) of smartphones are still only 3G-capable across the region - limiting utilisation of 4G rollouts.



Affordability of data plans and cheapest internet-enabled handsets across low- and middle-income countries in Sub-Saharan Africa

- ➔ Overall, the affordability for 5GB has improved substantially in Sub-Saharan Africa. However, it is still the region with the least affordable data on average. More than half of the countries have yet to meet the UN Broadband Commission’s target of 1GB at less than 2% of average monthly income.
- ➔ From 2017 to 2021, there had been a significant improvement in the affordability of entry level internet-enabled handsets. However, in 2022, affordability worsened significantly.

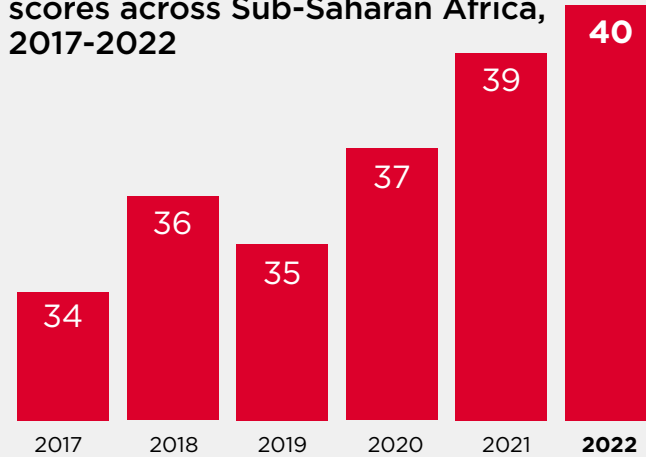


NB: Percentages are rounded

Sub-Saharan Africa Mobile Connectivity Index scores

The **Mobile Connectivity Index (MCI)** measures the performance of 170 countries against the four key enablers of mobile internet adoption: infrastructure; affordability; consumer readiness; and content and services. The index is built up through 32 indicators feeding into 11 dimensions that are aggregated to give a score for four enablers. Scores fall within a range of 0-100.

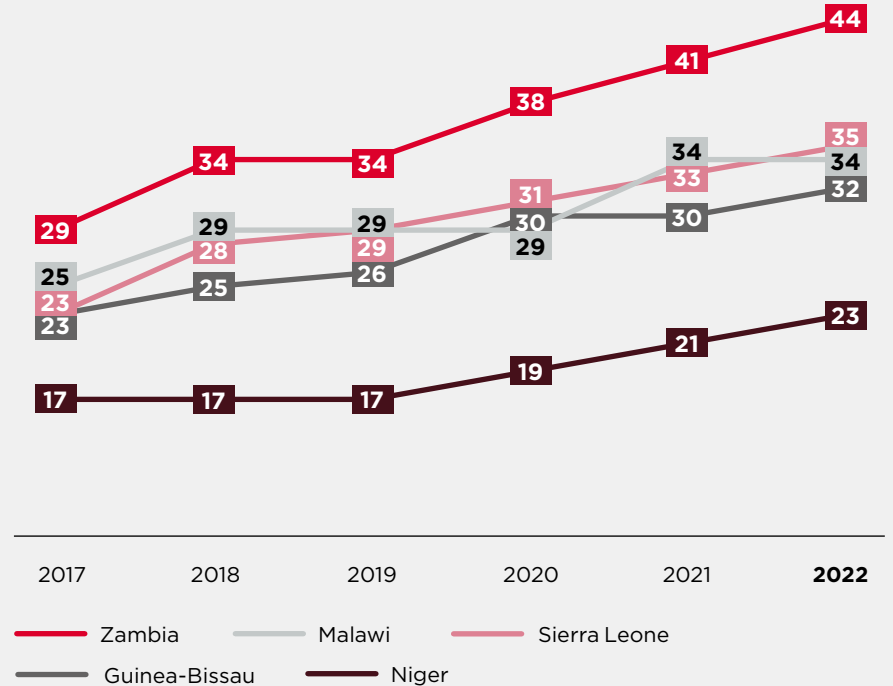
Average Mobile Connectivity Index scores across Sub-Saharan Africa, 2017-2022



Countries at the top of the MCI in Sub-Saharan Africa in 2022

1	Mauritius
2	South Africa
3	Botswana
4	Cabo Verde
5	Gabon

MCI scores of most improved countries in Sub-Saharan Africa between 2017 and 2022



<https://www.mobileconnectivityindex.com/>

GSMA

The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

We invite you to find out more at gsma.com
Follow the GSMA on Twitter/X: [@GSMA](https://twitter.com/GSMA)

This material has been funded by UK Aid from the UK Government; however, the views expressed do not necessarily reflect the UK Government's official policies.



GSMA Connected Society

The Connected Society programme works with the mobile industry, technology companies, the development community and governments to increase access to and adoption of mobile internet, focusing on underserved population groups in developing markets.

For more information, please visit
www.gsma.com/connectedsociety

To get in touch with the Connected Society team, please email connectedsociety@gsma.com

This document has been financed by the Swedish International Development Cooperation Agency, Sida. Sida does not necessarily share the views expressed in this material. Responsibility for its contents rests entirely with the author.



GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide — from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third-party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself. Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

www.gsmainelligence.com
info@gsmainelligence.com

GSMA Head Office
1 Angel Lane
London
EC4R 3AB
United Kingdom
Tel: +44 (0)20 7356 0600
Fax: +44 (0)20 7356 0601