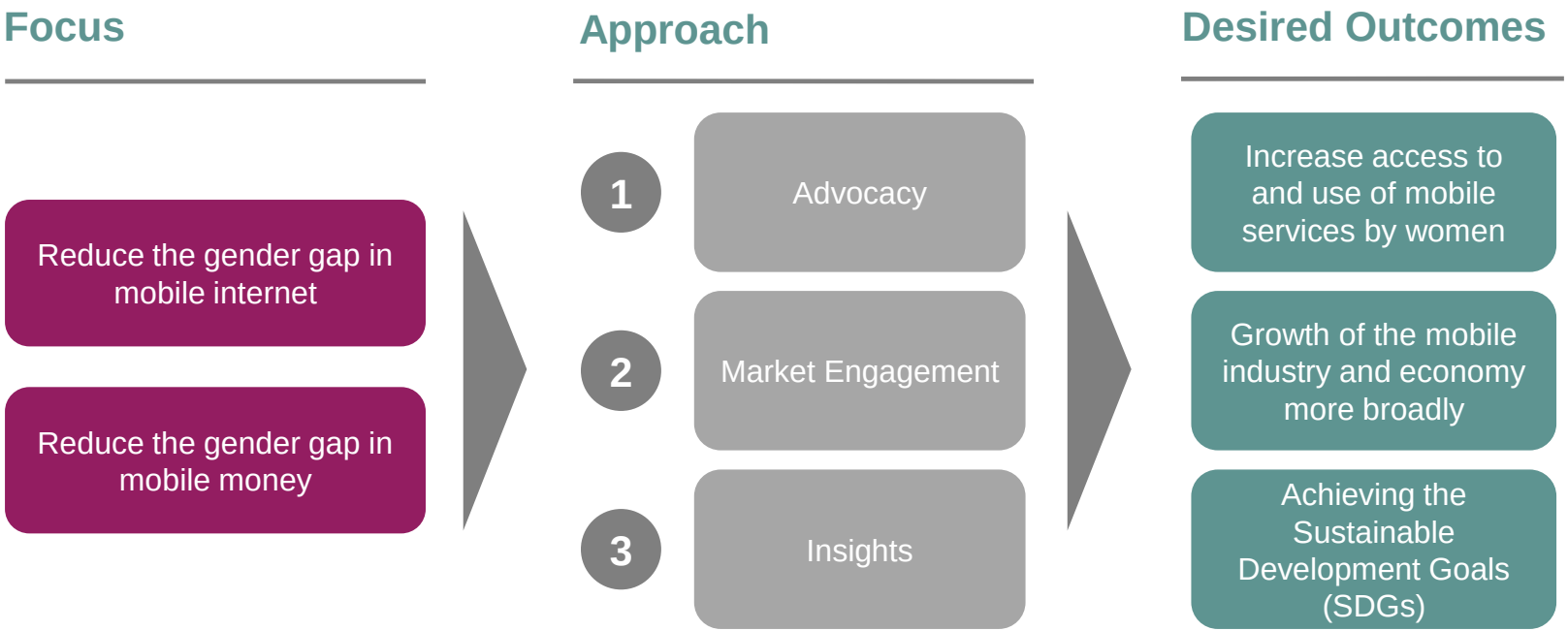


Connected Women

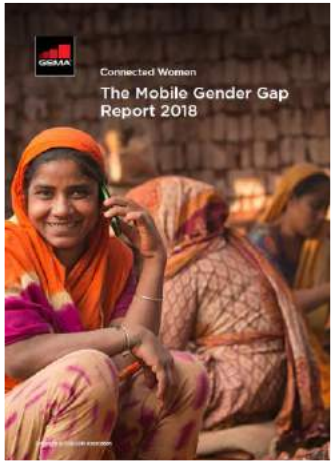
The Mobile Gender Gap Report 2020

Oliver Rowntree,
Senior Insights Manager

GSMA Connected Women: Supporting our partners to reach 50m additional women with mobile



The Mobile Gender Gap Report series



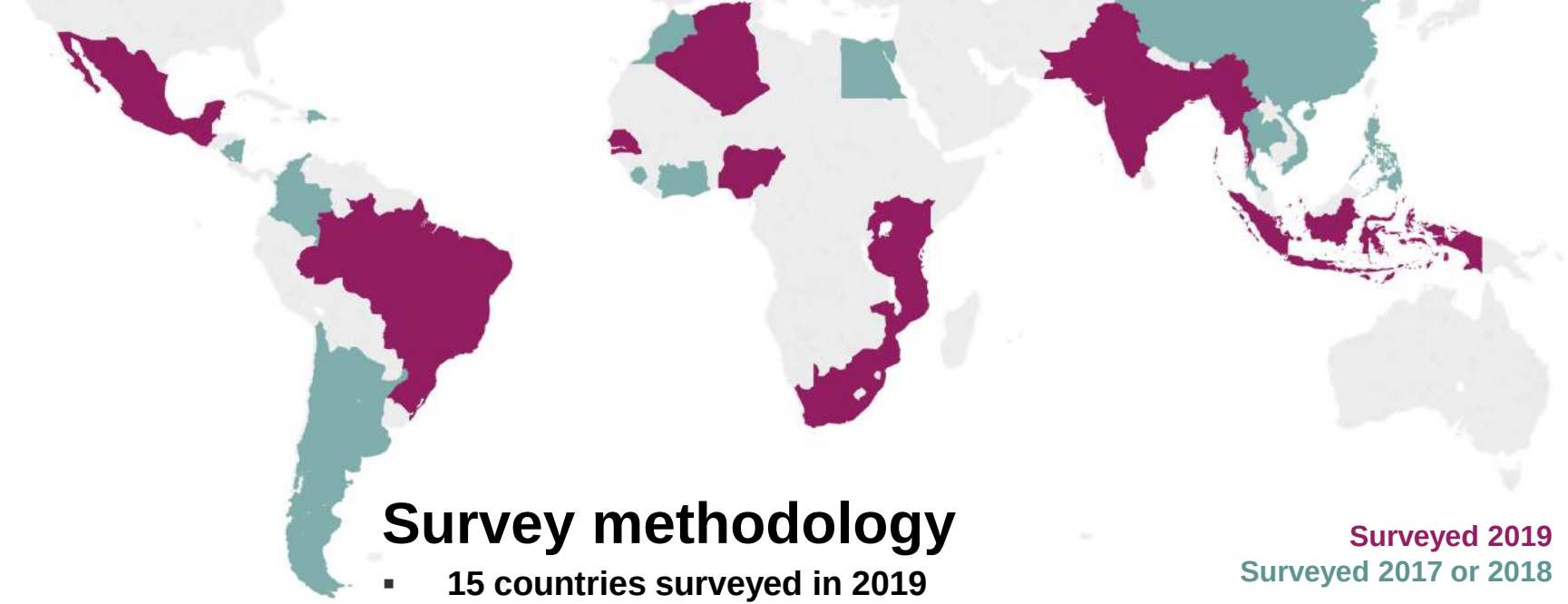




2018 **2019** **2020**

Objectives:

- Sizing and tracking the mobile gender gap
- Understanding gender differences in usage of mobile
- Identifying the barriers to women's equal access
- Informing action to close the gender gap



Survey methodology

Surveyed 2019
Surveyed 2017 or 2018

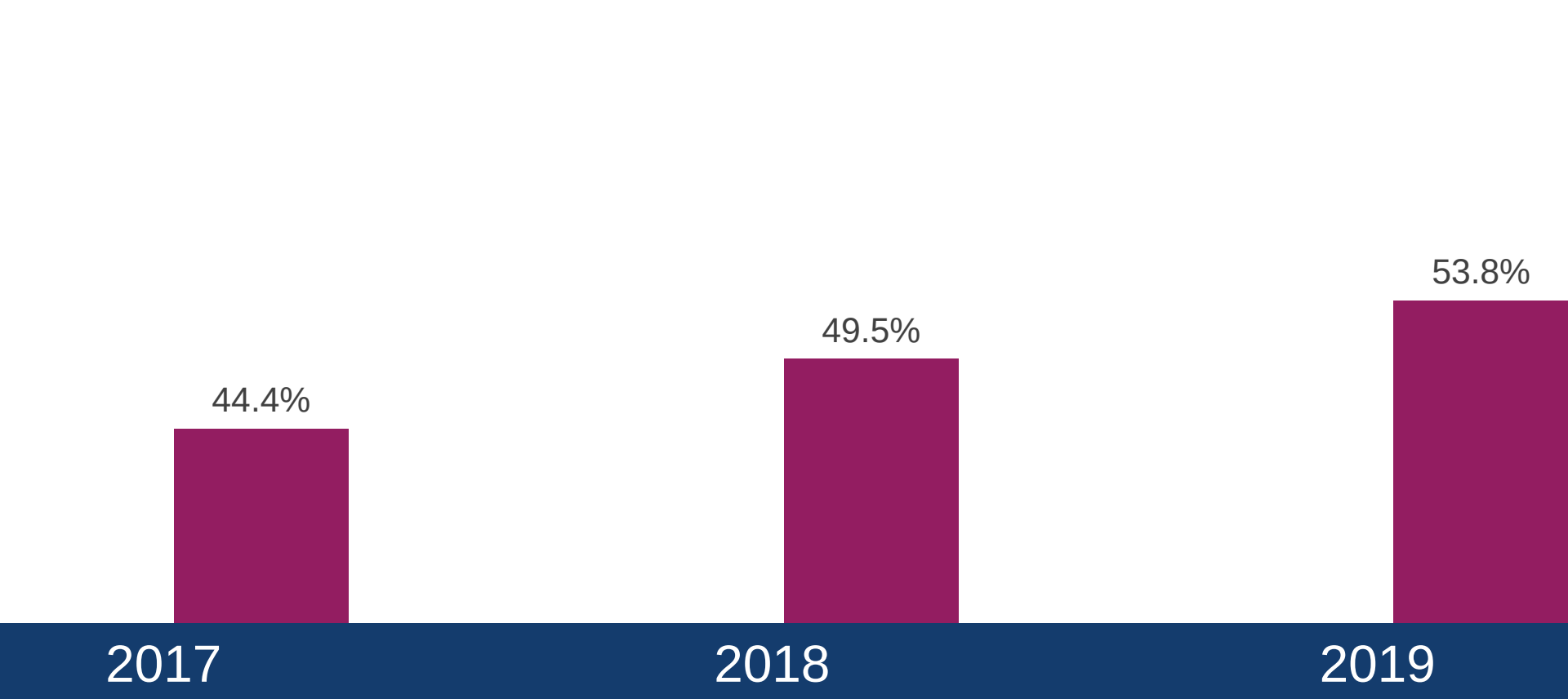
- **15 countries surveyed in 2019**
- Nationally representative sample
- Adults aged 18+
- At least 1000 individual face-to-face interviews per country
- Covering **75% of the adult population** in low- and middle-income countries, across three survey years
- Extrapolation model used to estimate values for non-surveyed countries

Data from the GSMA Intelligence Consumer Survey 2017, 2018 and 2019

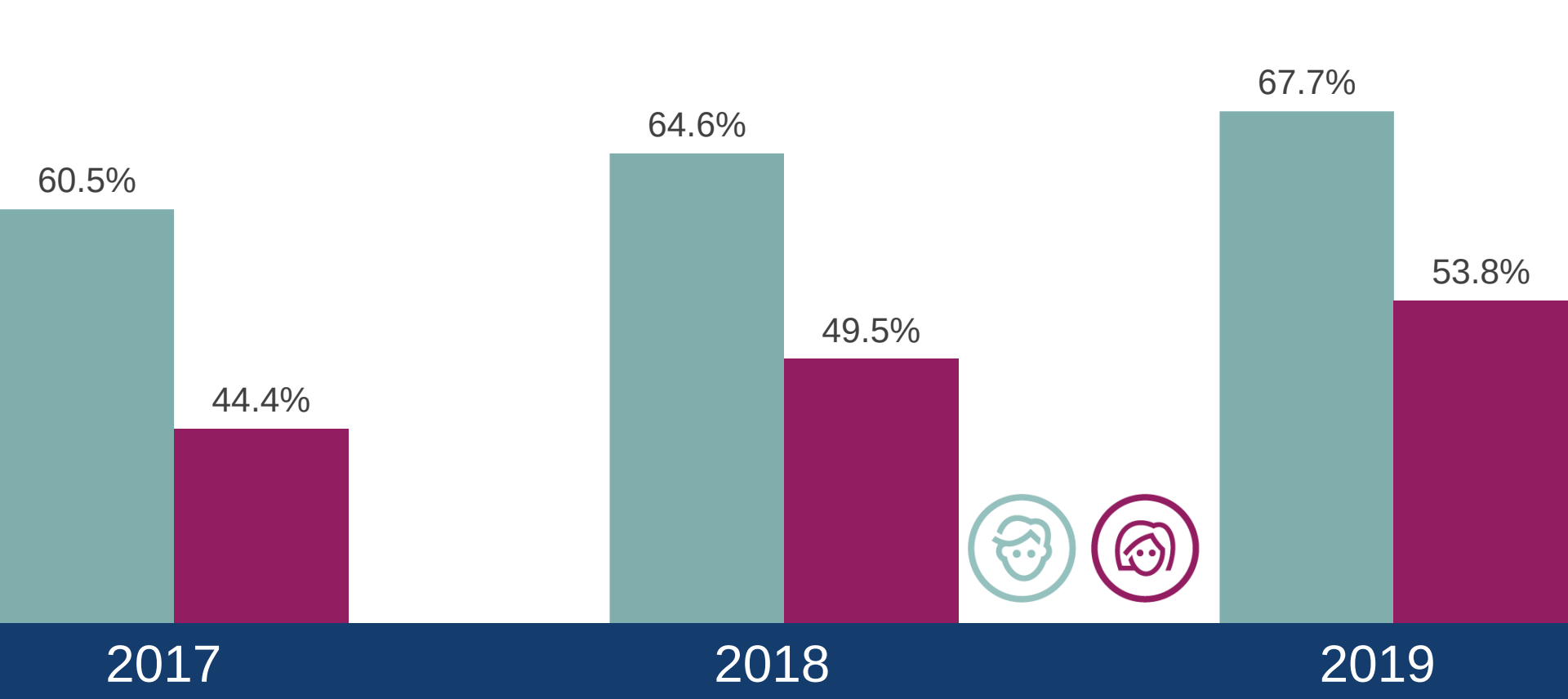


Research Findings

Over half of women in low- and middle-income countries (LMICs) now use mobile internet



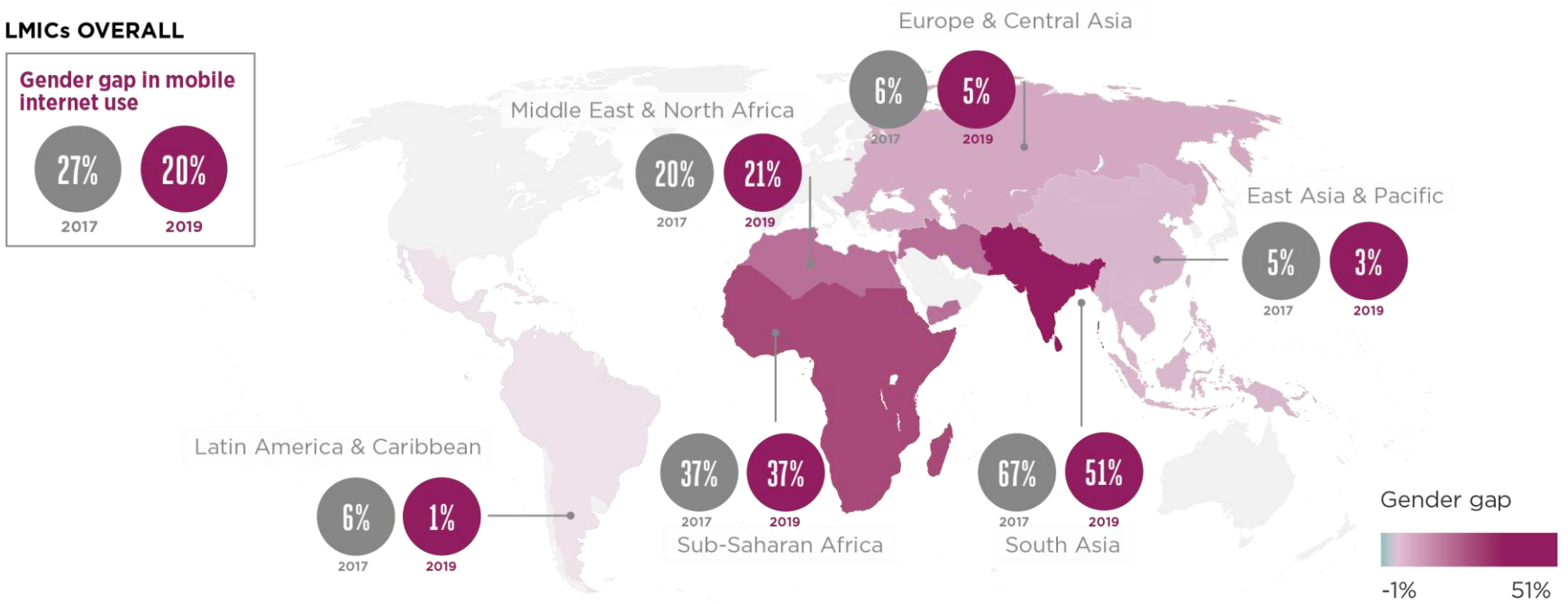
But male usage levels remain substantially higher



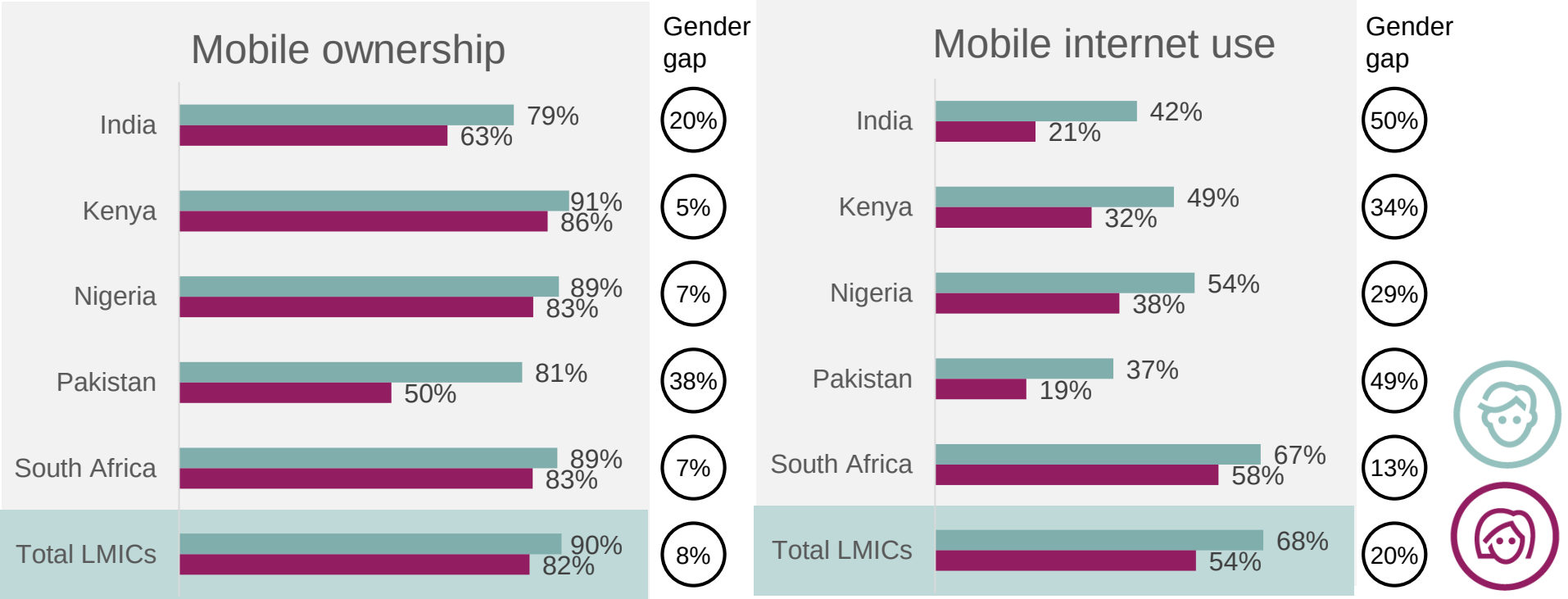
Though the mobile internet gender gap remains wide, it has reduced substantially, driven by South Asia

Gender gap in mobile internet use in low- and middle-income countries, by region

Base: Total adult population



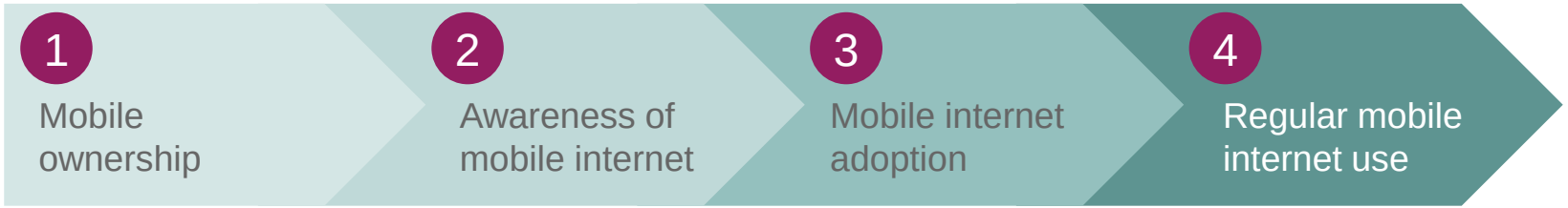
Country-level digital gender gaps vary – but are consistently wider for mobile internet than mobile ownership





How is women's digital inclusion changing?

The mobile internet user journey



Barriers by stage of the user journey



	Women	Men
1	Affordability	Affordability
2	Literacy and skills	Literacy and skills
3	Safety and security	Safety and security
4	Family disapproval ⬆	Relevance

	Women	Men
1	Literacy and skills	Literacy and skills
2	Affordability	Affordability
3	Safety and security ⬆	Safety and security ⬆
4	Relevance ⬇	Relevance ⬇

Awareness of mobile internet is growing quickly, and becoming more equal among men and women

Mobile internet awareness by country, 2017 and 2019

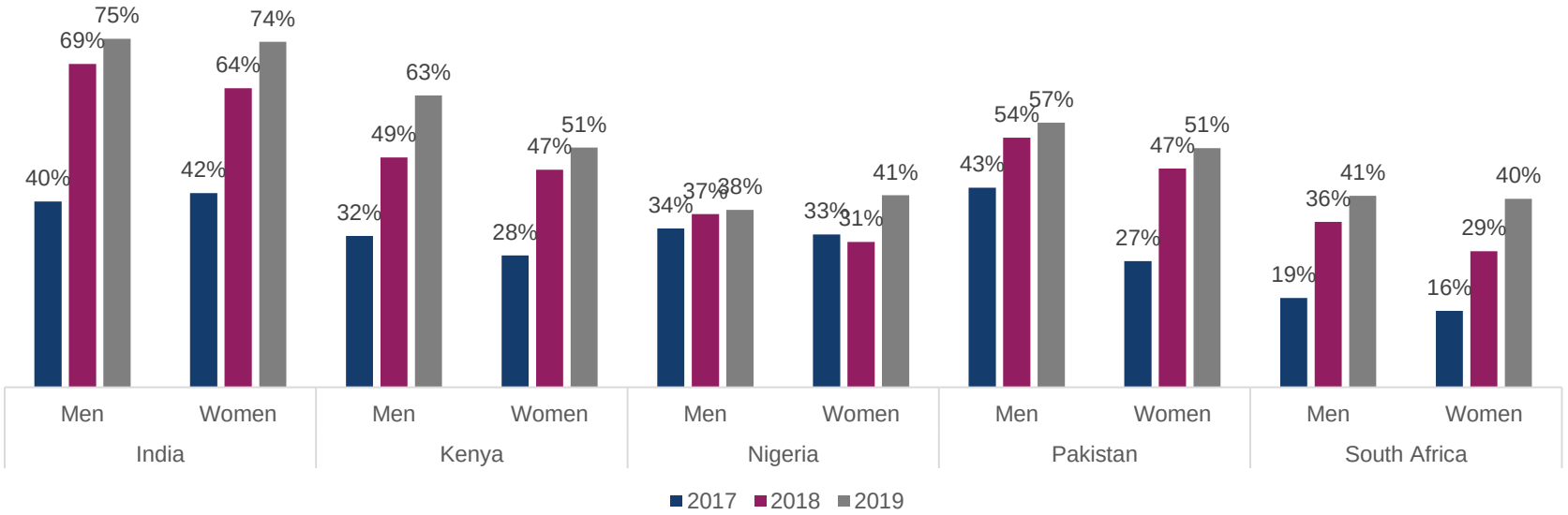
Percentage of total population



Women’s video consumption is growing rapidly

Growth in monthly video consumption on mobile in selected countries, by gender

Percentage of mobile internet users



Women tend to have substantially lower levels of smartphone ownership

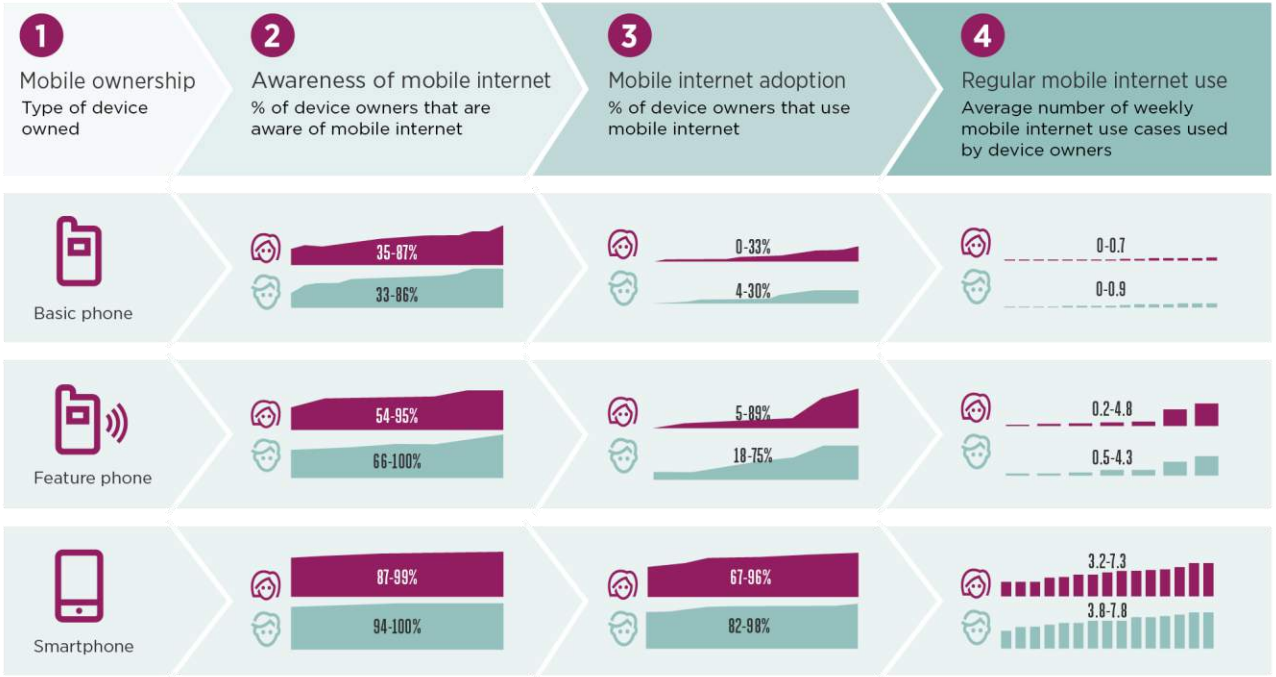
Share of population by type of handset owned

Percentage of total population



Smartphone owners are more likely to use a wider range mobile services

Mobile internet user journey by handset type



KEY

Distribution of country-level results, lowest to highest

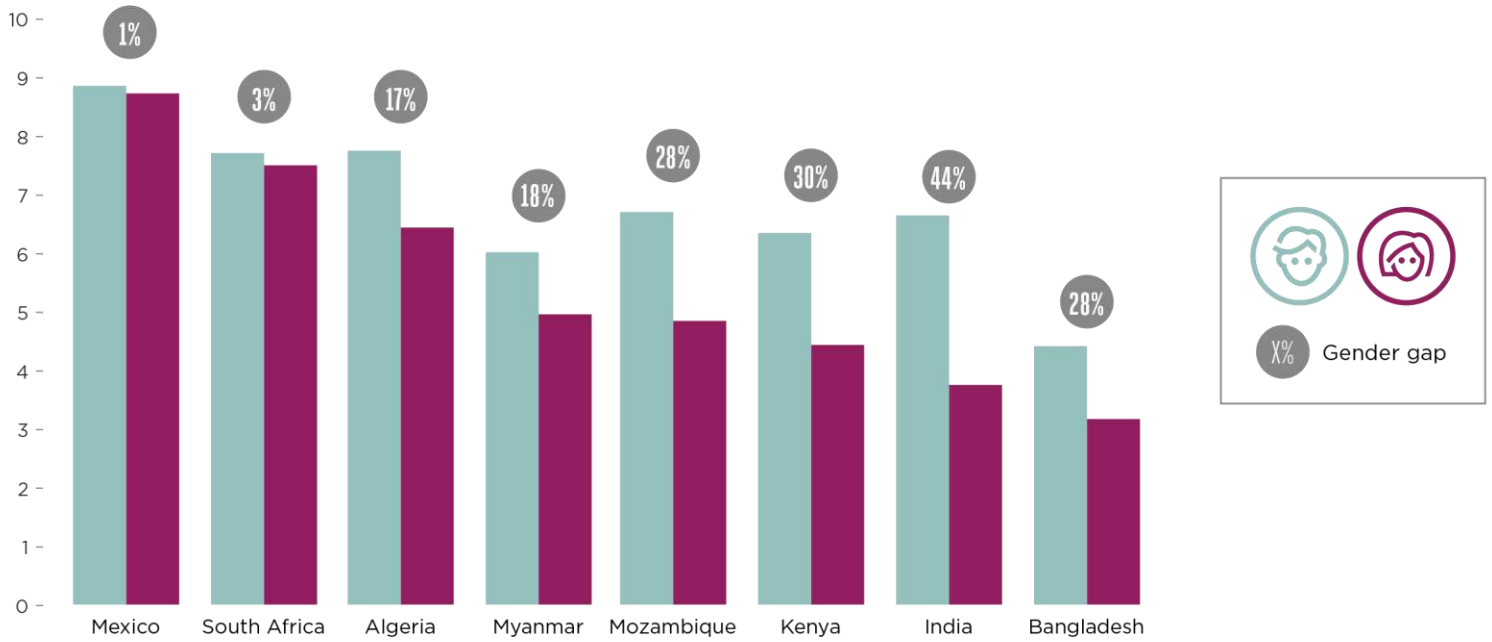
The lowest and highest proportion of male (or female) device type owners reaching this stage of the user journey, across countries

X-Y%

The lowest and highest average number of mobile internet use cases, across countries

Female mobile owners tend to use a less diverse range of mobile services, on average

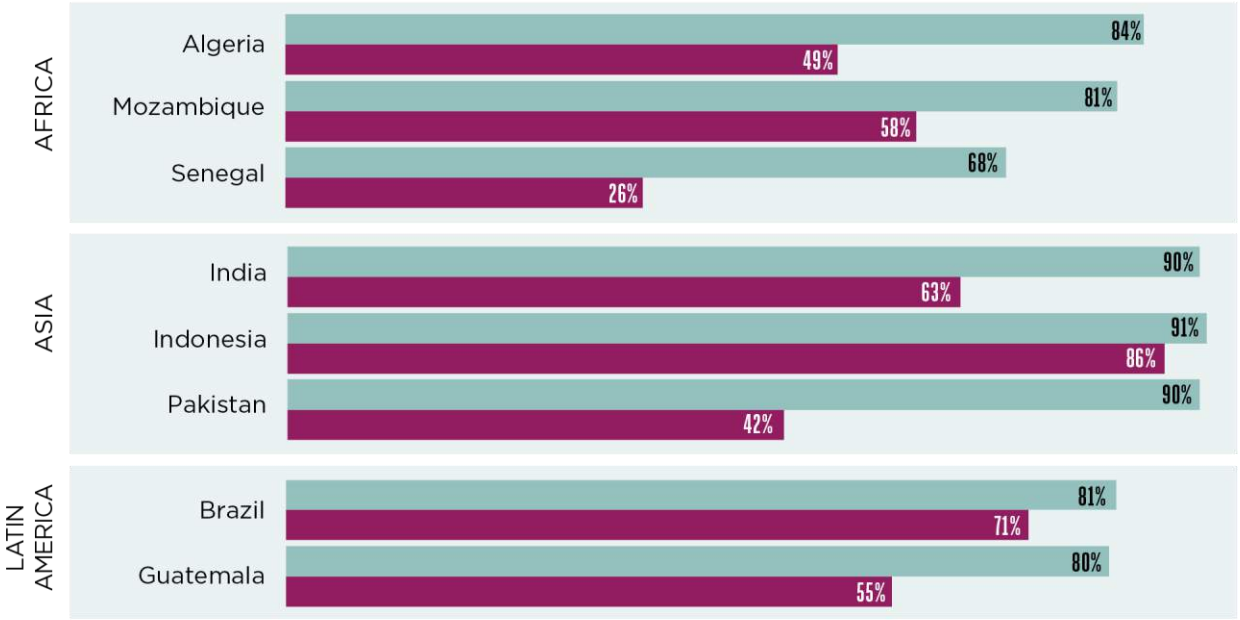
Average number of use cases per week among male and female mobile owners



Women are much less likely than men to make decisions about smartphone acquisition

Share of smartphone owners who purchased their own device, by gender

Percentage of smartphone owners





The importance of closing the mobile gender gap

The benefits of mobile ownership for women

% of female mobile owners who agreed that owning a mobile phone helps them with the following:

78%	Helps them in their day-to-day work, studies or household chores
76%	Mobile makes them feel safer
82%	Provides access to useful information that is otherwise hard to get

Median value across 15 surveyed countries

Closing the mobile gender gap presents a social, commercial and economic opportunity

$140 bn
opportunity for the mobile industry

$700 bn
in additional GDP growth



Key takeaways

1	54% of women in LMICs now use mobile internet
2	However, women remain 20% less likely than men to use mobile internet
3	This mobile internet gender gap is closing quickly, driven by South Asia
4	Women’s awareness and perception of relevance of mobile internet is increasing
5	Cost and digital skills remain key barriers to mobile ownership & mobile internet use
6	Video consumption is growing extremely rapidly among men and women
7	But lower levels of smartphone ownership limit women’s use of mobile services
8	Mobile ownership helps women feel safer and more informed

Further action is needed to close the mobile gender gap

Understand and address women's needs and barriers, and consider the effect of social norms
Involve women users in the design and implementation of products, services and policies
Improve the quality and availability of gender-disaggregated data, and set gender-equity targets

Barrier:	Example recommendation:
Affordability	Support industry to lower the up-front cost of mobile handsets at point of purchase
Literacy and skills	Provide training to women and girls to improve digital skills, including in schools
Safety and security	Develop applications, services and other measures to help women feel safer online
Relevance	Communicate relevance of mobile for women's day-to-day lives, including providing access to financial services
Accessibility	Ensure internet services and operating systems are available in local languages

Any questions?



See the full report at: **gsma.com/r/gender-gap**

Sign up for the Connected Women newsletter

Contact the author: orowntree@gsma.com