THE STATE OF MOBILE INTERNET CONNECTIVITY 2026

GSMA Mobile for Development

M4D

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.

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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/connected-society

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

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Author: Matthew Shanahan
Contributors: Harry Aquije Ballon, Kalvin Bahia, Evie Gilbert, Abi Gleek, Rosie Leary, Claire Sibthorpe, Melle Tiel Groenestege
External contributors: Jan Stryjak (Counterpoint Research)
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WHY MOBILE INTERNET CONNECTIVITY MATTERS

Mobile now connects 59% of the global population to the internet through their own device, accounting for 84% of broadband connections in 2025.[1] It remains the primary – in many cases, only – means of accessing the internet in low- and middle-income countries (LMICs). However, 3.4 billion people still do not use mobile internet, and significant digital divides persist.

Those most likely to be digitally excluded – including women, rural populations, persons with disabilities and those with lower incomes or levels of education – are also those with the most to gain from connectivity. As digitalisation accelerates and technologies such as AI reshape economies and societies, it is imperative that the unconnected in LMICs are not left further behind.

Mobile internet enables access to essential services (including healthcare, education, financial services and e-commerce), supports income generation and is associated with poverty reduction[2, 3] and improved livelihoods[4] and wellbeing.[5, 6] Connectivity is also integral to achieving the UN Sustainable Development Goals.

Of the global population, 38% live within mobile broadband coverage but do not use it, and 3% remain without coverage. Ensuring universal access to – and meaningful use of – mobile internet remains an economic imperative and development priority. GSMA analysis estimates that during 2023–2030 closing the usage gap would generate $3.5 trillion in additional GDP. Of this, just over $1.3 trillion is attributable to closing the gender gap in LMICs.[7] Concerted efforts are required to ensure equitable access to and use of mobile internet, and to enable all populations to realise its benefits.

1. International Telecommunication Union (ITU) estimates for 2025.
2. The poverty reduction effects of mobile broadband in Africa: Evidence from Nigeria, World Bank, GSMA, 2020
3. Mobile Broadband Internet, Poverty and Labor Outcomes in Tanzania, Bahia, K. et al., 2021
4. See Spotlight: Perceived impact of mobile internet on livelihoods and income in The Mobile Gender Gap Report 2026, GSMA, 2026
5. Mobile Internet Use, Well-being and Gender: Understanding the Links, GSMA, 2022; and The Impact of Mobile and Internet Technology on Women's Wellbeing Around the World, GSMA, 2019
6. The Impact of Mobile on People's Happiness and Well-Being, GSMA, 2018
7. The State of Mobile Internet Connectivity Report 2024, GSMA, 2024

METHODOLOGY

The findings of this report are based on the GSMA Consumer Survey, the GSMA Mobile Connectivity Index (MCI)[8] and a range of industry reports. The GSMA Consumer Survey is a face-to-face, nationally representative survey carried out each year since 2017 to understand access to – and use of – mobile and mobile internet in LMICs. In 2025, it included more than 16,200 respondents from 14 LMICs.[9]

The MCI measures the key enablers of mobile internet connectivity across 174 countries (representing 99% of the global population) against 32 indicators for 2014–2025. The indicators are grouped into four overarching enablers: infrastructure, affordability, consumer readiness, and content and services. Together, the data sources provide objective, quantitative metrics to track the key enablers of mobile internet adoption and usage, as well as insights into what consumers use mobile internet for or what prevents them from using it.[10]

8. The web tool is available at http://www.mobileconnectivityindex.com/
9. Bangladesh, Egypt, Ethiopia, Ghana, Guatemala, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Senegal, Sri Lanka and Uganda.
10. For further details on the methodology used for the MCI, see Mobile Connectivity Index Methodology.

KEY FINDINGS

KEY FINDINGS

1. **4.8 billion people (59% of the global population) now use mobile internet on their own device – but growth in mobile internet subscribers has slowed, with low growth rates across all regions.** Approximately 160 million people began using mobile internet on their own devices in 2025, down from 190 million the year before. A further 650 million people (equivalent to 8% of the global population) use mobile internet exclusively through borrowed or shared devices.

2. **There remain 3.4 billion people who do not use mobile internet. More than 90% of these live in areas with mobile broadband coverage.**

3. **3% of the world's population (270 million people) live in areas not covered by a mobile broadband network.** This reflects an increase in mobile internet coverage to approximately 40 million additional people over the last year.

4. **In total, 38% of the world's population (3.1 billion people) live in areas covered by mobile broadband but do not use it – the usage gap.** The majority of the usage gap (70%) comprises those who do not own a device. However, the percentage of those in the usage gap who do not own a device is significantly lower when focusing on adults aged 18 and over. Only around a third of those in the adult usage gap do not own a device.

5. **Women represent the majority (58%) of the adult usage gap in LMICs.** Women making up the majority also holds true across all regions worldwide and underscores the importance of gender-sensitive approaches in interventions aimed at expanding mobile internet access.

6. **Connectivity varies significantly by and within regions and countries – 92% of the unconnected live in LMICs.** Connectivity levels vary considerably – not only between HICs and LMICs; LDCs, LLDCs and SIDS lag other LMICs substantially too. In LMICs, adults in rural areas are 28% less likely than those living in urban areas to use mobile internet, while women are 12% less likely than men to use mobile internet.

7. **At the end of 2025, 4.6 billion people were using their own smartphone to access mobile internet, equivalent to 56% of the global population.** This represents an increase of approximately 200 million – a slower pace of growth than the increase of 250 million in 2024. The proportion of mobile internet subscribers accessing the internet on feature phones and 3G smartphones continues to decline but remains significant in several regions.

8. **5G coverage has continued to expand rapidly, reaching an additional 690 million people in 2025.** 5G now covers 57% of the global population (4.7 billion people). 4G continues to grow, with coverage now at 94%.

9. **Global download speeds increased by 22% (or 14 Mbps) in 2025. Data usage per connection continues to rise across LMICs, though the gap versus HICs persists.** Average download speeds in HICs are approximately 3.5 times higher and average upload speeds approximately 1.5 times higher than in LMICs. Driven primarily by the ongoing migration to 4G and 5G networks, average data traffic per connection reached 13.5 GB per month globally in 2025, up from 12 GB in 2024.

10. **Although an average of 83% of mobile internet users across the countries surveyed report daily use, many engage in only one or two types of activity.** Frequency and diversity of use vary considerably across and within countries, with women and rural respondents consistently using mobile internet less often and for a narrower range of activities than men and urban counterparts.

11. **Awareness is high in most countries surveyed; the majority of countries surveyed have awareness levels of 75% of the population or more.** However, in some countries, awareness remains a significant barrier to mobile internet adoption.

12. **For those already aware of mobile internet, the top reported barriers to adoption continue to be affordability (primarily of handsets) and literacy & digital skills.**

13. **Barriers to greater use of mobile internet differ from those to adoption and vary considerably by country. Safety and security concerns, data affordability and connectivity experience become more commonly reported for greater use.**

14. **Retail prices of entry-level, internet-enabled devices are expected to dramatically rise due to increases in memory cost.** These handsets are already unaffordable to many, especially those on lower incomes and women. By the end of 2025, across LMICs, the cost of an entry-level, internet-enabled handset represented 44% of average monthly income for the poorest 20%. While affordability varies substantially by region, reducing the entry-level, internet-enabled device cost to $20–30 could make devices affordable to 1.6–2.2 billion people. Given the cost increases, achieving such low device prices will prove increasingly challenging.

15. **In 2025, the affordability of 1 GB of data improved versus 2024, and remained unchanged for 5 GB and 20 GB.**

GLOBAL KEY FINDINGS

CONNECTED:

59%

of the world's population

4.8 BILLION PEOPLE

are now using mobile internet – but growth rates have slowed

COVERAGE GAP:

3%

of the world's population

270 MILLION PEOPLE

are still not covered by mobile broadband

USAGE GAP:

38%

of the world's population

3.1 BILLION PEOPLE

live within the footprint of a mobile broadband network but are not using it

Women represent the majority of the adult usage gap in LMICs

58%

KEY FINDINGS IN LOW- AND MIDDLE-INCOME COUNTRIES

THE TOP BARRIERS

to mobile internet adoption

1. AFFORDABILITY
   PARTICULARLY OF HANDSETS
2. A LACK OF LITERACY AND DIGITAL SKILLS

THE TOP BARRIERS

to further use of mobile internet

1. SAFETY AND SECURITY
2. AFFORDABILITY
3. CONNECTIVITY EXPERIENCE

The cost of an entry-level, internet-enabled handset represented

44%

of average monthly income for the **poorest 20%**

Prices are set to rise, as AI pushes up the cost of memory

There are two ways people can be **unconnected**; either they live in an area not covered by mobile broadband, or they live in an area that is covered but they do not use mobile internet.

UNCONNECTED
(not using mobile internet)

COVERAGE GAP
Those who live in an area not covered by a mobile broadband network

USAGE GAP
Those who live within the footprint of a mobile broadband network but do not use mobile internet services

CONNECTED
(using mobile internet)

Those who use mobile internet. Our definition of "connected" only includes mobile internet subscribers and users who connect via 3G, 4G or 5G technologies.[11] This is consistent with our definition of the coverage gap (which only considers mobile broadband).

Two categories of mobile internet usage are considered:

Mobile internet subscribers are individuals who use mobile internet on a device they own or have primary use of.

Additional mobile internet users are individuals who use mobile internet on a device they do not own or have primary use of. This is either on a shared device or a device that belongs to someone else.[12] It is possible that the estimate of additional mobile internet users includes individuals who use the internet but not on a mobile device, though we expect such a segment to be small in proportion to the total number of mobile internet users.

11 2G can be used to access data but provides an extremely limited experience. It therefore does not count towards the connected estimates.

12 For further details on this category, see The State of Mobile Internet Connectivity Report 2024, GSMA, 2024

1. GLOBAL CONNECTIVITY TRENDS

Mobile devices are connecting more people to the internet than ever before. However, growth in connectivity differs across geographies and demographic groups, and significant digital divides remain. The biggest challenge is a lack of mobile internet adoption among people living in areas already covered by mobile broadband (the usage gap), rather than a lack of mobile broadband coverage (the coverage gap).

While 4.8 billion people (59% of the global population) now use mobile internet (on their own device),[13] growth in mobile internet subscribers has slowed, with around 160 million new subscribers in 2025 – down from 190 million in 2024. This continues a longer-term trend of growth slowing. Nearly all growth (90%) in 2025 came from low- and middle-income countries (LMICs), where the vast majority of the unconnected live.

More than 90% of the 3.4 billion people who still do not use mobile internet live in areas with mobile broadband coverage (the usage gap). A much smaller proportion of people live outside mobile broadband coverage (the coverage gap).

In total, 3.1 billion people (38% of the global population) do not use mobile internet despite being covered by a mobile broadband network. With mobile internet adoption continuing to outpace network expansion, this usage gap continues to shrink (see Figure 1). Analysis by the GSMA estimated that closing the usage gap would add $3.5 trillion in total additional GDP over an eight-year period. More than 90% of that benefit ($3.2 trillion) would accrue to LMICs, as they account for 92% of the unconnected.[14]

The number of people not covered by a mobile broadband network has reduced to 270 million (3% of the global population). This reflects an increase in mobile internet coverage to approximately 40 million additional people over the last year. The remaining uncovered – who live in locations that are predominantly rural, poor and sparsely populated – are the most challenging to reach.

Connected:

4.8 BILLION PEOPLE

59%

of the **global population** now use **mobile internet** (on their own device)

160 MILLION NEW SUBSCRIBERS

began using mobile internet in 2025 – down from 190 million in 2024

Usage gap:

3.1 BILLION PEOPLE

38%

of the **global population** do not use mobile internet despite being covered by a mobile broadband network

Coverage gap:

The number of people not covered by a mobile broadband network has reduced to

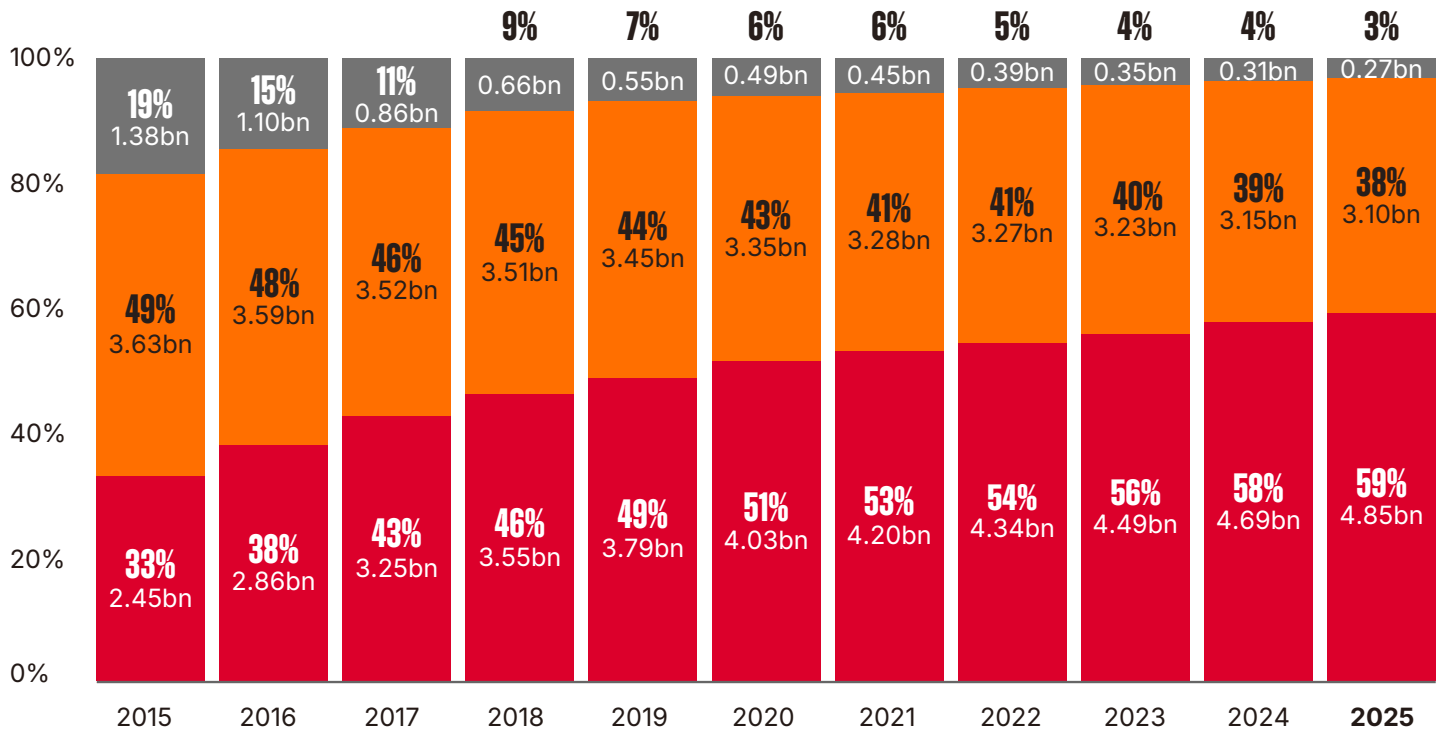
270 MILLION PEOPLE

3% **of the global population**

13 In this report, device generally refers to a mobile phone, given the vast majority of internet users in low- and middle-income countries access the internet through a mobile phone and the vast majority of users in high-income countries do so too (often in addition to other devices such as tablets, laptops and PCs).

14 The State of Mobile Internet Connectivity 2024, GSMA, 2024

Figure 1: Global mobile internet connectivity, 2015–2025

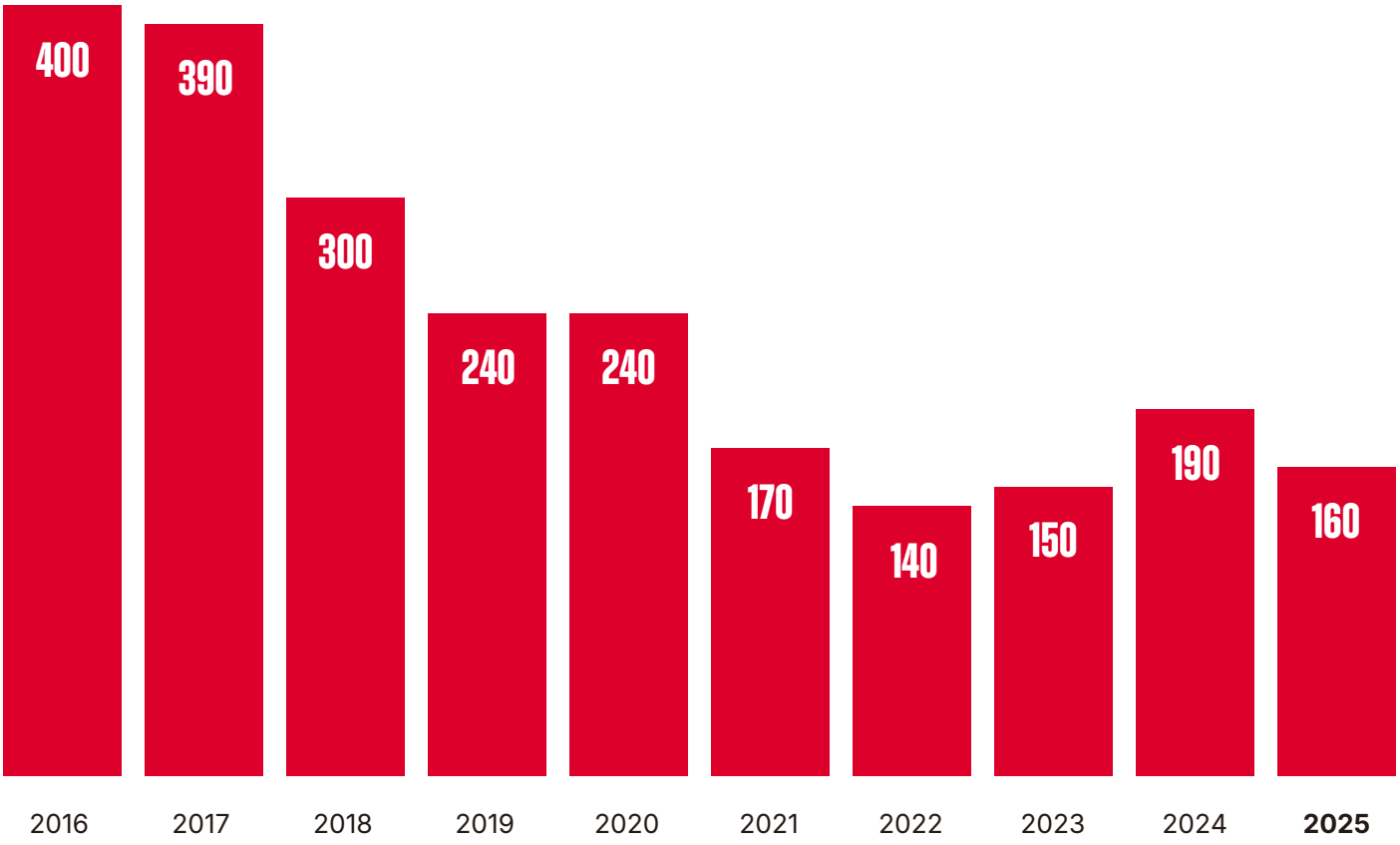


Base: Total population, 197 countries

Note: Totals may not add up to 100% due to rounding. Each year, GSMA Intelligence updates its estimates of the number of mobile internet subscribers in each country, incorporating new (and/or updated) data from operators, regulators, national statistics agencies and consumer surveys where available. In some countries and regions, estimates of mobile internet adoption may therefore differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

Source: Unique subscriber data is sourced from GSMA Intelligence. Coverage data is sourced from GSMA Intelligence, combining data reported by mobile operators and national regulatory authorities. Population data is sourced from the UN.

Figure 2: Global absolute increase in mobile internet subscribers per year, 2016–2025
Millions of people



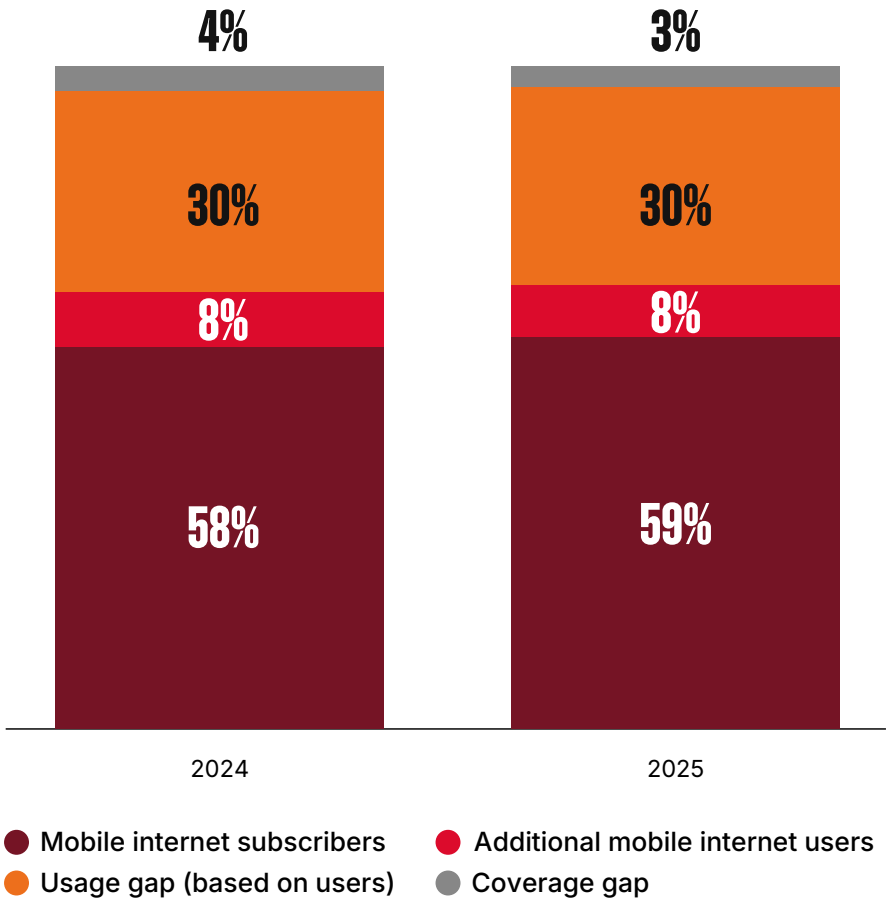
Base: Total population, 197 countries

Note: Each year, GSMA Intelligence updates its estimates of the number of mobile internet subscribers in each country, incorporating new (and/or updated) data from operators, regulators, national statistics agencies and consumer surveys where available. In some countries and regions, estimates of mobile internet adoption may therefore differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

Source: Unique subscriber data is sourced from GSMA Intelligence. Population data is sourced from the UN.

Beyond those with their own devices, a further 650 million people (8% of the global population) use mobile internet exclusively through borrowed or shared devices. This is inherently more restrictive, particularly for adults, as temporary, shared or intermittent use limits the benefits users are able to realise. This figure declined in 2025, from 690 million in 2024 – a shift likely partly attributable to shared users transitioning to owning their own devices.[15]

Figure 3: Global connectivity based on mobile internet subscribers and users, 2024–2025



Base: Total population, 197 countries

Note: Totals may not add up to 100% due to rounding.

Source: Unique subscriber data is sourced from GSMA Intelligence. Coverage data is sourced from GSMA Intelligence, combining data reported by mobile operators and national regulatory authorities. Population data is sourced from the UN. In some countries and regions, estimates of mobile internet subscribers and additional mobile internet users may differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

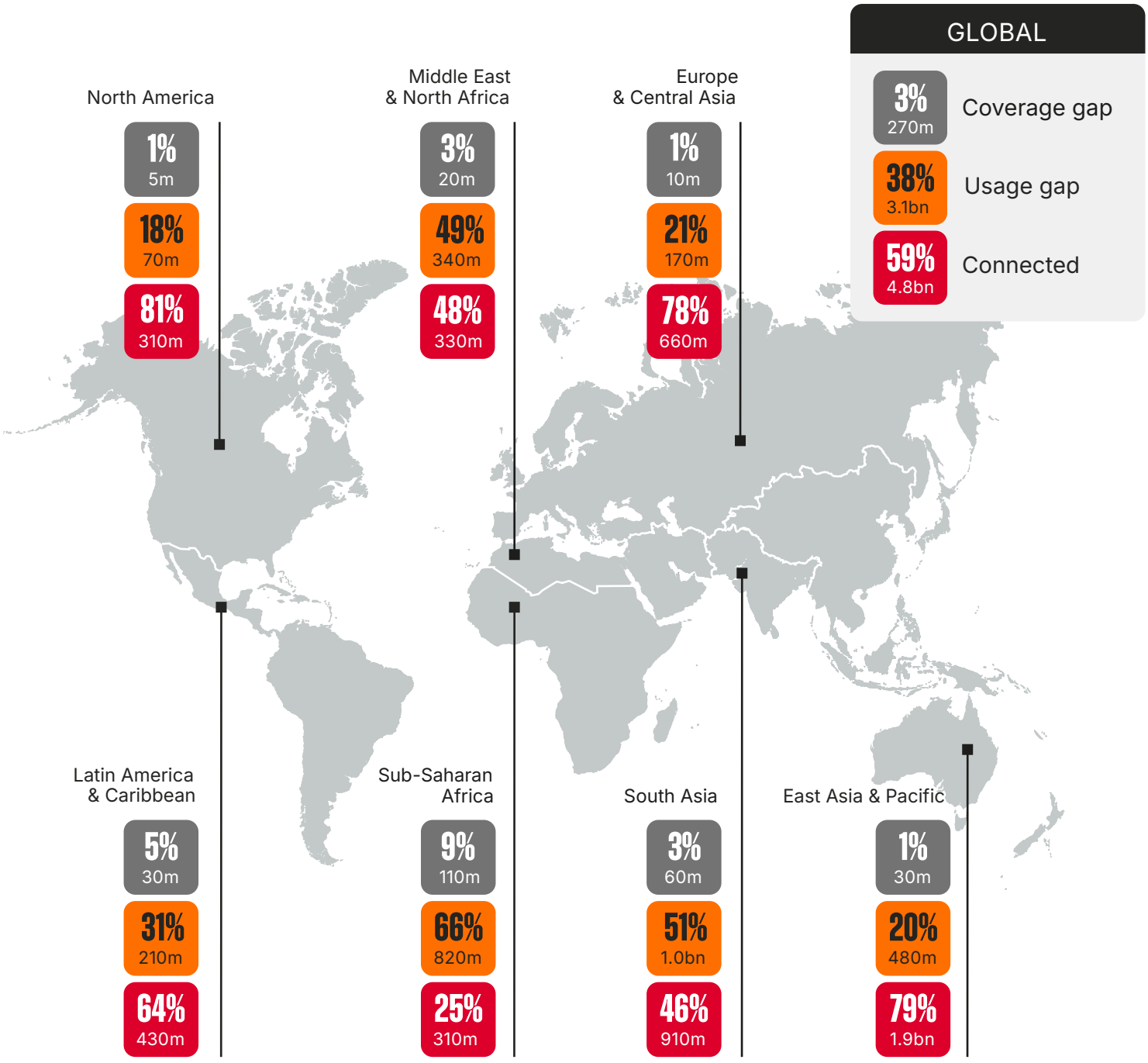
15 We are unable to determine whether most new mobile internet subscribers were previously mobile internet users on a shared device or are first-time internet users. However, with the number of people accessing on a shared device declining, at least a proportion of shared users now have their own device.

2. VARIATIONS IN CONNECTIVITY

Global connectivity trends mask significant levels of variation by and within regions and countries.

Regional disparities in connectivity remain pronounced. Sub-Saharan Africa continues to be the region with the lowest percentage of the population using mobile internet, at only 25%. It has both the largest usage gap and largest coverage gap, at 66% and 9% respectively.

Figure 4: State of mobile internet connectivity by region, 2025



Base: Total population

Note: Totals may not add up to 100% due to rounding. Each year, GSMA Intelligence updates its estimates of the number of mobile internet subscribers in each country, incorporating new (and/or updated) data from operators, regulators, national statistics agencies and consumer surveys where available. In some countries and regions, estimates of mobile internet adoption may therefore differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

Source: GSMA Intelligence

JUST

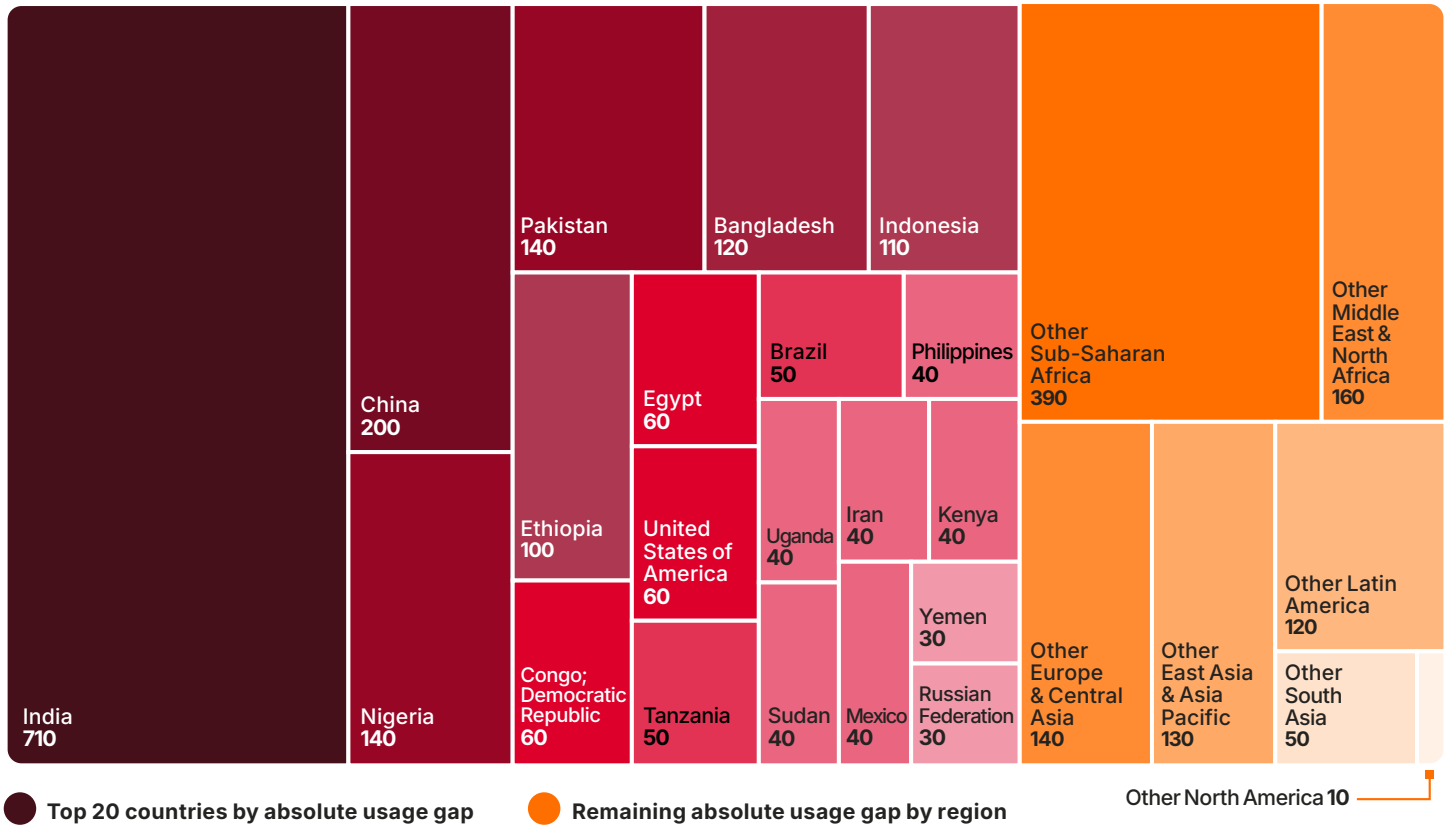
20

countries account for

68%

of the global usage gap

Figure 5: Usage gap by country in absolute terms, 2025
Millions of people

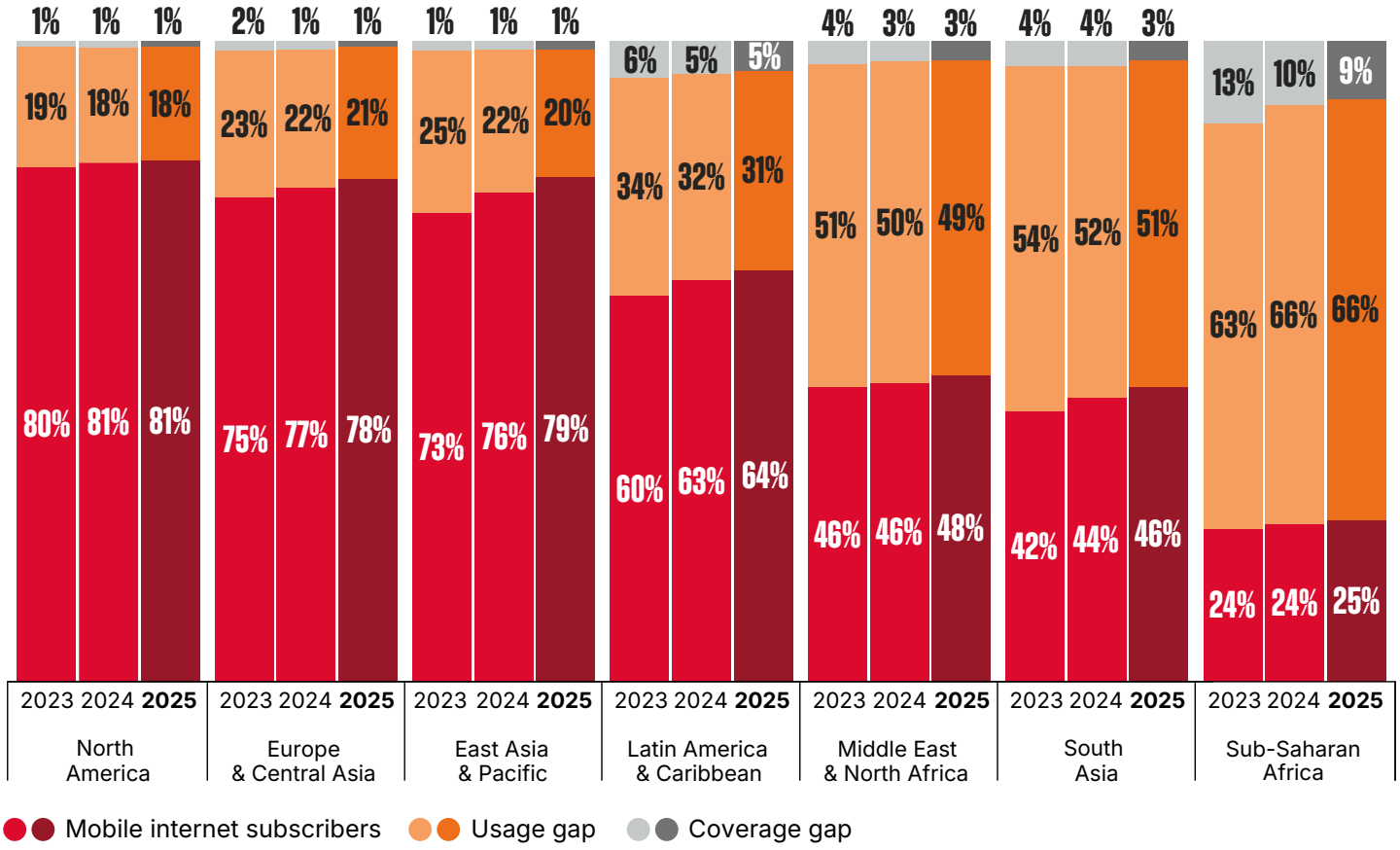


Base: Total population, 197 countries
Source: GSMA Intelligence

Low growth rates in mobile internet adoption can be seen across all regions in 2025. While Southeast Asia had higher growth rates than other regions in previous years, its growth is now in line with the rest of the world (dropping from 6 pp year-on-year growth in 2024 to 2 pp in 2025). In terms of the absolute number of new mobile internet subscribers globally, East Asia & Pacific and South Asia continued to contribute the most in 2025.

There were no significant reductions in the coverage gaps at a regional level, as 4G and 5G rollouts continued to areas already covered by mobile broadband. The usage gaps in each region also remained similar to 2024.

Figure 6: Mobile internet connectivity by region, 2023–2025



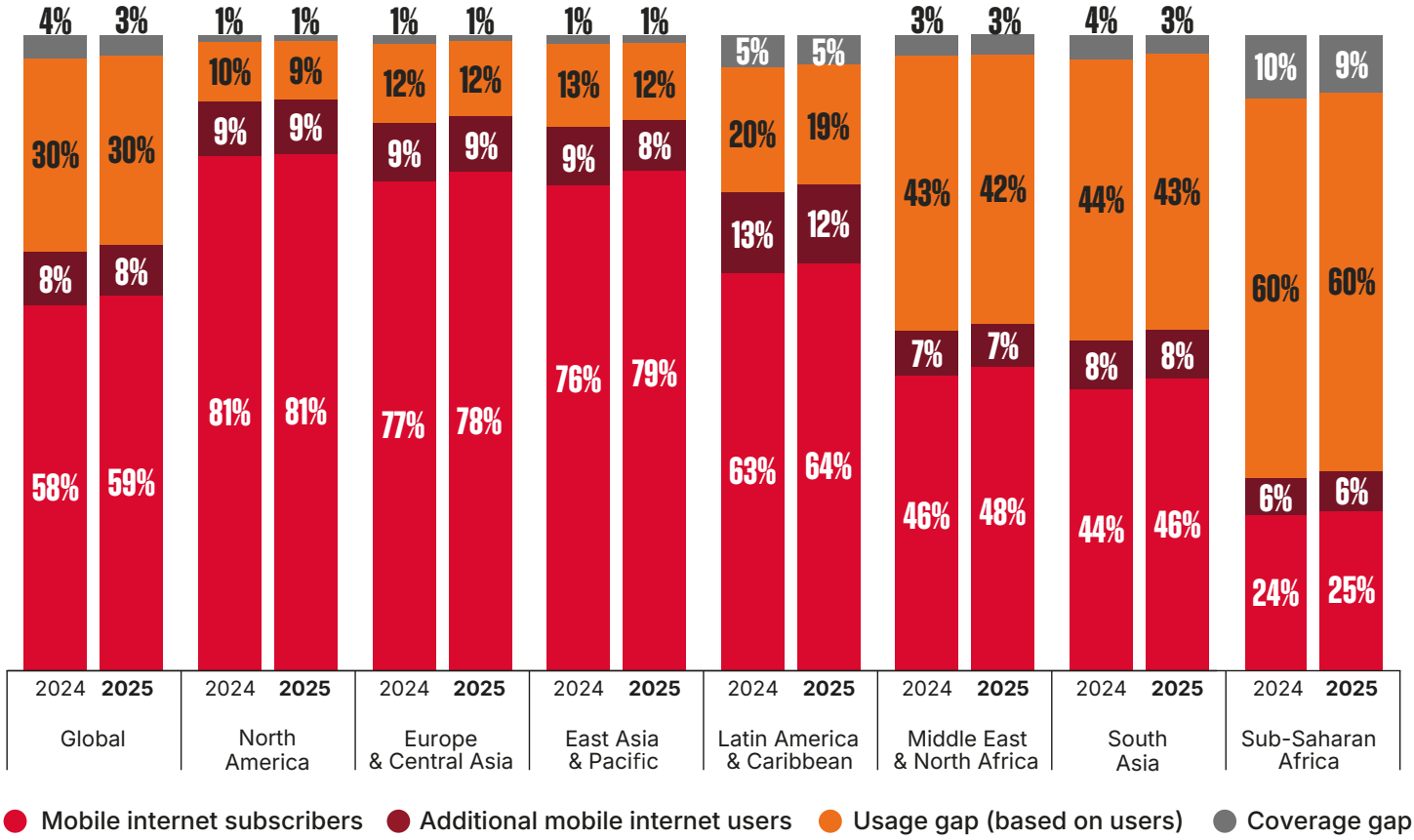
Base: Total population, 197 countries

Note: Totals may not add up to 100% due to rounding. Each year, GSMA Intelligence updates its estimates of the number of mobile internet subscribers in each country, incorporating new (and/or updated) data from operators, regulators, national statistics agencies and consumer surveys where available. In some countries and regions, estimates of mobile internet adoption may therefore differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

Source: GSMA Intelligence

Accessing the internet via a borrowed or shared device is most common in Latin America & Caribbean, at 12% of the total population. There is also variation at a country level, and gender often plays an important role too.[16]

Figure 7: Connectivity based on mobile internet subscribers and users, 2024–2025



Base: Total population, 197 countries

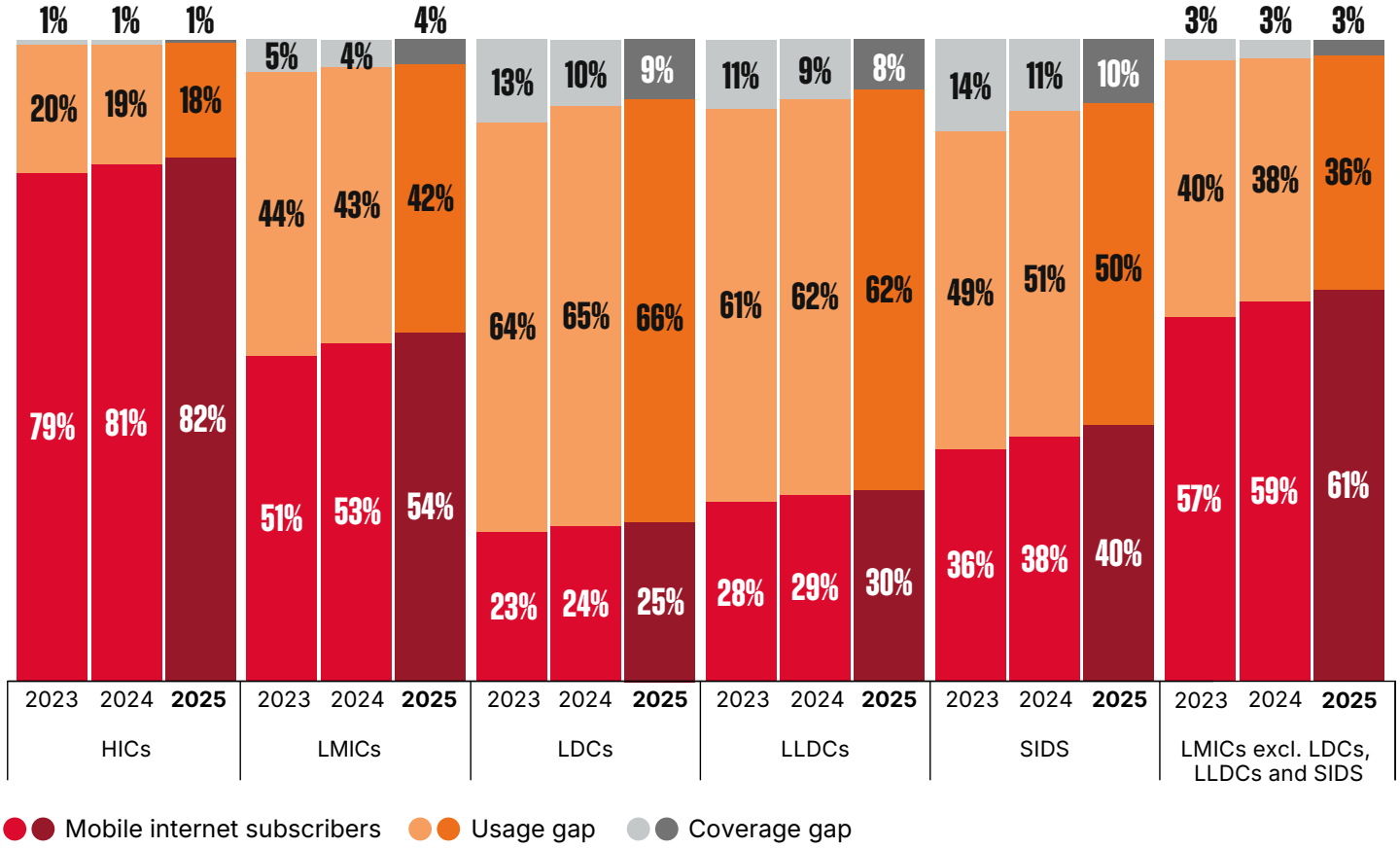
Note: Totals may not add up to 100% due to rounding.

Source: Unique subscriber data is sourced from GSMA Intelligence. Coverage data is sourced from GSMA Intelligence, combining data reported by mobile operators and national regulatory authorities. Population data is sourced from the UN. In some countries and regions, estimates of mobile internet subscribers and additional mobile internet users may differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

16 The Mobile Gender Gap Report 2026, GSMA, 2026

Connectivity levels vary considerably – not only between HICs and LMICs; LDCs, LLDCs and SIDS lag other LMICs substantially too.[17] Growth held steady across all development classifications in 2025, offering no indication that disparities are narrowing.[18]

Figure 8: Mobile connectivity in LDCs, LLDCs, SIDS, LMICs and HICs, 2023–2025



Base: Total population, 197 countries

Note: Totals may not add up to 100% due to rounding. Each year, GSMA Intelligence updates its estimates of the number of mobile internet subscribers in each country, incorporating new (and/or updated) data from operators, regulators, national statistics agencies and consumer surveys where available. In some countries and regions, estimates of mobile internet adoption may therefore differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

Source: GSMA Intelligence

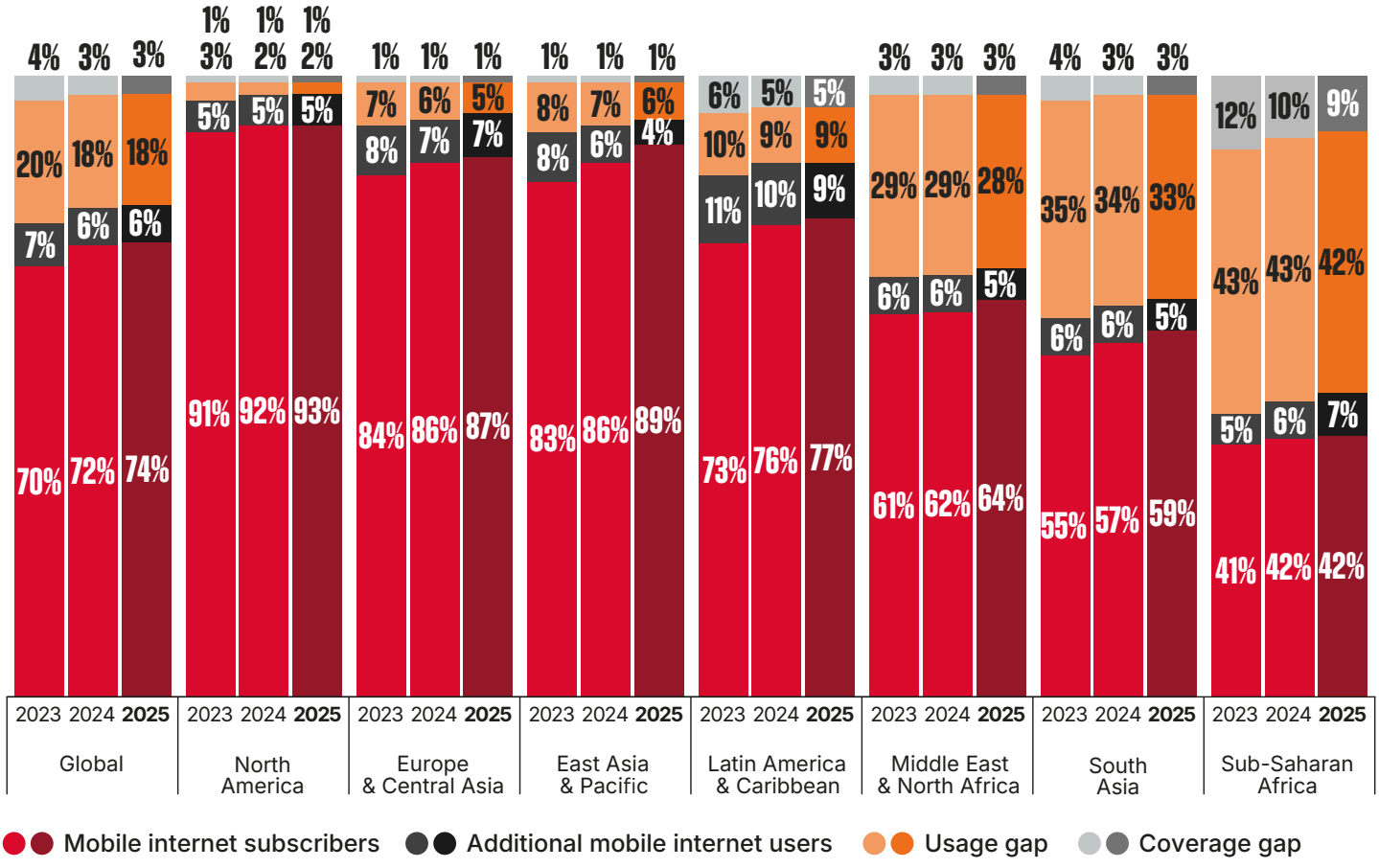
17 A least developed country (LDC) is a country classified as low income by the UN that faces severe structural impediments to sustainable development. LDCs are highly vulnerable to economic and environmental shocks and have low levels of human assets. A landlocked developing country (LLDC) is a country classified as landlocked and developing by the UN. A small island developing state (SIDS) is a country classified as a small island and developing state by the UN. A high-income country (HIC) is a country classified as high income by the World Bank.

18 Countries are classified according to World Bank Country and Lending Groups 2025.

Almost 3 in 4 adults now use mobile internet through their own device. To supplement total population figures, the analysis below considers adults aged 18 years old and above, as many countries have notably younger populations who are unlikely to use mobile internet. In the three regions with the greatest proportions of population under the age of 18 – Sub-Saharan Africa, South Asia and MENA – mobile internet subscribers rise by 13–17 pp when looking at the adult population (18+) rather than the total population: from 25% to 42% in Sub-Saharan Africa, from 46% to 59% in South Asia, and from 48% to 64% in MENA.[19] Nevertheless, more than half of adults in Sub-Saharan Africa remain offline, alongside around a third in both South Asia and MENA.

When considering access through a shared or borrowed device, the proportion of adults using the internet globally increases from 74% to 80%.

Figure 9: Mobile internet connectivity among adults aged 18+, 2023–2025



Base: Adult population aged 18+, 197 countries

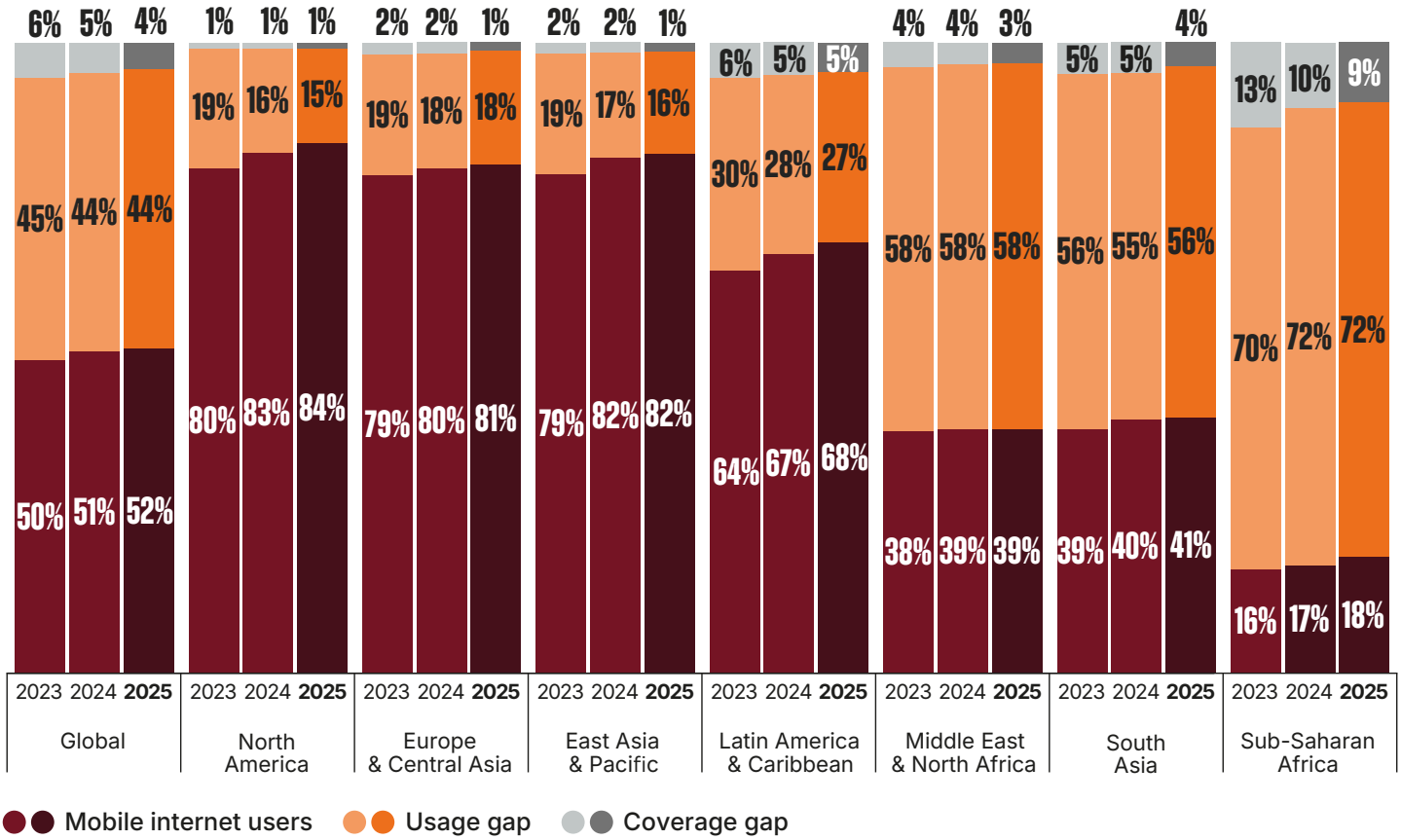
Note: Totals may not add up to 100% due to rounding. Each year, GSMA Intelligence updates its estimates of the number of mobile internet subscribers in each country, incorporating new (and/or updated) data from operators, regulators, national statistics agencies and consumer surveys where available. In some countries and regions, estimates of mobile internet adoption may therefore differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

Source: GSMA Intelligence

19 South Asia, Sub-Saharan Africa and MENA are the three regions with the greatest proportions of the population under 18, ranging from a third in South Asia to almost half in Sub-Saharan Africa. By contrast, just over 20% of the population is under 18 years old in East Asia & Pacific, Europe & Central Asia and North America.

Just over half of children aged 5–17 years old now use mobile internet, either on their own device or on a borrowed or shared device.[20] Approximately 10 million children became new mobile internet users globally in 2025, with two thirds of the growth concentrated in Sub-Saharan Africa. Regions with relatively larger usage gaps among the total and adult populations also have larger usage gaps among children.[21]

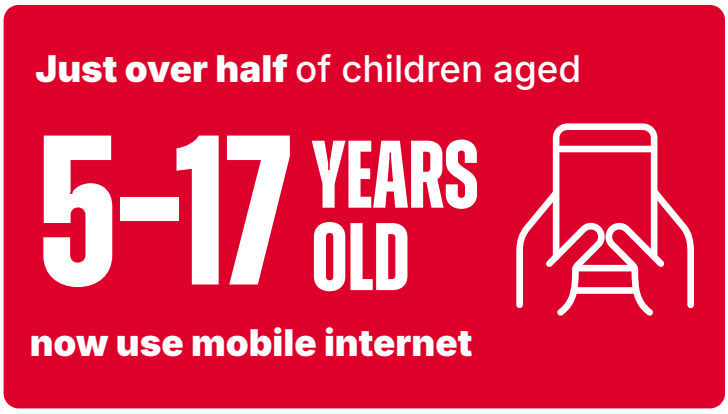
Figure 10: Mobile internet connectivity among children aged 5–17 years old, 2023–2025



Base: Children aged 5–17 years old, 197 countries

Note: Totals may not add up to 100% due to rounding. The global coverage gap for children is slightly higher than for adults and the overall population because countries with larger coverage gaps account for a greater proportion of the global child population.

Source: GSMA Intelligence

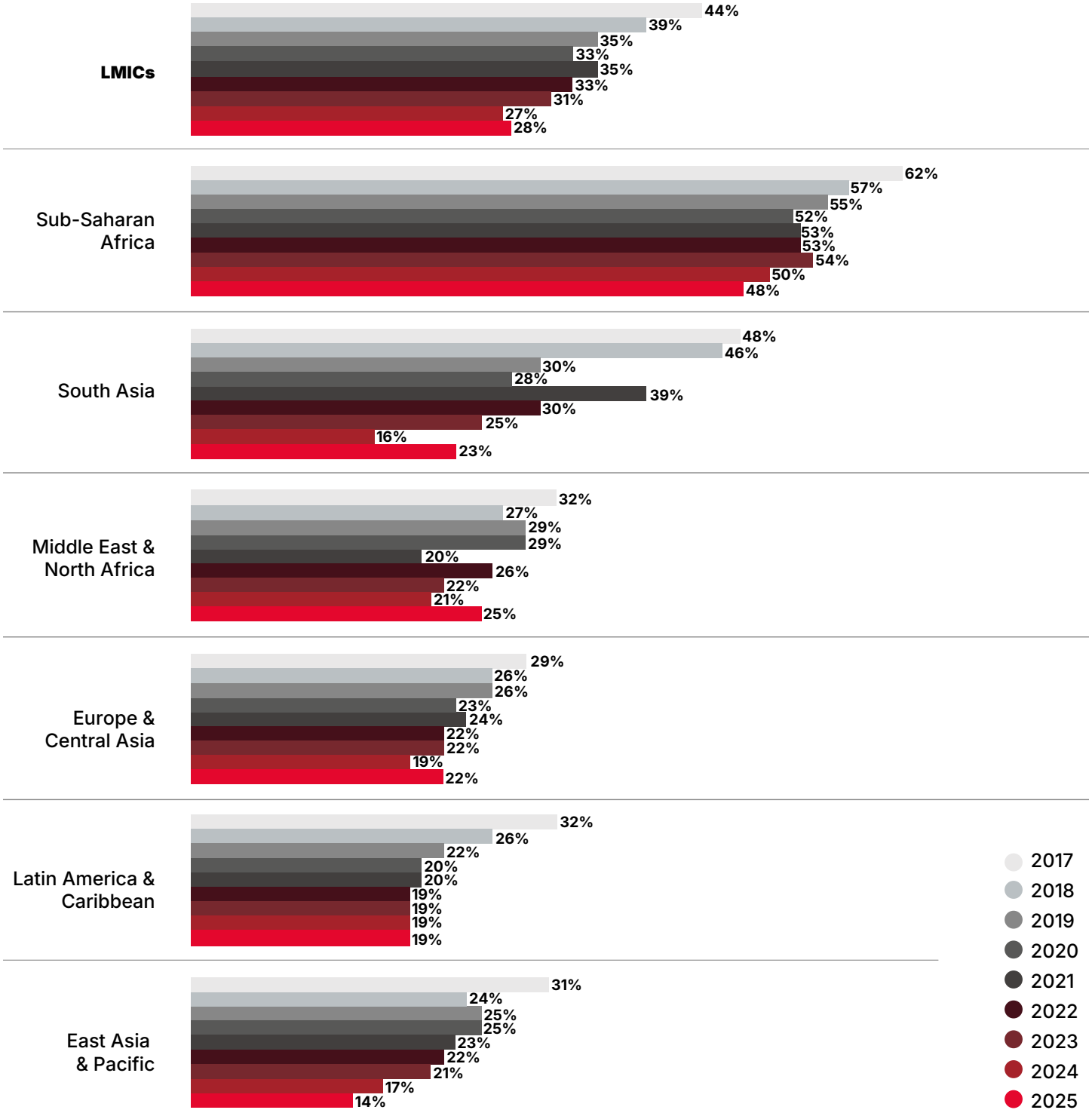


20 The analysis presented for children combines individuals who use the internet on either their own or a shared device. While internet access on a shared device can be limiting for adults, this does not apply to the same extent for children. This is because children under the age of 18 cannot register for a SIM card in many countries, or sign a monthly contract, and a shared device is sometimes preferred by parents to manage the potential risks of internet use by children (access to age-inappropriate content, for example).

21 For further details on mobile internet use among children, see The State of Mobile Internet Connectivity 2024, GSMA, 2024.

Progress with closing the rural-urban gap in mobile internet adoption across LMICs stalled in 2025, previously narrowing in most years since 2017. In 2025, adults in rural areas of LMICs were 28% less likely than those in urban areas to use mobile internet – a 1 pp increase from 2024. The gap widened most in South Asia, driven by increases in India (from 13% to 21%) and Bangladesh (from 32% to 41%), as growth in urban mobile internet adoption outpaced that in rural areas.

Figure 11: Rural-urban gap in mobile internet use in LMICs, by region, 2017–2025

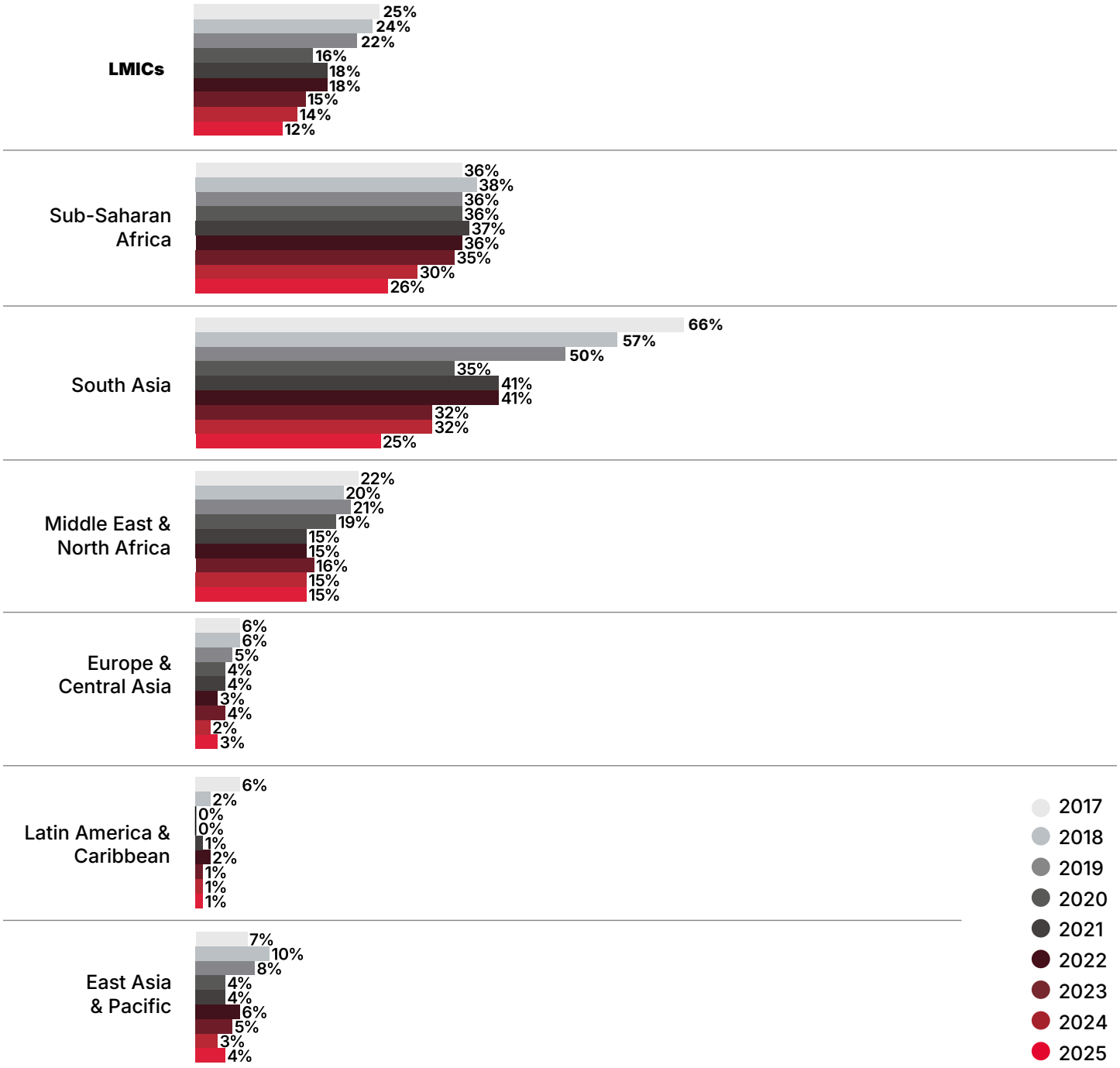


Base: Adults aged 18+

Source: GSMA Intelligence calculations. In some countries and regions, estimates of the rural-urban gap may differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

In 2025, the gender gap in mobile internet adoption across LMICs fell slightly, continuing a slow narrowing since 2022. Women in LMICs are now 12% less likely than men to use mobile internet, which translates to around 200 million fewer women than men. Over two thirds of the 810 million women who still do not use mobile internet in LMICs live in Sub-Saharan Africa and South Asia. Of the different categories of LMIC, the widest gender gaps in mobile internet adoption are in LDCs, followed by LLDCs.

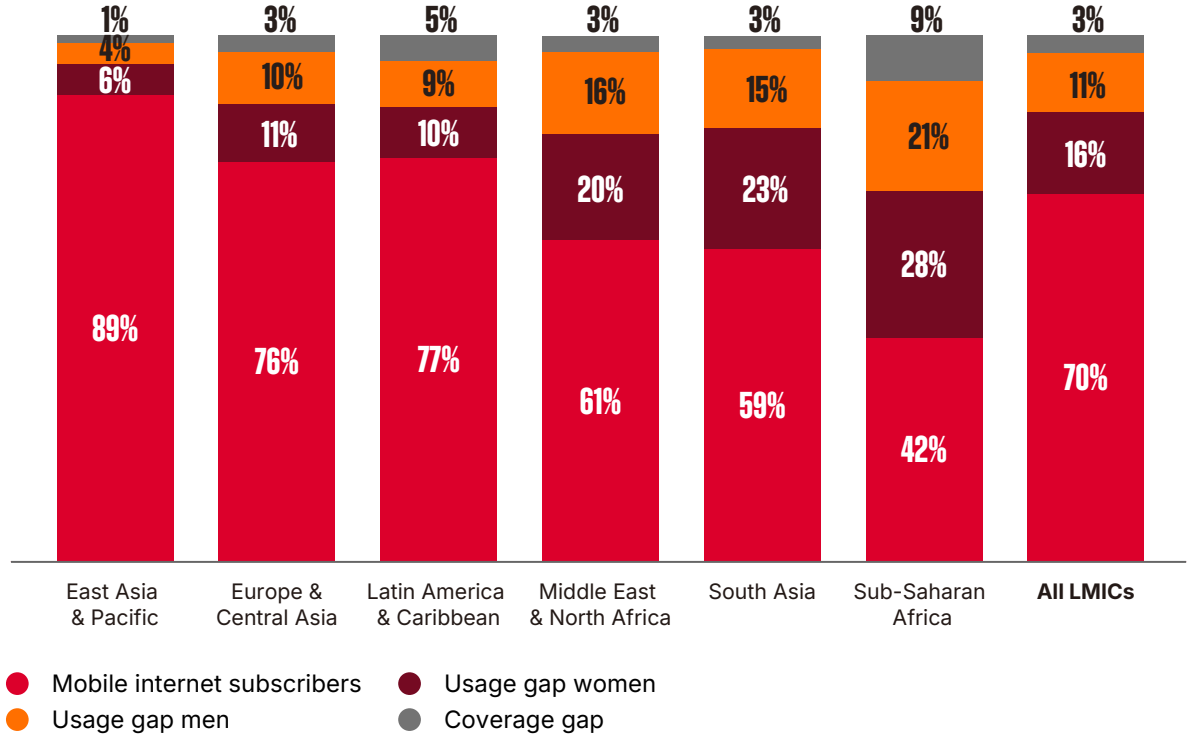
Figure 12: Gender gap in mobile internet use across LMICs and by region, 2017–2025



Source: The Mobile Gender Gap Report 2026, GSMA, 2026

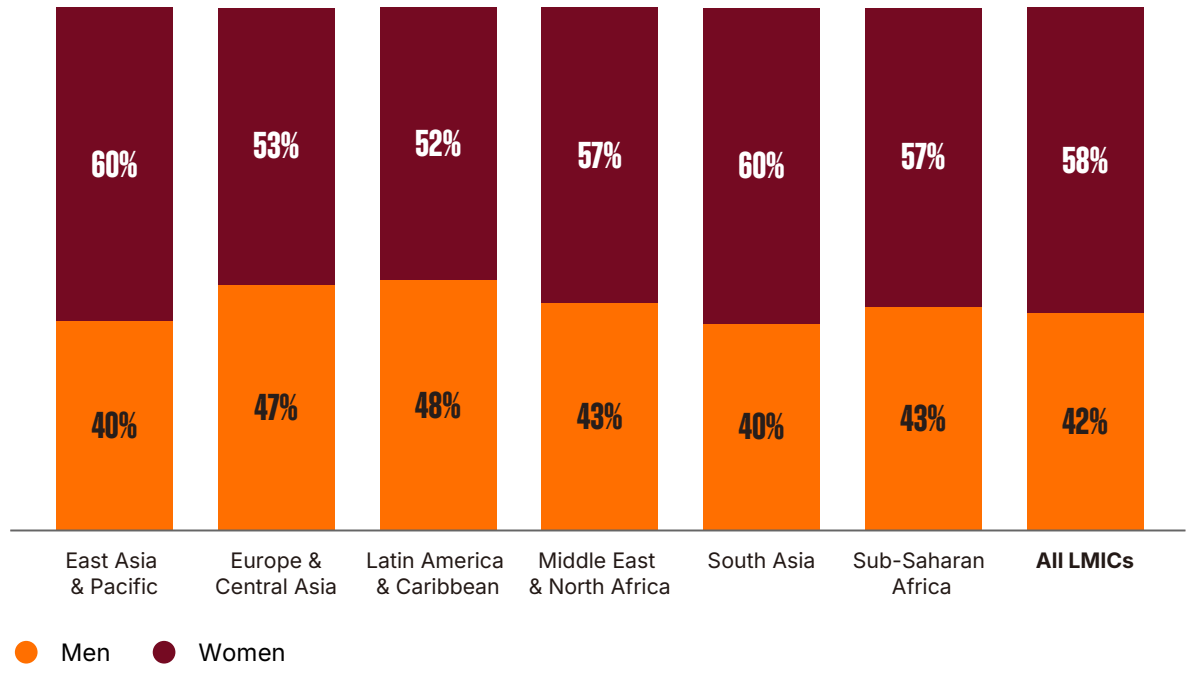
Women represent the majority (58%) of the adult usage gap in LMICs. Women making up the majority also holds true across all regions worldwide and underscores the importance of gender-sensitive approaches in interventions aimed at expanding mobile internet access.

Figure 13: Mobile internet connectivity in LMICs for adults aged 18+, with usage gap disaggregated by gender, 2025



Base: Adult population in LMICs aged 18+, 131 countries
Source: GSMA Intelligence calculations.

Figure 14: Distribution of the adult usage gap in LMICs by gender, 2025



Base: Adult usage gap aged 18+
Source: GSMA Intelligence calculations.

3. NETWORK COVERAGE AND INFRASTRUCTURE

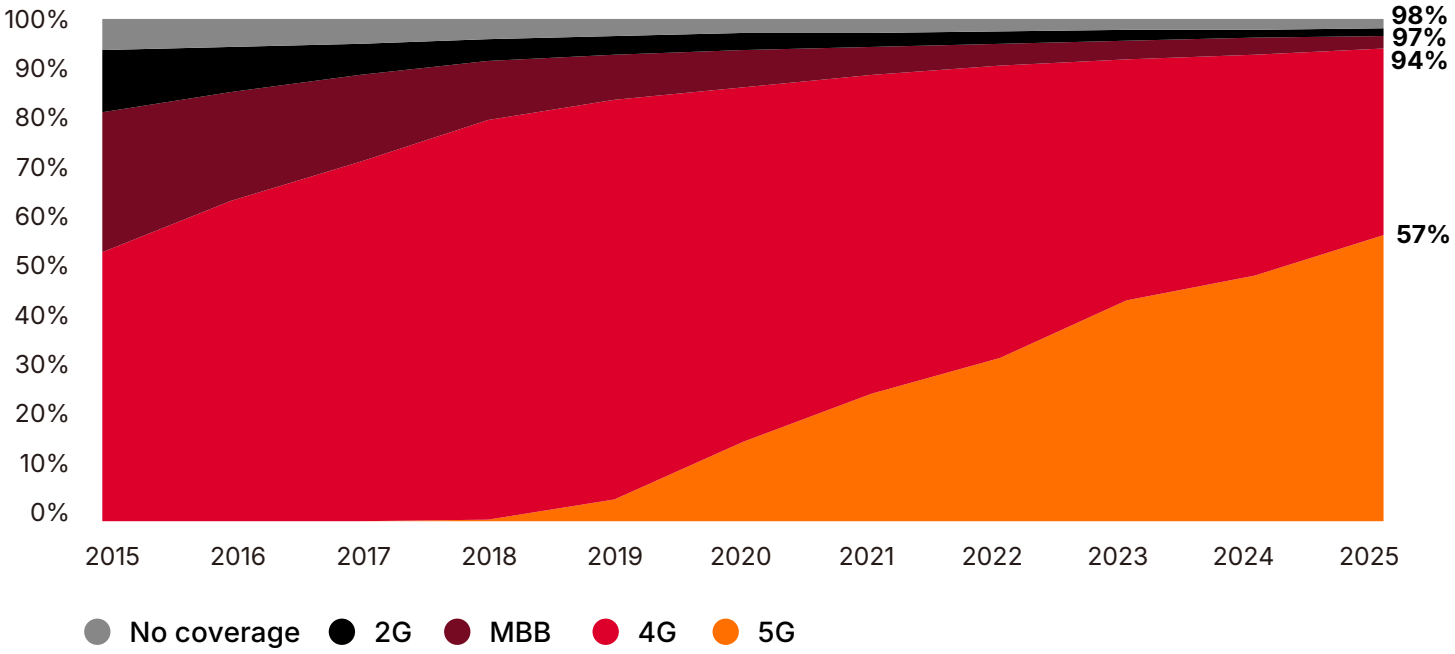
Network coverage and infrastructure continue to expand, with the vast majority (97%) of the global population now living within the footprint of a mobile broadband network. Meanwhile, rapid gains in 5G coverage are driving greater global network speeds.

However, the expansion of higher quality network coverage has varied significantly by region. In some countries, significant coverage gaps remain. The uncovered live in locations that are predominantly rural, poor and sparsely populated. They are typically in an LDC, LLDC or SIDS.

5G coverage has continued its rapid expansion, reaching an additional 690 million people in 2025. This means 57% of the global population (4.7 billion people) are now covered by 5G.

4G deployments also continue to grow, with 180 million additional people covered in 2025, bringing the total to 7.7 billion people (94% of the global population).

Figure 15: Global population coverage by technology, 2015–2025



Source: GSMA Intelligence

More than half of global 5G expansion in 2025 came from South Asia. Latin America & Caribbean and MENA also saw significant increases in 5G coverage. In LMICs, 51% of the population are now covered by 5G – gradually closing the gap with HICs, where coverage stands at 84%. Within LMICs, however, LDCs, LLDCs and SIDS remain far behind, with 5G coverage of just 9%, 12% and 17% respectively. 5G expansion in these regions remains limited, as 5G device costs remain out of reach for many.[22] It is also challenging to attract commercial investment due to low projected returns on investment.

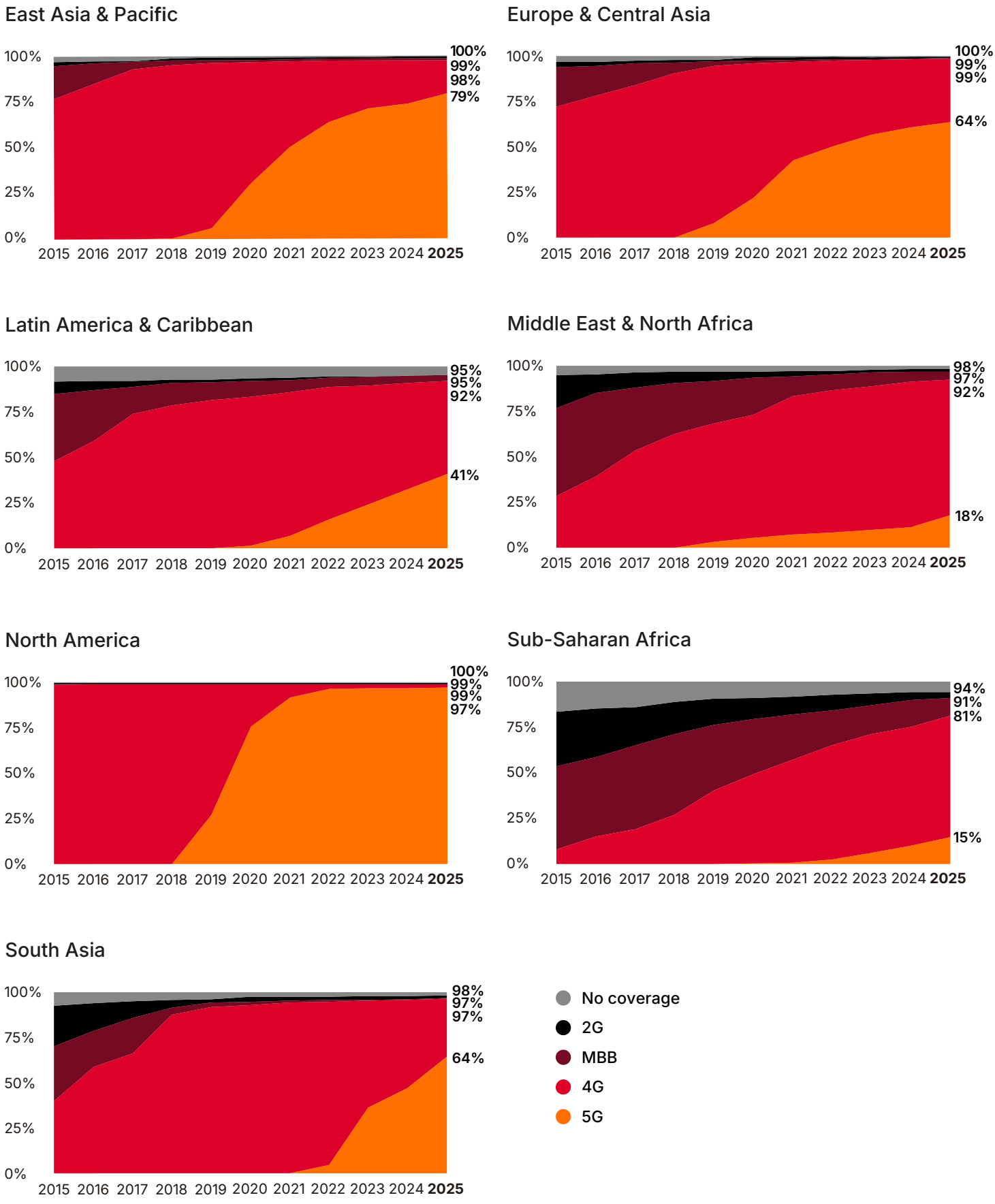
Sub-Saharan Africa accounted for more than half of global 4G coverage gains in 2025, with 81% of the region's population now living within 4G network coverage. However, its coverage gap remains the widest of any region, and progress with closing it has slowed. Eight countries in the region still have a coverage gap equal to or larger than 15%.[23] Seven of these are LDCs.

Many operators have either shut down or begun the process of sunsetting legacy 2G and/or 3G networks. By the end of Q1 2026, 36 operators from 20 countries had shut down both their 2G and 3G networks.[24] This has been driven by declining traffic on legacy generation networks, the financial burden of maintaining legacy infrastructure, the ongoing shift to open, cloud-native, AI-native networks, and the need to use spectrum resources efficiently by migrating to newer technologies. However, this sunsetting is conditional on enabling spectrum policies (particularly the assignment of technology-neutral spectrum) and the ability of operators to migrate consumers and businesses to 4G or 5G devices.

Together, these trends suggest meaningful improvements in network quality in areas previously served only by 3G, but limited progress extending mobile broadband to those not yet covered at all.

22 For example, the median cost of the cheapest 3G/4G device in LMICs in 2024 was around $54, which remains unaffordable to a large proportion of LMIC populations. This compares to $100–300 for the cheapest 5G device.
23 Burkina Faso, Burundi, Central African Republic, Chad, Democratic Republic of Congo, Equatorial Guinea, Gambia and South Sudan
24 Network Sunsets, Q1 2026, GSMA Intelligence, 2026

Figure 16: Population coverage by technology and region, 2015–2025



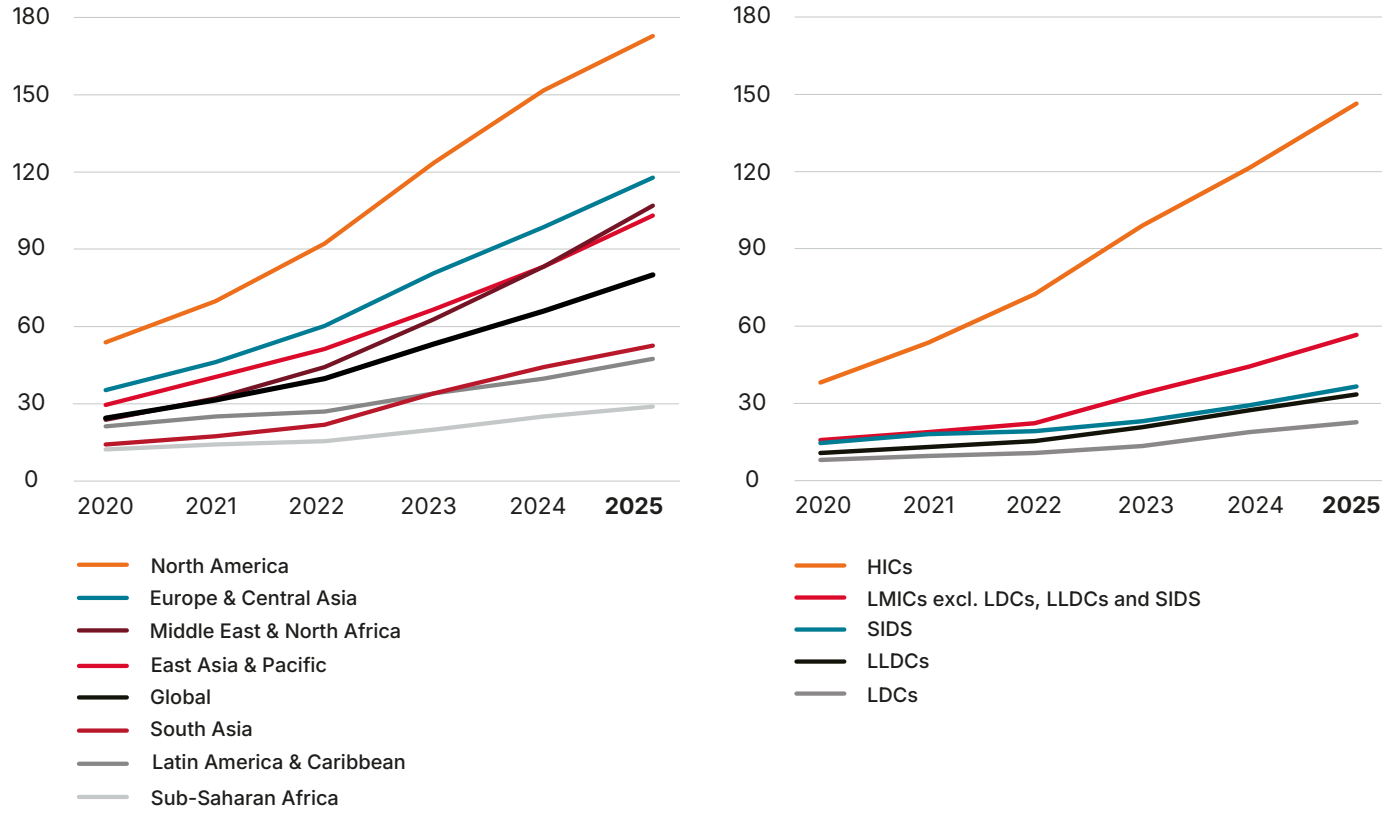
Source: GSMA Intelligence

Note: Coverage numbers in 2025 are rounded to the nearest percentage point.

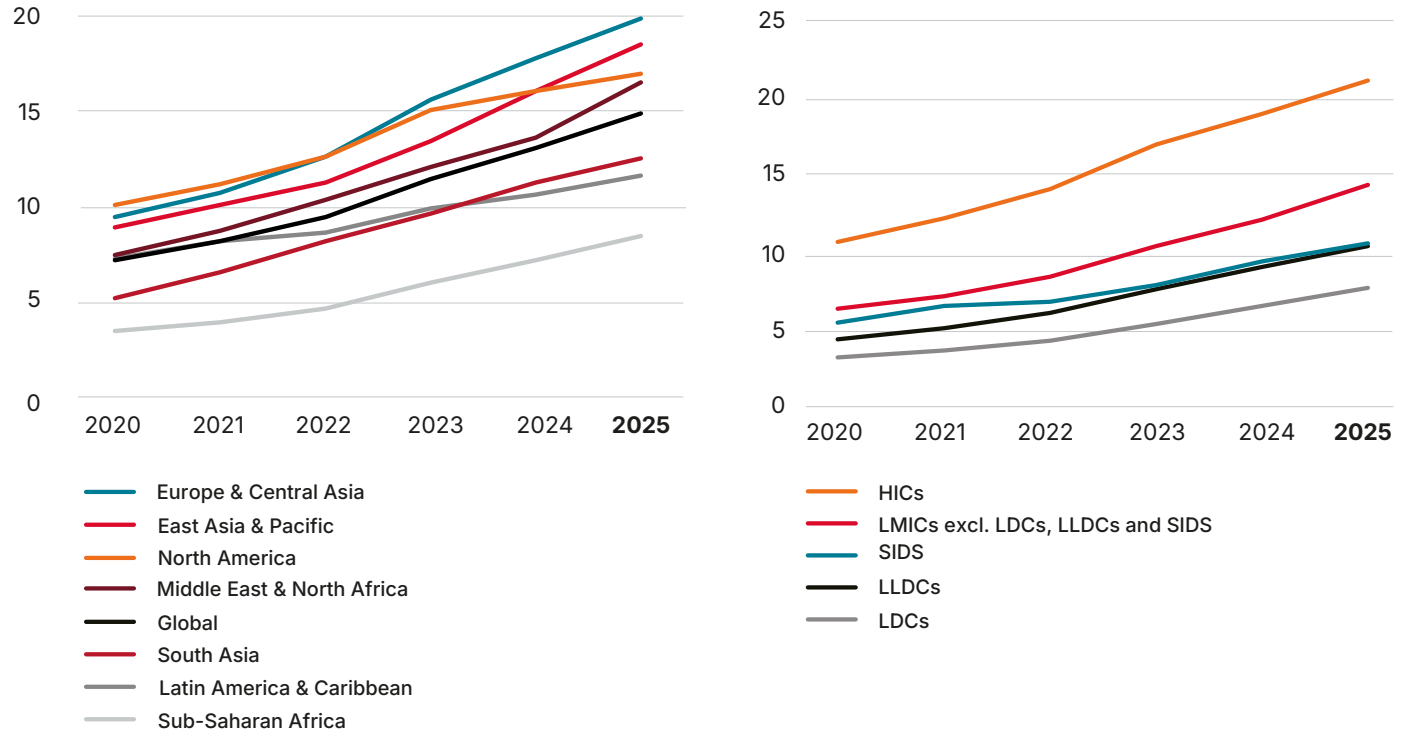
Average global download speeds increased by 22% (14 Mbps) in 2025, but substantial gaps in network quality remain between LMICs and HICs. Average download speeds in HICs are approximately 3.5 times higher and average upload speeds approximately 1.5 times higher than in LMICs. MENA recorded the most significant gains on both measures, driven by accelerating 5G adoption in the region.

Figure 17: Average download and upload speeds (Mbps), 2020–2025

Average download speeds by region and in HICs and sub-groups of LMICs



Average upload speeds by region and in HICs and sub-groups of LMICs



Source: GSMA Intelligence analysis of Ookla® Speedtest® data

4. DEVICE OWNERSHIP AND CONNECTIVITY

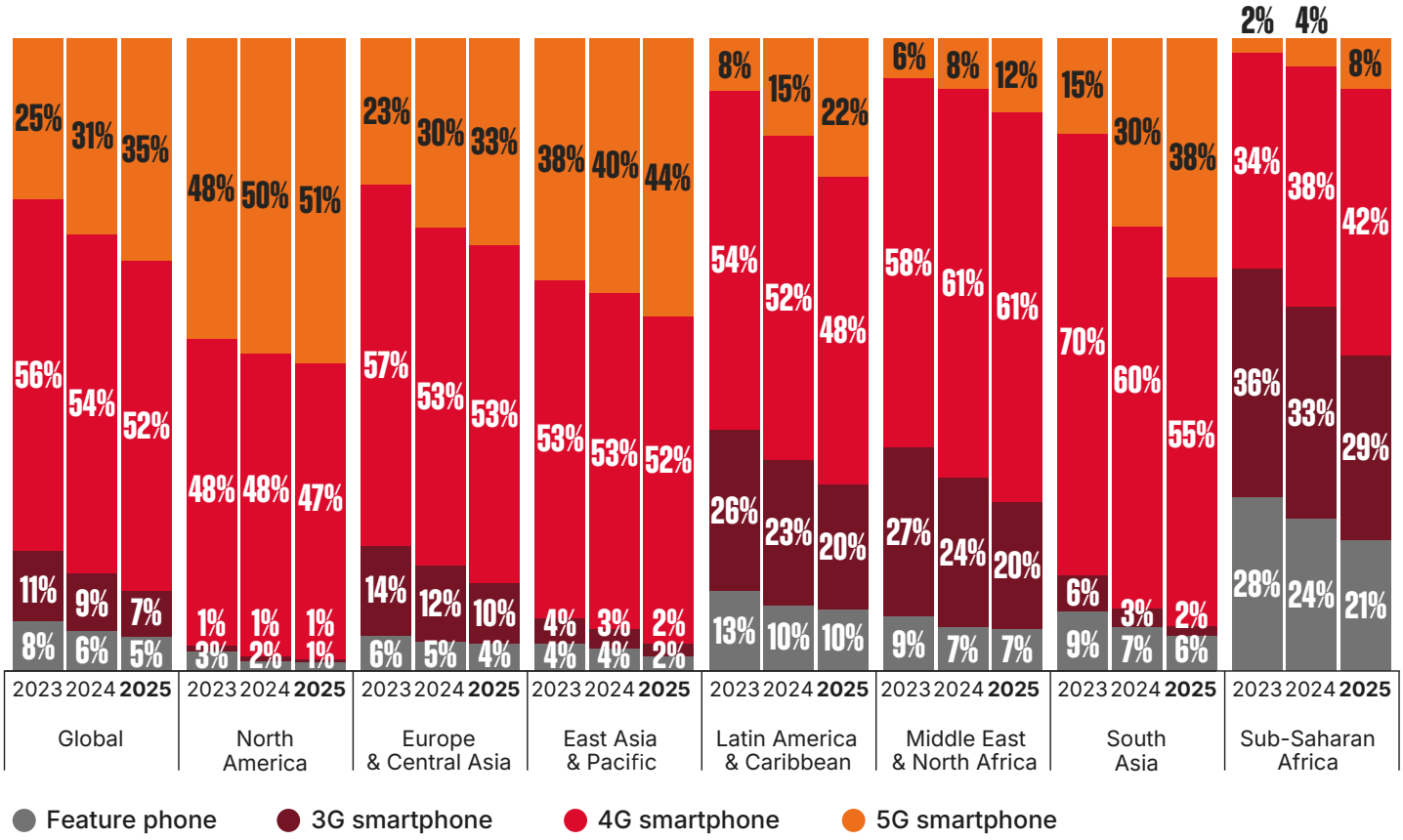
Mobile remains the primary – often only – way people in LMICs access the internet. The extent of mobile phone ownership and type of mobile device a person owns matters as it affects whether and how they use the internet. Smartphone owners, for instance, are much more likely to be aware of and adopt mobile internet, and to use it more frequently and for a wider variety of tasks.

At the end of 2025, 4.6 billion people (56% of the global population) were using their own smartphone to access mobile internet. This represents an increase of approximately 200 million – a slower pace of growth than the 250 million increase in 2024.

The proportion of mobile internet subscribers accessing the internet on feature phones and 3G smartphones continues to decline but remains significant in several regions.

More than 85% of mobile internet subscribers globally now access the internet on a 4G/5G smartphone, with notable increases in 5G device adoption in Latin America & Caribbean and South Asia. However, 13% of mobile internet subscribers globally are still using 3G smartphones or feature phones to access the internet, increasing to 50% in Sub-Saharan Africa, 30% in Latin America & Caribbean, and 27% in MENA.

Figure 18: Distribution of devices used by mobile internet subscribers, 2023–2025



Base: Mobile internet subscribers, 197 countries
Note: Totals may not add up to 100% due to rounding.
Source: GSMA Intelligence

4.6 BILLION PEOPLE

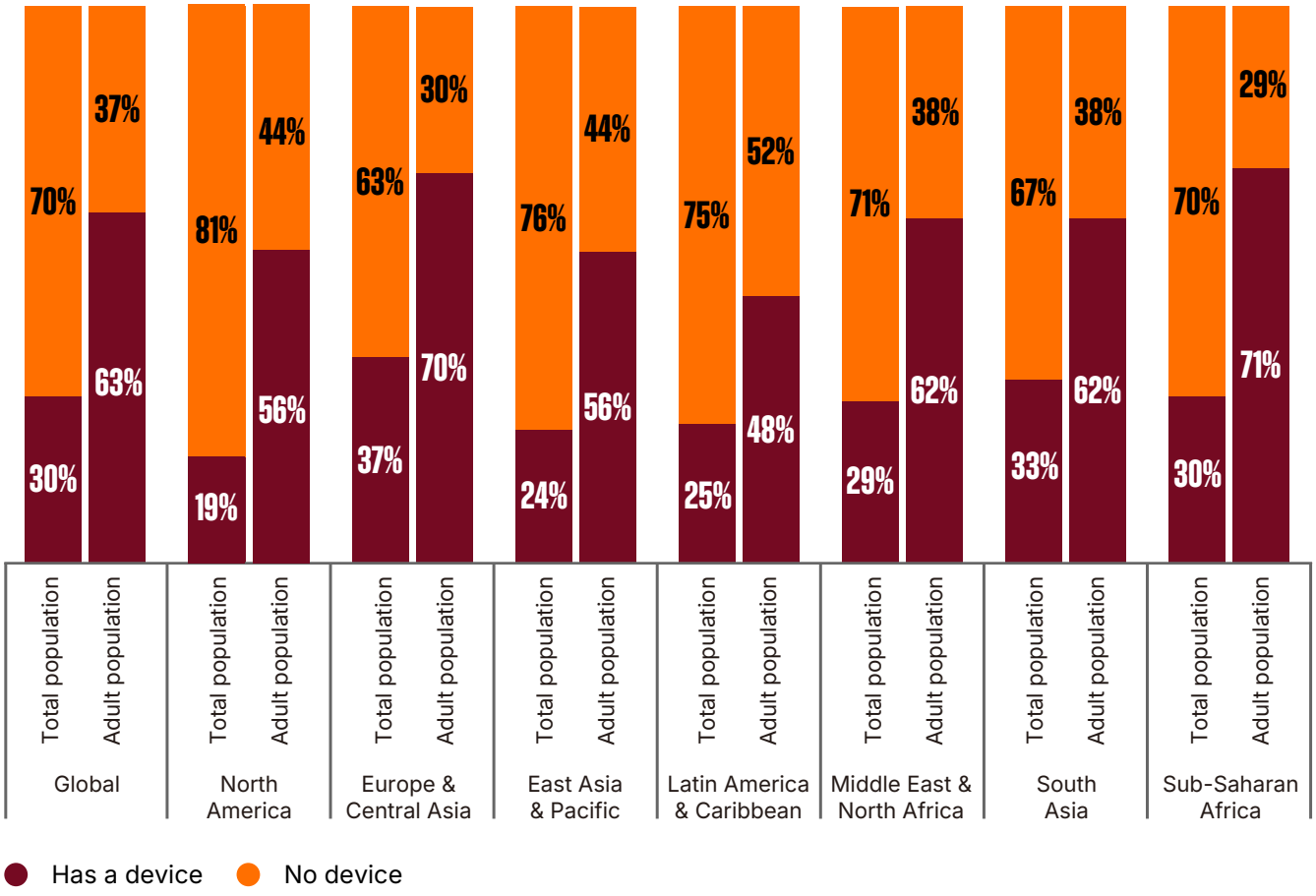
56%

of the **global population** were using their **own smartphone to access mobile internet**

Most of the usage gap (70%) comprises those who do not own a device.[25] Of the 3.1 billion people covered by mobile broadband networks who are not yet mobile internet subscribers, 920 million own a device but do not or cannot use it to access the internet. The remaining 2.2 billion have no device at all.

The percentage of the usage gap who do not own a device is significantly lower when focusing on adults. Only around a third of those in the adult usage gap do not own a device, compared to the vast majority of children in the usage gap. The majority of those in the usage gap without a device are under the age of 18. The most pronounced difference is in Sub-Saharan Africa, where 70% of the usage gap for the total population do not own a device, compared to 29% of the usage gap for the adult population, reflecting the region's younger population.

Figure 19: Proportion of usage gap who do not own a device by total population and adult population, 2025



Base: Total population, 197 countries

Note: Totals may not add up to 100% due to rounding.

Source: GSMA Intelligence. In some countries and regions, estimates of device ownership among the usage gap may differ from what was presented in previous editions of The State of Mobile Internet Connectivity.

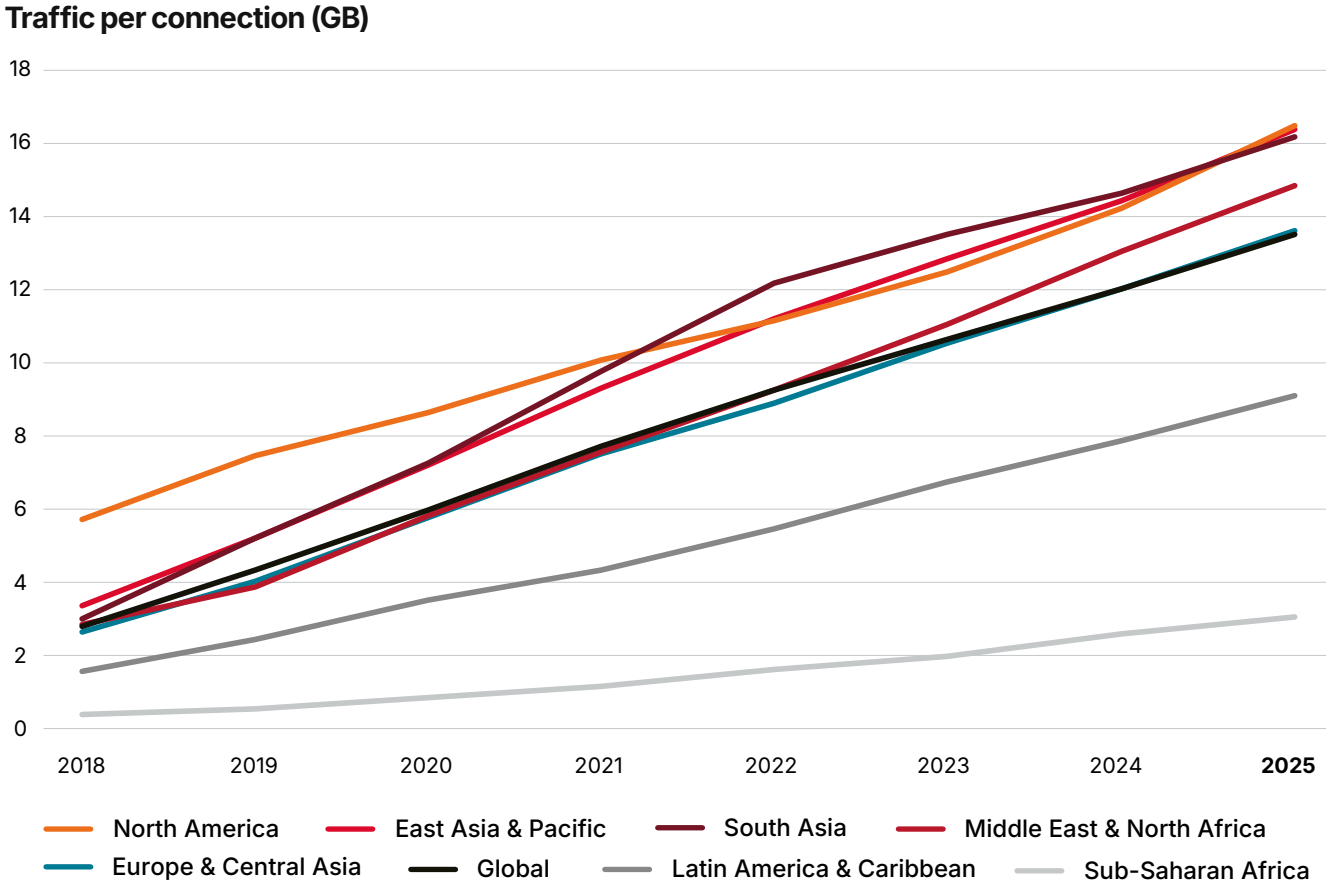
25 Device ownership here relates to any mobile device, whether or not it is internet-enabled.

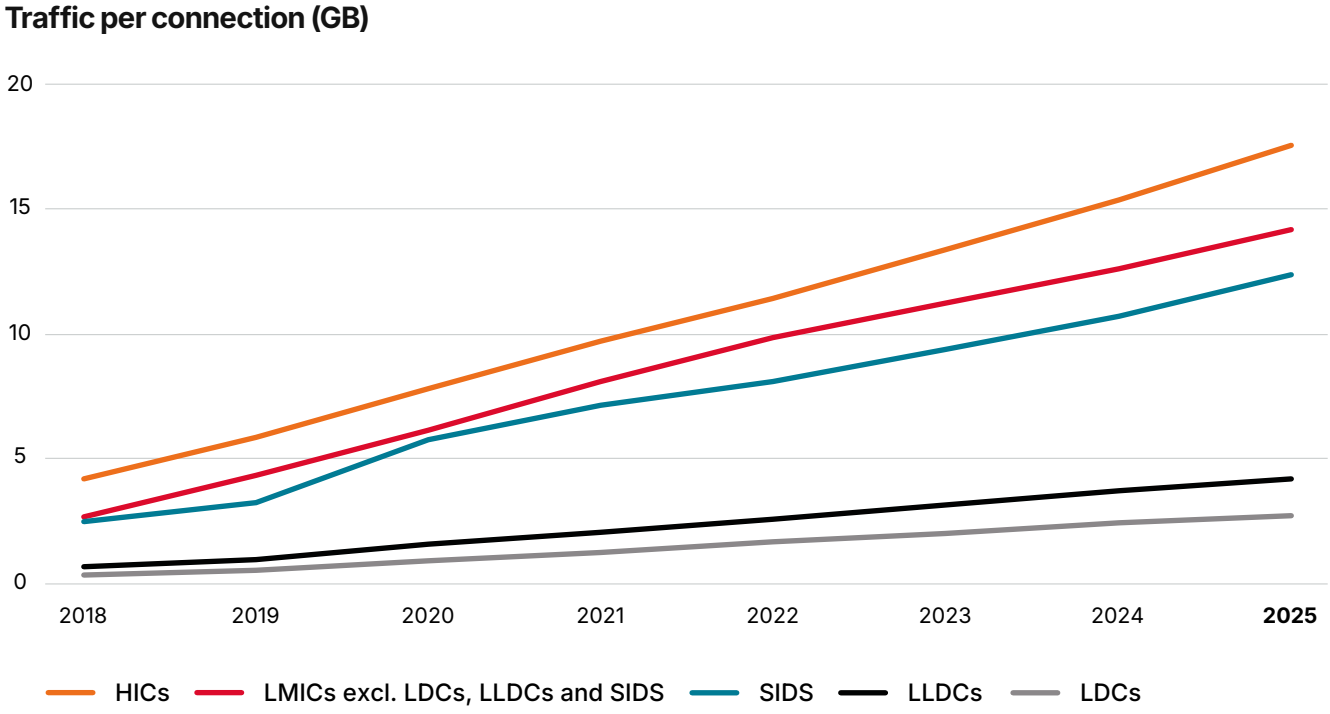
5. MOBILE INTERNET USAGE

It is important to ensure people are not only able to adopt mobile internet but use it regularly and for a range of use cases that meet their needs.

Data usage per connection continues to rise across LMICs, though the gap with HICs persists. Driven primarily by the ongoing migration to 4G/5G networks, average data traffic per connection reached 13.5 GB per month globally in 2025, up from 12 GB in 2024. Significant disparities persist across regions and income groups, with Sub-Saharan Africa continuing to record the lowest traffic per connection globally and the smallest year-on-year increase.

Figure 20: Mobile data traffic per connection, 2018–2025

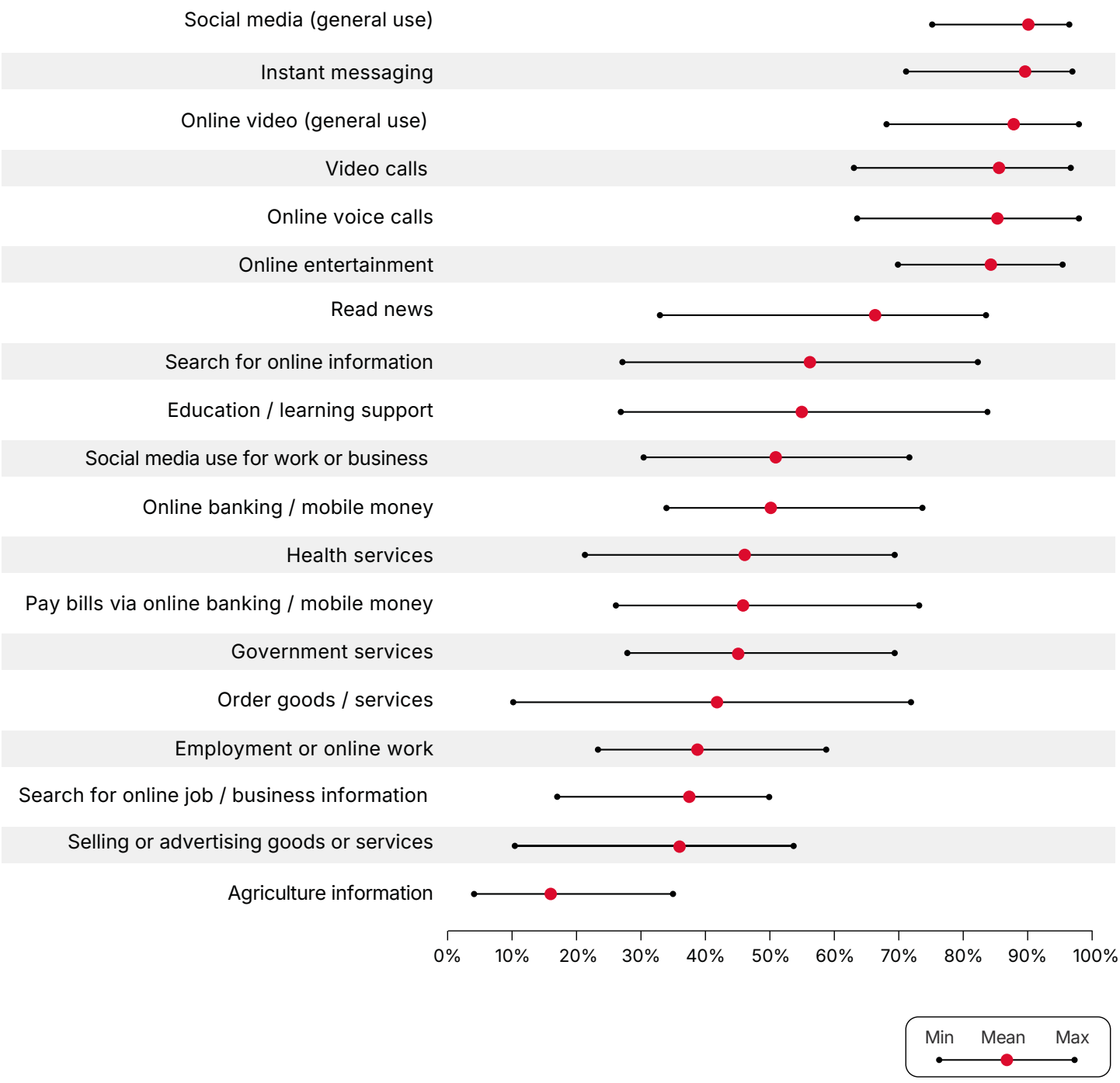




Source: GSMA Intelligence

Communications, social media and entertainment continue to be the most common mobile internet activities, used consistently across the countries surveyed. Awareness of these activities is near-universal among mobile internet users, but awareness declines for less frequently used activities.[26] Use of mobile internet for activities outside of communications, social media and entertainment is generally lower and varies considerably by country, with income generation, ordering goods and services, online banking, and health and government services among the least known and least used.

Figure 21: Activities that mobile internet users report having engaged in at least once on a mobile phone, 2025
Percentage of mobile internet users



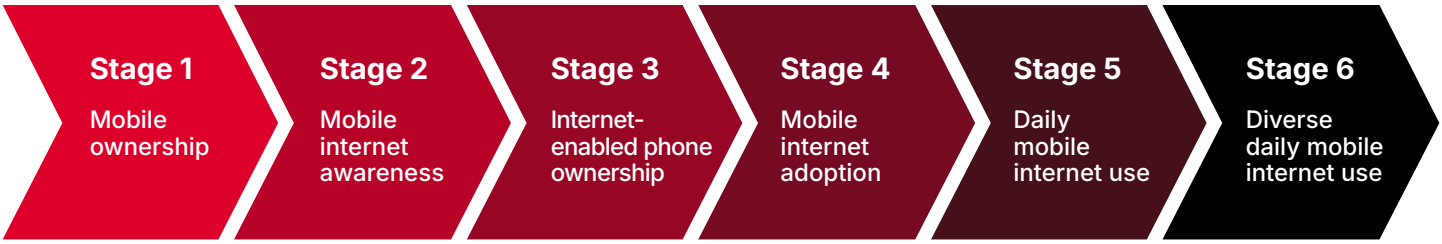
Base: Mobile Internet users aged 18+. N= from 296 to 1,316 across the 14 countries surveyed in 2025.
Source: GSMA Consumer Survey, 2025

26 The State of Mobile Internet Connectivity 2025: Understanding mobile internet use in low-and middle-income countries, GSMA, 2025

6. MOBILE INTERNET USER JOURNEY

Understanding how people in different contexts progress along the journey to mobile internet adoption, and regular and diverse use, is key to recognising the challenges that must be addressed. For example, while most users of mobile internet access it daily, most do so for only one or two activities, which suggests many users are not yet realising its full benefits.

Figure 22: The mobile internet user journey



While no two people have the same experience of adopting and using mobile technology, the journey typically starts with owning a handset (stage 1), progresses to being aware of mobile internet (stage 2) and then owning an internet-enabled phone (stage 3).[27] This is typically followed by mobile internet adoption (stage 4), and regular (stage 5) and diverse (stage 6) mobile internet use.[28] At each stage, users encounter barriers that hinder progression.

Users drop off at each stage of the mobile internet journey. The drop-offs are more pronounced in certain countries and among specific demographic groups. Women and rural populations are more likely overall to drop off at each stage of the user journey than men and urban counterparts.

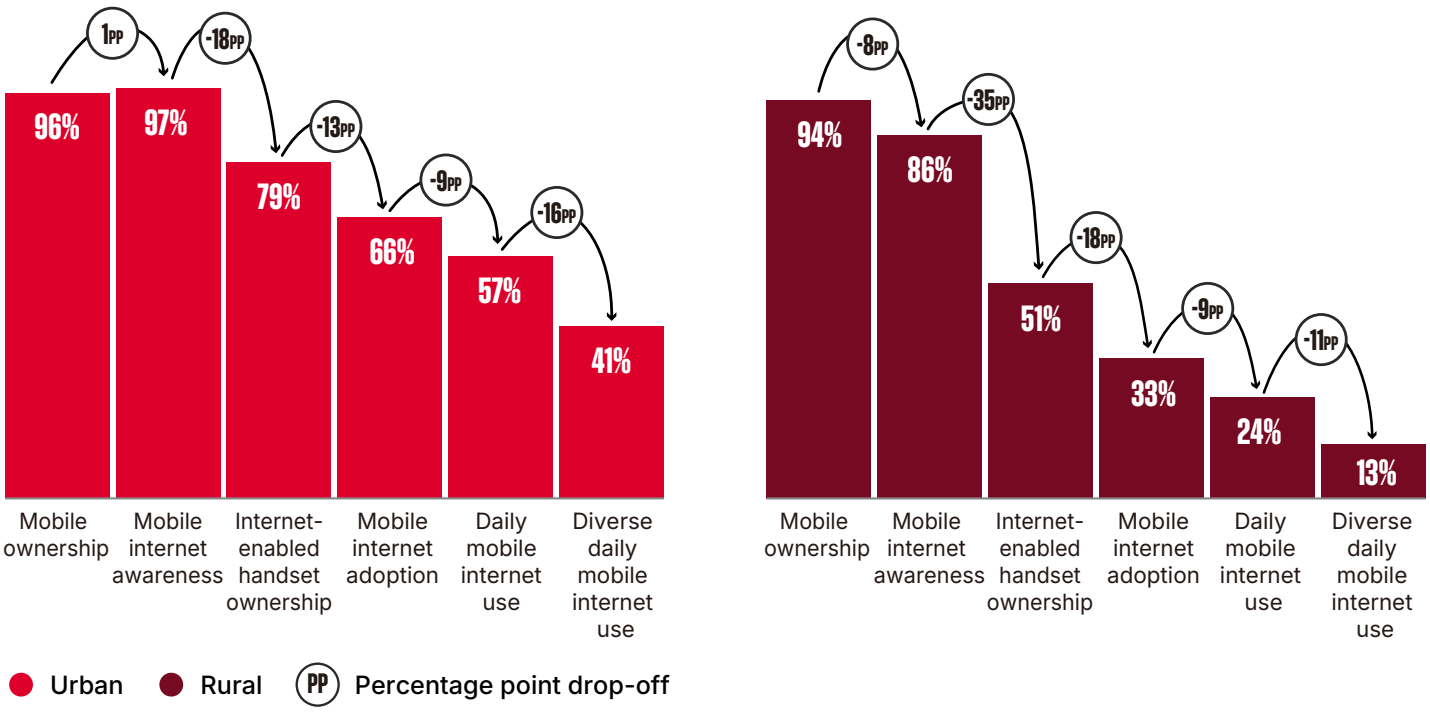
Across the majority of countries surveyed, the most significant drop-off in the mobile internet journey occurs between awareness (stage 2) and internet-enabled phone ownership (stage 3), particularly among rural respondents and women. For example, in Nigeria, 86% of rural respondents are aware of mobile internet, yet only 51% own an internet-enabled phone – a drop-off of 35 pp compared to 18 pp among urban respondents. A similar pattern is observed for women relative to men.[29]

Once people own an internet-enabled phone (stage 3), most use mobile internet (stage 4).[30] This is also the case for those living in rural areas and women. Focusing on efforts to increase internet-enabled phone ownership, especially among rural populations and women who are already aware of mobile internet, is therefore likely to be the most effective way to significantly reduce the rural-urban and gender gaps in mobile internet adoption.

Although an average of 83% of mobile internet users across the countries surveyed report daily use, many engage with only one or two types of activity. Frequency and diversity of use vary considerably across and within countries, with women and rural respondents consistently using mobile internet less often and for a narrower range of activities than men and urban counterparts.[31] Without regular and diverse use of internet,[32] mobile internet users are missing out on the full benefits.

27 Either a feature phone or smartphone.
28 Diverse daily mobile internet use is defined as performing at least three mobile internet use cases daily.
29 The Mobile Gender Gap Report 2026, GSMA, 2026
30 Mobile internet use (stage 4) is not device specific. Someone may therefore reach this stage of the journey by using mobile internet through a shared device or borrowing someone else's.
31 The Mobile Gender Gap Report 2026, GSMA, 2026
32 Diverse daily mobile internet use is defined as performing at least three mobile internet use cases daily.

Figure 23: The mobile internet user journey in Nigeria
Percentage of total adult population at each stage



Base: Total population aged 18+. N = 522 for rural and N = 490 for urban.

Note: A mobile owner is defined as a person who has sole or main use of a SIM card (or a mobile phone that does not require a SIM) and uses it at least once a month. Mobile internet users do not have to own their own mobile phone. Diverse daily mobile internet use is defined as performing at least three mobile internet use cases daily. Data labels are rounded.

Source: GSMA Consumer Survey, 2025

Figure 24: The mobile internet user journey
Percentage of total adult population

		Stage 1 Mobile ownership	Stage 2 Mobile internet awareness	Stage 3 Internet-enabled phone ownership	Stage 4 Mobile internet adoption	Stage 5 Daily mobile internet use	Stage 6 Diverse daily mobile internet use
Egypt	Urban	94%	92%	83%	79%	77%	34%
	Rural	85%	72%	55%	51%	48%	28%
Ethiopia	Urban	95%	87%	61%	48%	29%	19%
	Rural	72%	60%	30%	19%	7%	4%
Ghana	Urban	96%	92%	77%	73%	64%	50%
	Rural	92%	84%	67%	61%	49%	37%
Kenya	Urban	94%	94%	65%	68%	57%	50%
	Rural	93%	87%	48%	49%	37%	29%
Nigeria	Urban	96%	97%	79%	66%	57%	41%
	Rural	94%	86%	51%	33%	24%	13%
Senegal	Urban	97%	98%	83%	87%	74%	61%
	Rural	89%	94%	71%	75%	63%	45%
Uganda	Urban	94%	78%	50%	49%	25%	23%
	Rural	88%	60%	30%	27%	13%	10%
Bangladesh	Urban	81%	84%	56%	48%	42%	36%
	Rural	79%	63%	61%	28%	26%	18%
India	Urban	85%	80%	66%	68%	65%	51%
	Rural	79%	72%	55%	53%	51%	37%
Indonesia	Urban	87%	93%	75%	78%	73%	64%
	Rural	78%	83%	65%	65%	61%	55%
Pakistan	Urban	85%	87%	62%	65%	59%	37%
	Rural	78%	84%	46%	50%	42%	25%
Sri Lanka	Urban	93%	91%	78%	78%	75%	62%
	Rural	91%	87%	69%	64%	61%	53%
Guatemala	Urban	88%	96%	80%	84%	74%	66%
	Rural	78%	90%	66%	72%	63%	55%
Mexico	Urban	90%	98%	85%	89%	82%	63%
	Rural	87%	89%	74%	74%	65%	52%

Base: Total population aged 18+. N= from 212 to 1,518 for rural and from 217 to 841 for urban.

Note: A mobile owner is defined as a person who has sole or main use of a SIM card (or a mobile phone that does not require a SIM) and uses it at least once per month. Mobile internet users do not have to own their own mobile phone. Diverse daily mobile internet use is defined as performing at least three mobile internet use cases daily.

Source: GSMA Consumer Survey, 2025

7. BARRIERS TO MOBILE INTERNET ADOPTION AND USE

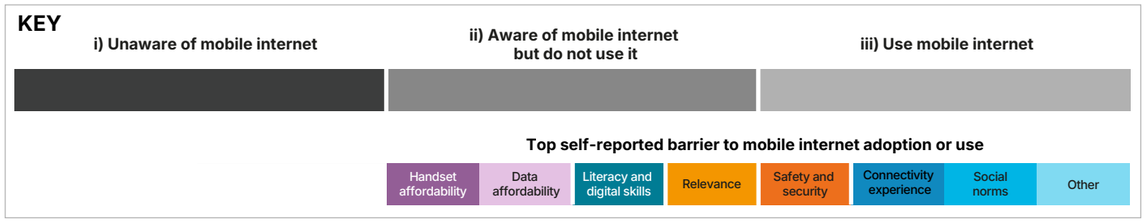
A range of barriers prevent people from adopting mobile internet and using it more extensively, with underserved groups (including women and persons with disabilities) experiencing these barriers more acutely due to structural inequalities in income and access to education, as well as restrictive social norms.

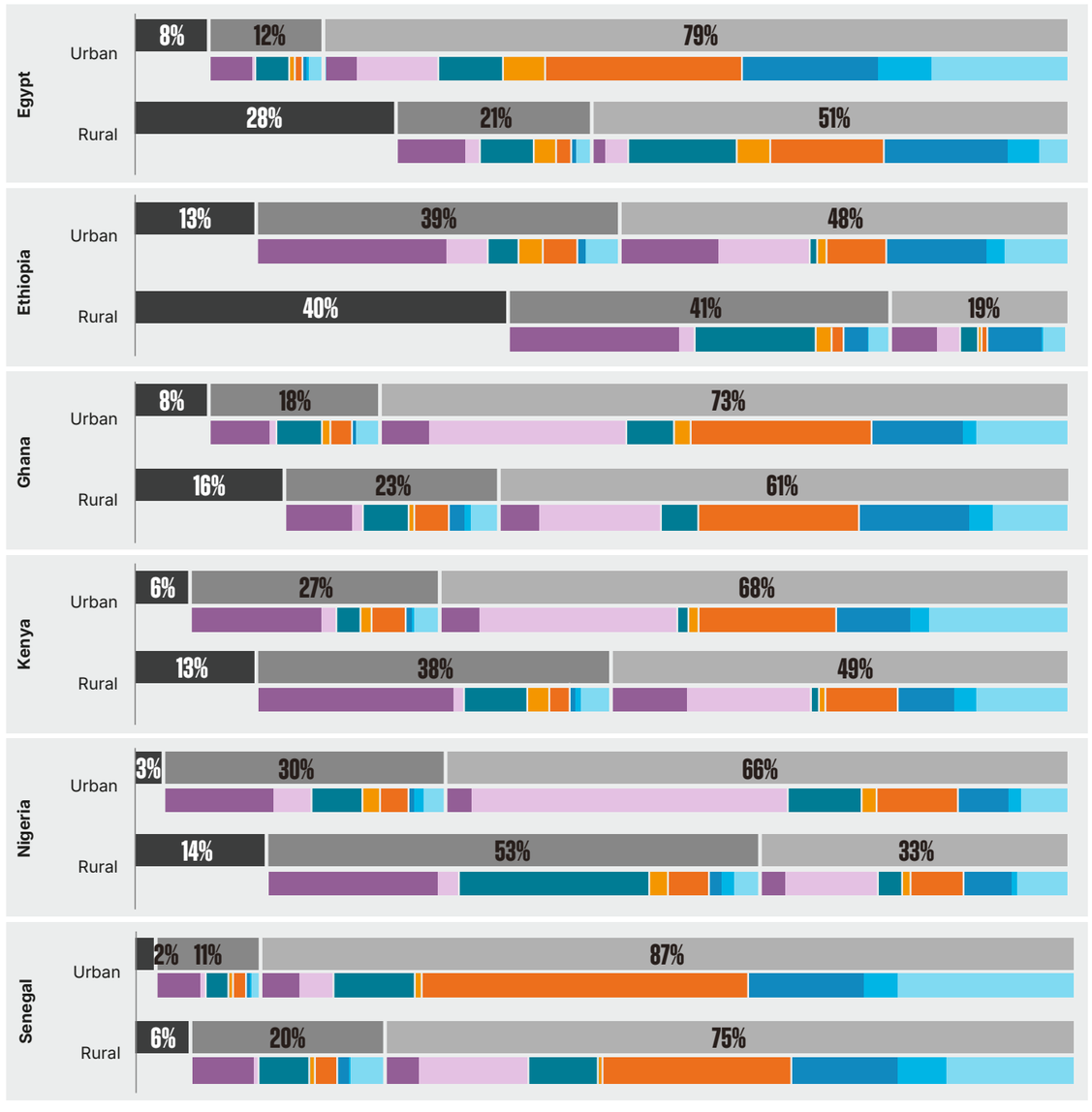
Figure 25: Barriers to mobile internet adoption and use

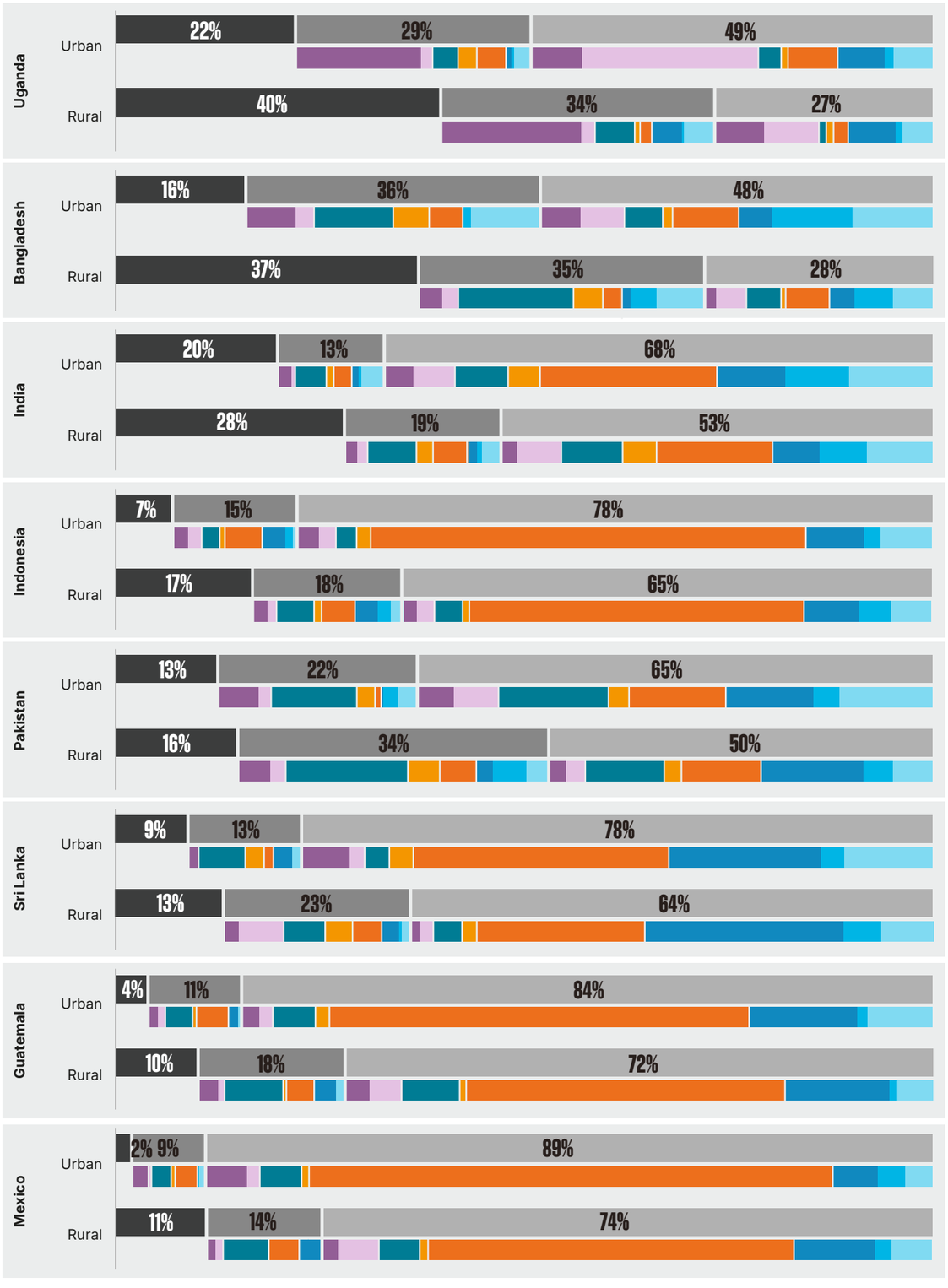
Affordability	Knowledge and skills	Safety and security	Relevance	Fundamental enablers
Inability to afford internet-enabled handsets and other costs beyond ownership, such as data plans and service fees	Lack of awareness and understanding of mobile internet, its benefits and uses, as well as lack of literacy, digital skills and confidence	Concerns about the negative aspects and risks of the internet, including issues such as harassment, identify theft, harmful content and information security	Lack of relevant content, products and services that meet users' preferences and needs, including those that are accessible, easy to use and in local languages	Lack of access to networks and enablers, such as electricity, formal ID, devices and customer-service touch points (e.g. agents), as well as restrictive social norms

Key barriers to mobile internet adoption include a lack of awareness of mobile internet and, once aware, not being able to afford an internet-enabled phone, and a lack of literacy and digital skills. Even among existing mobile internet users, many want to use the internet more but face different barriers. These include safety and security concerns, affordability and connectivity experience. Lack of perceived relevance also contributes to limited use.

Figure 26: Barriers to mobile internet adoption and use across survey countries
Percentage of total adult population



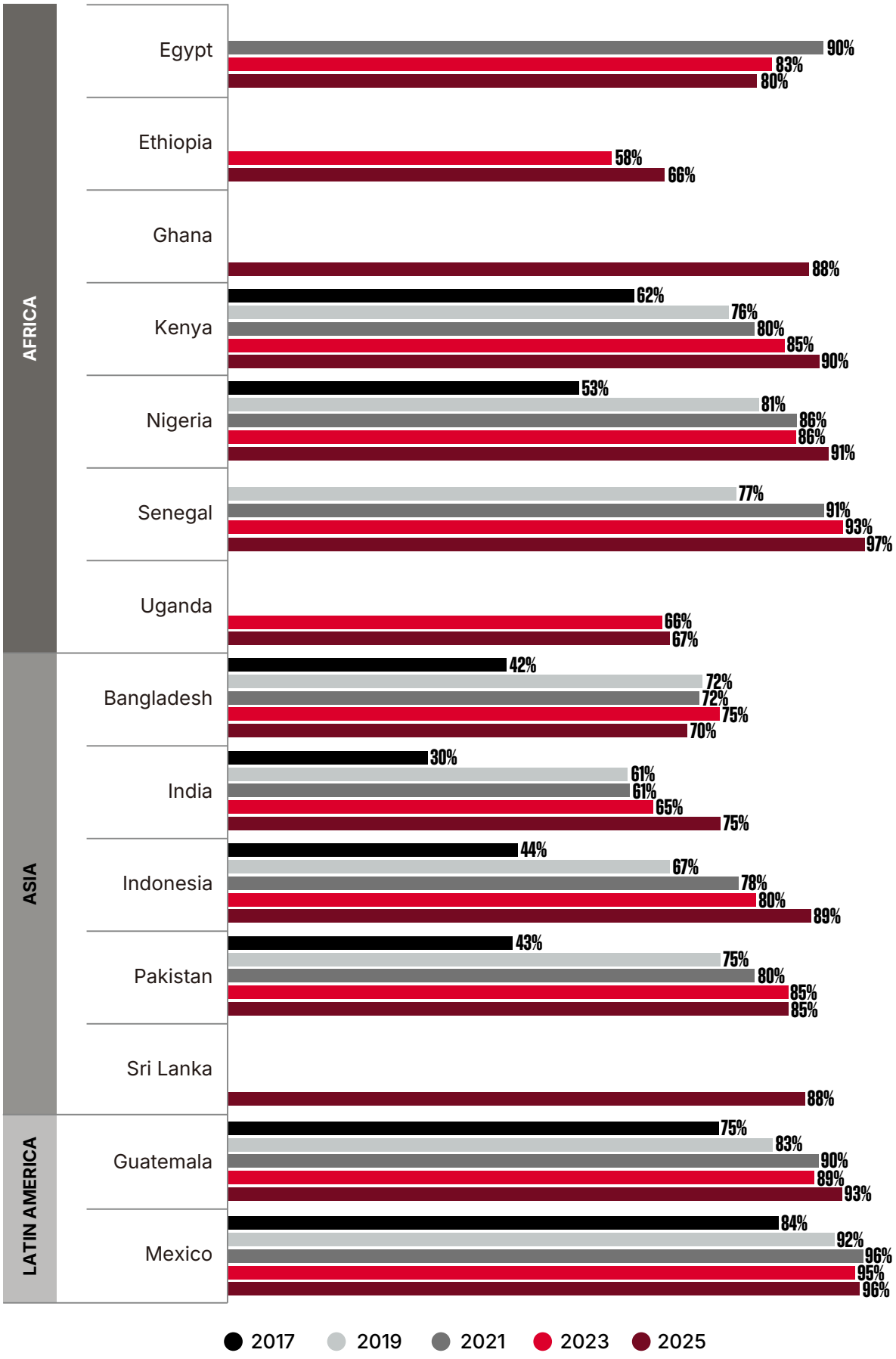




Base: Total population aged 18+. N= from 212 to 1,518 for rural and from 217 to 841 for urban in 2025.
Source: GSMA Consumer Survey, 2025

Awareness is high in most countries surveyed. The majority of countries surveyed have awareness levels of 75% of the population or more. However, in four countries, awareness of mobile internet remains below 75%, reaching as low as 66% of the population. Once approximately three quarters of the population are aware, the rate of growth decelerates. This reflects the challenge of reaching the final segments of the population. Awareness levels also vary significantly within countries, with women and rural populations less likely to be aware than men and urban counterparts.

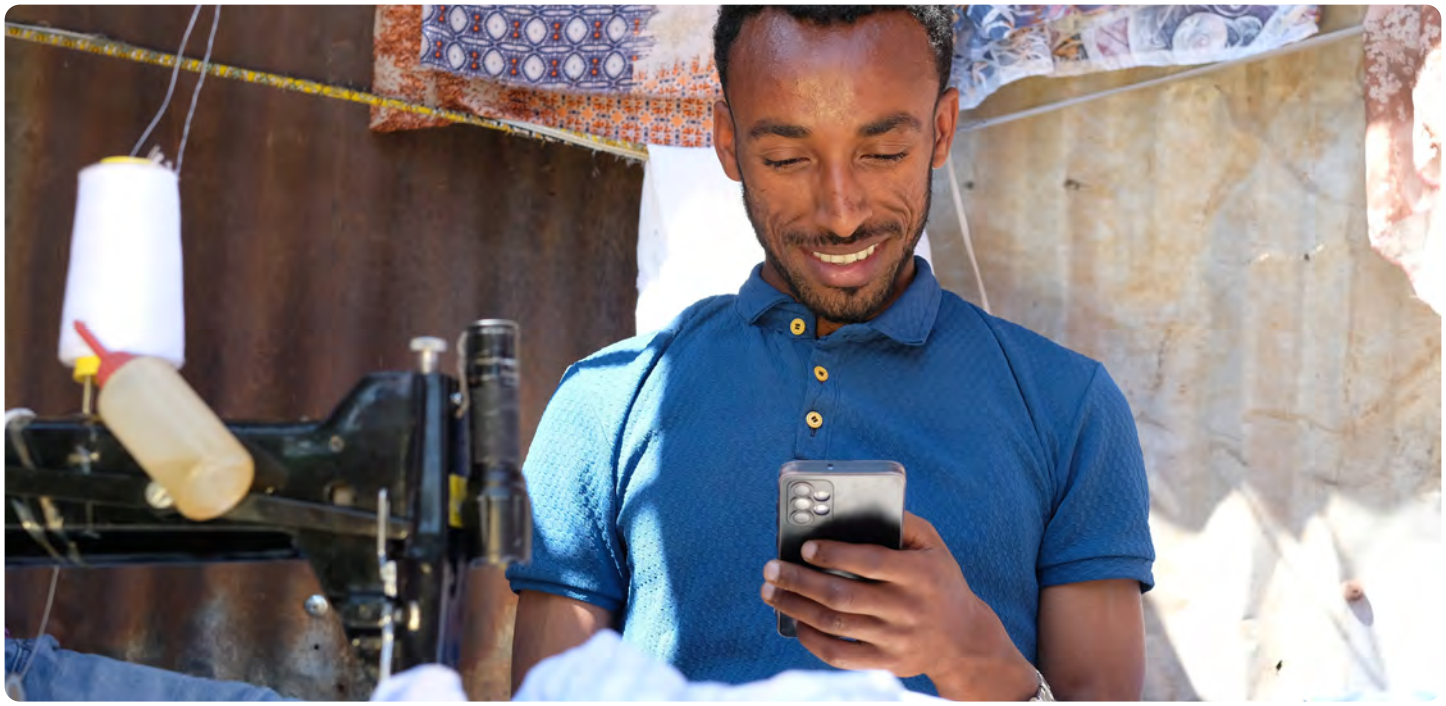
Figure 27: Mobile internet awareness, 2017–2025
Percentage of total adult population



Base: Total population aged 18+. N= from 1,006 to 2,293.

Note: 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.

Source: GSMA Consumer Survey, 2017–2025



Handset affordability and literacy & digital skills remain the top barriers to mobile internet adoption among those aware of it. While mentioned less often, concerns about safety and security also remain a significant deterrent, ranking as the third most commonly reported barrier overall.

The relative prominence of these barriers varies by region. Affordability, particularly of internet-enabled handsets, is reported more frequently in Sub-Saharan Africa; literacy and digital skills[33] are more commonly reported in South Asia; and safety and security concerns are more prominent in Latin America. Certain barriers are also particularly pronounced in specific country contexts, such as family disapproval in Pakistan (see Appendix 1).

Table 1: Top barriers to mobile internet adoption for those aware of mobile internet[34]
Based on the single most important reported barrier to adopting mobile internet

All countries	Urban	Rural	Men	Women
1	Affordability	Literacy and digital skills	Affordability	Affordability
2	Literacy and digital skills	Affordability	Literacy and digital skills	Literacy and digital skills
3	Safety and security concerns	Safety and security concerns	Safety and security concerns	Safety and security concerns

Base: Adults aged 18+ who have not used mobile internet in the past three months on any device, despite being aware of mobile internet (excludes those not aware of mobile internet). N = from 30 to 346 for rural and from 31 to 150 for urban. N = from 62 to 238 for women and from 43 to 240 for men.

Note: The barriers in the above table are composite barriers. These composite barriers are aggregates (not averages) of the responses for between two and five sub-barriers (see Appendix 1). Fundamental enabler-related barriers are not grouped as a composite since they cover a disparate range of topics. Rankings indicate the relative aggregated proportion of respondents who answered, "This is the most important reason stopping me" to the question, "Which one of those factors would you say is the single most important reason stopping you from using the internet on a mobile phone?"

Source: GSMA Consumer Survey, 2025

33 Tools such as the GSMA Mobile Internet Skills Training Toolkit (MISTT) can help teach people the basic digital skills needed to access and use mobile internet.
34 See The Mobile Gender Gap Report 2026 for a gender disaggregated table for all countries surveyed.

Barriers to greater use of mobile internet differ from those to adoption, and vary considerably by country. Safety and security concerns become more prominent at this stage, with higher reported levels tending to correlate with greater overall adoption.[35] For existing users, data affordability becomes a more pressing concern than device affordability. The connectivity experience also emerges as a more significant barrier.[36]

Although perceived lack of relevance is not among the top reported barriers, it is still reported by many and plays an important role in perceived value and people's willingness to pay, intersecting with affordability. The availability and awareness[37] of locally relevant content and services in a range of languages is a key enabler of both adoption and regular and diverse use. See Appendix 1 for the country-level data.

Table 2: Top barriers to further mobile internet use for existing mobile internet users[38]
Based on the single most important reported barrier to using mobile internet more

All countries	Urban	Rural	Men	Women
1	Safety and security concerns	Safety and security concerns	Safety and security concerns	Safety and security concerns
2	Affordability	Affordability	Affordability	Affordability
3	Connectivity experience	Connectivity experience	Connectivity experience	Connectivity experience

Base: Mobile internet users aged 18+. N = from 158 to 797 for rural and from 135 to 747 for urban. N = from 115 to 531 for women and from 181 to 785 for men.

Note: The barriers in the table above are composite barriers. These composite barriers are aggregates (not averages) of the responses for between two and five sub-barriers (see Appendix 1). Fundamental enabler-related barriers are not grouped as a composite since they cover a disparate range of topics. Rankings indicate the relative aggregated proportion of respondents who answered, "This is the most important reason stopping me" to the question, "Which one of those factors would you say is the single most important reason stopping you from using the internet more on a mobile phone?"

Source: GSMA Consumer Survey, 2025

35 Tend to be related to scams/fraud and information security, followed by harmful content, unwanted contact and the reliability of information online.
36 Connectivity experience as a barrier represents an aggregate of those who reported: "Using the internet on a mobile phone is too slow (e.g. connection speeds)" or "There is inconsistent coverage (e.g. connection drops) or no coverage to access the internet in my area".
37 Being aware of mobile internet does not necessarily translate into being aware of services that may be relevant to people's lives.
38 See The Mobile Gender Gap Report 2026 for a gender disaggregated table for all countries surveyed.

8. AFFORDABILITY OF INTERNET-ENABLED HANDSETS AND DATA

Affordability is a key driver of mobile internet adoption and use. A large proportion of those who do not use the internet do not own a device. Handset affordability plays a significant role. It is the top reported barrier to mobile internet adoption across surveyed LMICs. Once people start to use mobile internet, data affordability emerges as a key barrier to further use. It is important to examine affordability trends closely to understand the scale of the challenge.

DEFINING AFFORDABILITY

Affordability refers to the ability of consumers to both pay for a handset and cover the cost of a suitable data bundle.

The affordability of mobile data and handsets has two parts:

— The cost (in local currency) of purchasing mobile data and an internet-enabled handset

— A consumer's income.[39,40]

In this context, the lower the cost of a handset and data as a share of monthly GDP per capita, the more affordable a handset and data are. However, cheaper handsets are not the only way to lower the handset cost burden. Making financing more accessible and strengthening the enabling environment (including stimulating demand by increasing awareness and willingness to pay) can also improve affordability.[41]

Analysis by the GSMA has shown that devices are likely to be affordable when they cost 15–20% of monthly GDP per capita.[42]

The ITU aspirational affordability target aims to make entry-level, broadband subscription costs account for less than 2% of monthly income per capita by 2030.

Handset affordability

The retail price and affordability of an entry-level, internet-enabled handset have remained relatively unchanged. However, significant price increases have been seen in recent shipments of new devices, so consumer prices are expected to increase sharply (see *Spotlight: The memory price crisis threatening handset affordability*)**.** It is important to note that there is a delay between higher prices of new devices being shipped and the impact on consumers, as previous device stocks purchased at lower prices are first sold.

The affordability of entry-level, internet-enabled devices varies considerably by region and population segment. Across LMICs, the affordability of an entry-level device is 15% of average monthly income for the cheapest overall device. For the poorest 20%, it costs 44% of average monthly income, increasing to 76% of average monthly income for the poorest 20% in Sub-Saharan Africa. Across all regions, particularly in MENA, entry-level, internet-enabled devices remain much less affordable for women than men. On average, the cost of an entry-level, internet-enabled handset in LMICs accounts for 20% of average monthly income for women, compared to 12% for men.[43]

39 Income is an important factor to consider. If two consumers with different levels of income face the same handset and data costs, the consumer with the lower income will be less likely to purchase and will remain unconnected.
40 Changes in affordability over time can therefore be the result of changes in the costs of handsets and data, an individual's income, or both.
41 For more details, see Improving handset affordability in low- and middle-income countries, GSMA, 2025.
42 Analysis to improve handset affordability, GSMA, 2024
43 Women often face greater affordability barriers due to larger gender gaps in wages and employment.

Figure 28a: Median cost and affordability of an internet-enabled handset across LMICs, 2021–2025

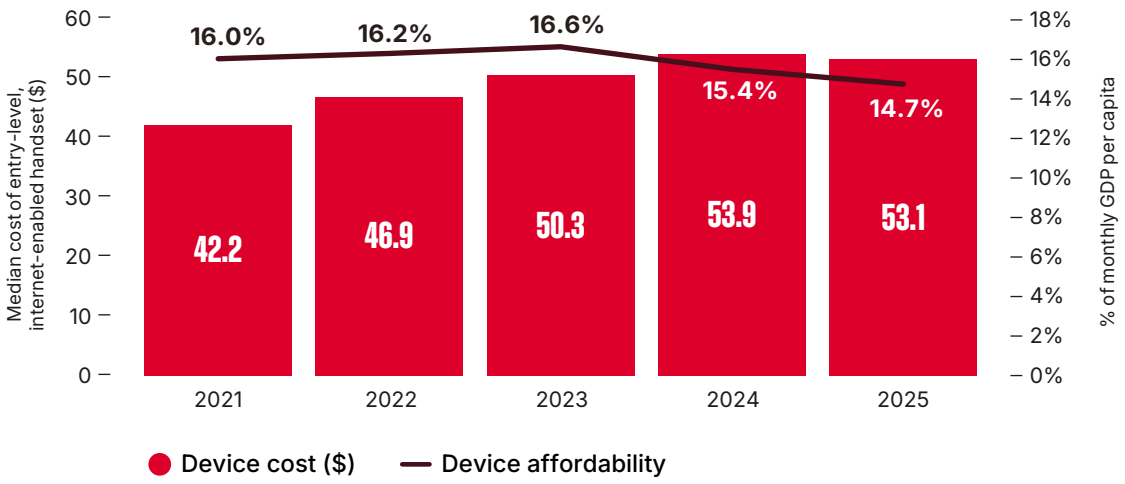
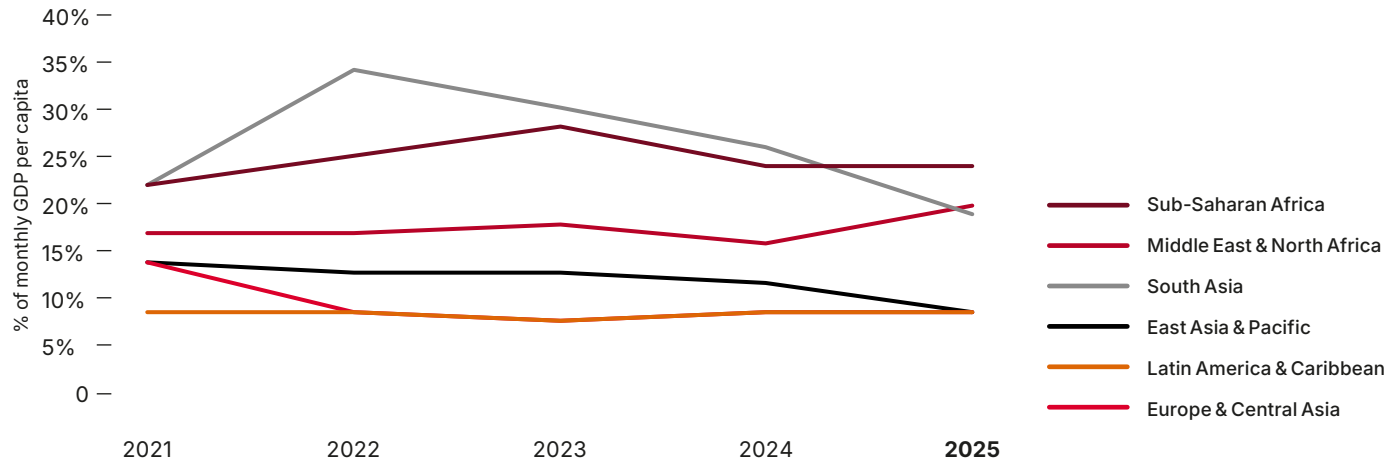


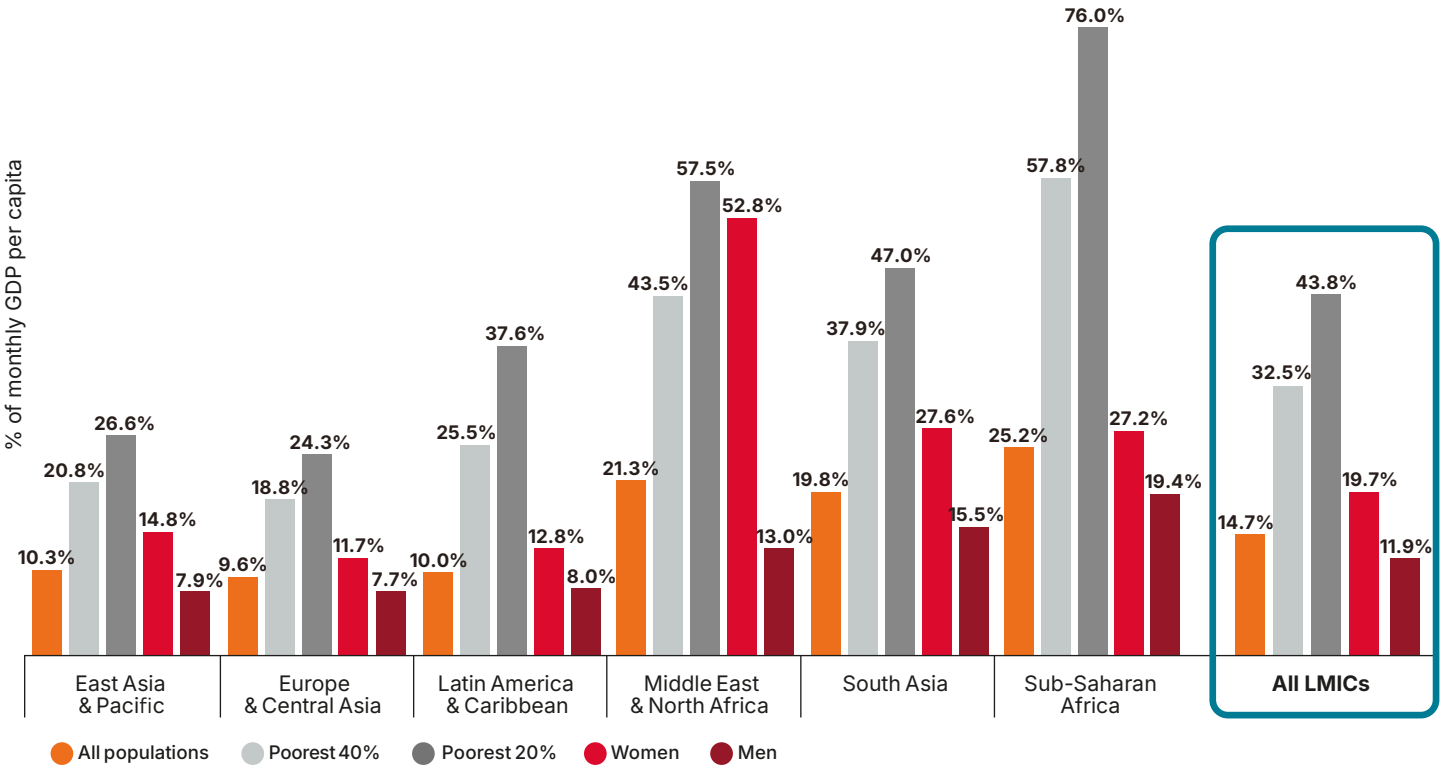
Figure 28b: Median affordability of an internet-enabled handset across LMICs by region, 2021–2025



Note: Price of handset is the cheapest internet-enabled feature phone, smart feature phone or smartphone available (at the time of collecting data) sold by mobile operators or mobile phone retailers (it does not reflect prices for second-hand or black-market handsets). To determine affordability, we divide the price by monthly GDP per capita.

Source: GSMA Intelligence calculations based on pricing data from Tarifica and monthly GDP per capita sourced from IMF World Economic Outlook.

Figure 28c: Affordability of an entry-level, internet-enabled device for the poorest 20% and 40%, and men and women, by region, 2025

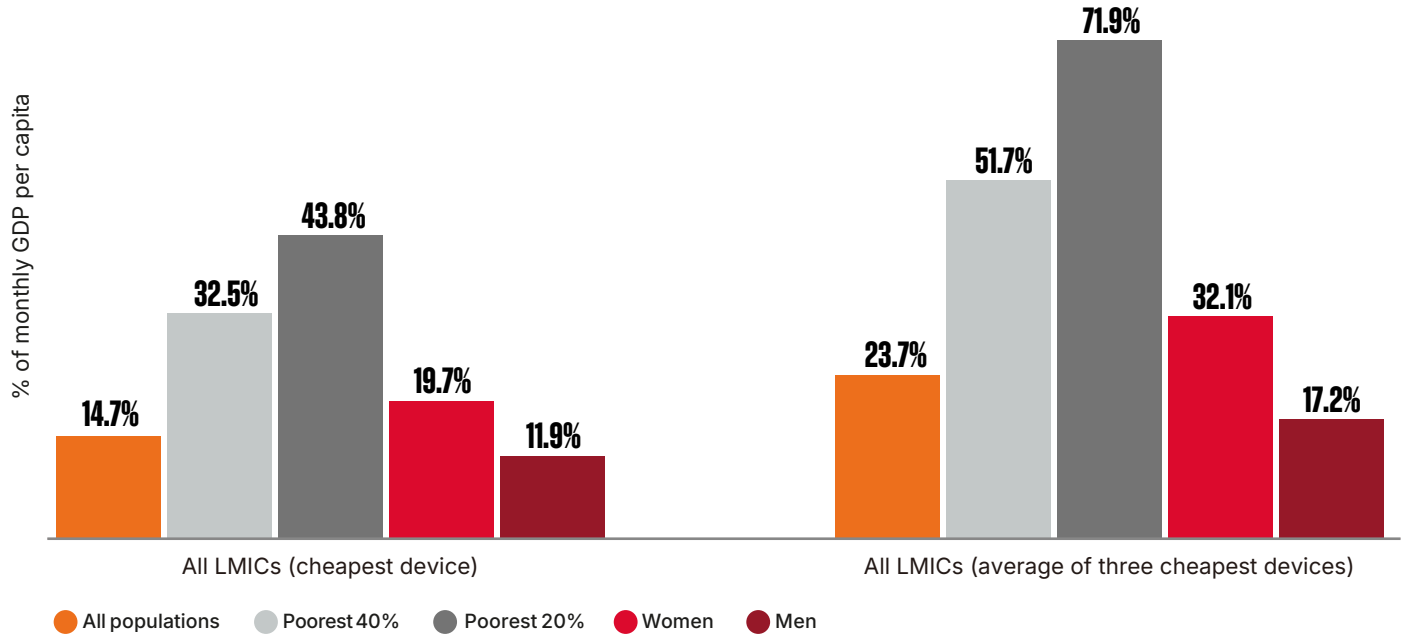


Note: Price of handset is the cheapest internet-enabled feature phone, smart feature phone or smartphone available (at the time of collecting data) sold by mobile operators or mobile phone retailers. To determine affordability, we divide the price by monthly GDP per capita. Affordability is based on entry-level device prices in 130 LMICs in 2025.

Source: GSMA Intelligence calculations based on pricing data from Tarifica. Data on incomes for the poorest 20% and 40% of the population and men and women is based on information sourced from the World Bank, World Inequality Database, UN and the IMF World Economic Outlook.

Examining the average of the cheapest three internet-enabled devices in LMICs, affordability worsens from 15% of average monthly income to 24%. This is important to consider since the single cheapest internet-enabled device may not necessarily be consistently available across the whole market. It may also not have significant uptake among new and existing mobile internet users. Therefore, this research now also considers the average of the cheapest three internet-enabled devices available in each market.[44]

Figure 28d: Comparison of affordability based on the cheapest internet-enabled device versus average affordability based on the three cheapest internet-enabled devices for the poorest 20% and 40%, and men and women, in LMICs, 2025



Note: Affordability for the three cheapest device prices uses data from 103 LMICs in 2025, compared to 130 countries for the cheapest device. To determine affordability, we divide the price by monthly GDP per capita.

Source: GSMA Intelligence calculations based on pricing data from Tarifica. Data on incomes for the poorest 20% and 40% of the population and men and women is based on information sourced from the World Bank, World Inequality Database, UN and the IMF World Economic Outlook.

44 Data on the three cheapest devices is only available for 2025, so cannot be compared to any historical data.

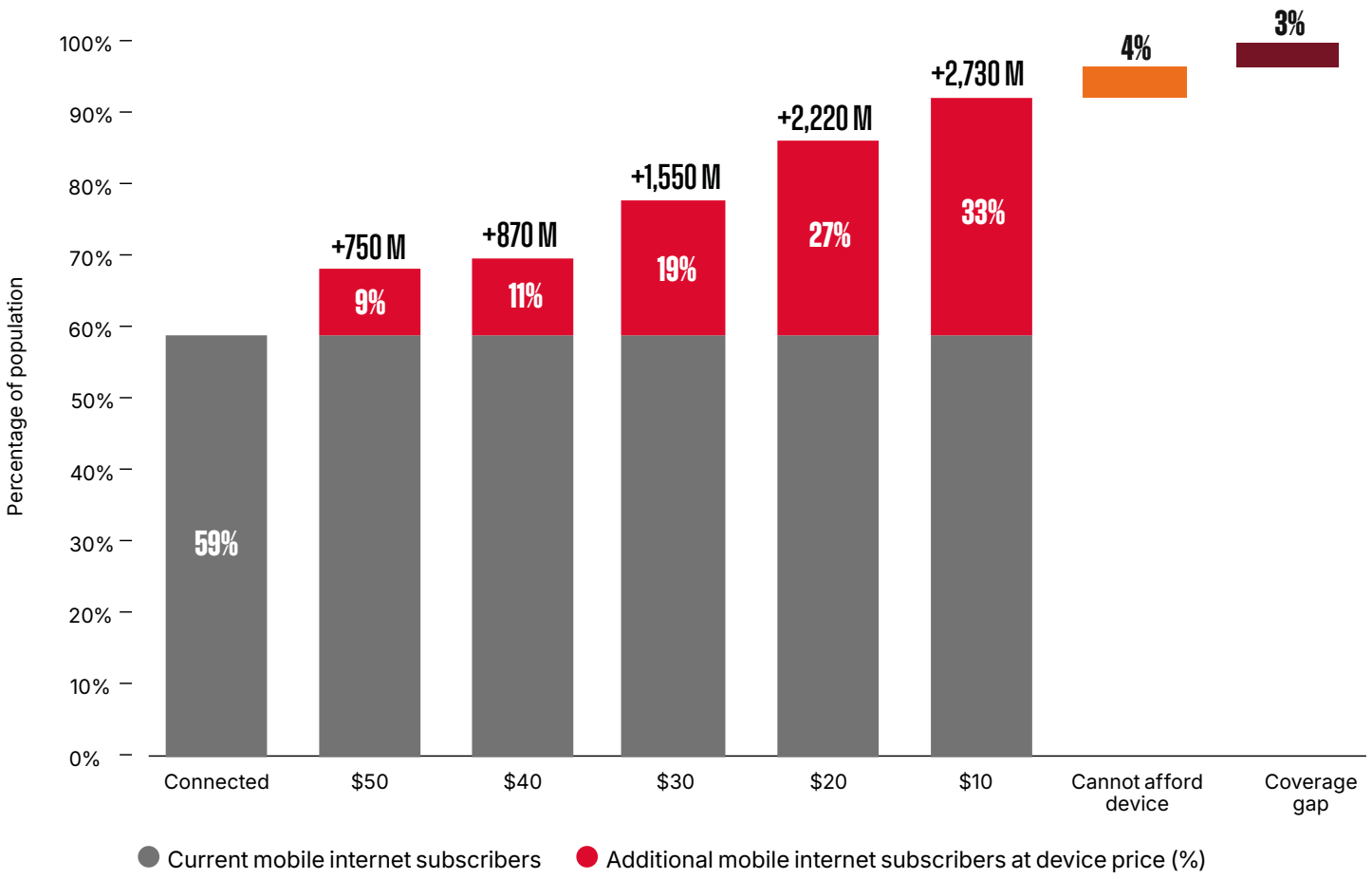
By the end of 2025, 52% of LMICs had an entry-level, internet-enabled device available for less than the affordability threshold of 15% of average monthly income, and 64% of LMICs had one available for less than 20% of average monthly income. GSMA research analysed the impact of reducing device costs on affordability and the potential impact it could have on making handsets affordable to people who live within mobile broadband coverage but do not use mobile internet.

A device at $30 could, in theory, make handsets affordable to just under an additional 1.6 billion people,[45] while a device at $20 could make handsets affordable to around an additional 2.2 billion people, but 850 million people would still not be able to afford a device at that price point. There is substantial variation by region.

For example, in Sub-Saharan Africa, handsets do not become more affordable to a significant proportion of people until the device price is reduced to $20, which would make devices affordable to an additional 18% of the population (230 million people), rising to 46% (580 million people) at $10. Even at $10, the remaining 20% of the population living within mobile broadband coverage but not using it (240 million) would still find a device unaffordable (see Appendix 1 for regional analysis).

In practice, achieving such low device costs will prove increasingly challenging considering both existing and projected increases in overall device costs (see *Spotlight: The memory price crisis threatening handset affordability*).

Figure 29: The potential impact of a reduction in device cost on the usage gap



Base: Total population, 192 countries

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

45 This theoretical impact is based solely on the cost of the device meeting the affordability threshold. A number of additional considerations mean the actual impact would be different, for example, due to limited availability of a given device in rural areas or higher prices in rural areas due to higher distribution costs, a lack of perceived relevance of a device to people who can afford it (i.e. lack of willingness to pay) or other barriers to internet adoption unrelated to affordability.

SPOTLIGHT: THE MEMORY PRICE CRISIS THREATENING HANDSET AFFORDABILITY

Memory prices are skyrocketing because of AI

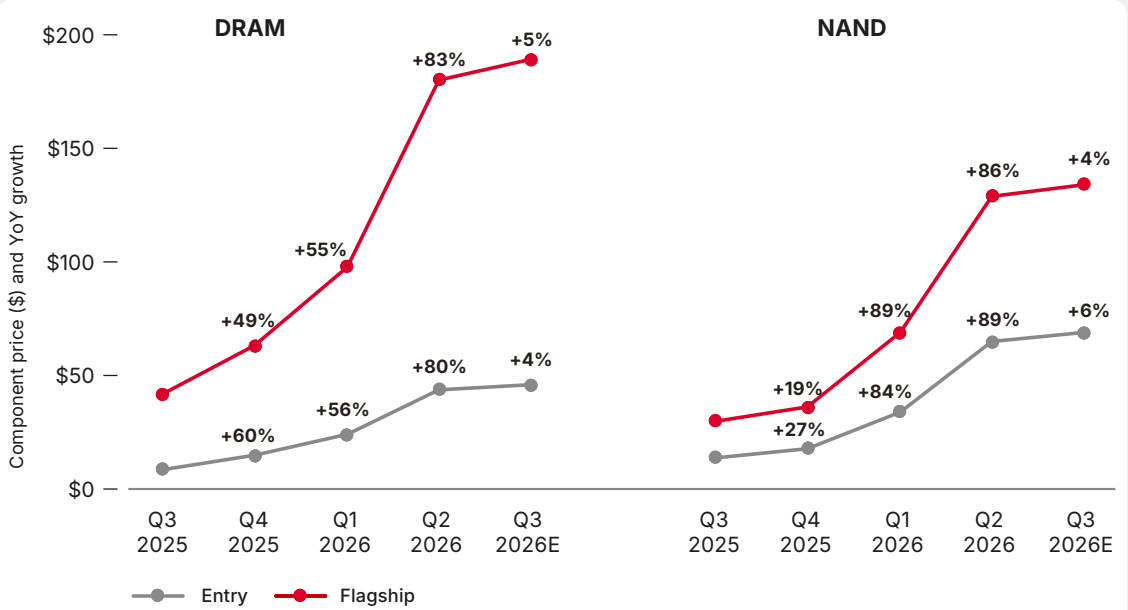
The push for more affordable smartphones faces a significant challenge because of the price of memory. Memory is essential in smartphones in two forms:

- **Dynamic random-access memory (DRAM)** is short-term storage that temporarily holds active apps, system processes and data, and dictates how seamlessly a device can multitask and switch between apps. Older DRAM is low-power double data rate 4 (LPDDR4), while the newest and most in demand by both smartphones and data centres is LPDDR5x. Most smartphones have between 2 and 16 GB.

- **NAND** is long-term storage for data, photos, apps and anything else. NAND can be either universal flash storage (UFS) 4.0, which is the modern standard for mobile memory, or UFS 4.1, which is high-speed memory designed for flagship smartphones and AI-driven applications. This is typically between 256 GB and 1 TB.

Prices are increasing rapidly as demand grows for high-performance memory to power AI operations and data centres, including DDR5 memory used in flagship smartphones. At the same time, manufacturing is shifting away from older memory platforms such as DDR4 which is still used in entry-level handsets. Having already more than doubled between Q3 2025 and Q1 2026, memory prices jumped by a further 80–90% in Q2 2026.

Figure 30: Mobile memory prices are skyrocketing



DRAM: Entry = 4 GB LPDDR4, Flagship = 16 GB LPDDR5
NAND: Entry = 256 GB UFS 4.0, Flagship = 512 GB UFS 4.1

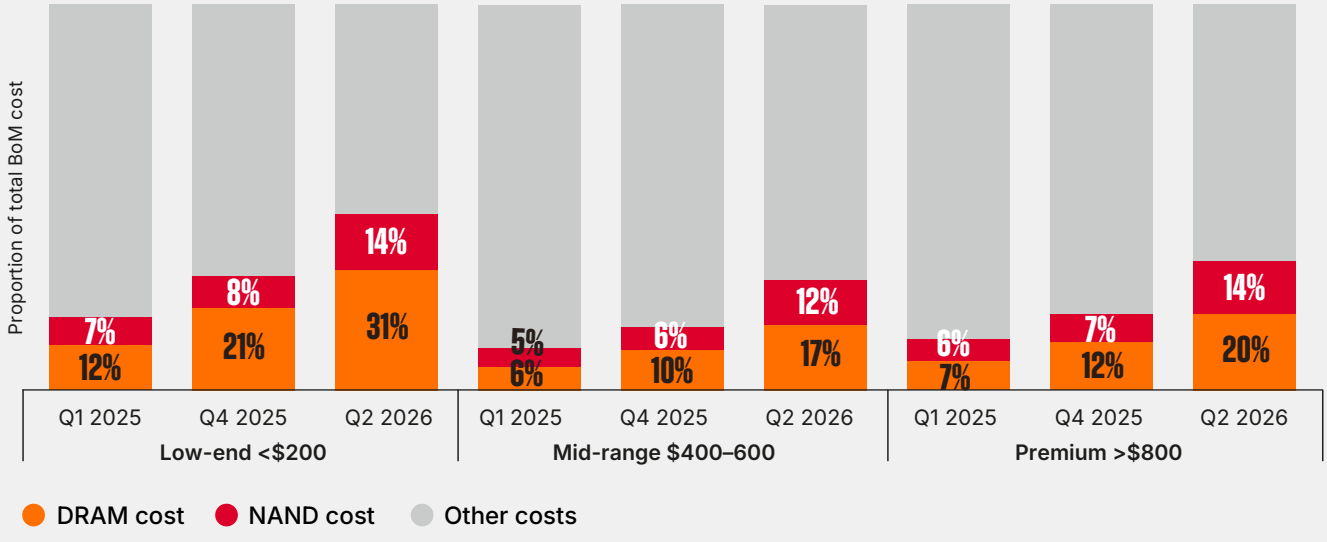
Source: Counterpoint Research

SPOTLIGHT: THE MEMORY PRICE CRISIS THREATENING HANDSET AFFORDABILITY

Higher component prices mean more expensive smartphones

These price rises are fundamentally impacting the bill of materials (BoM) for smartphone original equipment manufacturers (OEMs), with the memory proportion of the total BoM more than doubling since Q1 2025. For a mid-range smartphone (between $400 and $600 wholesale), memory now accounts for almost 30% of total BoM. In a low-end smartphone (under $200 wholesale), where margins are much narrower, memory now accounts for almost half the total BoM. Entry-level smartphones face the most pressure in this global context.

Figure 31: The growing proportion of memory costs in smartphone BoM



Source: Counterpoint Research

Since this increased BoM significantly impacts the margin of a device, the final retail price inevitably increases. This is already evident in recent launches. For example, the entry-level Xiaomi Redmi A7, released in April 2026 for around $110, is 40% more expensive than the Redmi A5 was when it launched in April 2025, despite almost identical hardware and only slightly improved software support. A further example is the Realme C71 in India. Although it launched in June 2025 at the same price as its predecessor (the C61, at INR7,699 or $80), it has since increased in price by almost 70% and now retails at INR12,999 ($135).

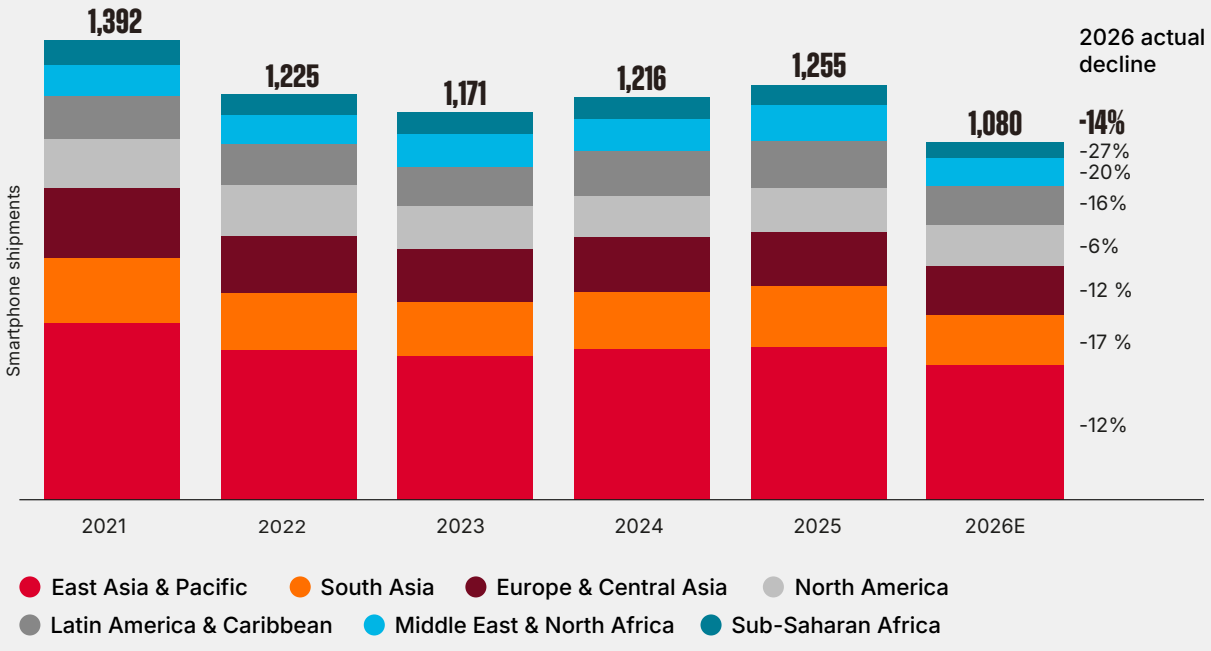
SPOTLIGHT: THE MEMORY PRICE CRISIS THREATENING HANDSET AFFORDABILITY

More expensive smartphones threaten digital inclusion in LMICs

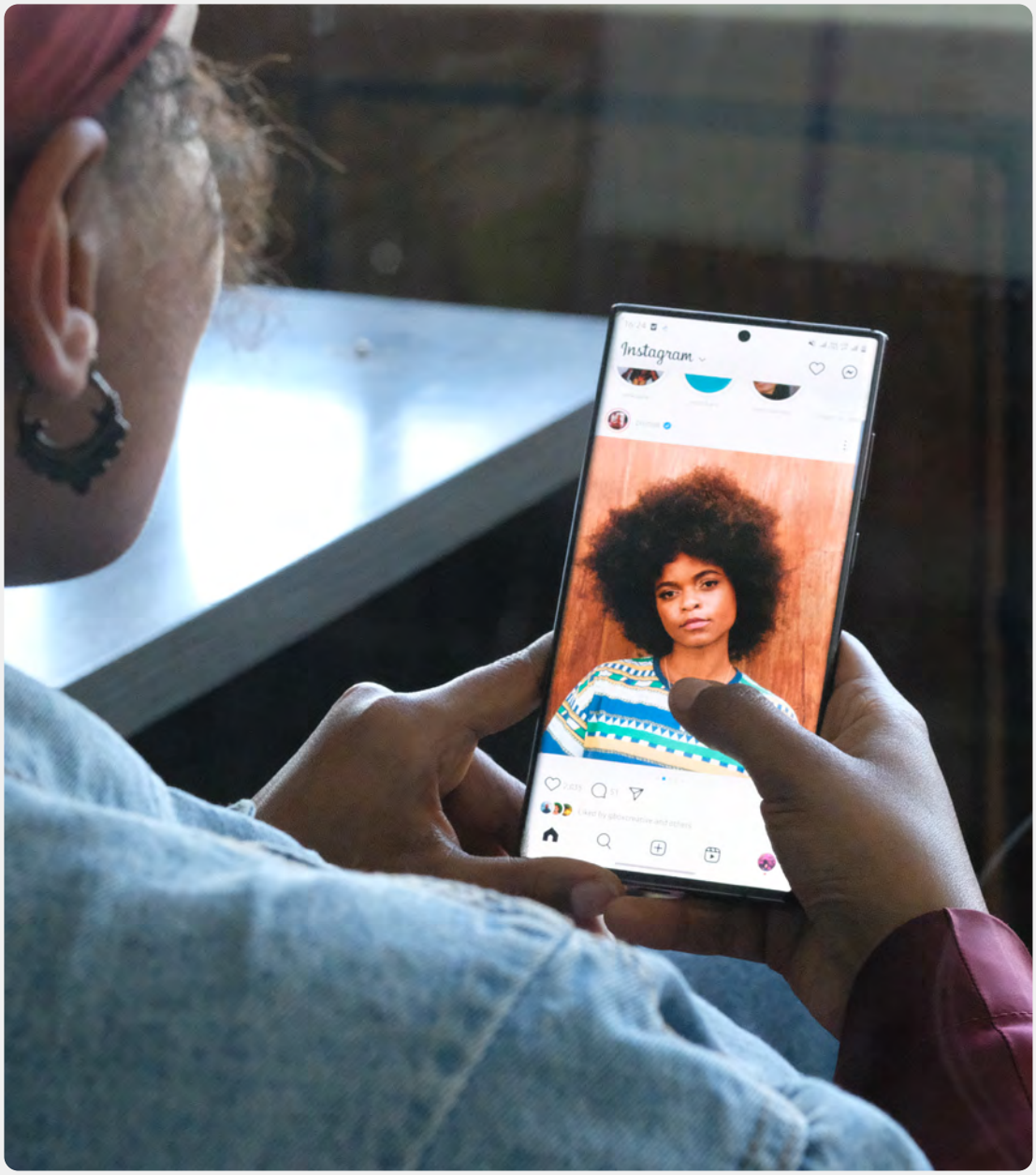
Increases in device prices will disproportionately impact consumers in more price-sensitive markets, especially those in emerging regions where reliance on lower-end devices is greater, and where smartphone adoption is already unaffordable for many.

Global smartphone shipments are expected to see the largest single annual drop in history in 2026, dropping by 14% versus 2025. That equates to 174 million fewer smartphones shipped in 2026. Most of the decline will be driven by the sub-$100 segment, which is expected to see a 36% drop in smartphone shipments over the same timeframe, or around 90 million fewer smartphones. Consequently, emerging markets will suffer the most because they rely more on lower-end devices. Sub-Saharan Africa, for example, is expected to see 16 million fewer smartphones shipped in 2026 – down more than a quarter on 2025.

Figure 32: 2026 will see the largest fall in shipments in smartphone history



Source: Counterpoint Research



SPOTLIGHT: THE MEMORY PRICE CRISIS THREATENING HANDSET AFFORDABILITY

GSMA research shows that the affordability of internet-enabled devices is the most significant barrier to mobile internet adoption across LMICs surveyed, particularly in Sub-Saharan Africa. To help tackle this, in 2025, the GSMA announced a strategic partnership with six leading African mobile operators to introduce $40 4G smartphones and expand digital and financial inclusion. However, with a single entry-level memory chip now costing more than that alone, progress on making devices more affordable is at significant risk. This represents a considerable threat to the growth of smartphone adoption in emerging regions, slowing digital expansion and ecosystem development.

Affordability is a defining barrier to mobile internet adoption. These strategies can ease some of the upward pressure on device costs, but the AI drive for memory will continue to fuel demand and increase prices. More needs to be done to protect and improve the availability of low-cost, entry-level devices for first-time buyers to avoid further entrenching digital divides.

Data affordability

In 2025, the affordability of 1 GB of data improved and is now at 1.1% of average monthly income – the lowest value in the last five years. However, it remains unaffordable for underserved populations in many regions, particularly the poorest and women, and varies by region.

The ITU has set an aspirational target of ensuring that an entry-level broadband subscription costs less than 2% of income per capita, as well as less than 2% of the average income of the poorest 40% of the population.[46] In 2025, across the 133 LMICs where 1 GB pricing data was available, 47 countries (35%) have yet to meet the affordability target of 1 GB at less than 2% of average monthly income (only a slight improvement on 2024).

Considering the second affordability target to make entry-level broadband account for less than 2% of average income for the poorest 40% of the population, 80 LMICs (60%) did not meet the target in 2025. This has improved compared to 2024, when 85 countries (63%) did not meet the target. It highlights the challenge remaining to make mobile broadband affordable for everyone.

Figure 33a: Median cost and affordability of 1 GB data across LMICs, 2021–2025

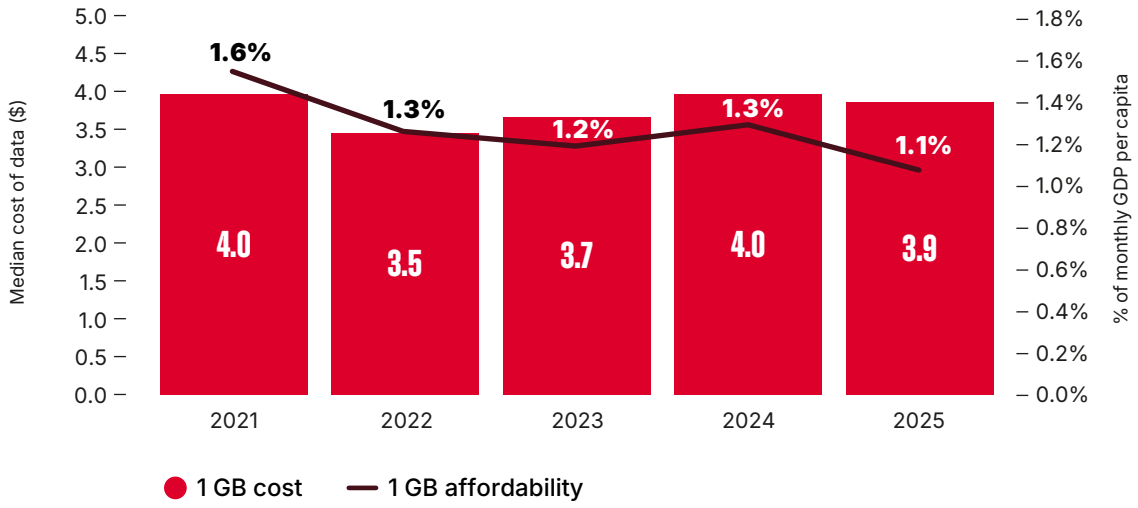
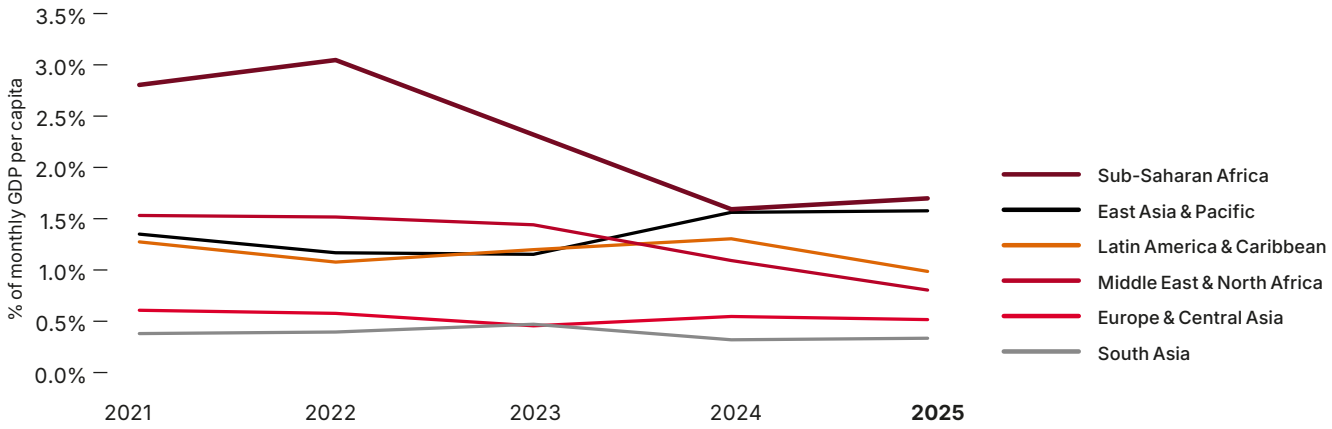


Figure 33b: Median affordability of 1 GB data across LMICs by region, 2021–2025

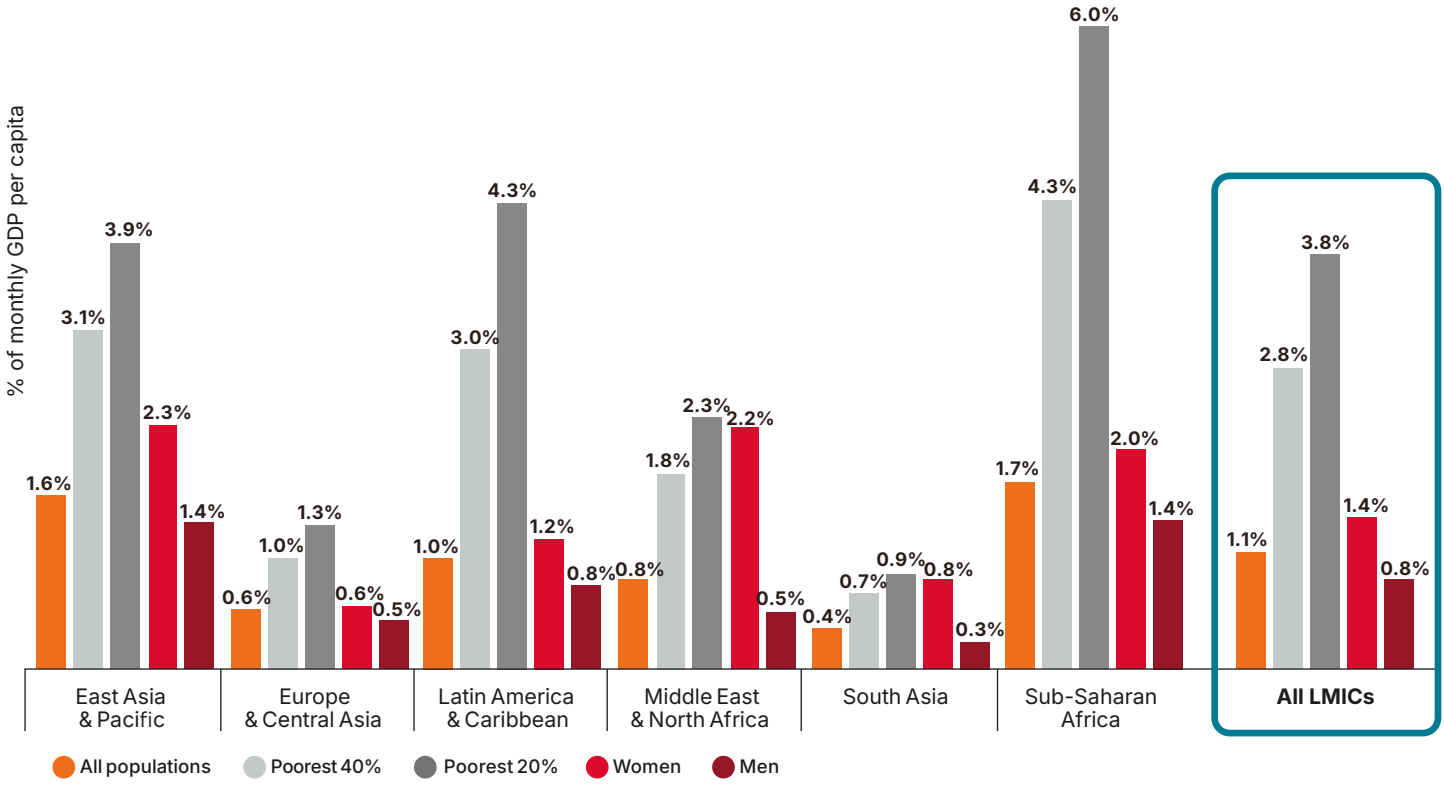


Note: Price of 1 GB is the price of the cheapest plan available (at the time of collecting data) to purchase at least 1 GB of data per month. Further details on how pricing data is gathered can be found in the Mobile Connectivity Index Methodology. To determine affordability, we divide the price by monthly GDP per capita.

Source: GSMA Intelligence calculations based on pricing data from Tarifica and ITU, and monthly GDP per capita sourced from IMF World Economic Outlook.

46 Aspirational targets for 2030, ITU, 2022. While the ITU's target refers to affordability based on GNI per capita, we use GDP per capita to incorporate more up-to-date data on income per capita.

Figure 33c: Affordability of 1 GB data for the poorest 20% and 40%, and men and women, by region, 2025



Note: To determine affordability, we divide the price by monthly GDP per capita

Source: GSMA Intelligence calculations based on pricing data from Tarifica and ITU. Data on incomes for the poorest 20% and 40% of the population and men and women is based on information sourced from the World Bank, World Inequality Database, UN and the IMF World Economic Outlook.

The affordability of 5 GB of data remained the same in 2025, following years of improvement since 2021. Over this period, all regions except Sub-Saharan Africa have seen relatively little change. The improvement in affordability between 2021 and 2024 has therefore largely been driven by Sub-Saharan Africa. The affordability of 5 GB of data shows significant variation by population segment. Across LMICs, median 5 GB affordability is 1.8% of average monthly income, rising to 6.3% for the poorest 20%.

Across the 131 LMICs where 5 GB pricing was available, 61 countries (47%) have not yet met the target of 5 GB affordability at less than 2% of monthly income, compared to 47 for 1 GB. However, considering the average income of the poorest 40%, at the end of 2025 there were 94 LMICs (72%) where 5 GB cost more than 2% of monthly income for the poorest population segments.

Figure 34a: Median cost and affordability of 5 GB data across LMICs, 2021–2025

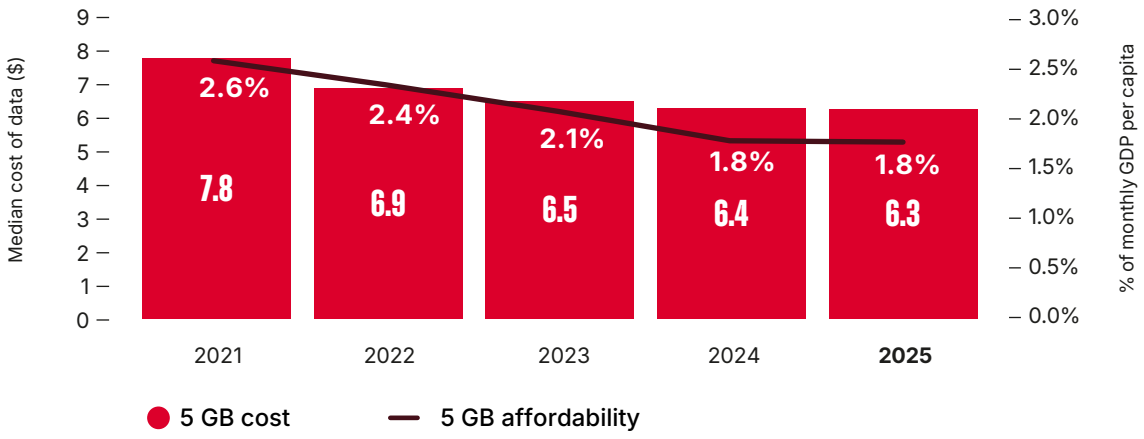
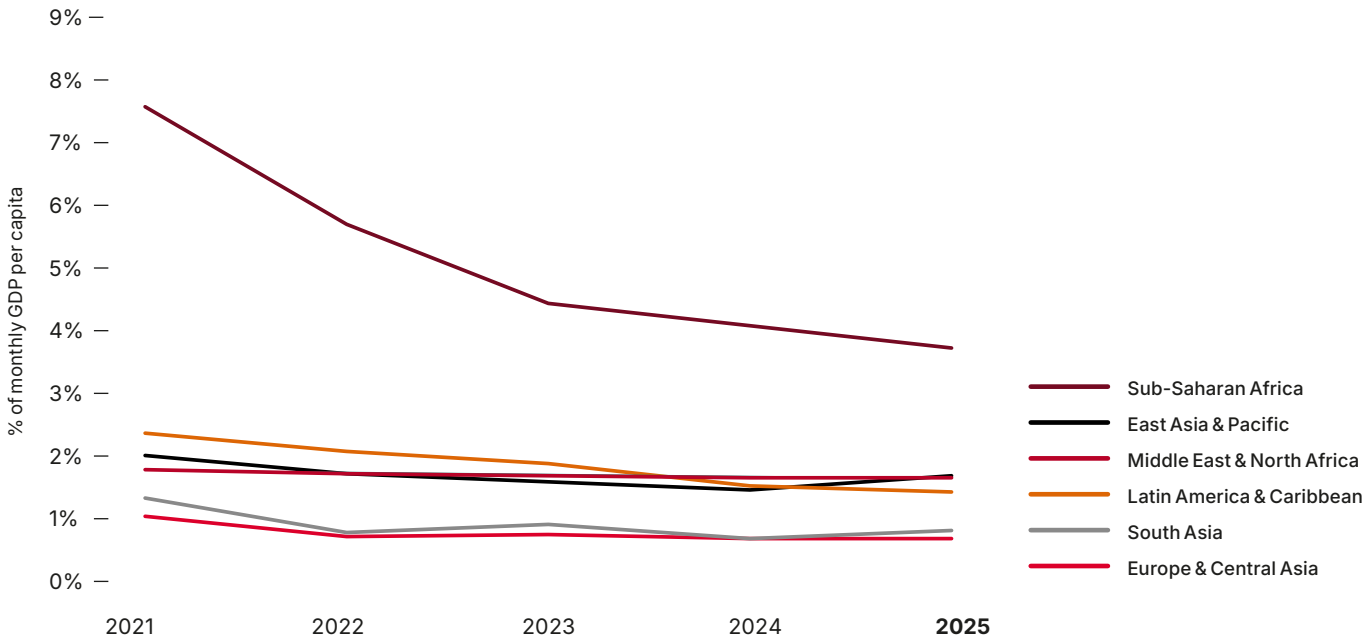


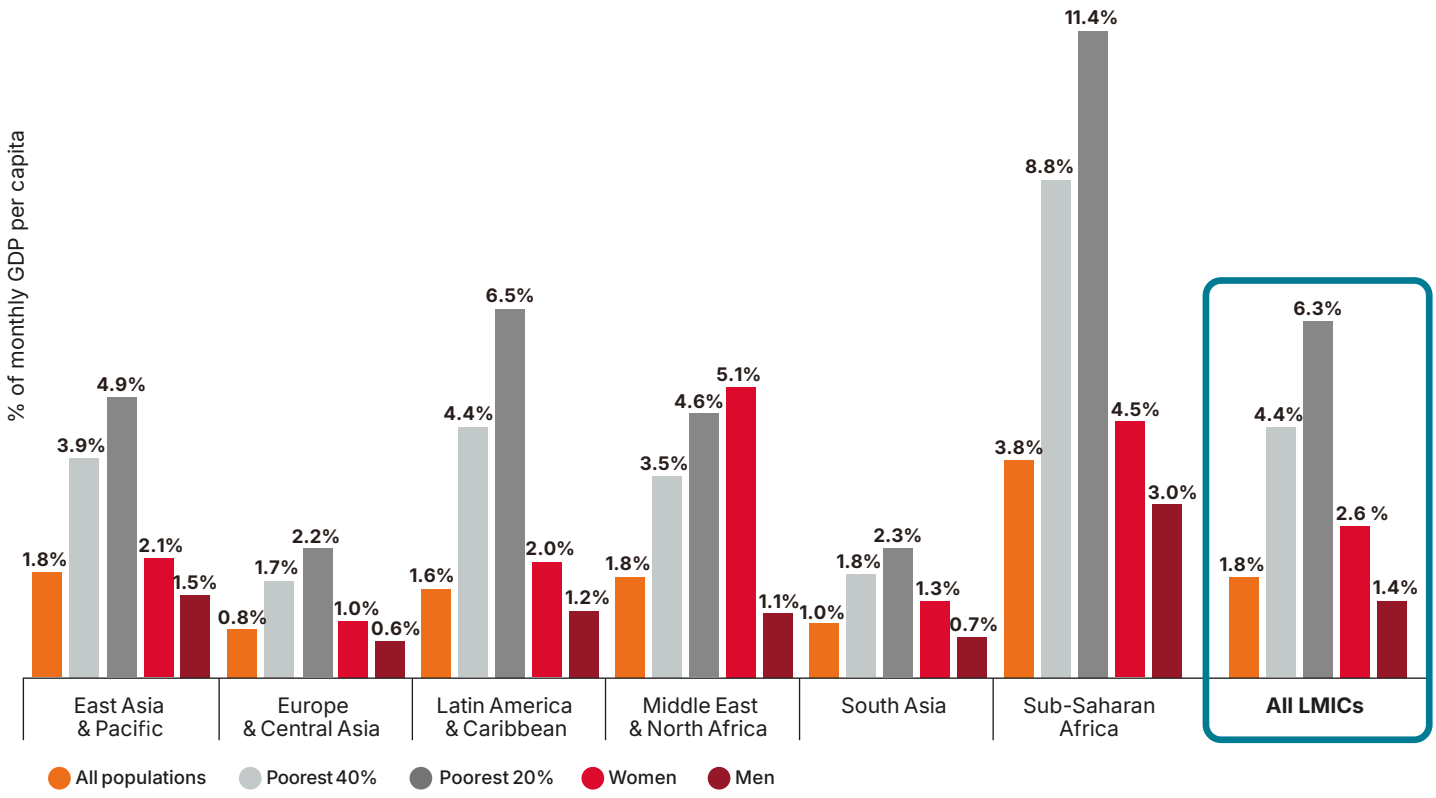
Figure 34b: Median affordability of 5 GB data across LMICs by region, 2021–2025



Note: Price of 5 GB is the price of the cheapest plan available (at the time of collecting data) to purchase at least 5 GB of data per month. Further details on how pricing data is gathered can be found in the Mobile Connectivity Index Methodology. To determine affordability, we divide the price by monthly GDP per capita.

Source: GSMA Intelligence calculations based on pricing data from Tarifica and ITU and monthly GDP per capita sourced from IMF World Economic Outlook.

Figure 34c: Affordability of 5 GB data for the poorest 20% and 40%, and men and women, by region, 2025



Note: To determine affordability, we divide the price by monthly GDP per capita

Source: GSMA Intelligence calculations based on pricing data from Tarifica and ITU. Data on incomes for the poorest 20% and 40% of the population and men and women is based on information sourced from the World Bank, World Inequality Database, UN and the IMF World Economic Outlook.

Overall, affordability of 20 GB of data remained unchanged in 2025. There is a large gap in affordability between Sub-Saharan Africa and other regions. In Sub-Saharan Africa, the affordability of 20 GB is at 14% of average monthly income – five times the median affordability across LMICs overall. In Sub-Saharan Africa, it represents 44% of average monthly income for the poorest 20%.

Figure 35a: Median cost and affordability of 20 GB data across LMICs, 2023–2025

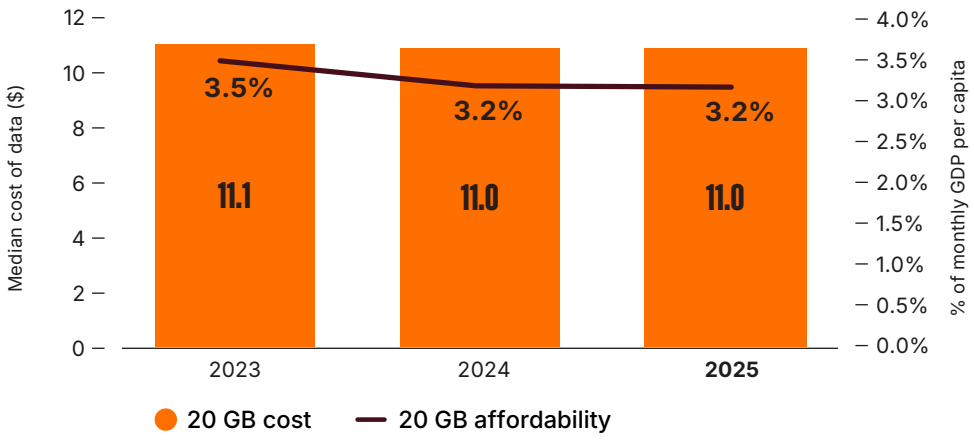
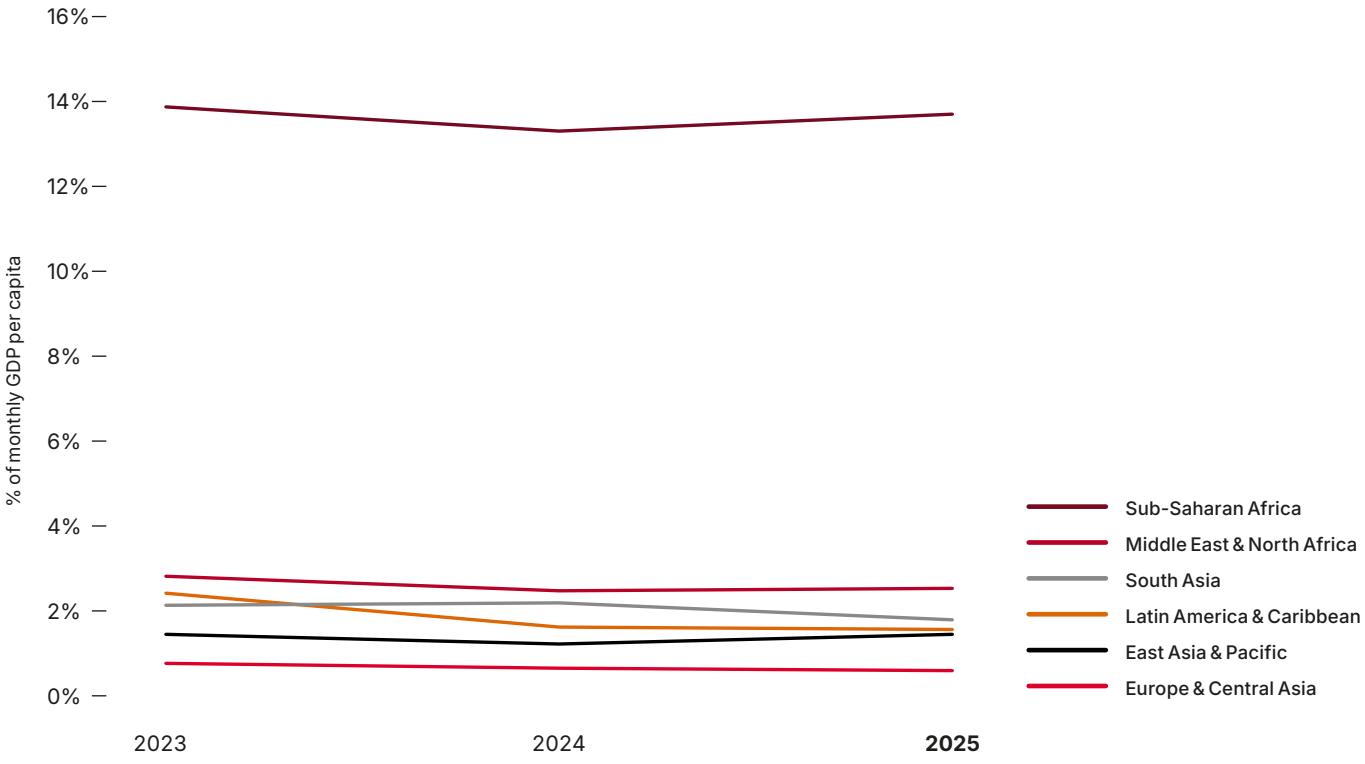


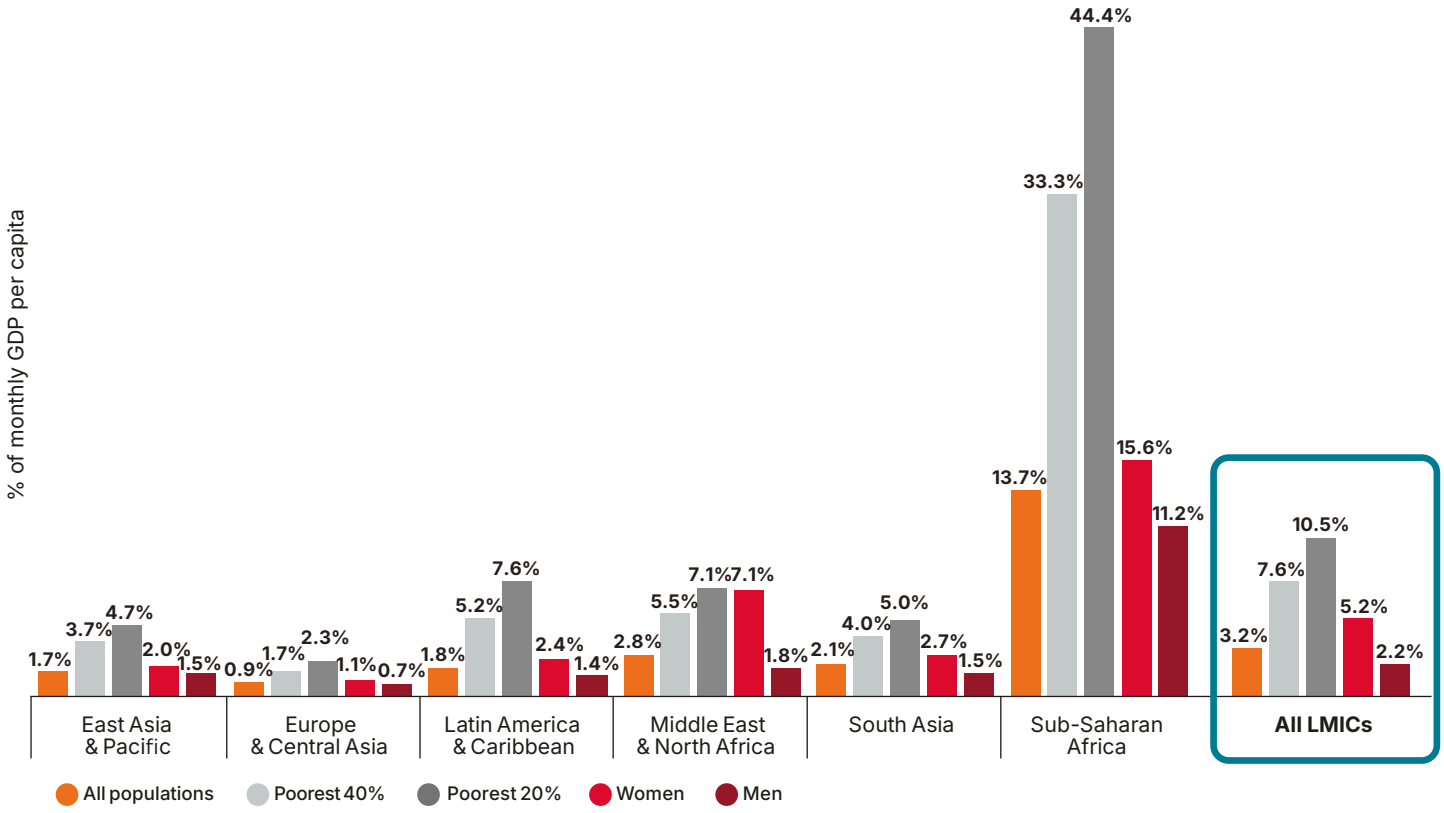
Figure 35b: Median affordability of 20 GB data across LMICs by region, 2023–2025



Note: Price of 20 GB is the price of the cheapest plan available (at the time of collecting data) to purchase at least 20 GB of data per month. Further details on how pricing data is gathered can be found in the Mobile Connectivity Index Methodology. To determine affordability, we divide the price by monthly GDP per capita.

Source: GSMA Intelligence calculations based on pricing data from Tarifica and monthly GDP per capita sourced from IMF World Economic Outlook.

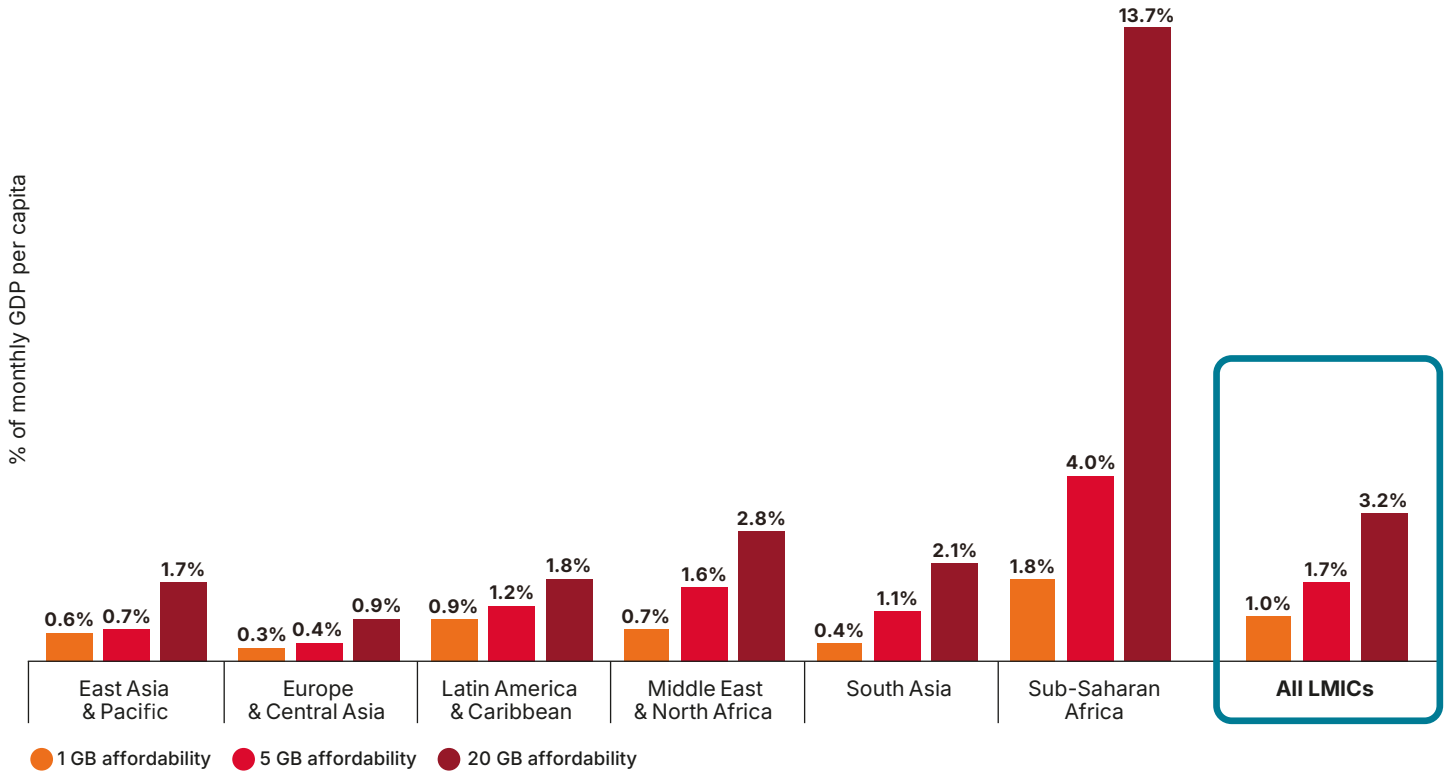
Figure 35c: Affordability of 20 GB data for the poorest 20% and 40%, and men and women, by region in 2025



Note: To determine affordability, we divide the price by monthly GDP per capita

Source: GSMA Intelligence calculations based on pricing data from Tarifica. Data on incomes for the poorest 20% and 40% of the population and men and women is based on information sourced from the World Bank, World Inequality Database, UN and the IMF World Economic Outlook.

Figure 36: Median affordability of 1, 5 and 20 GB data across LMICs, 2025



Note: For consistency, we apply the same sample of countries for 1, 5 and 20 GB. This means we consider 105 countries in the sample. The results are therefore slightly different to the 1 GB / 5 GB trend chart. To determine affordability, we divide the price by monthly GDP per capita.

Source: GSMA Intelligence calculations based on pricing data from Tarifica and monthly GDP per capita sourced from IMF World Economic Outlook.

9. CALL TO ACTION

While more people than ever before are connected, progress with accelerating digital inclusion remains slow, and significant challenges persist. In total, 3.4 billion people are still not using mobile internet. The vast majority live within mobile broadband coverage but face other barriers to use. It is also important to look beyond basic mobile internet adoption to ensuring people can use it to meet their life needs. Even when people have started using mobile internet, a digital divide persists; many only use it for a few use cases each day. As advancements in technologies such as AI accelerate the pace of digitalisation, it is more critical than ever to ensure no one is left behind.

Closing the digital divide requires coordinated, targeted action across all stakeholders. Figure 37 presents high-level recommendations to address the key barriers to digital inclusion. This includes barriers such as affordability and digital skills. With handsets becoming increasingly unaffordable (driven by the memory crisis), it will be important to prioritise actions to mitigate this impact. Examples include tax reforms, such as removing taxes or duties on entry-level devices,[47] improving access to device financing, improving willingness to pay and addressing other costs beyond device ownership.

These barriers are complex and interconnected. They must therefore be addressed through collaborative, holistic approaches. Interventions need to also consider structural inequalities in income, education and social norms that underpin digital divides. Sustained and scaled action is essential to ensure commitments to digital inclusion translate into meaningful and lasting progress for those most at risk of being left behind.

Figure 37: Addressing key barriers to digital inclusion

Affordability	Knowledge and skills	Safety and security	Relevance	Fundamental enablers
				
Affordability – especially of handsets – remains a key challenge. Approaches to improve affordability should include efforts to lower the cost of internet-enabled handsets and data, innovative data pricing strategies, and expanding handset financing options. Additionally, efforts to improve affordability should include adopting tax policies and providing targeted subsidies that promote the uptake of internet-enabled devices and data services.[48]	Improving literacy, digital skills and confidence, as well as driving awareness and understanding of mobile internet, its benefits and uses, is essential to address the usage gap and expand digital inclusion. Digital skills initiatives should focus on the life needs and circumstances of users.[49]	Concerns about the negative aspects and risks of the internet, including issues such as harassment, identify theft, harmful content and information security, are preventing some from going online and having a positive internet experience. Appropriate mechanisms and frameworks that recognise and address these online risks should be established to help build consumer trust. Stakeholders should provide users, including women, with the tools to increase their knowledge and skills to mitigate online risks.	Supporting the creation of relevant content, products and services that meet user preferences and needs, including those that are accessible, easy to use and in local languages, is important to driving internet adoption and use. This includes supporting local digital ecosystems to accelerate growth in local content, services and applications that meet the needs and priorities of people in their communities, in their own language.	Increasing access to mobile broadband networks and enablers, such as electricity, formal ID, devices, customer-service touchpoints (e.g. agents), as well as overcoming restrictive social norms, is important for connectivity. Stakeholders can increase mobile internet adoption by focusing on, for example, facilitating inclusive and transparent mobile registration processes, and making services, sales channels and training facilities accessible to underserved groups, such as women and persons with disabilities, and expanding/upgrading networks.

47 Accelerating Smartphone Adoption Through Tax Reform: Evidence from South Africa, GSMA, 2026
48 Making internet-enabled handsets more affordable in low- and middle-income countries, GSMA, 2022
49 See Developing mobile digital skills in low- and middle-income countries, GSMA, 2021, and GSMA Mobile Internet Skills Training Toolkit.

APPENDIX 1: ADDITIONAL FIGURES

Figure 38: Activities engaged in online (ever performed over mobile)
Percentage of mobile internet users that report having engaged in the activity at least once on a mobile phone

		Social media (general use)	Instant messaging	Online video (general use)	Video calls	Online voice calls	Online entertainment	Read news	Search for online information	Education/ learning support	Social media use for work or business	Online banking/ mobile money	Health services	Pay bills via online banking/ mobile money	Government services	Order goods/ services	Employment or online work	Selling or advertising goods or services	Search for online job/ business information	Agriculture information
AFRICA	Egypt	96%	94%	97%	87%	92%	90%	71%	67%	54%	41%	43%	55%	37%	47%	57%	43%	41%	34%	8%
	Ethiopia	89%	74%	68%	63%	63%	80%	60%	29%	27%	39%	36%	22%	32%	35%	10%	23%	10%	21%	13%
	Ghana	92%	91%	86%	91%	90%	84%	64%	56%	60%	69%	36%	41%	34%	35%	30%	31%	41%	44%	14%
	Kenya	96%	95%	94%	81%	87%	93%	76%	69%	66%	57%	59%	54%	57%	51%	32%	52%	41%	50%	35%
	Nigeria	93%	93%	84%	90%	90%	76%	70%	51%	55%	72%	71%	43%	69%	36%	35%	36%	49%	44%	21%
	Senegal	90%	93%	82%	76%	82%	81%	62%	43%	46%	62%	74%	43%	73%	42%	38%	27%	43%	35%	16%
	Uganda	93%	88%	88%	77%	84%	88%	65%	48%	44%	57%	34%	38%	32%	34%	14%	26%	23%	43%	28%
ASIA	Bangladesh	75%	71%	80%	86%	80%	75%	43%	52%	33%	36%	37%	32%	31%	32%	40%	30%	27%	22%	4%
	India	86%	87%	91%	85%	85%	85%	69%	66%	64%	47%	62%	61%	54%	61%	63%	58%	54%	42%	23%
	Indonesia	89%	96%	94%	96%	96%	85%	71%	58%	47%	45%	43%	43%	40%	44%	67%	33%	24%	38%	10%
	Pakistan	77%	82%	84%	84%	80%	70%	33%	27%	31%	30%	36%	21%	26%	28%	25%	26%	21%	17%	11%
	Sri Lanka	95%	96%	98%	97%	78%	95%	83%	72%	84%	40%	53%	62%	48%	69%	70%	59%	36%	35%	17%
LATIN AMERICA	Guatemala	97%	97%	91%	95%	98%	89%	77%	70%	80%	61%	49%	59%	47%	50%	34%	47%	41%	49%	15%
	Mexico	94%	97%	93%	89%	89%	88%	83%	82%	81%	55%	66%	69%	64%	68%	72%	51%	52%	50%	7%

0-10% 11-30% 31-50% 51-70% 71-90% 91-100%

Base: Mobile internet users aged 18+. N = from 296 to 1,316.

Note: Percentages indicate the proportion of respondents who answered that they have ever performed each activity on a mobile. Respondents may have engaged in some use cases on a phone other than their own.

Source: GSMA Consumer Survey, 2025

Table 3: Top barriers to mobile internet adoption for those aware of mobile internet[50]
Based on the single most important reported barrier to adopting mobile internet

	Urban			Rural		
	1	2	3	1	2	3
ALL COUNTRIES	**Affordability**	**Literacy and digital skills**	**Safety and security concerns**	**Literacy and digital skills**	**Affordability**	**Safety and security concerns**
Egypt	Affordability	Literacy and digital skills	Safety and security concerns	Affordability	Literacy and digital skills	Relevance
Ethiopia	Affordability	Safety and security concerns	Do not have time to use mobile internet	Affordability	Literacy and digital skills	Connectivity experience
Ghana	Affordability	Literacy and digital skills	Safety and security concerns	Affordability	Literacy and digital skills	Safety and security concerns
Kenya	Affordability	Safety and security concerns	Literacy and digital skills	Affordability	Literacy and digital skills	Relevance
Nigeria	Affordability	Literacy and digital skills	Safety and security concerns	Literacy and digital skills	Affordability	Safety and security concerns
Senegal	Affordability	Literacy and digital skills	Safety and security concerns	Affordability	Literacy and digital skills	Safety and security concerns
Uganda	Affordability	Safety and security concerns	Literacy and digital skills	Affordability	Literacy and digital skills	Connectivity experience
Bangladesh	Literacy and digital skills	Affordability	Relevance	Literacy and digital skills	Affordability	Relevance
India	Literacy and digital skills	Safety and security concerns	Affordability	Literacy and digital skills	Safety and security concerns	Affordability
Indonesia	Safety and security concerns	Affordability	Connectivity experience	Safety and security concerns	Literacy and digital skills	Affordability
Pakistan	Literacy and digital skills	Affordability	Relevance	Literacy and digital skills	Affordability	Safety and security concerns
Sri Lanka	Literacy and digital skills	Relevance	Connectivity experience	Affordability	Literacy and digital skills	Safety and security concerns
Guatemala	Safety and security concerns	Literacy and digital skills	Affordability	Literacy and digital skills	Safety and security concerns	Affordability
Mexico	Safety and security concerns	Literacy and digital skills	Affordability	Literacy and digital skills	Safety and security concerns	Connectivity experience

Base: Adults aged 18+ who have not used mobile internet in the past three months on any device, despite being aware of mobile internet (excludes those not aware of mobile internet). N = from 30 to 346 for rural and from 31 to 150 for urban.

Note: The barriers in the above table are composite barriers. These composite barriers are aggregates (not averages) of the responses for between two and five sub-barriers (see Appendix 1). Fundamental enabler-related barriers are not grouped as a composite since they cover a disparate range of topics. Rankings indicate the relative aggregated proportion of respondents who answered, "This is the most important reason stopping me" to the question, "Which one of those factors would you say is the single most important reason stopping you from using the internet on a mobile phone?"

Source: GSMA Consumer Survey, 2025

50 See The Mobile Gender Gap Report 2026 for a gender disaggregated table.

Figure 39: Top barriers to mobile internet use

Percentage of mobile users who are aware of mobile internet but do not use it, and who identified the following as the single most important barrier to using mobile internet

		AFFORDABILITY				LITERACY AND DIGITAL SKILLS								RELEVANCE				SAFETY AND SECURITY										FUNDAMENTAL ENABLERS									
		Handset cost		Data cost		Reading/ writing difficulties		Difficulties using a mobile in general		Not confident using mobile internet		Not sufficient support in learning to use the internet		Internet is not relevant for me		Insufficient content in local language		Strangers contacting me		Harmful content (self/family)		Information security		Do not trust information on websites or apps		Scams or fraud		Inconsistent/ no coverage		Slow connection speeds		Internet drains my battery		Access to agent support		Do not have time to use mobile internet		Shared phone access		Family does not approve	
		U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R
AFRICA	Egypt	35%	35%	3%	8%	22%	13%	4%	13%	0%	2%	3%	0%	5%	10%	0%	2%	2%	4%	5%	1%	0%	0%	0%	1%	0%	2%	2%	0%	0%	2%	7%	1%	3%	2%	5%	4%	2%	1%	3%	0%
	Ethiopia	52%	41%	11%	4%	2%	28%	0%	3%	6%	5%	1%	1%	7%	3%	0%	1%	2%	2%	1%	1%	4%	0%	0%	0%	2%	0%	1%	4%	1%	1%	0%	1%	2%	1%	8%	3%	0%	0%	0%	0%
	Ghana	35%	31%	4%	5%	18%	16%	1%	0%	4%	6%	4%	1%	4%	3%	1%	0%	2%	2%	4%	2%	4%	3%	2%	1%	2%	7%	0%	3%	1%	3%	3%	3%	0%	0%	13%	9%	0%	2%	0%	3%
	Kenya	52%	55%	6%	3%	4%	11%	1%	3%	3%	4%	1%	1%	3%	4%	1%	2%	2%	1%	1%	1%	6%	0%	1%	2%	4%	2%	2%	1%	0%	1%	1%	3%	0%	0%	6%	3%	3%	2%	1%	2%
	Nigeria	39%	34%	13%	4%	13%	33%	1%	2%	4%	3%	0%	0%	5%	3%	1%	0%	2%	2%	0%	1%	4%	1%	1%	2%	4%	3%	2%	2%	0%	0%	1%	1%	0%	1%	3%	2%	5%	2%	3%	3%
	Senegal	40%	30%	5%	3%	14%	20%	4%	2%	3%	7%	2%	0%	3%	2%	0%	0%	3%	1%	5%	4%	1%	1%	0%	1%	6%	4%	3%	4%	0%	2%	3%	6%	0%	1%	6%	4%	2%	6%	2%	1%
	Uganda	53%	49%	4%	5%	6%	9%	0%	2%	3%	3%	3%	3%	8%	2%	1%	0%	1%	1%	3%	2%	3%	0%	1%	0%	4%	1%	2%	10%	0%	0%	2%	1%	2%	2%	1%	5%	3%	3%	1%	0%
ASIA	Bangladesh	16%	7%	6%	6%	15%	31%	7%	7%	3%	2%	3%	2%	7%	4%	6%	6%	0%	0%	9%	3%	0%	1%	2%	1%	0%	2%	0%	1%	1%	2%	12%	2%	0%	1%	6%	9%	5%	4%	3%	9%
	India	11%	7%	4%	7%	13%	18%	3%	2%	10%	4%	5%	6%	6%	6%	2%	4%	1%	3%	0%	4%	6%	4%	1%	1%	6%	9%	1%	2%	5%	3%	4%	2%	4%	2%	3%	3%	10%	4%	3%	4%
	Indonesia	11%	9%	12%	6%	6%	14%	3%	3%	6%	7%	0%	0%	4%	3%	0%	2%	3%	4%	2%	4%	7%	7%	2%	1%	17%	8%	10%	5%	9%	9%	0%	0%	0%	2%	2%	4%	2%	3%	6%	8%
	Pakistan	20%	10%	6%	5%	37%	30%	2%	2%	0%	4%	4%	3%	9%	7%	0%	3%	0%	1%	1%	3%	2%	3%	0%	1%	0%	3%	0%	2%	1%	3%	3%	1%	0%	0%	7%	4%	0%	2%	7%	11%
	Sri Lanka	7%	9%	0%	22%	20%	6%	6%	3%	19%	12%	0%	3%	21%	14%	0%	0%	0%	3%	6%	9%	0%	1%	0%	0%	0%	2%	8%	8%	4%	1%	0%	0%	4%	1%	0%	4%	0%	0%	0%	1%
LATIN AMERICA	Guatemala	9%	12%	9%	5%	15%	28%	6%	8%	5%	3%	3%	3%	2%	0%	0%	1%	10%	7%	2%	7%	7%	1%	4%	0%	11%	4%	7%	15%	3%	0%	0%	2%	0%	2%	4%	2%	0%	1%	0%	0%
	Mexico	21%	5%	2%	6%	2%	30%	5%	9%	14%	0%	9%	5%	5%	0%	0%	0%	2%	0%	2%	4%	16%	11%	2%	0%	11%	10%	0%	14%	0%	5%	0%	0%	0%	0%	3%	0%	5%	0%	2%	0%

U URBAN R RURAL

Least frequently cited barrier in that country — Most frequently cited barrier in that country

Base: Adults aged 18+ who have used a mobile phone in the last three months but have not used mobile internet in the last three months, despite being aware of mobile internet (excludes mobile users who are not aware of mobile internet). N = from 30 to 346 for rural and from 31 to 150 for urban.

Note: Percentages indicate the proportion of respondents who answered, "This is the most important reason stopping me" to the question, "Which one of those factors would you say is the single most important reason stopping you from using the internet on a mobile phone?"

Source: GSMA Consumer Survey, 2025

Table 4: Top barriers to further mobile internet use for existing mobile internet users[51]
Based on the single most important reported barrier to using mobile internet more

	Urban			Rural		
	1	2	3	1	2	3
ALL COUNTRIES	**Safety and security concerns**	**Affordability**	**Connectivity experience**	**Safety and security concerns**	**Affordability**	**Connectivity experience**
Egypt	Safety and security concerns	Connectivity experience	Affordability	Connectivity experience	Safety and security concerns	Literacy and digital skills
Ethiopia	Affordability	Connectivity experience	Safety and security concerns	Affordability	Connectivity experience	Literacy and digital skills
Ghana	Affordability	Safety and security concerns	Connectivity experience	Affordability	Safety and security concerns	Connectivity experience
Kenya	Affordability	Safety and security concerns	Internet drains my battery	Affordability	Safety and security concerns	Connectivity experience
Nigeria	Affordability	Safety and security concerns	Literacy and digital skills	Affordability	Safety and security concerns	Connectivity experience
Senegal	Safety and security concerns	Connectivity experience	Do not have time to use mobile internet	Safety and security concerns	Affordability	Connectivity experience
Uganda	Affordability	Safety and security concerns	Connectivity experience	Affordability	Connectivity experience	Safety and security concerns
Bangladesh	Affordability	Social norms	Safety and security concerns	Safety and security concerns	Affordability	Social norms
India	Safety and security concerns	Affordability	Connectivity experience	Safety and security concerns	Affordability	Literacy and digital skills
Indonesia	Safety and security concerns	Connectivity experience	Affordability	Safety and security concerns	Connectivity experience	Social norms
Pakistan	Literacy and digital skills	Safety and security concerns	Connectivity experience	Connectivity experience	Safety and security concerns	Literacy and digital skills
Sri Lanka	Safety and security concerns	Connectivity experience	Affordability	Connectivity experience	Safety and security concerns	Social norms
Guatemala	Safety and security concerns	Connectivity experience	Literacy and digital skills	Safety and security concerns	Connectivity experience	Affordability
Mexico	Safety and security concerns	Affordability	Connectivity experience	Safety and security concerns	Connectivity experience	Affordability

Base: Mobile internet users aged 18+. N = from 158 to 797 for rural and from 135 to 747 for urban.

Note: The barriers in the table above are composite barriers. These composite barriers are aggregates (not averages) of the responses for between two and five sub-barriers (see Appendix 1). Fundamental enabler-related barriers are not grouped as a composite since they cover a disparate range of topics. Rankings indicate the relative aggregated proportion of respondents who answered, "This is the most important reason stopping me" to the question, "Which one of those factors would you say is the single most important reason stopping you from using the internet more on a mobile phone?".

Source: GSMA Consumer Survey, 2025

51 See The Mobile Gender Gap Report 2026 for a gender disaggregated table.

Figure 40: Top barriers to further mobile internet use

Percentage of mobile internet users who reported the following as the single most important barrier to using mobile internet more

		AFFORDABILITY				LITERACY AND DIGITAL SKILLS								RELEVANCE				SAFETY AND SECURITY										FUNDAMENTAL ENABLERS															
		Handset cost		Data cost		Reading/ writing difficulties		Difficulties using a mobile in general		Not confident using mobile internet		Not sufficient support in learning to use the internet		Internet is not relevant for me		Insufficient content in local language		Strangers contacting me		Harmful content (self/family)		Information security		Do not trust information on websites or apps		Scams or fraud		Inconsistent/ no coverage		Slow connection speeds		Internet drains my battery		Access to agent support		Do not have time to use mobile internet		Shared phone access		Family does not approve		Only allowed to use mobile internet for specific reasons		Only allowed to use mobile internet for a limited amount of time or at certain times of the day	
		U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R	U	R
AFRICA	Egypt	4%	3%	11%	5%	1%	13%	5%	1%	1%	3%	3%	5%	4%	6%	1%	1%	4%	4%	5%	4%	8%	7%	4%	4%	5%	4%	13%	16%	5%	10%	9%	3%	1%	1%	6%	2%	2%	0%	3%	2%	3%	1%	1%	3%
	Ethiopia	22%	26%	21%	13%	0%	6%	0%	3%	0%	1%	2%	2%	2%	1%	0%	1%	3%	1%	3%	1%	3%	1%	3%	1%	1%	1%	15%	19%	7%	12%	5%	3%	2%	1%	5%	7%	3%	3%	2%	1%	1%	0%	1%	0%
	Ghana	7%	7%	29%	21%	4%	5%	2%	0%	0%	1%	1%	1%	0%	0%	2%	0%	7%	3%	3%	5%	5%	4%	1%	2%	10%	13%	9%	16%	5%	4%	7%	6%	1%	3%	4%	3%	1%	1%	0%	1%	0%	2%	1%	1%
	Kenya	7%	17%	31%	27%	2%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	5%	3%	1%	4%	6%	3%	3%	2%	7%	4%	6%	9%	5%	3%	13%	9%	0%	1%	4%	7%	4%	4%	0%	1%	1%	2%	2%	1%
	Nigeria	4%	8%	51%	30%	10%	6%	0%	1%	1%	1%	1%	0%	1%	1%	1%	2%	3%	5%	2%	2%	1%	4%	2%	1%	5%	6%	6%	11%	2%	4%	5%	7%	0%	3%	2%	4%	1%	2%	1%	0%	1%	1%	1%	1%
	Senegal	5%	5%	4%	16%	7%	7%	0%	1%	2%	0%	0%	1%	0%	0%	0%	0%	5%	3%	11%	4%	8%	9%	1%	4%	15%	8%	9%	12%	5%	3%	7%	7%	1%	0%	13%	10%	1%	1%	1%	1%	0%	2%	3%	3%
	Uganda	12%	22%	44%	25%	3%	1%	0%	0%	1%	1%	2%	1%	1%	1%	1%	2%	2%	2%	3%	1%	3%	2%	1%	1%	4%	2%	7%	19%	5%	3%	4%	6%	1%	1%	3%	4%	2%	3%	1%	0%	1%	2%	1%	1%
ASIA	Bangladesh	10%	5%	11%	13%	2%	4%	4%	4%	1%	1%	3%	6%	0%	0%	2%	1%	3%	6%	6%	5%	1%	1%	6%	4%	1%	4%	4%	5%	5%	7%	12%	6%	0%	1%	5%	5%	4%	6%	5%	5%	6%	6%	10%	6%
	India	5%	4%	8%	10%	3%	3%	2%	4%	3%	4%	2%	3%	4%	4%	2%	4%	6%	4%	4%	4%	7%	5%	4%	3%	11%	10%	4%	4%	8%	7%	3%	4%	3%	2%	3%	6%	6%	2%	3%	3%	4%	4%	4%	4%
	Indonesia	3%	2%	3%	3%	1%	0%	1%	1%	1%	1%	0%	3%	1%	1%	1%	1%	5%	10%	8%	7%	27%	16%	2%	4%	24%	25%	5%	8%	4%	3%	2%	2%	1%	1%	4%	4%	1%	1%	0%	3%	1%	2%	1%	1%
	Pakistan	7%	4%	9%	5%	16%	16%	2%	2%	3%	2%	1%	1%	2%	2%	2%	2%	3%	2%	4%	5%	3%	5%	2%	2%	6%	6%	2%	7%	14%	20%	6%	3%	2%	1%	6%	4%	3%	2%	1%	4%	3%	3%	1%	1%
	Sri Lanka	8%	2%	2%	3%	1%	1%	0%	2%	2%	2%	0%	1%	3%	2%	1%	1%	11%	6%	11%	10%	10%	7%	1%	1%	8%	8%	12%	17%	12%	20%	9%	3%	0%	2%	4%	3%	1%	1%	1%	4%	0%	1%	2%	3%
LATIN AMERICA	Guatemala	3%	4%	2%	5%	3%	5%	2%	2%	0%	2%	1%	1%	1%	0%	1%	1%	16%	12%	11%	10%	11%	12%	4%	2%	19%	19%	12%	13%	3%	5%	5%	3%	0%	1%	1%	1%	2%	1%	1%	0%	0%	0%	1%	1%
	Mexico	6%	3%	2%	6%	1%	2%	1%	0%	3%	3%	2%	2%	1%	2%	0%	0%	8%	13%	14%	13%	24%	18%	5%	2%	20%	13%	4%	11%	2%	2%	1%	2%	0%	0%	2%	1%	1%	2%	2%	1%	0%	0%	2%	2%

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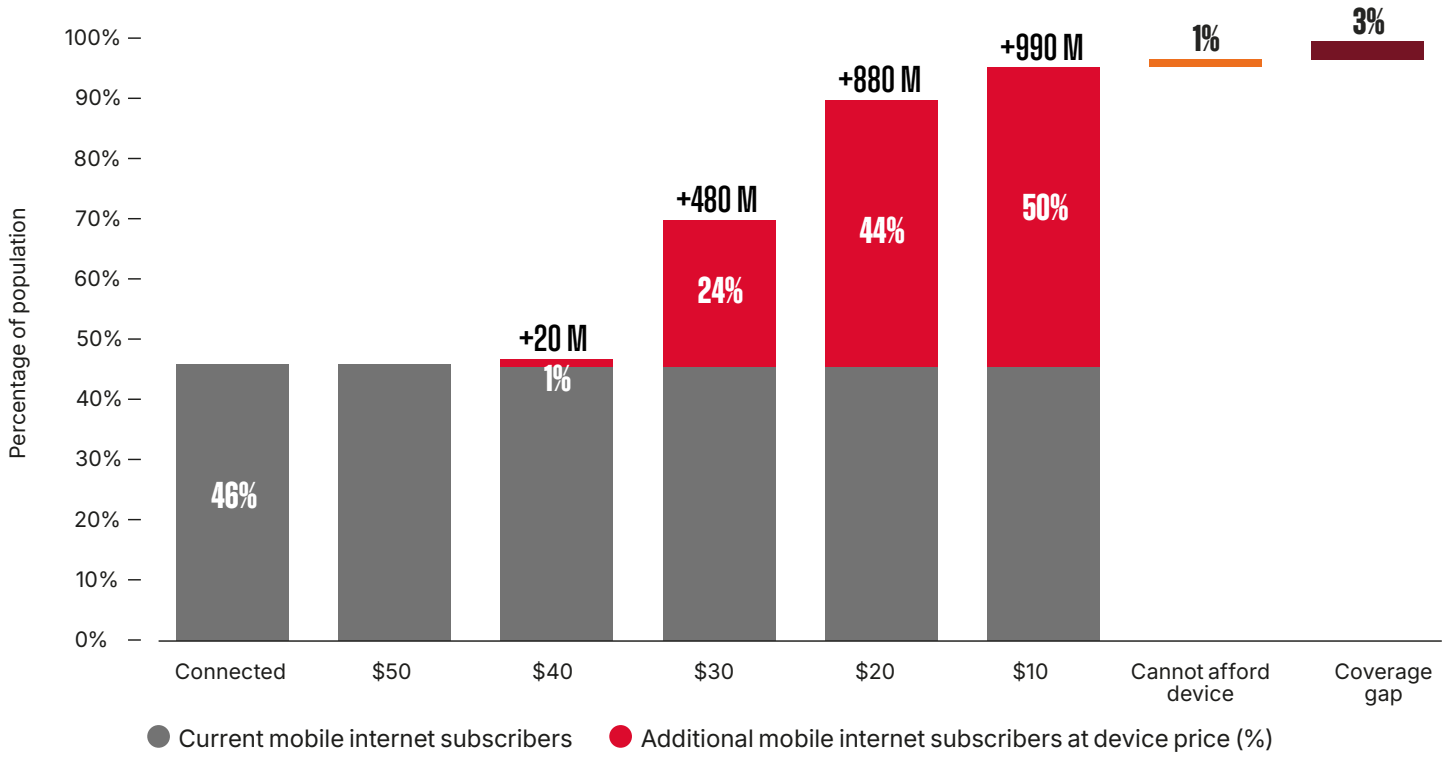
Least frequently cited barrier in that country — Most frequently cited barrier in that country

Base: Mobile internet users aged 18+. N = from 158 to 797 for rural and from 135 to 747 for urban.

Note: Percentages indicate the proportion of respondents who answered, "This is the most important reason stopping me" to the question, "Which one of those factors would you say is the single most important reason stopping you from using the internet more on a mobile phone?"

Source: GSMA Consumer Survey, 2025

Figure 41: The potential impact of a reduction in device cost on the usage gap in South Asia

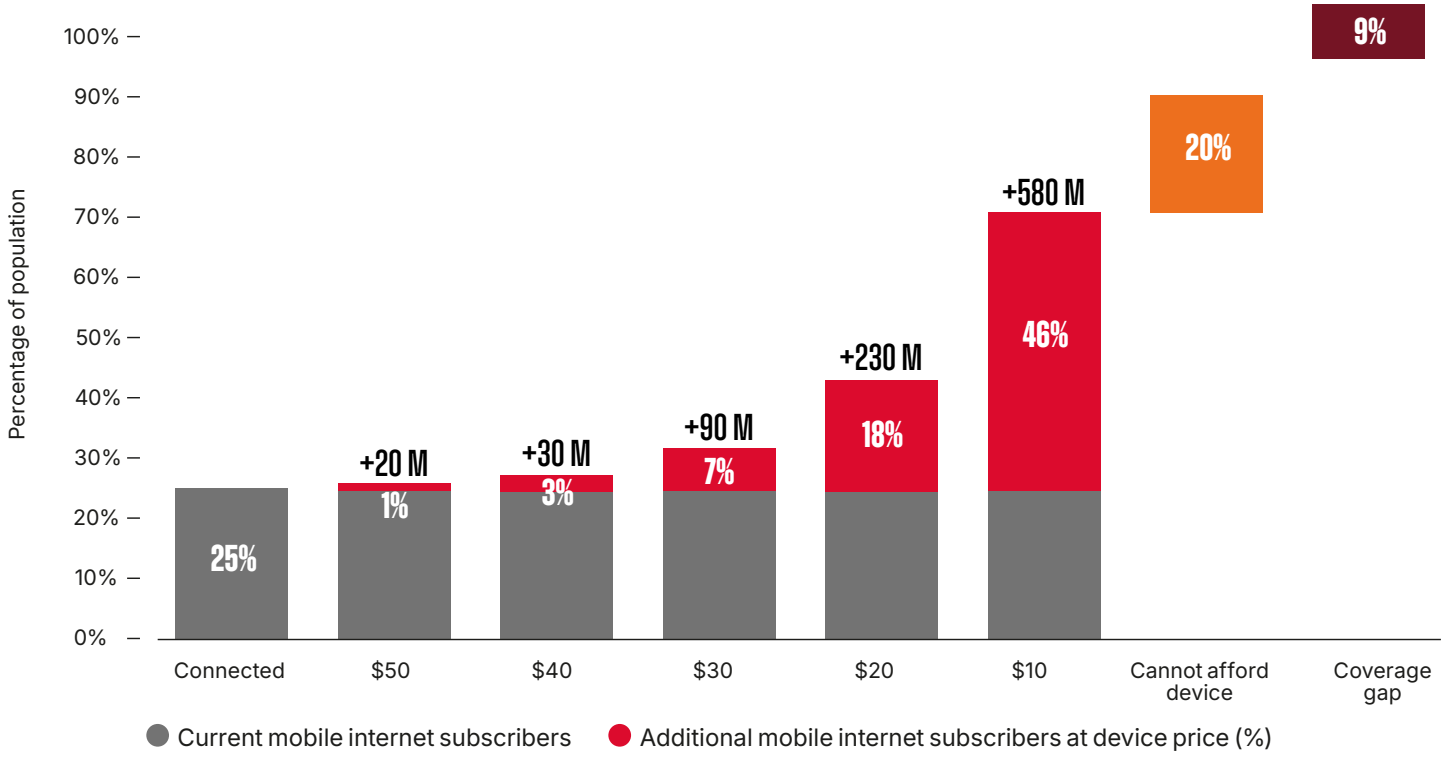


Base: Total population, 8 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

Figure 42: The potential impact of a reduction in device cost on the usage gap in Sub-Saharan Africa

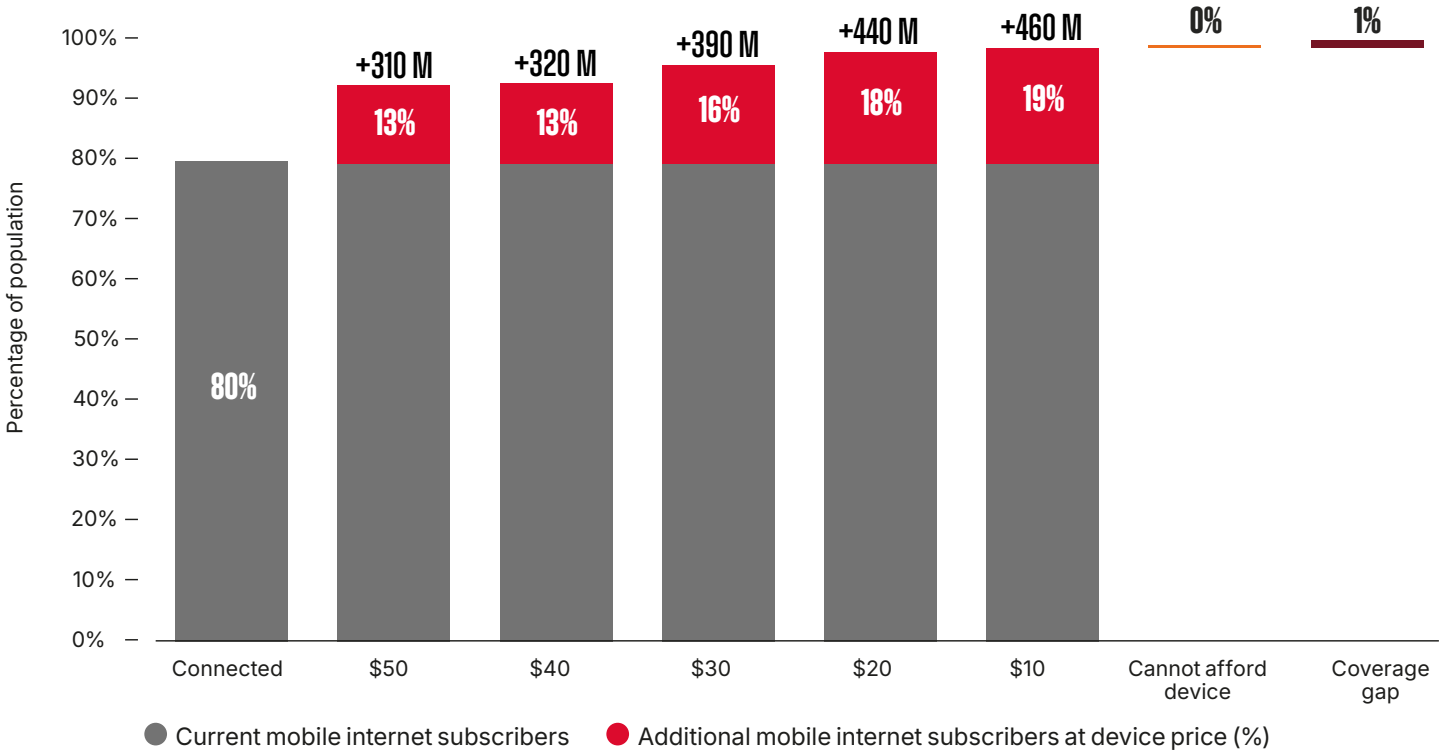


Base: Total population, 44 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

Figure 43: The potential impact of a reduction in device cost on the usage gap in East Asia & Pacific

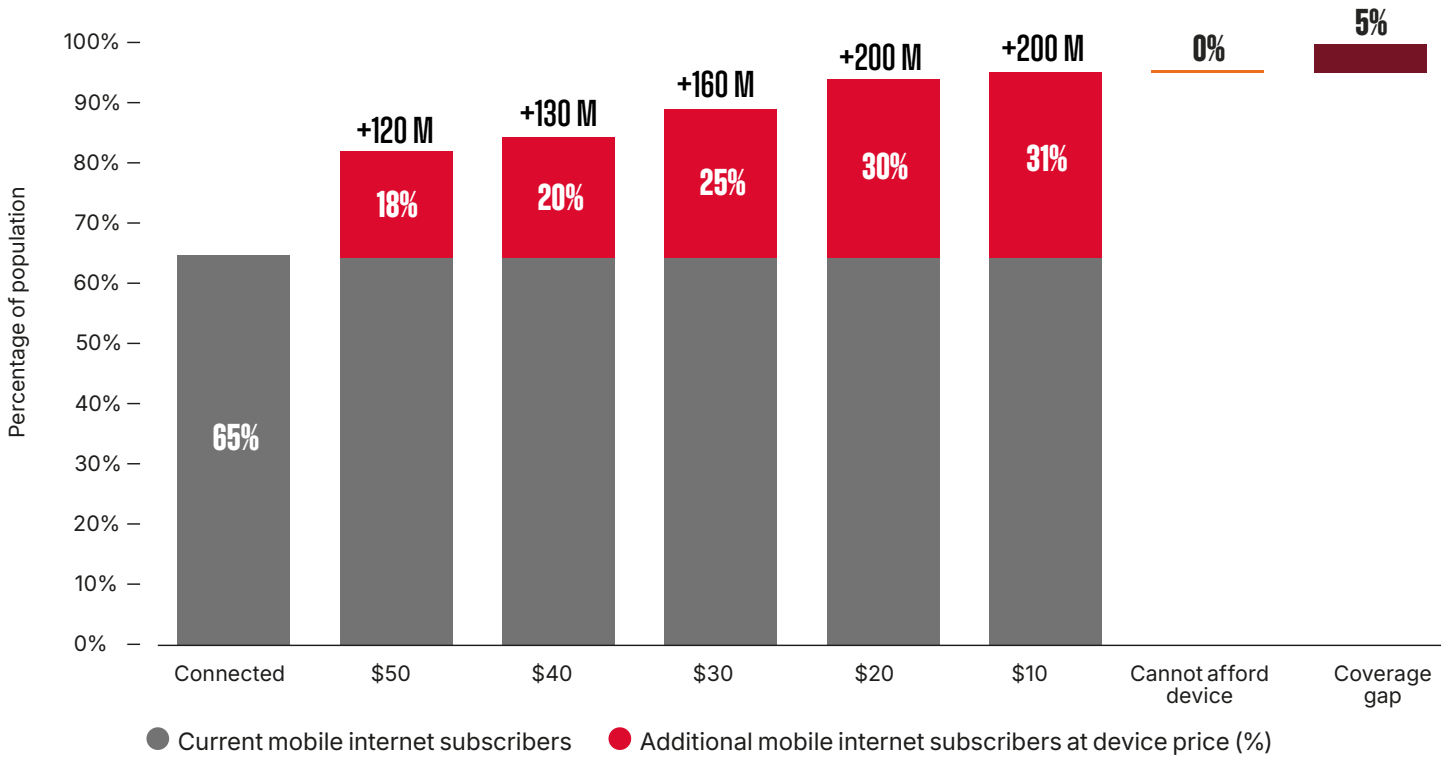


Base: Total population, 32 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

Figure 44: The potential impact of a reduction in device cost on the usage gap in Latin America & Caribbean

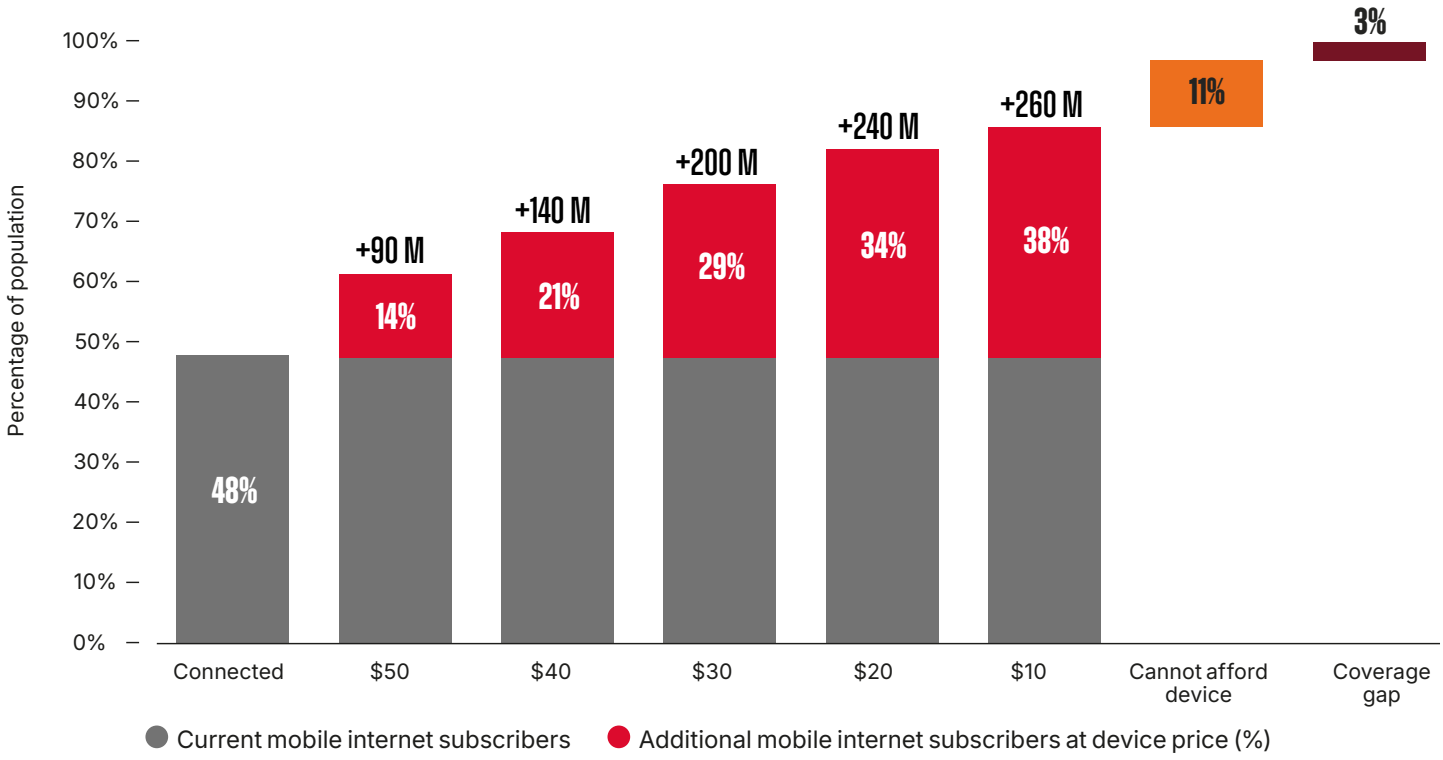


Base: Total population, 32 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

Figure 45: The potential impact of a reduction in device cost on the usage gap in Middle East & North Africa

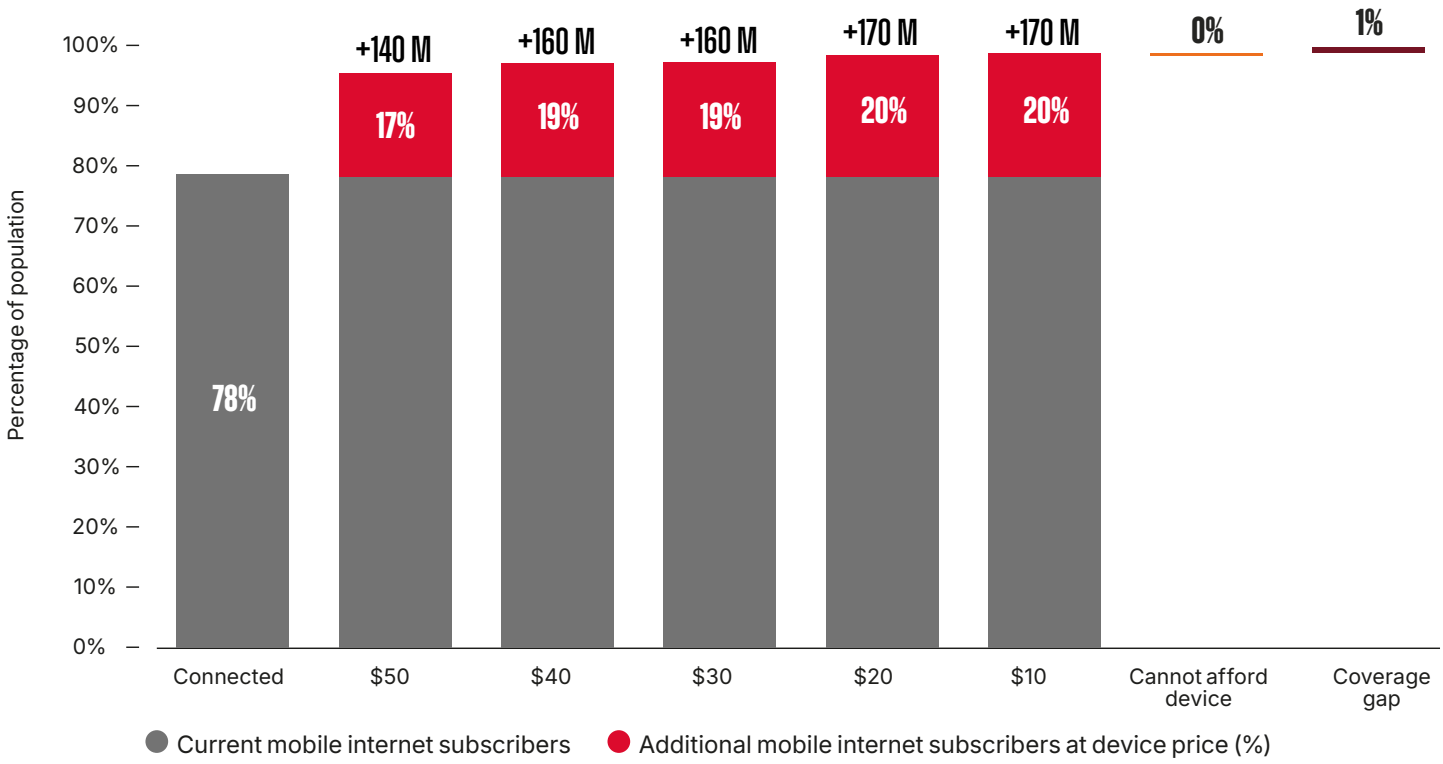


Base: Total population, 25 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

Figure 46: The potential impact of a reduction in device cost on the usage gap in Europe & Central Asia

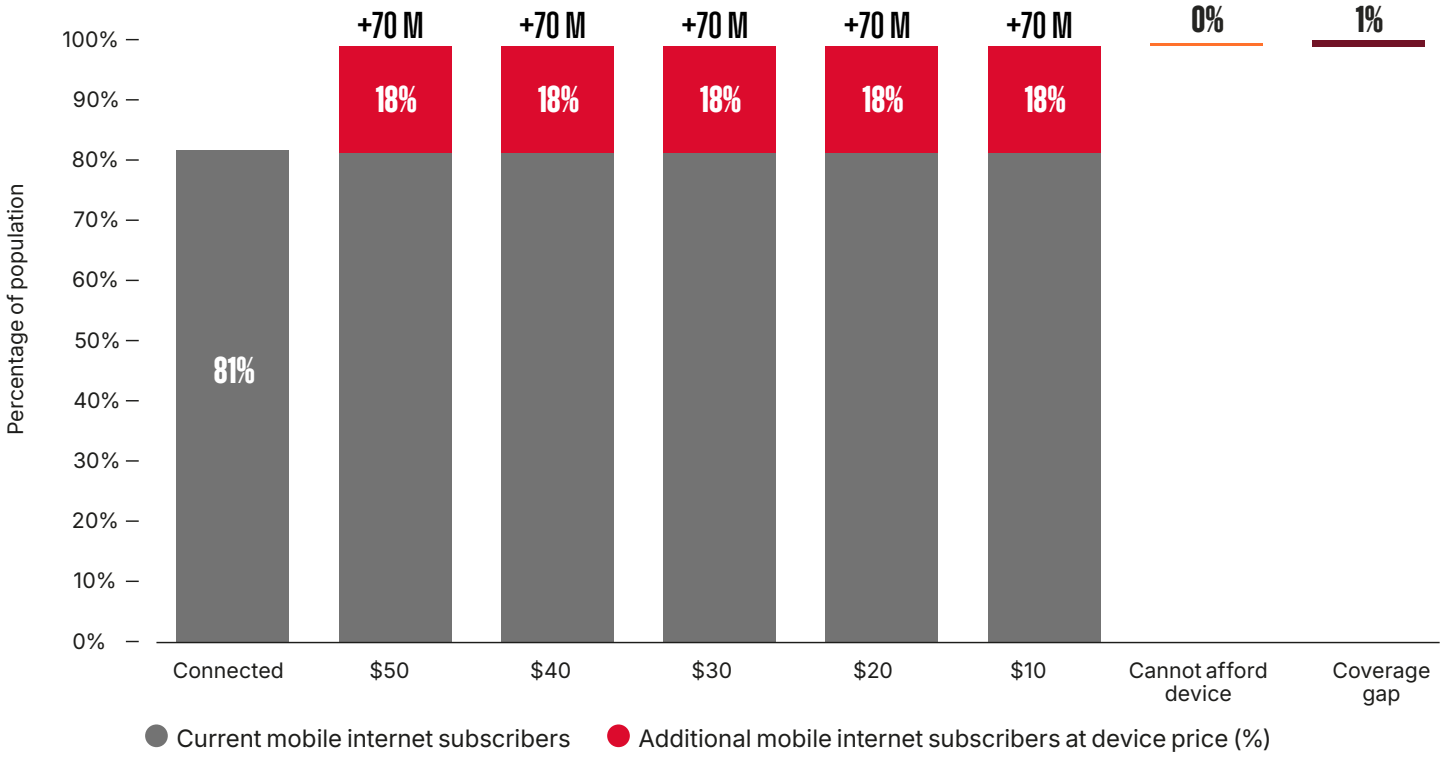


Base: Total population, 49 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.

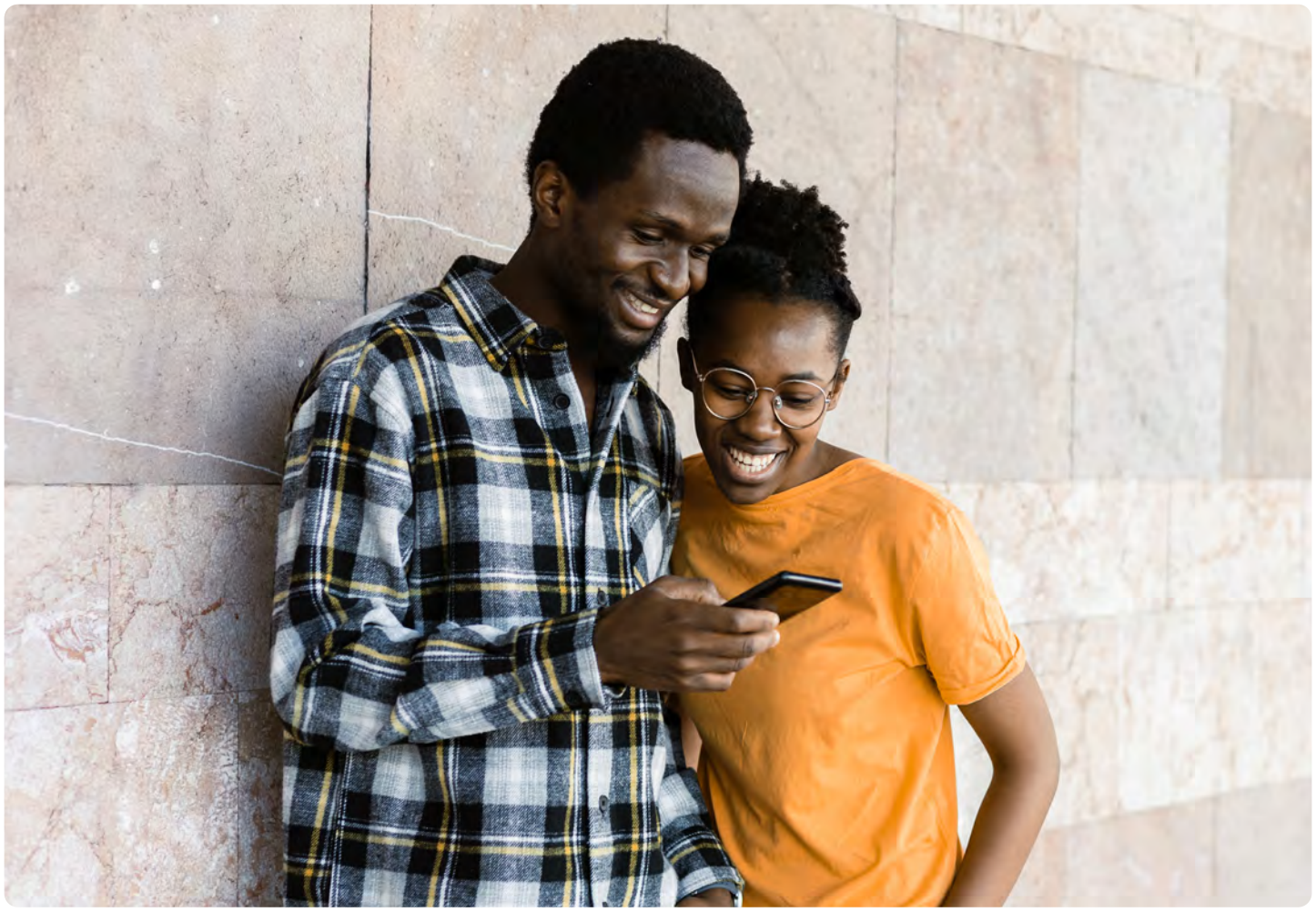
Figure 47: The potential impact of a reduction in device cost on the usage gap in North America



Base: Total population, 2 countries

Note: Income inequality data is not available for all countries. These have been excluded from the analysis. This means the connectivity levels may slightly differ from those reported in Chapter 2 of this report.

Source: GSMA Intelligence. Further details on data and methodology can be found in Analysis to improve handset affordability, GSMA, 2024.



APPENDIX 2: GLOSSARY

GLOSSARY

Connected	'The connected' or 'connected population' refers to people who use mobile internet. 'The unconnected' refers to those who do not use mobile internet.
Coverage	'Population coverage' is the share of the population that lives in an area where the signal provided by a mobile network is strong enough to use telecoms services (voice, SMS, data).[52] The coverage levels provided by 2G, 3G or 4G networks are independent from each other.
Coverage gap	Populations who do not live within the footprint of a mobile broadband network.
Device	A device that is used to access the internet. In this report, the term device generally refers to a mobile phone, given the vast majority of internet users in LMICs access the internet through a mobile phone and the vast majority of users in high-income countries also do so on a mobile phone (often in addition to other devices such as tablets, laptops and PCs).
Feature phone	A mobile handset that allows basic access to internet-based services but on a closed platform that does not support a broad range of applications. The handset supports additional features such as a camera and the ability to play multimedia files such as music and video.
Landlocked developing country (LLDC)	A country classified as landlocked and developing by the UN.[53]
Least developed country (LDC)	A country classified as low-income that faces severe structural impediments to sustainable development. It is highly vulnerable to economic and environmental shocks and has low levels of human assets.
Low- and middle-income country (LMIC)	A country classified as low income, lower-middle income and upper-middle income by the World Bank Country and Lending Groups.
Mobile broadband	3G, 4G or 5G technologies.
Mobile connection	A unique SIM card (or phone number, where SIM cards are not used) that has been registered on a mobile network. Connections differ from subscribers in that a unique subscriber can have multiple connections.

52 For further details on different technologies, see ITU-R FAQ on International Telecommunications (IMT), ITU, 2022.
53 https://www.un.org/ohrlls/content/list-lldcs

Mobile internet subscriber	Individuals who use mobile internet on a device they own or have primary use of.
Mobile internet user	A person who uses internet services on a mobile device. Mobile internet services are defined as any activities that use mobile data.
Additional mobile internet user	Individuals who use mobile internet on a device they do not own or have primary use of.
Mobile (phone) owner/ subscriber	A person who subscribes to a mobile service. They do not necessarily use mobile internet.
Small island developing state (SIDS)	A country classified as a small island and developing state by the UN.[54]
Smartphone	A mobile handset enabling advanced access to internet-based services and other digital functions. Smartphone platforms, such as Android and iOS, support a range of applications created by third-party developers.
Unique subscribers	The GSMA Intelligence unique subscriber dataset uses insights from the annual GSMA Consumer Survey, which examines the habits of mobile users around the world. Since 2016, we have reviewed and analysed the annual results of the survey from 56 countries (accounting for more than 70% of the world's population), alongside external sources and existing knowledge enabling us to calculate subscriber, mobile internet and smartphone penetration. We then use the GSMA Consumer Survey as a benchmark for different regions around the world, taking into account macroeconomic indicators and growth potential, and current mobile use cases.
Usage gap	Populations who live within the footprint of a mobile broadband network but do not use mobile internet.

54 https://www.un.org/ohrlls/content/list-sids

GSMA Head Office
1 Angel Lane
London
EC4R 3AB
United Kingdom
gsma.com

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