LESOTHO COMMUNICATIONS AUTHORITY

THE STATE OF ICT IN LESOTHO

A demand side assessment of access and usage of ICTs by households and individuals.

2023

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The state of ICT in Lesotho, 2023

Acknowledgements

It is my pleasure to present to you the findings of the 2023 survey on Access and Use of Information and Communication Technologies (ICTs) by households and individuals in Lesotho. This was the third national ICT survey following the initial one undertaken in 2016 which established the baseline for the access and use of ICT services and products.

The 2023 survey was undertaken primarily to establish the extent of access to and use of ICT products and services by the households and individuals to measure trends in ICT development over the years. In addition, the aim of carrying out these series of surveys is to continue to provide reliable statistics, which are vital for formulating and revising national ICT policies and strategies. ICT indicators are also necessary in monitoring progress towards achieving the set targets for regional and international developmental goals such as SADC Broadband Targets as well as Sustainable Development Goals (SDGs).

The survey was carried out in collaboration with the Lesotho Bureau of Statistics (BoS). The BoS supported the sampling and weighting for the survey. The Authority thanks them sincerely for their cooperation.

I would also take this opportunity to thank the staff of the Authority for the different roles they played in support of this project.

Nizam Goolam
Chief Executive Officer

Executive Summary

In its endeavour to provide reliable, comprehensive and comparable ICT statistics, Lesotho Communications Authority (LCA) conducted a national household survey to assess the state of ICT from the demand side, in collaboration with the Bureau of Statistics (BoS). This survey follows previous surveys that were conducted in 2019 and 2016 with the same scope.

The main objective of the survey was to measure access to and use of ICTs at household[1] and individual[2] levels in Lesotho. The data collected are a useful reference material for policy makers, investors, academia and business on the current uptake of ICTs in Lesotho. In addition, accurate ICT data are essential in the Authority's regulatory interventions, which include among others, monitoring the sector's development and the effective rollout of communication services throughout the country. The survey also assessed knowledge and awareness about the existence and mandate of the LCA.

The following are the key findings:

i.The proportion of households owning a functional radio is 47.6 percent while 57.9 percent of individuals listen to the radio.

ii.The proportion of households owning a functional television set is 34.4 percent with individual viewership at 38.7 percent. Of the households with a television set, 95.7 percent have satellite decoders.

iii.The proportion of households owning a working computer is 10.3 percent while individuals that used a computer is 21.4 percent.

iv.The proportion of individuals that owned a working mobile phone is 83.1 percent and of those, 66 percent own smart phones with an urban-rural gap of 28.6 percent in favour of urban residents.

v.The proportion of individuals that use mobile money is 65.1 percent and the urban-rural gap is insignificant (below 10%).

[1]For the household level indicators, access of ICT assets or services alludes to those that are generally available for use by all members of the household at any time

[2]Individual level indicators measure access and use of ICT assets and services by individual household members

vi.The proportion of households with internet connection is 5.3 percent while the proportion of individuals that use internet is 58.4 percent. The urban-rural disaggregation showed that 77 percent of individuals in urban areas use internet compared to 43 percent of rural residents, resulting in the urban-rural gap of 34 percent.

vii. Of those that use internet, the proportion that use social media is 98 percent.

viii.The proportion of individuals with ICT skills constitutes 35.1 percent. The gap between individuals that use internet (58.4%) and those with ICT skills (35.1%) is 23.3%, which demonstrates that many individuals may be using the internet without being able to fully benefit from it or avoid its dangers.

ix.The proportion of households with a postal box is 4.8 percent, however, individuals that use postal services constitutes 4.2 percent.

x.The proportion of individuals that have heard and know about LCA is 28 percent and of those, 76.8 percent heard about LCA from the radio.

xi.With regard to LCA mandate, 79.8 percent of individuals knew that LCA regulates broadcasting, 32.6 percent knew that LCA regulates telecommunications and 14.4 percent knew that LCA regulates postal services.

Acronyms and abbreviations

ADSL	Asymmetric Digital Subscriber Line
BoS	Bureau of Statistics
COVID-19	Coronavirus Disease 2019
EAs	Enumeration Areas
ETL	Econet Telecom Lesotho
ICT	Information and Communication Technology
ITU	International Telecommunication Union
LCA	Lesotho Communications Authority
LDS	Lesotho Demographic Survey
NSDP II	National Strategic Development Plan II
OECD	Organization for Economic Co-operation and Development
PSUs	Primary Sampling Units
RIA	Research ICT Africa
SADC	Southern African Development Community
SDGs	Sustainable Development Goals
SIM	Subscriber Identity Module
SMS	Short Message Service
UN	United Nations
VOIP	Voice Over Internet Protocol
Wi-Fi	Wireless Fidelity

1.1 Background

The availability of information and communication technology (ICT) infrastructure and the uptake in its use continue to grow tremendously. For countries to maximize and harness the benefits of these technologies, it is imperative to regularly take stock of the country's level of development and use of the ICTs using reliable data; hence the increasing demand for accurate and comparable ICT data and statistics. These technological advances together with the recognition that ICTs are a driver of social and economic development, have driven a need for reliable, comprehensive and comparable statistics to support government and industry policy decisions.

In most instances, the supply-side data can be availed through use of administrative records from service providers. However, the ICT demand-side statistics can only be sourced through nationally representative surveys with specific objectives. To respond to data needs on the demand-side, the Lesotho Communications Authority (LCA) undertook the first ICT access and use survey in 2016 and the second survey was undertaken in 2019. To have an updated and comprehensive demand-side data on the developments in the ICT sector, the Authority undertook the third ICT survey in collaboration with Bureau of Statistics (BoS) in 2023. In addition to aggregated data on ICT indicators, the demand side surveys provide an opportunity for drawing reliable estimates on gender and urban-rural ratios. Consequently, the objectives of the 2023 survey were to:

- Collect, collate and analyse data on ICT indicators related to access and use by households and individuals;
- Track progress towards the attainment of ICT related developmental goals and targets set out at the national, regional and International levels;
- Update the database on access and usage of ICTs in Lesotho.

The Government of Lesotho has identified ICT as one of the key enablers to the attainment of the goals and aspirations of the NSDP II in the country's economic blueprint (NSDP II 2018/19-2022/23). The plan has been extended to 2027/28 following the implementation failure in the past three years due to the COVID-19 pandemic (www.gov.ls, 2023). The thrust of the NSDP II with regard to the ICT sector is to transform Lesotho into a truly knowledge and information-based economy. An integral step in achieving this objective is to establish the ICT access levels in the country, determine ICT access gaps that need to be served and evaluate barriers to ICT access such as costs, literacy levels and technological barriers.

The outcomes of the ICT survey will provide useful insight on the access and use levels, gaps and barriers in the monitoring of the sector development towards achieving the NSDP II goals.

At the International level, there was a global agenda for ICT sector adopted in 2018 under ITU, which sets out the shared vision, goals and targets that member states have committed to achieve by 2023. The 'Connect 2030 Agenda for Global Telecommunication/ICT Development' focuses on how technological advances will contribute to accelerate the achievement of the United Nations Sustainable Development Goals (SDGs) by 2030. The goals for the Connect 2030 Agenda include but not limited to growth - enable and foster access to and increased use of telecommunications/ICT, inclusiveness - bridge the digital divide and provide broadband for all. Lesotho as one of the UN member states has to track and report progress on the set targets and reliable data on some of indicators used to monitor targets is obtained from the ICT access and use surveys.

1.2 Sampling, listing and weighting

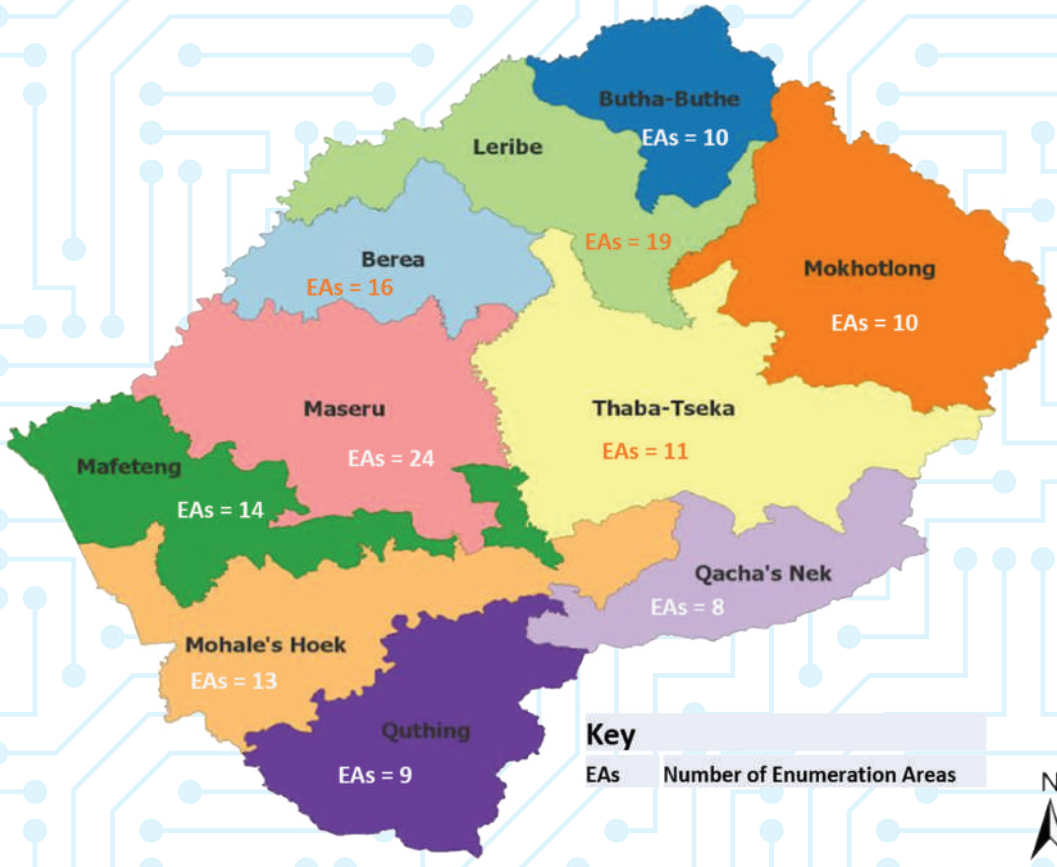
The survey used a three-stage stratified cluster sampling approach with power allocation (0.5 magnitude) to the size of the cluster, measured by number of households. This approach was applied to ensure that all target population (population aged 15 and above) have an equal probability of selection. The first level of sampling entailed selecting 135 enumeration areas (EAs) using a probability proportional to population size approach. During the second stage of sampling, a sample of 15 households were randomly selected within each EA, or cluster, using an equal probability method. The third level of sampling was at individual level. One individual (i.e. the intended respondent) was selected at random from all individuals who were 15 years or older in each of the sampled households within an EA.

The primary sampling units (PSUs) for this sample survey were the EAs/clusters from the BOS master sample frame developed based on 2016 Lesotho Population and Housing Census enumeration areas frame. The frame consists of all EAs in Lesotho along with the estimated number of households, stratified into urban, peri-urban and rural stratums ordered by district, constituencies, urban councils, community councils and ecological zones in order to have a geographical representative frame.

The listing was performed for each selected EA and all households in each EA were listed. The households to be interviewed were randomly selected from this list. Individuals aged 15 and older were eligible for selection from each of the selected households. All eligible individuals were listed and a Simple Random Number Generator application installed on all devices was used to select the individual to be interviewed from each household.

Household and individual weights were calculated and applied to the data for analysis, to ensure that the sample used in the survey was nationally representative.

Figure 1: Map of Lesotho at the district level



The survey was conducted in all the 10 districts (see Figure 1) and the information was captured in 2025 households. In each household, the study collected information about the household head, household members, and access to electricity and information and communication technologies (ICTs), such as telephones, mobile phones and computers. The study also collected detailed information on one member of the household in terms of his or her access and usage of ICTs.

Simple random sampling was used on the household members to select one individual to interview. The personal interview method was applied because it enables data collection to be collected in a timely manner and it also enables the creation of personal relationship for future studies. The survey was run using Fulcrum, which is a mobile phone data collection application that allows for real-time capturing of data. A combination of these data collection methods resulted in a high (100%) response rate and rigorous on-the-spot data capturing.

The sample has been designed to guarantee representativeness at the national level so as to indicate developments at the urban/rural level as well as the district level among others. The bias in this survey, measured as the difference between the actual and the sampled population per location and district is less than eight percent (Tables 1 & 2 respectively).

The share of population living in rural areas in the whole sample is about 54 percent with 46 percent of respondents living in urban areas. It is also noted that of the 10 districts, Maseru has the highest population, followed by Leribe. The district of Qacha's Nek is the least populated district.

Table 1: Distribution of the sample classified by location

Location	Population estimate (LDS, 2021) %	Respondents %	Difference (Bias) %
Urban	48.8	46.2	2.6
Rural	51.2	53.8	-2.6

Table 2: Distribution of the sample across the districts

District	Population estimate (LDS, 2021) %	Respondents %	Difference (Bias) %
Maseru	27.3	24.9	2.4
Leribe	17.4	19.6	-2.2
Berea	13.0	12.5	0.5
Mafeteng	8.2	11.3	-3.1
Mohale's Hoek	7.7	8.0	-0.3
Thaba-Tseka	6.6	3.7	2.9
Botha-Bothe	5.9	5.2	0.7
Quthing	5.3	5.2	0.1
Mokhotlong	5.0	6.3	-1.3
Qacha's Nek	3.7	3.3	0.4

The distribution of the sample across the districts classified by urban-rural location showed that a high proportion of people resides in the rural parts of the districts except in Maseru and Leribe (Table 3). In Maseru, the population that resides in the urban parts are twice those that resides in the rural setting of the district.

Table 3: Distribution of sample across the districts classified by location

Name of the district	National %	Urban %	Rural %
Maseru	24.9	43.5	8.9
Leribe	19.6	20.8	18.6
Berea	12.5	12.1	12.8
Mafeteng	11.3	7.2	14.9
Mohale's Hoek	8.0	4.4	11.1
Thaba-Tseka	3.7	1.3	5.7
Botha-Bothe	5.2	4.6	5.7
Quthing	5.2	3.5	6.7
Mokhotlong	6.3	1.0	10.9
Qacha's Nek	3.3	1.7	4.6

1.3 Structure and organisation of the report

The rest of the report is organised as follows. In chapter two, a detailed account of access and usage of ICTs by households is presented, followed by chapter three with an in-depth analysis of ownership and usage of computers by individuals. Chapters four and five deal with ownership and usage of mobile phones and Internet penetration respectively. Chapter six provides an account on limitations and barriers mobile phone and Internet use. Chapters seven and eight presents access and use of radio and television and postal services by individuals respectively. The last chapter, chapter nine, gives a brief account of whether or not individuals know and aware of LCA's existence and its mandate.

Chapter 2: Access and Usage of ICTs by Households

2.1 Household ownership of ICT assets

This chapter presents the findings on the household level indicators regarding access and use of ICTs by family members. In order for a household to have access to ICT assets or services, the assets/services should generally be available for use by all members of the household at any time, regardless of whether it is actually used. The information regarding the household level indicators was sought from the household head or their proxy if not resident at that time.

Over 50 percent of all households (55.2%) were headed by women (Table 4). This is not surprising considering that there is still a high number of male migrant workers in the population, who work in South Africa and in the country, mainly in Maseru.

Table 4: Gender of household head

Gender	Respondents (%)
Male	44.8
Female	55.2

Electricity is not an ICT commodity but is an important prerequisite for using many ICTs devices. To this end, over half of the households reported that they had some form of electricity (64.7%). Of those that had some form of electrical supply, 53.3 percent were connected to the main electricity grid, 9.7 percent used solar and less than one percent used a generator while 1.3% were connected through a neighbour (Table 5).

Table 5: Household's indicators

	Indicator	Percentage (%)
Electricity connection	No electricity	35.3
	Main electricity grid	53.3
	Generator	0.4
	Solar	9.7
	Neighbour	1.3
Households communication facilities	Fixed line telephone	2.4
	Radio	47.6
	Television	34.4
	Satellite decoder	95.7
	Computer	10.3
	Desktop	2.8
	Laptop	8.6
	Tablet/iPap	1.9
	Mobile phone	4.0
	Postal box	4.8

In terms of household ICT assets, 2.4 percent of households indicated that they had a working fixed telephone, 4.8 percent owned a postal box and 4.0 percent stated that they have a household mobile phone. Radio is still common among households, with 47.6 percent of households indicating that they had a radio and 34.4 percent have a television. Of those households with a television, 95.7 percent of them have a satellite decoder (Table 5).

Fixed telephone penetration in Lesotho is low: 2.4 percent households per 100 households have fixed telephone connections. The use of fixed line in some districts such as Mokhotlong, Botha-Bothe and Quthing was very low, with majority of residents having no fixed-line connections (Table 6). Estimated

computer density was low at about three per 100 households. However, laptop penetration was higher than desktop computer density at about nine percent (Table 5). Most households that owned laptops and desktop computers were based in the district of Maseru. A small proportion of households in Thaba-Tseka, Qacha's Nek and Mokhotlong owned laptops, while ownership of desktop computers in the same districts was negligible.

Table 6: Household ownership and use of ICT devices by district

District	Fixed phone %	Mobile phone %	Radio %	Television %	Desktop %	Laptop %	Postal box %
Maseru	5.4	8.0	52.8	50.9	7.3	23.5	9.0
Leribe	1.5	3.2	50.8	38.9	0.7	4.0	3.1
Berea	2.3	3.5	49.5	32.3	2.1	6.1	6.8
Mafeteng	2.4	6.8	54.4	27.5	3.2	2.2	5.4
Mohale's Hoek	0.4	1.0	42.9	26.1	0.2	5.0	1.9
Thaba-Tseka	0.0	0.0	43.2	9.6	0.0	0.9	1.0
Botha-Bothe	0.0	2.5	49.9	38.5	3.8	7.7	1.7
Quthing	1.7	0.0	26.6	24.5	0.0	0.6	2.3
Mokhotlong	0.0	0.0	32.3	3.4	0.0	0.0	0.6
Qacha's Nek	1.4	0.0	27.9	32.5	0.6	3.1	1.0

Radio density was much higher than that of all other the devices used. About 49.5 percent of households owned a radio. Quthing, Mokhotlong and Qacha's Nek had the lowest adoption of radio. Television ownership was lower than radio ownership at 34 households per 100. Similarly, the share of households that owned a television in the districts, Thaba-Tseka and Mokhotlong remained low. The country postal household penetration was at 4.8 percent and Maseru had the highest proportion of households with a postal box; 9 per 100 households (Table 6).

A disaggregation by household-head gender showed that male-headed families were more likely than female-headed families to have ICT devices (Table 7). For instance, a higher proportion of male headed households had a radio compared to female headed households.

Table 7: Household's ownership and use of ICT devices by gender

Gender	Fixed phone %	Mobile phone %	Radio %	Television %	Desktop %	Laptop %	Postal Box %
Male	3.2	3.7	50.0	33.7	3.4	8.3	5.3
Female	1.7	4.4	45.7	35.1	2.3	8.9	4.3

About 4.1 percent of urban households had fixed-line connections. A negligible number of rural households were connected to fixed-line telephones (0.9%). About 17 in 100 residents of urban areas own a laptop while a very few households owned a laptop in rural areas (2.3%). Radio and television seem to be the most popular medium of communication in Lesotho. About 56 percent of urban households had a radio and television whereas, among the rural residents, 40 percent of the households had a radio while 15.7 percent had a television. The results show that there is a significant urban-rural divide with regard to television ownership. (Table 8).

Table 8: Household's ownership and use of ICT devices by settlement

Location	Fixed phone %	Mobile phone %	Radio %	Television %	Desktop %	Laptop %	Postal Box %
Urban	4.1	7.0	56.1	56.2	5.6	17.2	7.6
Rural	0.9	1.5	40.3	15.7	0.4	1.2	2.3

2.2 Household Internet connectivity

Connection to the fixed Internet at household level was very low with 5.3 percent of households stating that they have Internet connection at home. Though the share of households with Internet connection was minimal, about 42 percent of these households used a mobile phone to connect to the Internet, 29 percent use a USB modem or card, and 30 percent use fibre or ADSL connections (Table 9).

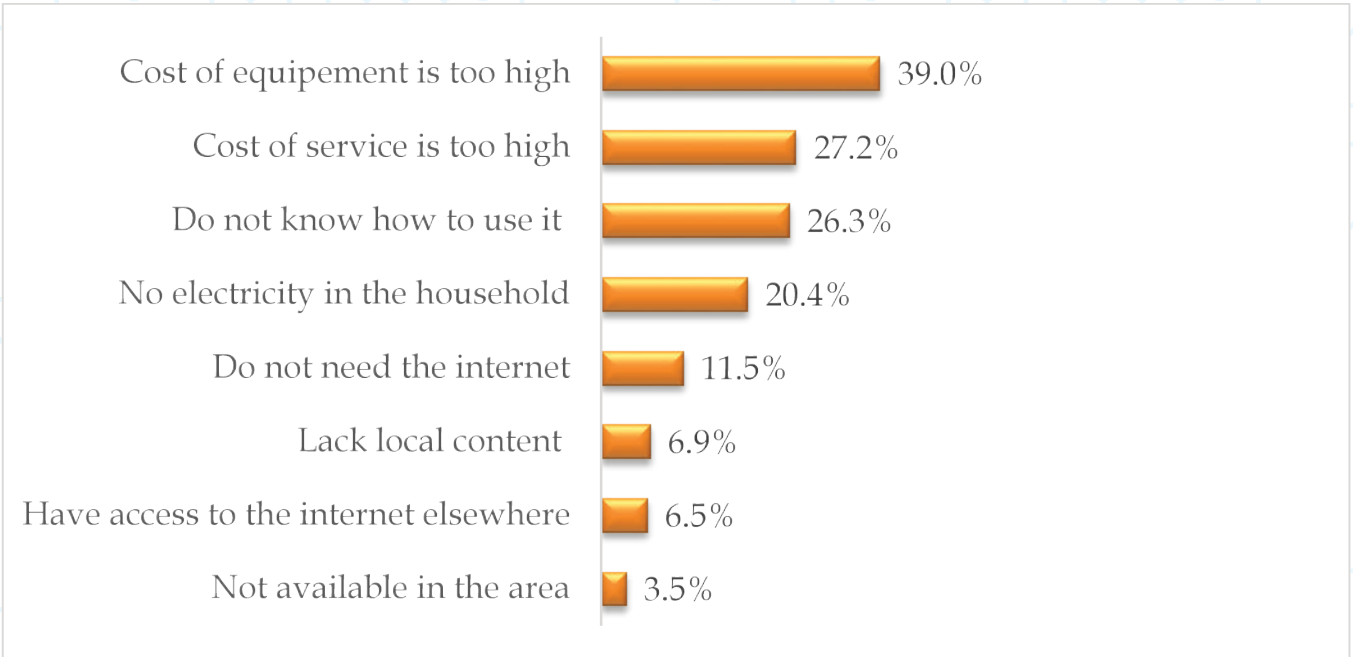
Table 9: Internet connectivity

Internet connection at household level	Households with internet connection	5.3%
5.3%	Use of mobile phone	41.7%
	USB modem/card	28.5%
	Fibre/ADSL	29.8%

About 10 percent (9.9%) of urban households had Internet connection, while about 1 percent (1.4%) of rural households had Internet. In terms of gender of the household head, slightly higher male headed households (5.9%) had Internet compared to female headed households (4.8%).

Households that did not have Internet connection were asked to state reasons for not having Internet and the results are presented in Figure 2. The most cited reason for not having household Internet connection was that the 'cost of equipment is too high'. Another reason cited by about 27.2 percent of households with no Internet connection was that the cost of service is too high. A further 26.3 percent stated that they did not know how to use the Internet while 20.4% were hindered by lack of electricity in the household. Lack of local content and lack of availability of Internet in the area were the least of their problems (Figure 2).

Figure 2: Main reasons cited by households for not having Internet connection



Chapter 3: Ownership and Usage of Computers by Individuals

3.1 Individual demographic characteristics

This section presents the demographic characteristics of randomly selected individuals in each household that were interviewed on issues related to ownership, access and use of their ICTs.

When disaggregated by gender, the sample of individuals in the study consisted of 30 percent females and 70 percent males. In addition, 58 percent of the randomly selected individuals were from rural areas while 46 percent resided in urban areas. The age groups of individuals interviewed were slightly more evenly distributed, although the majority were of school-going or university-going age. Majority of these individuals were married (51.1%), followed by those who were never married (29.8%) and those that were separated or divorced or widowed (18.7%). The individuals that were cohabiting constituted 0.4 percent. Only 27.2 percent of these individuals were either employed or self-employed.

Secondary school is the highest educational level attained by most individuals, both nationally and across the sexes. About 33 percent of individuals had attained secondary-level education, 27 percent had attained primary school and 20 percent had attempted primary (Table 10). About 17.4 percent of these individuals had primary education as the highest level of education attained. Very few individuals (0.4%) had attained vocational level of education.

Table 10: Highest level of education attained classified by gender

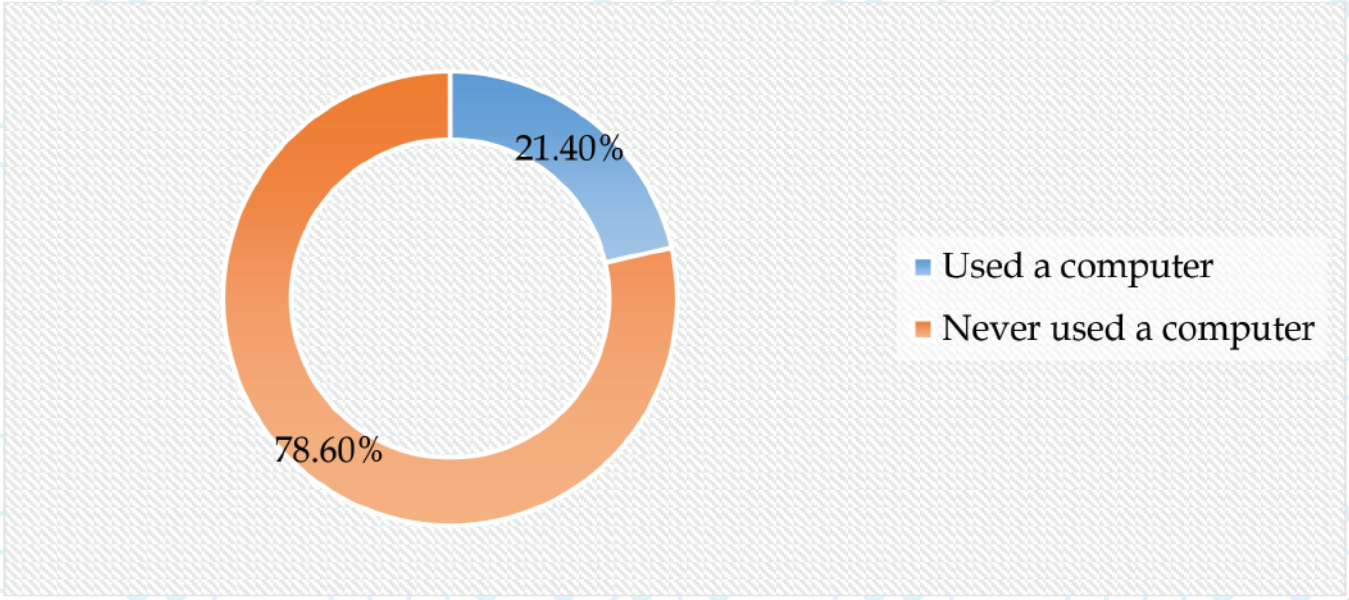
Level of education	National %	Male %	Female %
None	6.4	3.7	12.9
Attempted primary	20.1	19.3	22.1
Primary	27.2	30.4	19.5
Secondary	32.8	33.1	32.0
Vocational training	0.5	0.4	0.7
Tertiary	13.0	13.1	12.8

3.2 Computer usage and ownership by individuals

It has been shown over the years that using a computer is an increasingly important life skill (ITU, 2014). It allows people to carry out basic computing tasks, stores and processes information, including word processing. Using a computer also allows people to improve their ICT skills and become more familiar with advanced computing functionalities.

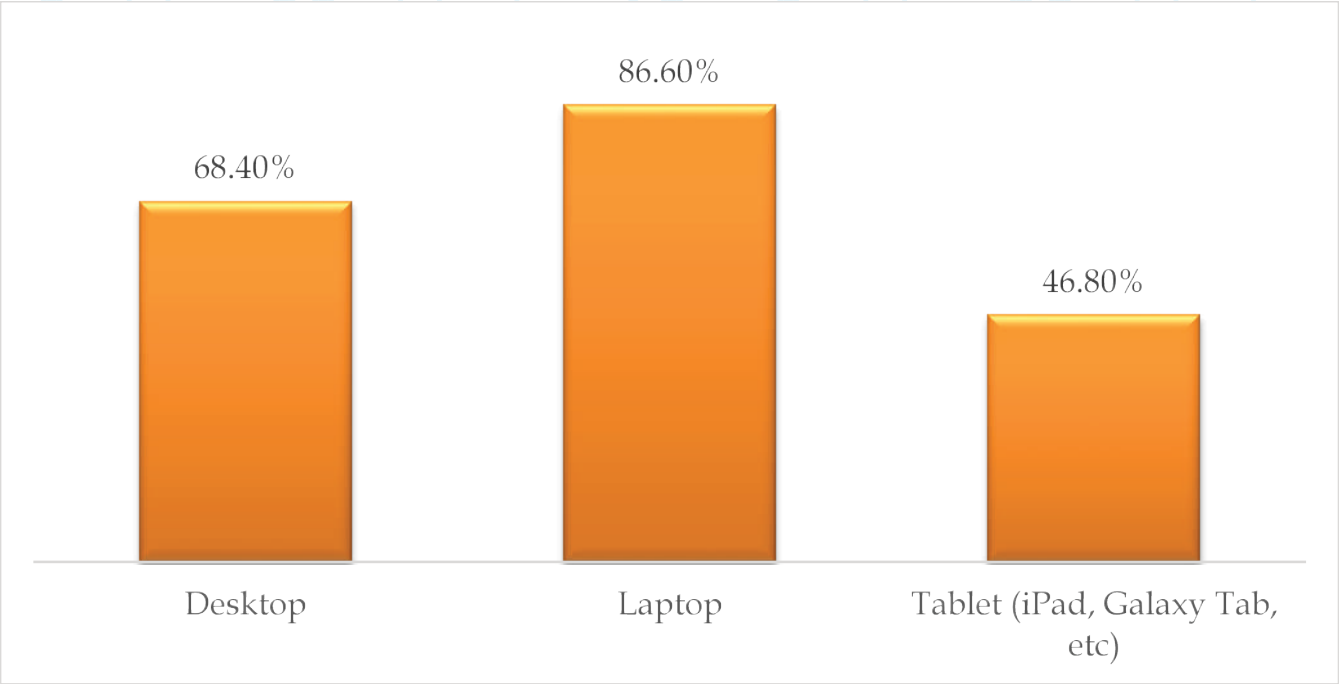
Information was sought from the respondents on whether or not they used a computer from any location in the last three months. On the overall, 21.4 percent had used a computer in the last three months whereas 78.6 percent reported to have never used a computer at all (Figure 3).

Figure 3: Computer usage by individuals



Of those that used a computer, most of them reported that they used laptops (86.6%), followed by desktop (68.4%) and then tablets (46.8%).

Figure 4: Computer usage by individuals classified by type of computer



Disaggregating computer usage by gender, it is shown that a higher proportion of females owned all three types of computers than their male counterparts (Table 11). Furthermore, a higher proportion of urban residents use computers (36.9%) compared to rural residents (8.1%), resulting in the urban-rural gap in computer usage of 28.8 percentage.

Table 11 Computer usage classified by gender and location

Computer usage	National %	Male %	Female %	Gender gap %
Computer usage	21.4	20.1	24.5	- 4.4
		Urban %	**Rural %**	**Location gap %**
		36.9	8.1	28.8

There is a negative relationship between computer usage and age in that as age increases, computer usage decreases (Figure 5). On the other hand, there is a positive association between computer usage and the level of education attained in that computer usage increases as level of education attained increases (Figure 6).

Figure 5: Individual computer usage classified by age

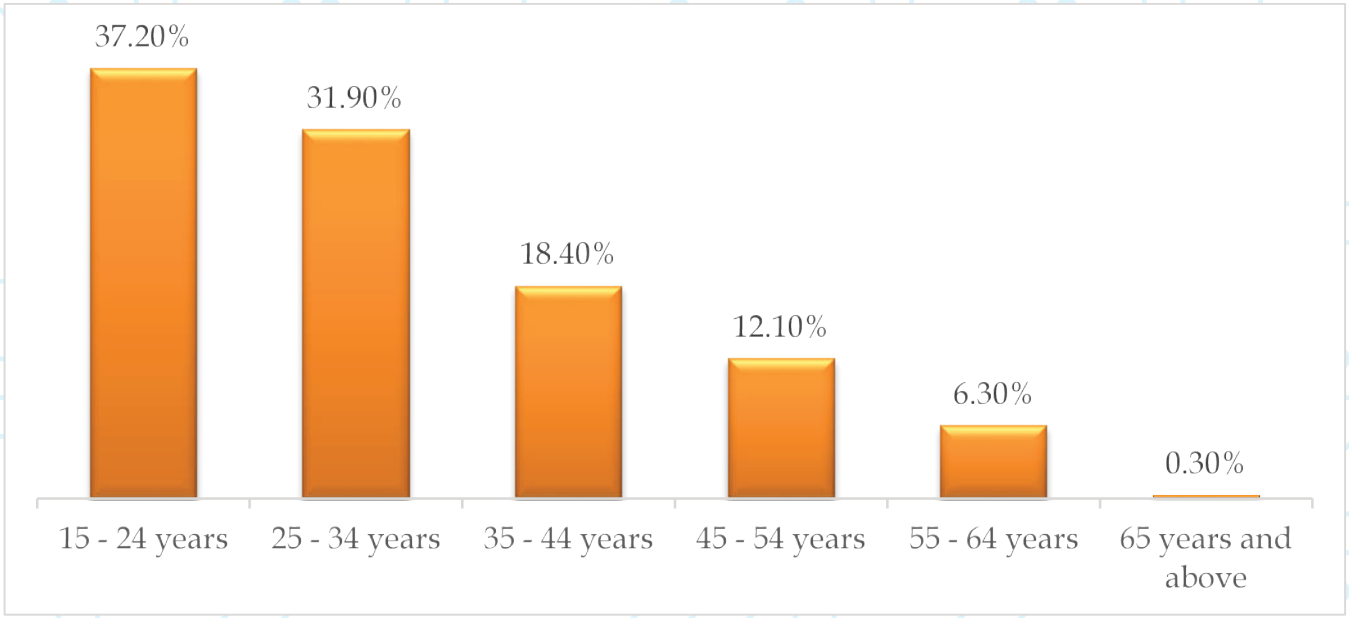
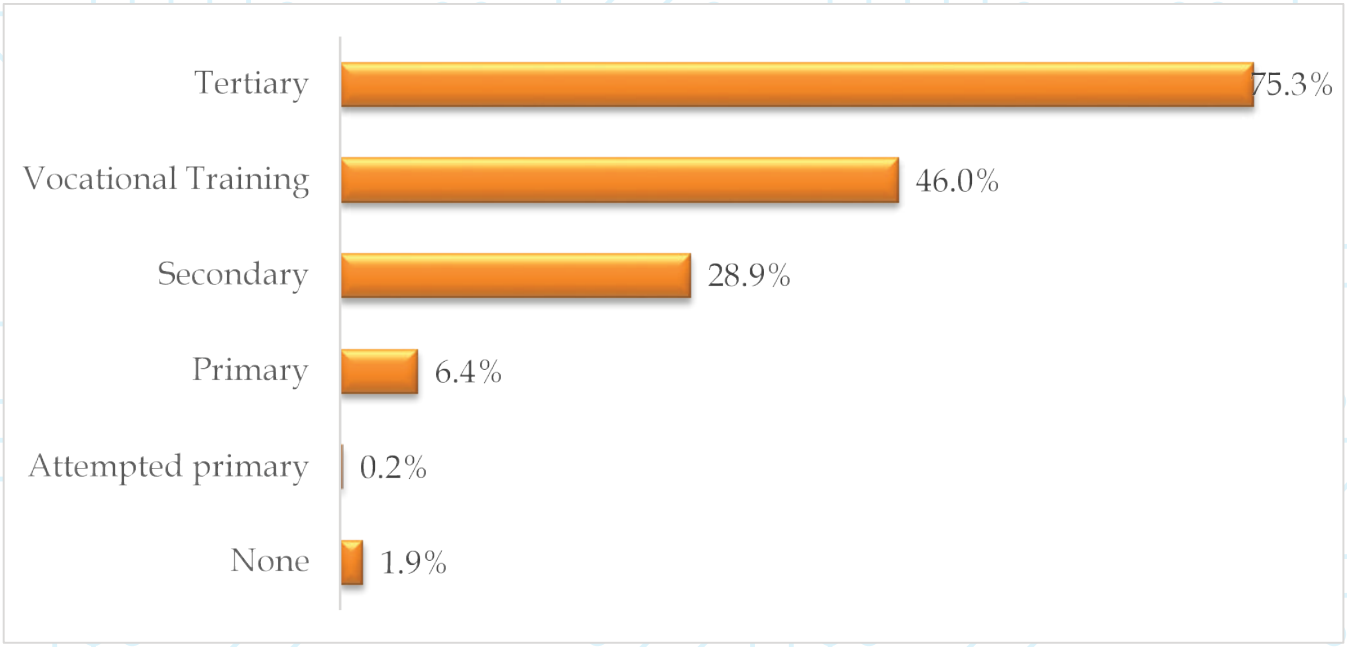


Figure 6: Individual computer usage classified by highest level of education obtained



Chapter 4: Ownership and Usage of Mobile Phone by Individuals

4.1 Mobile phone ownership

The survey results showed that about 83.1 percent of Basotho aged 15 years and older, own a mobile phone (Figure 7). The results showed that about 35.6 percent owned two or more SIM cards (Table 12). It is further shown that there are more females who owned two SIM cards than males while the reverse is true with ownership of one SIM card. While the number of individuals with one SIM card was the highest, the proportion with dual SIM was higher in the urban areas whereas in rural areas, majority owned one SIM card (Table 13).

Figure 7: Ownership of mobile phone by individuals

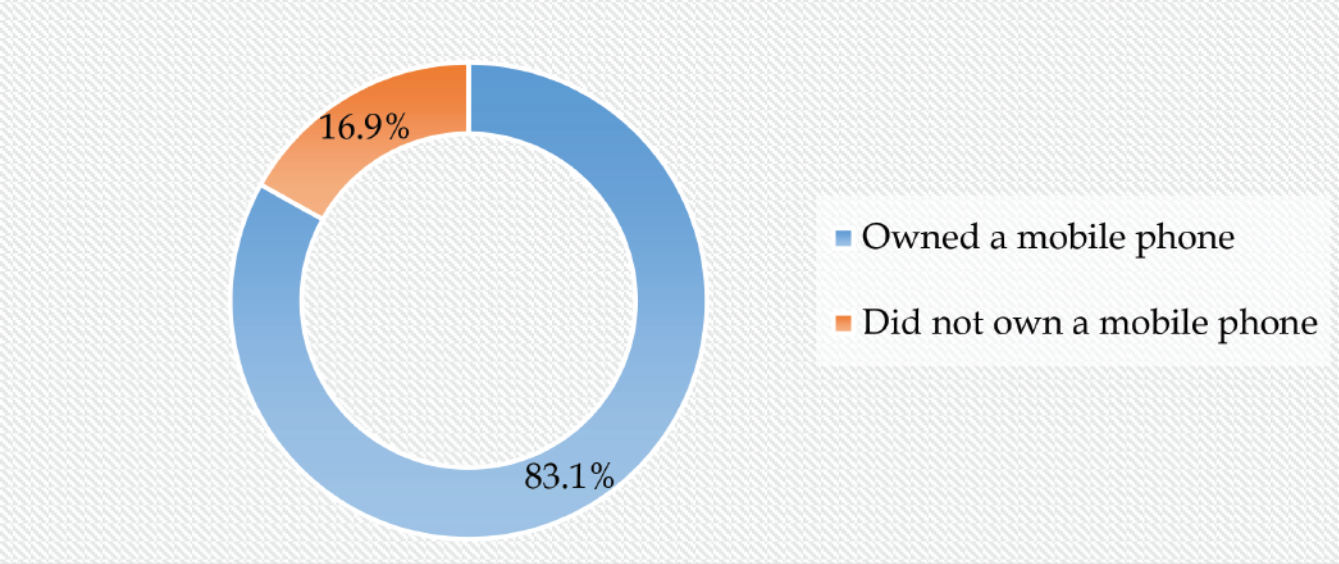


Table 12: Sim card ownership by gender

Number of SIM cards	National %	Male %	Female %	Gender gap
1 SIM card	62.8	66.5	59.6	6.9
2 SIM cards	35.6	31.7	38.8	- 7.1
3 SIM cards & more	1.6	1.8	1.6	0.2

Table 13: Sim card ownership by location

Number of SIM cards	National %	Urban %	Rural %	Location gap
1 SIM card	62.8	53.4	72.3	-15.9
2 SIM cards	35.6	44.5	26.5	18.0
3 SIM cards & more	1.6	2.1	1.2	0.9

The results further showed that 59.7 percent of respondents who indicated Vodacom Lesotho as their primary network service provider owned two SIM cards while 38.2 percent owned only one SIM card. On the other hand, 31.7 percent of ETL customers owned two SIM cards. These results could be due to several factors. Reasons for high numbers of Vodacom Lesotho customers owning multiple SIM cards could be to take advantage of all-net prices that ETL introduced before Vodacom Lesotho.

Of those that owned a mobile phone, almost two thirds (66%) had a smart phone and there was a gender gap of 5.2 percent of smart phone ownership in favour males (Table 14). The respondents that owned a basic and or a feature phone constituted 34 percent and again there were more females than males in this category of mobile phone ownership.

Moreover, there is a significant urban-rural gap in terms of mobile ownership. The results showed that 90.1 percent of people residing in urban areas owned mobile phones while 77.1 percent of rural people owned a mobile phone, resulting in the location gap of 13.0 percent in favour of urban areas. Furthermore, a higher proportion of respondents in the urban areas owned smart phones while feature phones and or basic phones were more prevalent in rural areas (Table 15).

Table 14: Mobile phone ownership by gender

	National %	Male %	Female %	Gender gap %
Mobile phone	83.1	83.0	83.6	- 0.6
Smart phone	66.0	67.5	62.3	5.2
Feature/Basic phone	34.0	32.5	37.7	- 5.2

Table 15: Mobile phone ownership by location

	National %	Urban %	Rural %	Location gap %
Mobile phone	83.1	90.1	77.1	13.0
Smart phone	66	80.2	51.6	28.6
Feature/Basic phone	34	19.8	48.4	-28.6

With regard to mobile phone ownership by age, the results showed that ownership increases with age up to the age of 34 years and then it begins to gradually decline (Table 16).

Table 16: Mobile ownership by age category

Age category	Own mobile phone %	Did not own a mobile phone %
15 - 24 years	75.4	24.6
25 - 34 years	92.2	7.8
35 - 44 years	86.5	13.5
45 - 54 years	86.3	13.7
55 - 64 years	86.7	13.3
65 years and above	73.2	26.8

A disaggregation of mobile phone ownership by education showed that there is a strong positive relationship between education and mobile phone adoption in Lesotho. Almost all the individuals who completed tertiary education own mobile phones (99.7%), and 90.4 percent of individuals with a secondary certificate own a mobile phone (Table 17). However, the results show that in comparison to other groups, people with no education are less likely to own a mobile phone. While 35.3 percent of people who did not attend school did not have a mobile phone, the number of people who did not have a mobile phone significantly declines as the highest level of education attained by an individual increase.

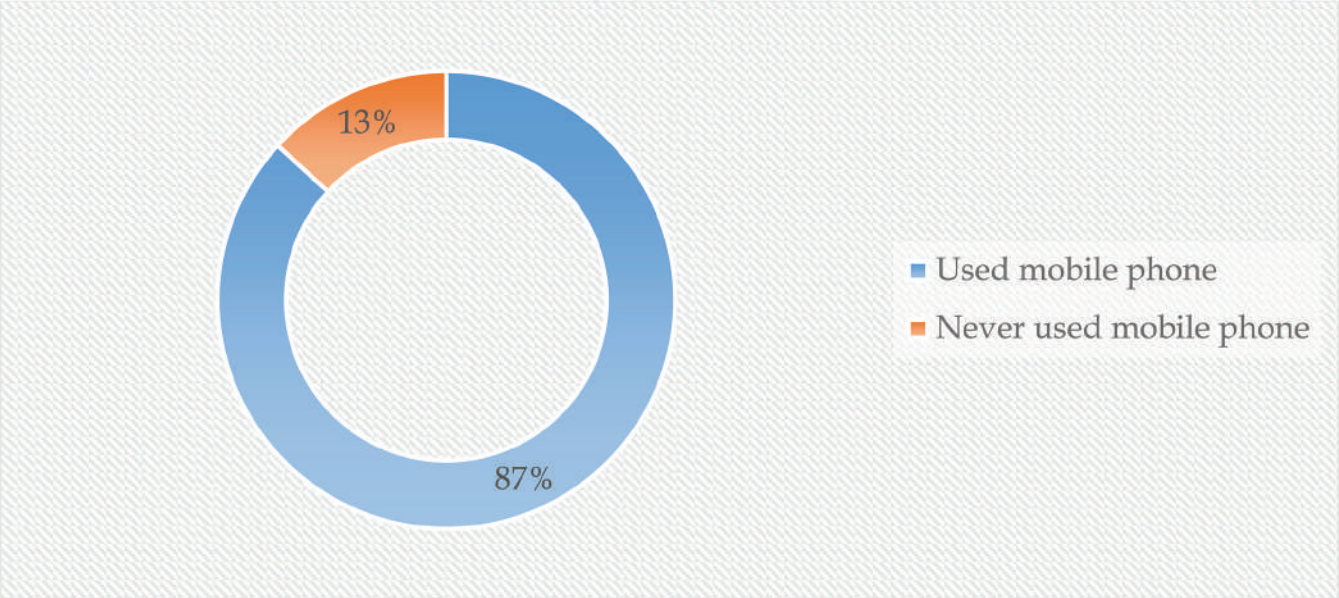
Table 17: Mobile phone ownership by education

Level of education	Own mobile phone %	Did not own a mobile phone %
Tertiary	99.7	0.3
Secondary	90.4	9.6
Vocational	84.2	15.8
Primary	81.2	18.8
Attempted primary	69.0	31.0
None	64.7	35.3

4.2 Mobile phone usage

The survey showed that while 83 percent of individuals owned a mobile phone, 87 percent used the mobile phone in the last 3 months prior to the survey (Figure 8). This means that although four percent of individuals did not own mobile phones, they had used someone else mobile phone to do an activity that required a mobile phone.

Figure 8: Usage of mobile phone by individuals



Of those who used a mobile phone, over two thirds (68.2%) used a smart phone and there was a gender gap of 5.4 percent of smartphone usage in favour males (Table 18).

Moreover, there is a significant urban-rural gap in terms of mobile phone usage. The results showed that 94.2 percent of people residing in urban areas used mobile phones while 80.4 percent of rural people used a mobile phone, resulting in the location gap of 13.8 percent in favour of urban areas. Furthermore, a higher proportion of respondents in the urban areas used smart phones while feature phones and or basic phones were more prevalent in rural areas (Table 19).

Table 18: Mobile phone usage by gender

	National %	Male %	Female %	Gender gap %
Mobile phone Usage	86.8	87.8	86.3	1.5
Smart phone	68.2	69.8	64.4	5.4
Feature /Basic phone	31.8	30.2	35.6	- 5.4

Table 19: Mobile phone usage by location

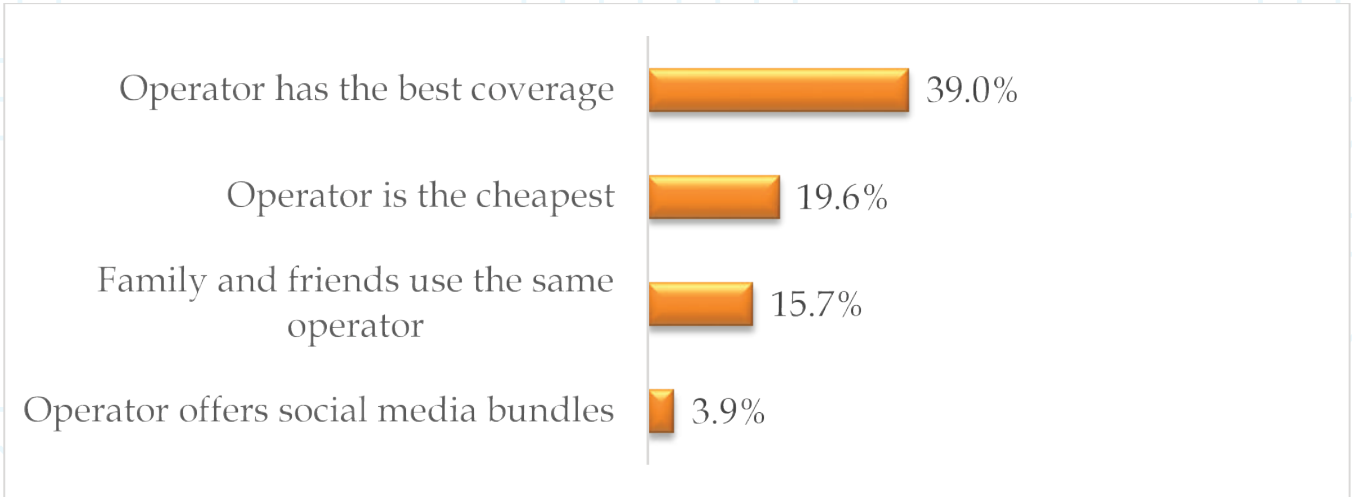
	National %	Urban %	Rural %	Location gap %
Mobile phone	86.8	94.2	80.4	13.8
Smart phone	68.2	81.2	55.1	26.1
Feature/Basic phone	31.8	18.8	44.9	-26.1

4.3 Choice of mobile operator

About 97.9 percent of mobile phone owners reported that they had a pre-paid SIM card. Almost 0.9 percent had a South African SIM card, and only 1.2 percent stated that their main SIM card was post-paid.

Information was sought from the respondents about the reasons for choosing their main operator and their results are presented in Figure 9. Over one third of users reported that their choice of the main network operator was because the operator has the best coverage. About 19.6 percent indicated that their decision for a main operator was based on cost. Less than 5 percent stated that their choice of a main operator was due to the offer of free social media bundles.

Figure 9: Reasons for choosing the current MAIN operator



4.4 Use of mobile financial services

In Sub-Saharan Africa, the growth of mobile money has been exponential as it allows millions of people to save and transact money on a digital platform. The survey results showed that over half the population (65.1%) use mobile money for transacting financially while the use of mobile banking was still very low (1.0%). Disaggregating the use of mobile money by gender, the

results revealed that slightly more males use the mobile money platform than their female counterparts (Table 20). The gender gap stands at 0.2 percent in favour of men. Also, there are more females than males that reported using mobile banking than males.

Table 20: Use of mobile financial services classified by gender

Use of mobile money service	National %	Male %	Female %	Gender gap %
Used mobile money	65.1	65.2	65.0	0.2
Used mobile banking	1.0	1.1	0.8	0.3
Used both mobile money and banking	10.8	9.9	11.5	- 1.6
Did not use mobile money services	23.2	23.8	22.6	1.2

Looking at the use of mobile money services in the urban and rural settings, it was found that slightly more than one third (31.2%) of the rural people did not use any mobile money services compared to 15.1 percent of those who did not use any platform in the urban areas, making the urban rural gap of 16.1 percent (Table 21).

Table 21: Use of mobile financial services classified by location

Use of mobile money service	National %	Urban %	Rural %	Location gap %
Used mobile money	65.1	68.3	61.9	6.4
Used mobile banking	1.0	1.6	0.4	1.2
Used both mobile money and banking	10.8	15.1	6.5	8.6
Did not use mobile money services	23.2	15.1	31.2	-16.1

4.5 Airtime conversion to mobile money

Information was also sought from individuals regarding airtime conversion to mobile money. The results show that of those that use mobile money, 20 percent of individuals convert airtime to mobile money (Figure 10).

The results further show that 69.4 percent of those that convert airtime to mobile money reside in urban areas and there is a significant urban-rural gap of 38.8 percent (Table 22).

Figure 10: Proportion of individuals who convert airtime to money

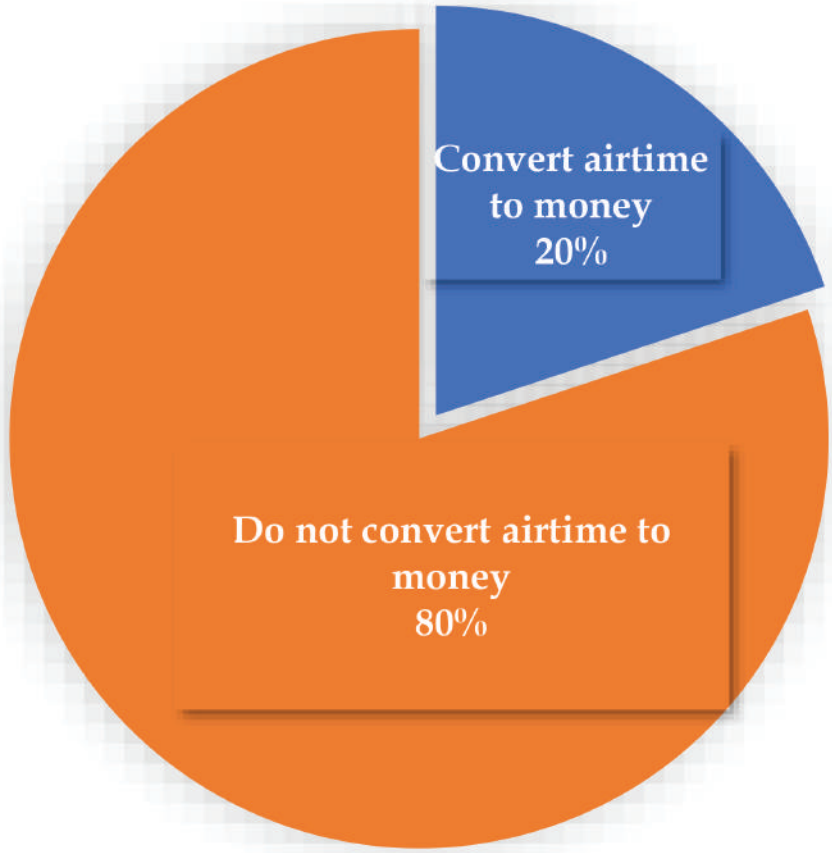
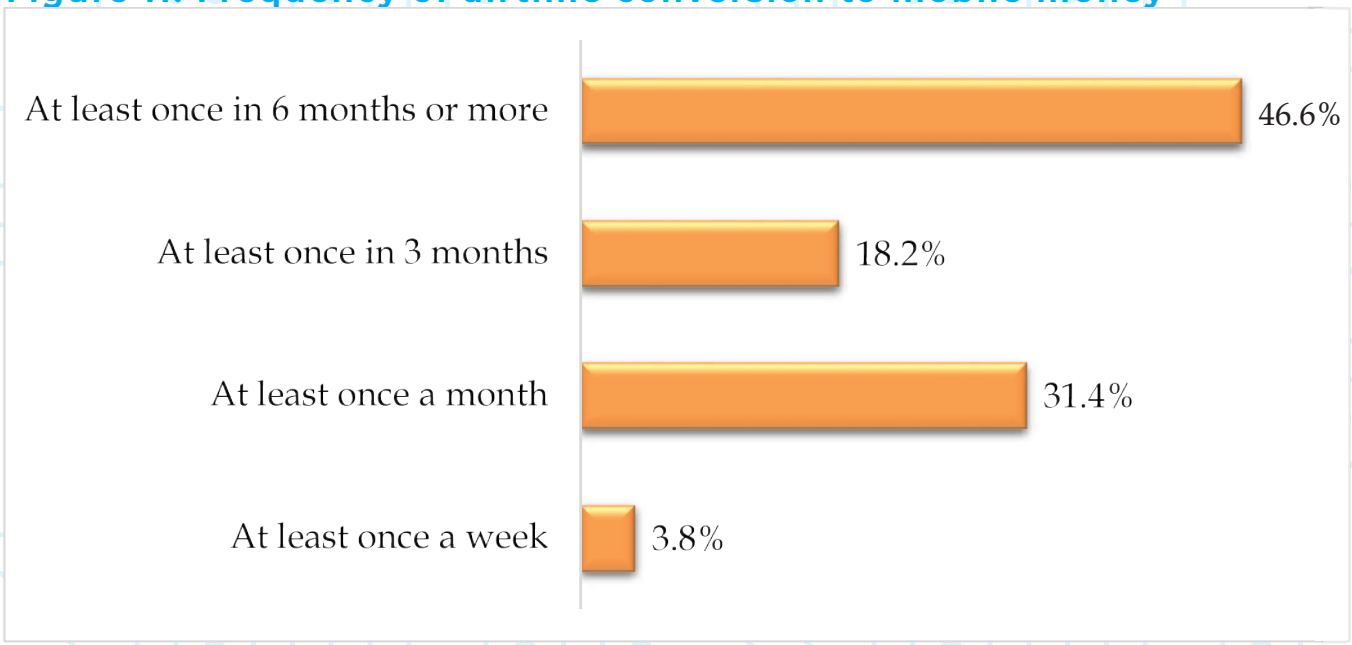


Table 22: Proportion of individuals who convert airtime to money by gender and location

Internet usage	National %	Male %	Female %	Gender gap %
Conversion of airtime to mobile money	20%	67.9	32.1	35.8
		Urban %	**Rural %**	**Location gap %**
		69.4	30.6	38.8

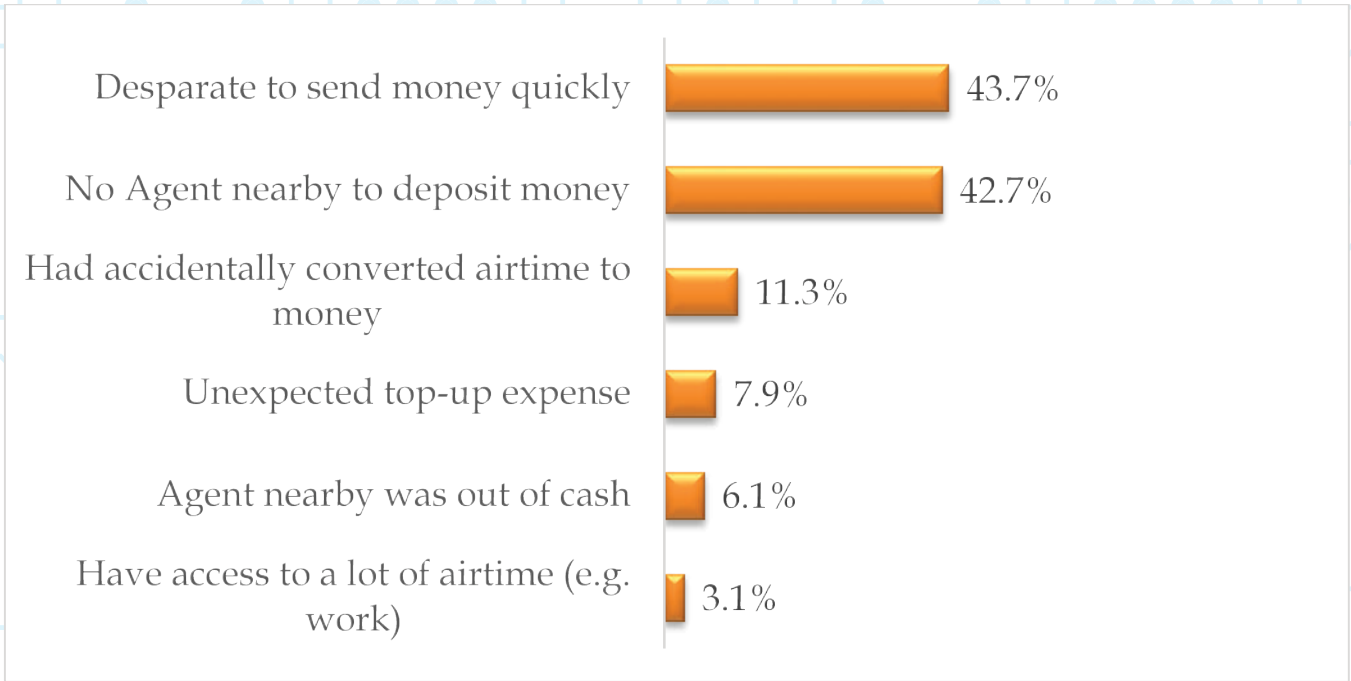
When asked how often they convert airtime to mobile money, majority reported to do the conversion at least once in 6 months (46.6%), followed by those who do it at least once a month (31.4%) (Figure 11).

Figure 11: Frequency of airtime conversion to mobile money



Majority of individuals reported to convert airtime into money because they would be desperate to send money quickly (43.7%) or there would be no mobile money agent nearby to deposit money (42.7%) (Figure 12). There is also 11.3 percent who reported that they would have converted airtime into money accidentally.

Figure 12: Reasons for converting airtime to mobile money




Instagram
Facebook

5.1 Internet Usage by Individuals

The benefits of internet connectivity have never been greater. It does not merely transform individual human potential, it also reinforces national efforts to develop knowledge economies, foster digital transformation in government services and digital transition across economic sectors, expand opportunities for enterprises, and provide greater value for citizens and consumers (State of Broadband Report, 2019).

Internet user uptake is a key indicator of a country's progress towards becoming an information society. In this regard, individuals were asked whether they have ever used the Internet and the results are presented in Figure 13. It is shown that 58.4 percent of the people use the Internet. When disaggregated by gender, the results revealed that slightly more men (59.9%) than women (54,8%) use the Internet (Table 23). The location gap is even more pronounced in relation to Internet use than the gender gap. The location gap in Internet usage was 33.9 percent with the probability of Internet usage higher among people in urban areas than in rural areas. The results revealed that 76.6 percent of the people residing in urban areas use the Internet while only 42.7percent of people in the rural areas use Internet.

Figure 13: Internet usage by individuals

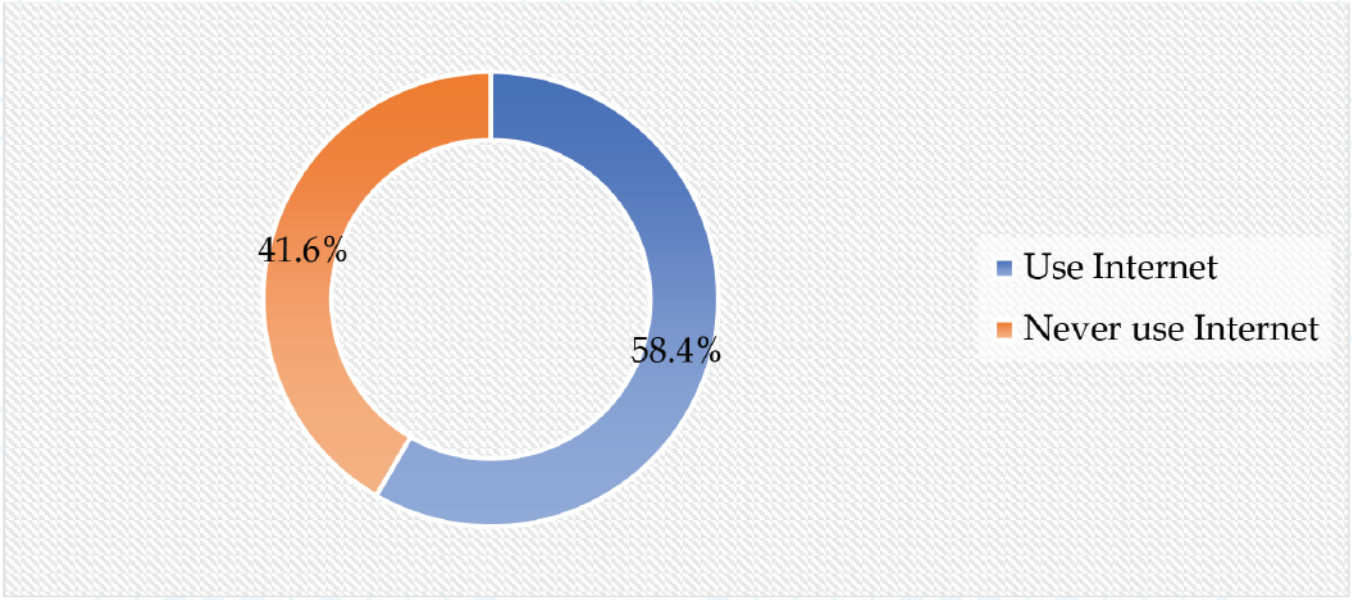
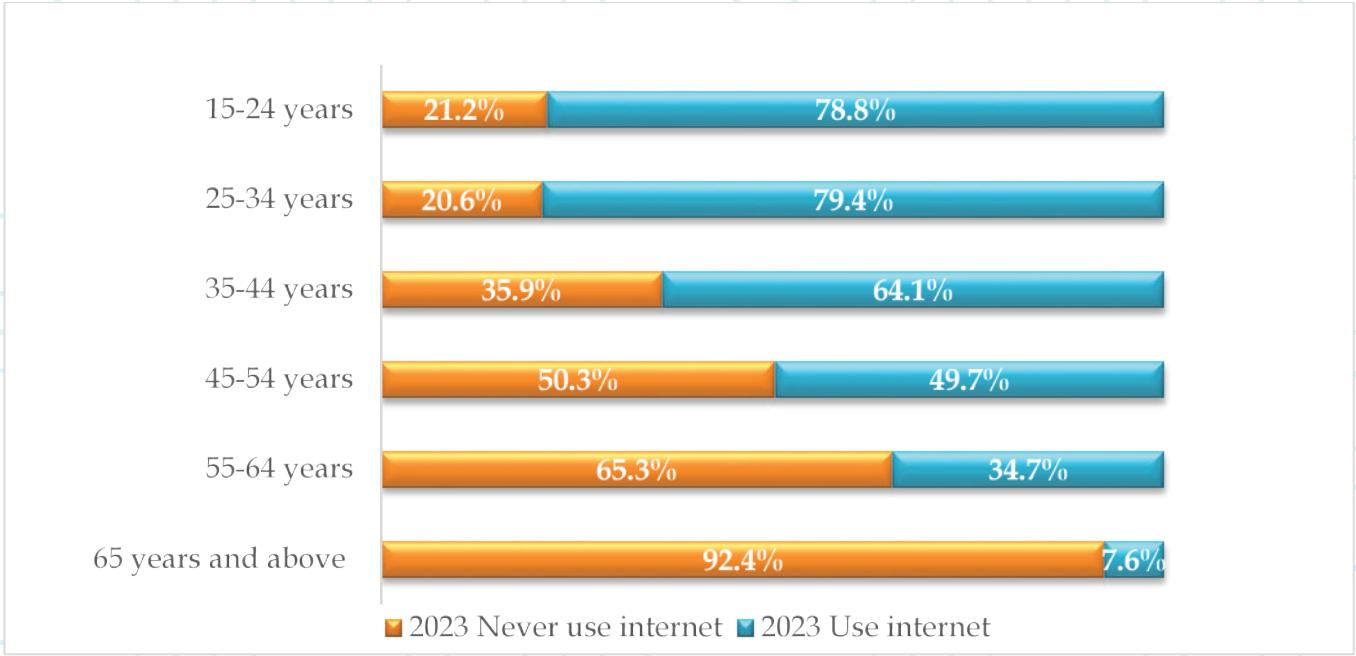


Table 23: Internet Usage Classified by Gender and Location

Internet usage	National %	Male %	Female %	Gender gap %
Use Internet	58.4	59.9	54.8	5.1
		Urban %	**Rural %**	**Location gap %**
		76.6	42.7	33.9

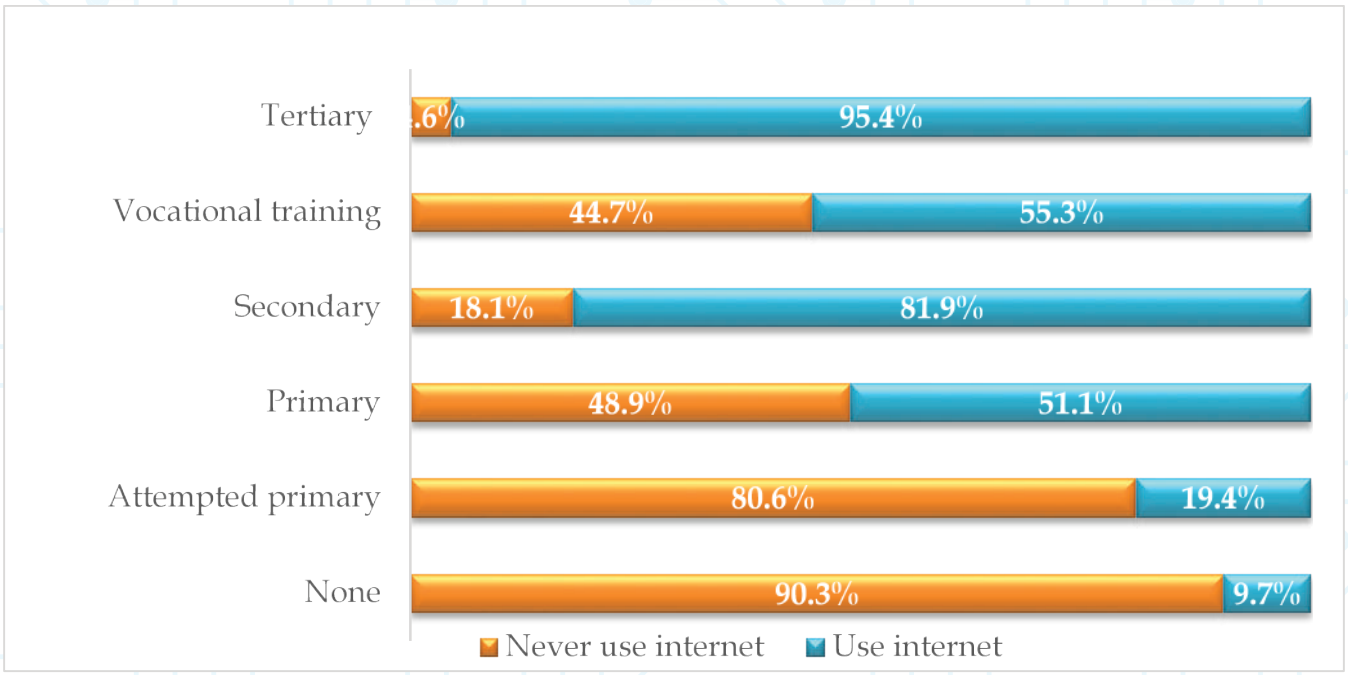
A disaggregation of Internet usage by age showed that there is a strong negative relationship between age and Internet adoption in Lesotho. As age increases, the rate of Internet adoption decreases. That is, over 75 percent of individuals aged between 15 to 34 years use the Internet whereas less than 10 percent of individuals aged 65 and above use the Internet (Figure 14).

Figure 14: Individuals who used Internet by age



The analysis of Internet adoption by level of education attained showed that usage increases as the level of education attained increases (Figure 15). Almost all the individuals who completed tertiary education use Internet (95.4%) whereas less than 10 percent of those with no education use the Internet.

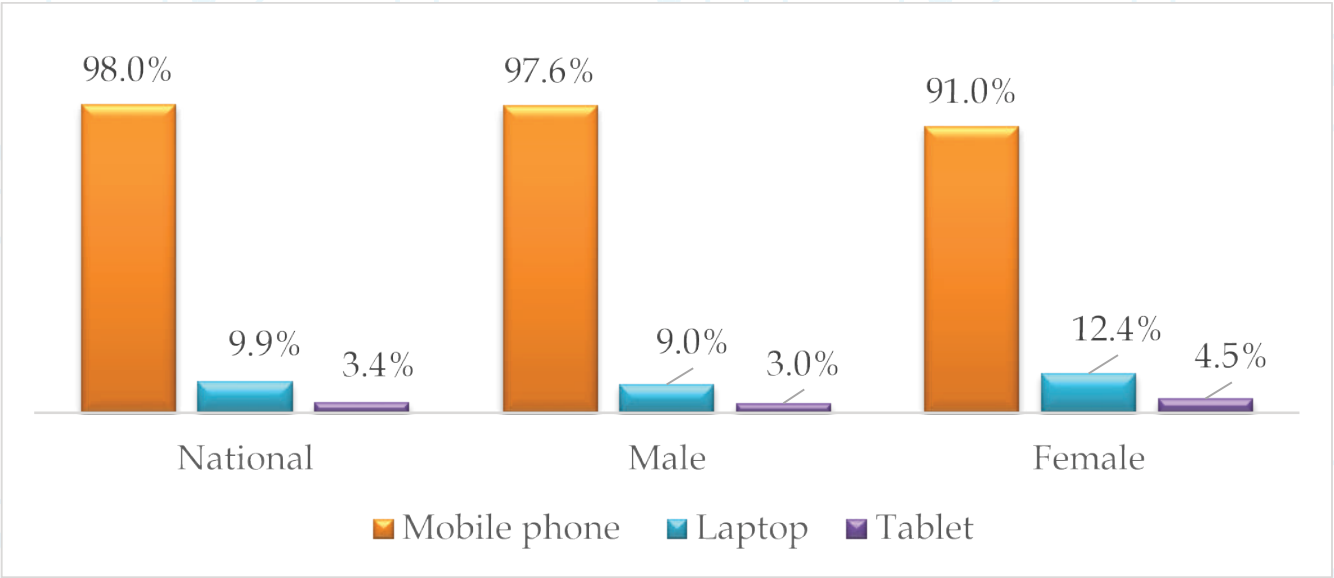
Figure 15: Individuals who used Internet by highest level of education obtained



5.2 Devices individuals use to access Internet

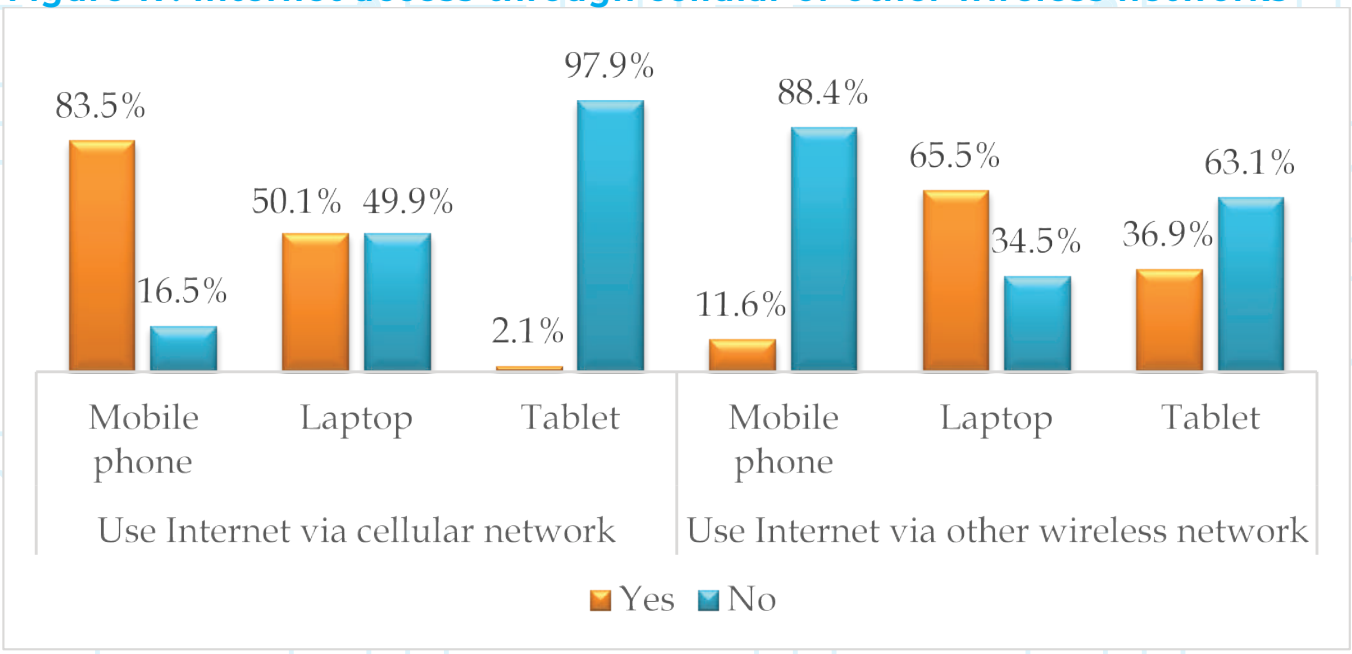
Most surveys that have been conducted in African countries found that most people were accessing the Internet through their mobile phones (Stork, Calandro & Gillwald, 2013; LCA, 2016; Gillwald, Odufuwa & Mothobi, 2018). The studies revealed that access to the Internet by most Internet users is the mobile phone. The results from the current study indicate a similar trend. It is shown in Figure 16 that at the national level as well as across sexes, more than 90 percent of individuals indicated that they use their mobile phones to access Internet.

Figure 16: Devices individuals use to access Internet



Respondents were further asked to indicate whether or not they access internet through cellular networks or other wireless networks (e.g. Wi-Fi) when using their devices. The results showed that with individuals that uses mobile phones, majority (83.5%) access internet through cellular networks while the other wireless networks are used mostly by those that access internet using laptops (Figure 17).

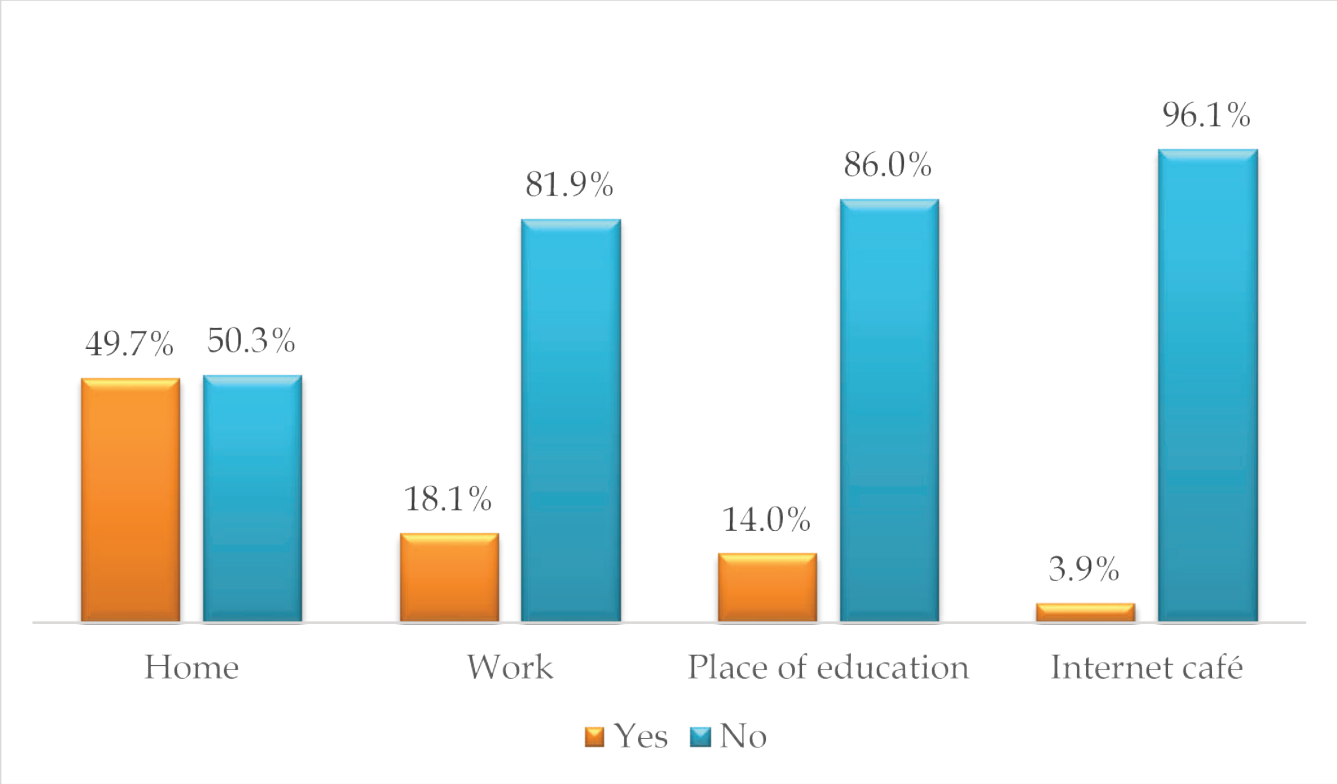
Figure 17: Internet access through cellular or other wireless networks



5.3 Places of Internet access

In terms of place of access, almost half (49.7%) of individuals is found to access the Internet at home and this is similar for both females (52.6%) and males (48.6%). The second most used place to access the Internet was the place of work (18.1%), followed by the place of education (14.0%). Internet café was the least used place to access the Internet (3.9%) in comparison with the other places (Figure 18).

Figure 18: Places of Internet Access by Individuals



The results further indicate that females tend to use Internet more at the place of work, place of education and Internet cafes than their male counterparts.

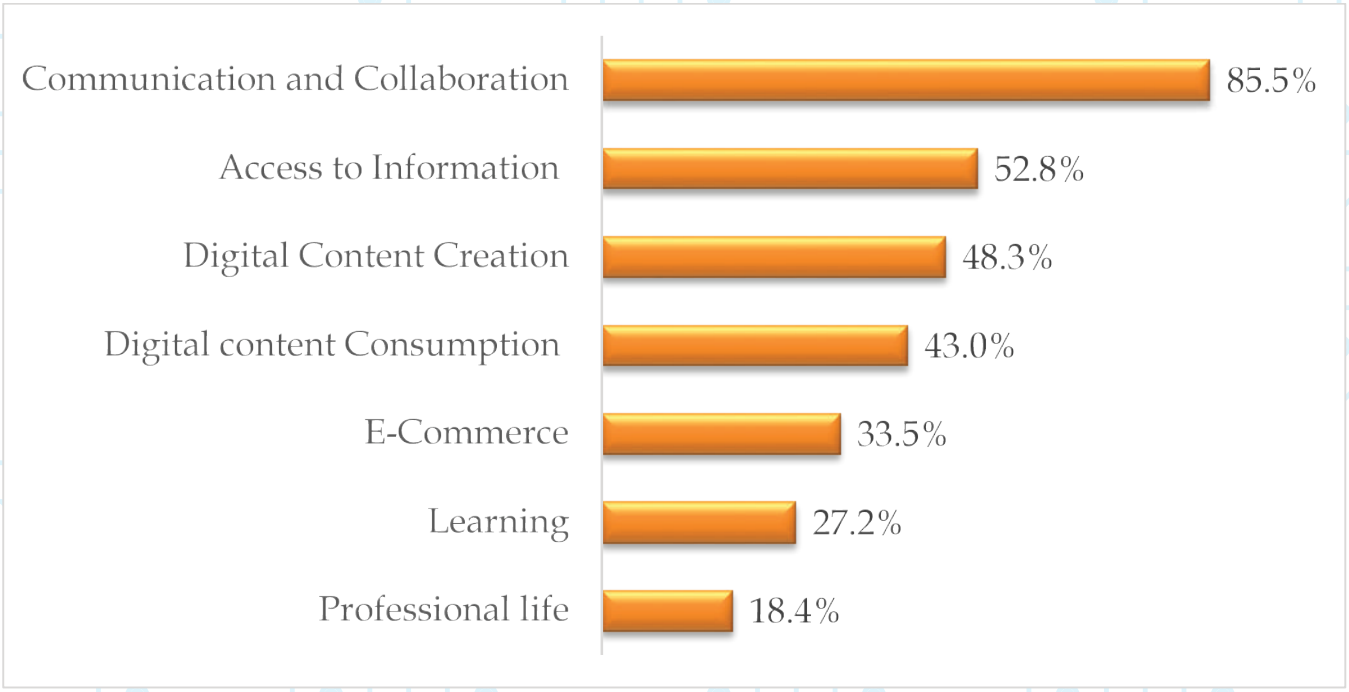
5.4 Activities taken online

Information was sought to establish the activities that individuals undertook on the internet. Activities performed online are measured based on whether an individual has recently performed at least one action in the seven areas as outlined in Box 1 below.

Box 1: Framework used to measure activities taken online	
Access to information	▪ Getting Information about goods or services ▪ Seeking health info (nutrition, disease etc) ▪ Getting information from government websites, social media platforms etc ▪ Using Services related to travel or travel related accommodation ▪ Downloading software or applications. ▪ Read or Download online newspapers, magazines and electronic book
Communication, Civic Participation and Collaboration	▪ Sending and Receiving emails ▪ Making calls (WhatsApp call, skype call, VOIP/ TelOVIP) ▪ Participating in social networks (creating user profile, posting messages, or other contributions to Facebook, twitter etc) ▪ Making appointment with health practitioner via a website ▪ Interacting with government organizations ▪ Accessing or posting opinions on chat sites, blogs, newsgroups or online discussions.
Electronic Commerce, Trading and Transaction	▪ Purchasing or ordering goods and services ▪ Selling Goods or services (Via Facebook, eBay etc) ▪ Internet Banking (Including Mobile Banking)
Learning Activities over Internet for Educational, Professional or Private Purpose	▪ Doing a formal online course in any subject (E.G Distance Learning) ▪ Consulting WIKIS (Wikipedia etc.), online encyclopaedia or other websites for formal or informal learning purposes.
Professional Life	▪ Looking for a job or sending/submitting a job application (includes searching specific websites for a job; sending/ submitting an application online) ▪ Participating in professional networks (LinkedIn etc)
Entertainment, Digital Content Consumption	▪ Listen to web radio (Either paid or free of charge) ▪ Watching Web Television (Either paid or free of charge) ▪ Streaming or downloading images, movies, videos or music; playing or downloading images (Either paid or free of charge)
Digital Content Creation	▪ Uploading Self/User-Created Content to a Website to be shared (Text, images, photos, videos, Music, Software, etc) ▪ Using Storage space on the internet to save Documents, Pictures, Music, Video or Other files (E.g. Google Drive, Dropbox, Windows, SkyDrive, iCloud, Amazon Cloud Drive)

Using the framework provided in Box 1, the results reveal that the most common activity undertaken online by individuals that used the internet was communication and collaboration (85.5%) followed by access to information (52.8%). About 18.4 percent used the internet for professional life (Figure 19).

Figure 19: Proportion of Individuals by Activities Undertaken



The survey results show that among those who have access to or use the internet, the frequency of use is very high. About 80.4 percent of individuals browse the internet every day, with about 14.6 percent connecting to the internet at least once a week. However, 5.1 percent of internet users only access at least once a month.

5.5 Social media

About 98 percent of individuals use social media and there were slightly more women than men that use it, where the gender gap was 1.5 percent in favour of women. Anonymity does not seem to be a big issue with 75.4 percent of people indicating that they use their real names to sign-up on social media. The results show that slightly more men sign-up using their real names. There were 22.6 percent of individuals indicated that they use a pseudonym to sign-up on social media, with more women than men using a pseudonym name (Table 24).

Table 24: Use of Social media classified by gender

Social media	National %	Male %	Female %	Gender gap %
Use social media	97.9	97.1	98.6	-1.5
Use real name to sign-up	75.4	75.8	75.1	0.7
Use pseudonym to sign-up	22.6	21.6	23.4	-1.8
Use both real name and pseudonym	2.0	2.6	1.6	1.0

In terms of urban-rural divide, the results revealed that a slightly higher number of urban people use social media than rural people with the location gap of 2 percent in favour of urban dwellers (Table 25). In addition, a higher number of urban residents used their real names when signing-up on social media compared to rural residents.

Table 25: Use of Social media classified by location

Social media	National %	Urban %	Rural %	Location gap %
Use social media	97.9	98.7	96.7	2.0
Use real name to sign-up	75.4	77.1	72.8	4.3
Use pseudonym to sign-up	22.6	21.1	24.9	-3.8
Use both real name and pseudonym	2.0	1.8	2.3	-0.5

5.6 Use of e-Services

ICTs offer governments an opportunity to achieve sustainable development and improve the well-being of their citizens by among others, providing education, health and other government services online. The use of ICTs in public sector institutions has the potential to improve efficiency in the delivery of government services to the public and in this regard, the Government of Lesotho is implementing an e-government project to improve online public service.

The adoption of e-government services is still very limited as the survey results revealed that only 6.7 percent of the people interacted with government through the online platforms. Of those that used the e-government services, majority reported to have downloaded or printed official forms (89.1%) and have submitted forms online (89.3%) (Table 26). The gender gap of those who downloaded or printed official forms was 4.9 percent in favor of men.

Table 26: The use of e-government services classified by gender

e-Government services	National %	Male %	Female %	Gender gap %
Obtaining information from websites or apps	16.5	17.7	15.6	2.1
Sending and receiving emails	34.9	36.6	33.6	3.0
Submitting forms online	89.3	90.8	88.1	2.7
Downloading or printing official forms	89.1	91.9	87.0	- 4.9

The survey results revealed that the adoption of e-educational services was still very low. About 43 percent of the respondents reported that they use e-educational platforms. Of those that engaged in e-education, over three quarters (77.4%) read online newspapers or magazines and there were gender differences in favor of females. Over one third (68.4%) used such platform to consult online wikis (e.g. Wikipedia etc), online encyclopaedias or other websites for formal or informal learning. The gender gap was 7 percent in favor of males. Less than 30 percent used the Internet to do online courses and to participate in professional networks. In all these activities, more women used the Internet than men (Table 27).

Table 27: The use of e-education services classified by location

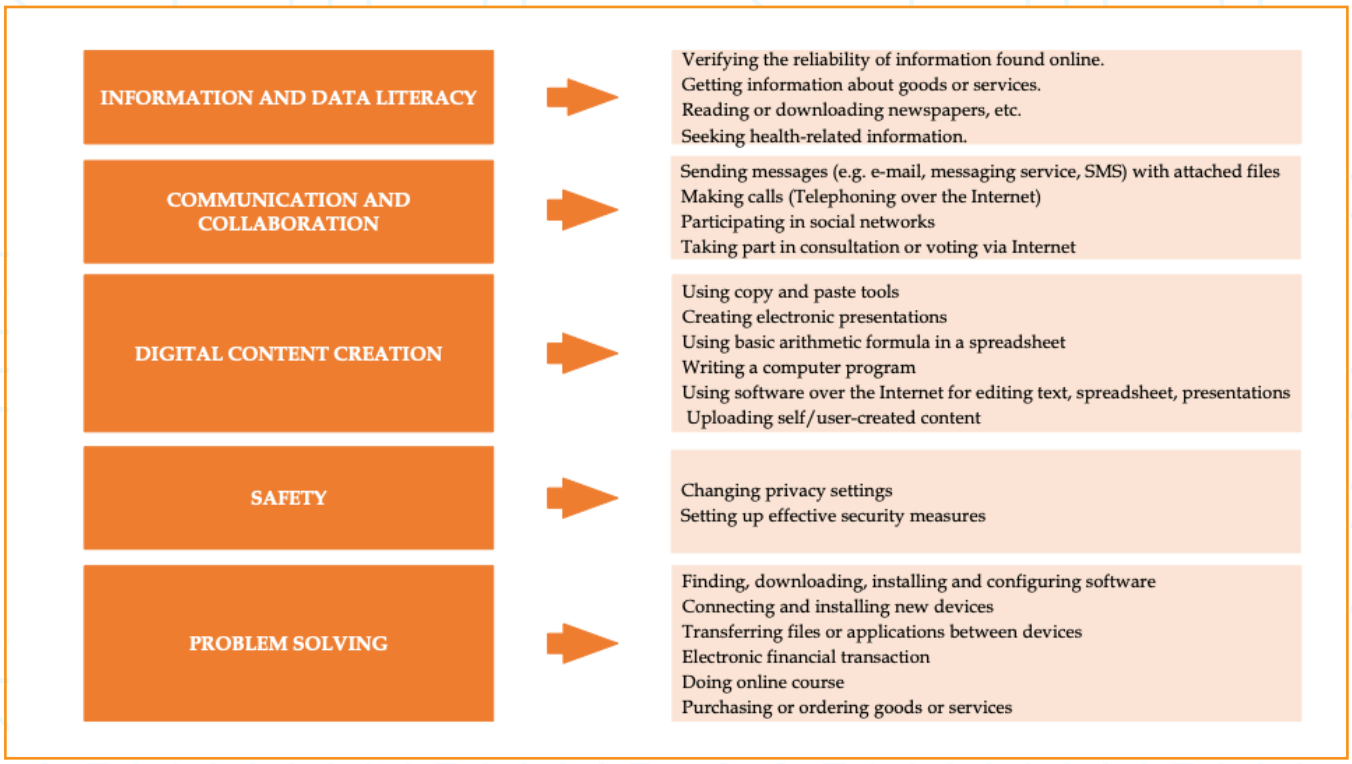
e-Education services	National %	Male %	Female %	Gender gap %
Doing an online course (e.g. distance learning)	24.9	23.0	29.2	- 6.2
Consulting online wikis (e.g. Wikipedia etc.), encyclopaedias or other websites for formal or informal learning	68.4	70.6	63.6	7.0
Reading online newspapers or magazines	77.4	77.4	87.3	-9.9
Participating in professional networks (LinkedIn etc)	19.2	17.1	23.6	-6.5

5.7 ICT Skills

ICT skills are fundamental for participation in today's information society and are viewed as one of the core foundations of the digital transformation. People with relevant ICT skills can safely access news and information, communicate with friends and family, and access important services related to e-health, e-government, digital finance, and otherwise enjoy the many benefits of participating in the global knowledge society. Moreover, lack of ICT skills is an important impediment for people to access the Internet.

In this survey, ICT skills are measured based on whether an individual has recently performed certain activities (on the computer and the internet) that require different types of skill. The assumption is that performing these activities implies that one has a certain level of the required skills. Activities are grouped into five areas of digital skills as outlined in Box 2 below.

Box 2: Five ICT Skill Areas Assessed



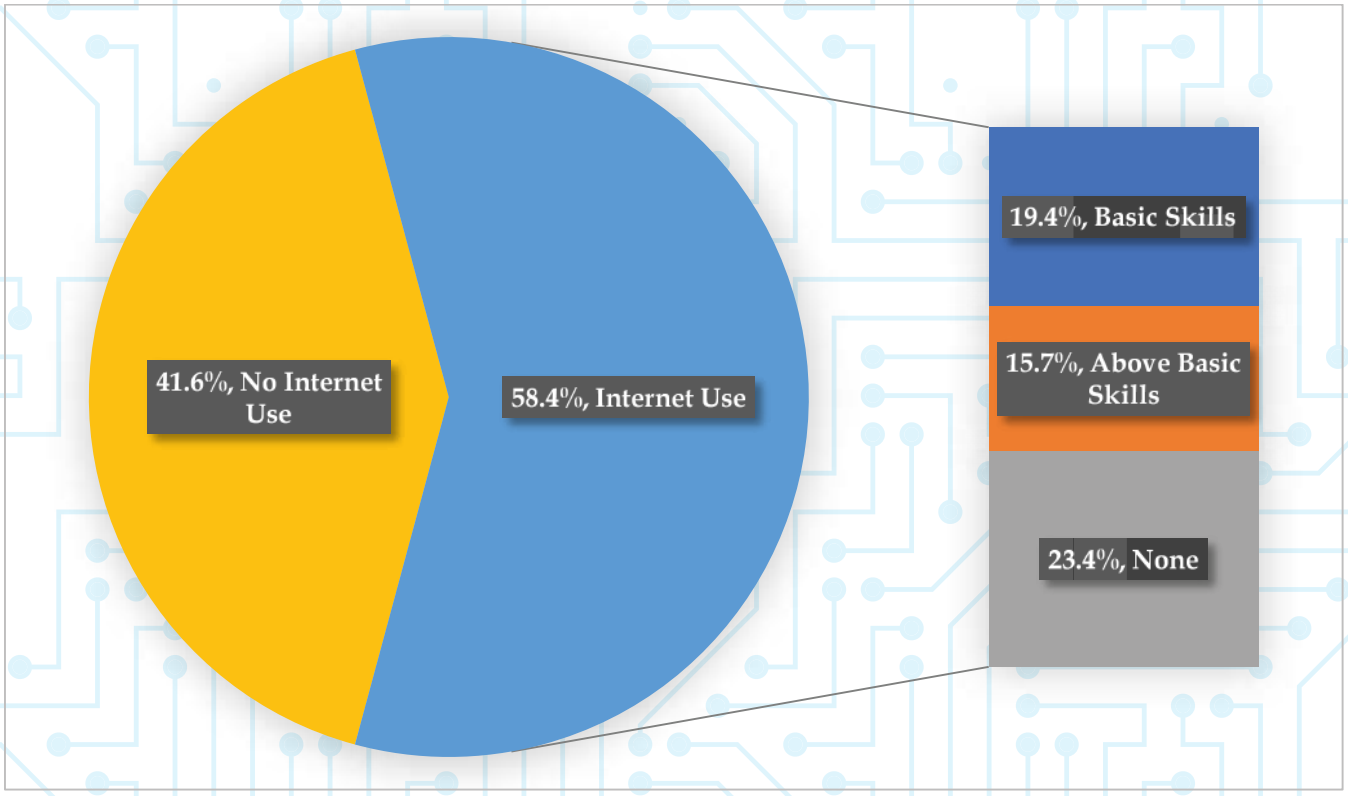
The individuals' responses were assessed on several activities within a skill area they had reported having done in the last three months before the survey using the following progression:

None	Basic	Above basic
At least 1 activity in any of the 5 skills area	At least 1 activity in all the 5 skills area	Two or more activities in all the 5 skills area

The results show that almost 16 percent of individuals had above basic ICT skills while 19 percent possessed basic ICT skills (Figure 20). This highlights that while 58.4% of individuals use internet, only 35.1 percent (those with basic and above basic skills) had ICT skills resulting in a gap of 23.3 percent.

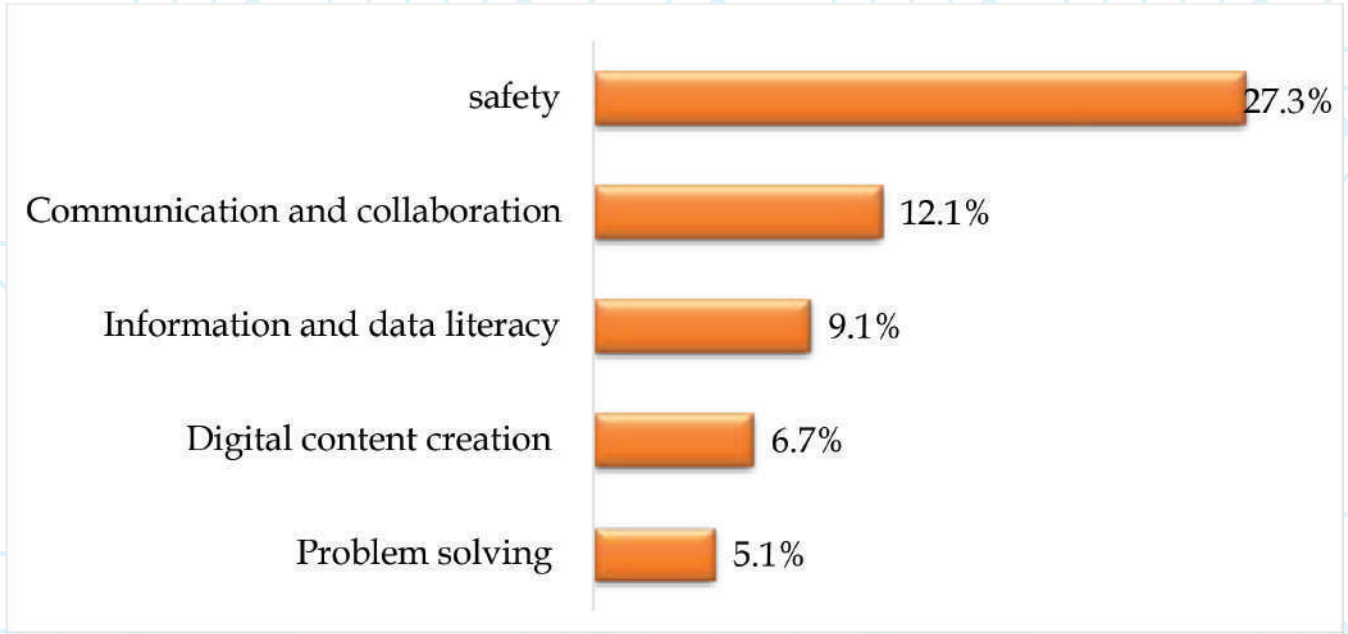
This gap between individuals using the Internet and those with digital skills demonstrates that many may be using the Internet without being able to fully benefit from it or avoid its dangers.

Figure 20: Proportion of Individuals with ICT Skills



Looking at individual skills area, the results reveal that skills related to safety (e.g. strong passwords to protect devices and online accounts) are most prevalent with the median of 27.3 percent. Communication and collaboration is the second most prevalent (median of 12.1%). They are followed by skills related to Information and data literacy (9.1%) and content creation (6.7%). Problem solving (5.1%) has the lowest median (Figure 21).

Figure 21: Average of Individuals by Type of Skills Area

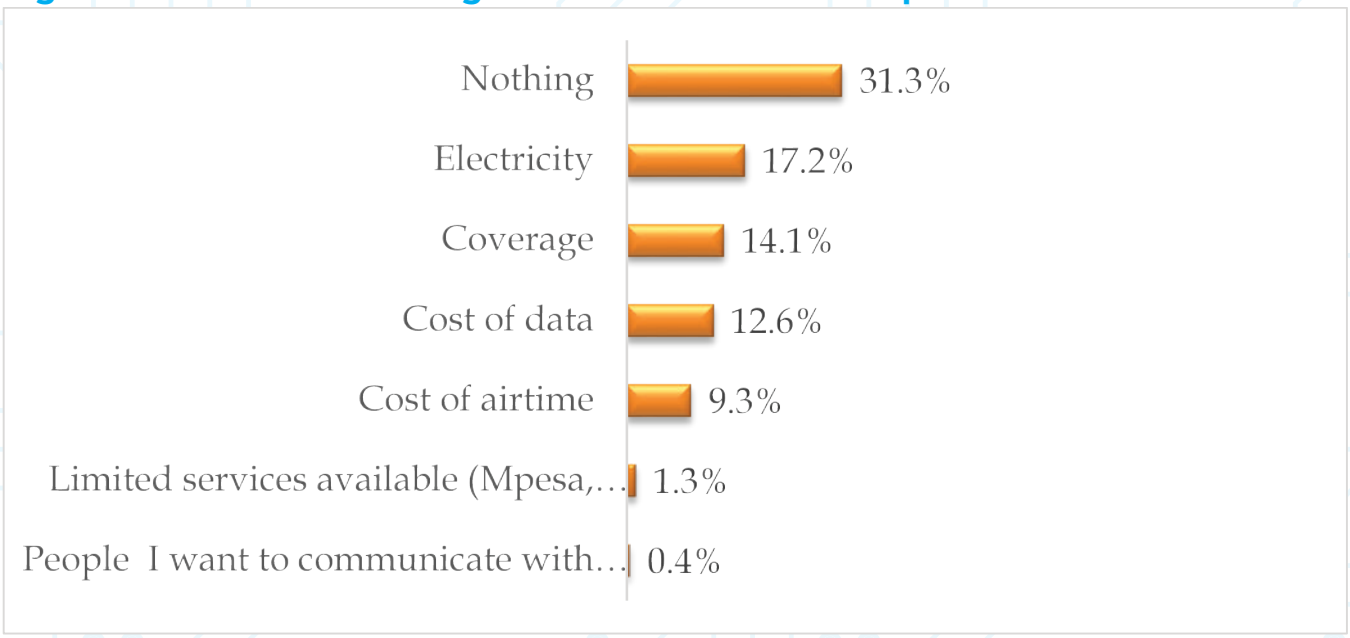


This chapter presents survey results related to both users and non-users of mobile phones and the Internet. The first section discusses the factors that prevent users from using these ICTs as much as they would like to. The second section focuses on non-users and the reasons behind their non-use of mobile phones and the Internet.

6.1 Limited use

Of the individuals who used mobile phones, 17.2% stated that lack of electricity minimized their use of the mobile phone (Figure 22). On the other hand, a little over a third of mobile phone users (31.3%) indicated that nothing really hinders their use of mobile phone. Lack of coverage (14.1%), cost of data (12.6%) and cost of airtime (9.3%) are three other main factors that users indicated hinder their use of the mobile phone. Less than five percent cited limited services available as the main factor preventing them from using their mobile phones more.

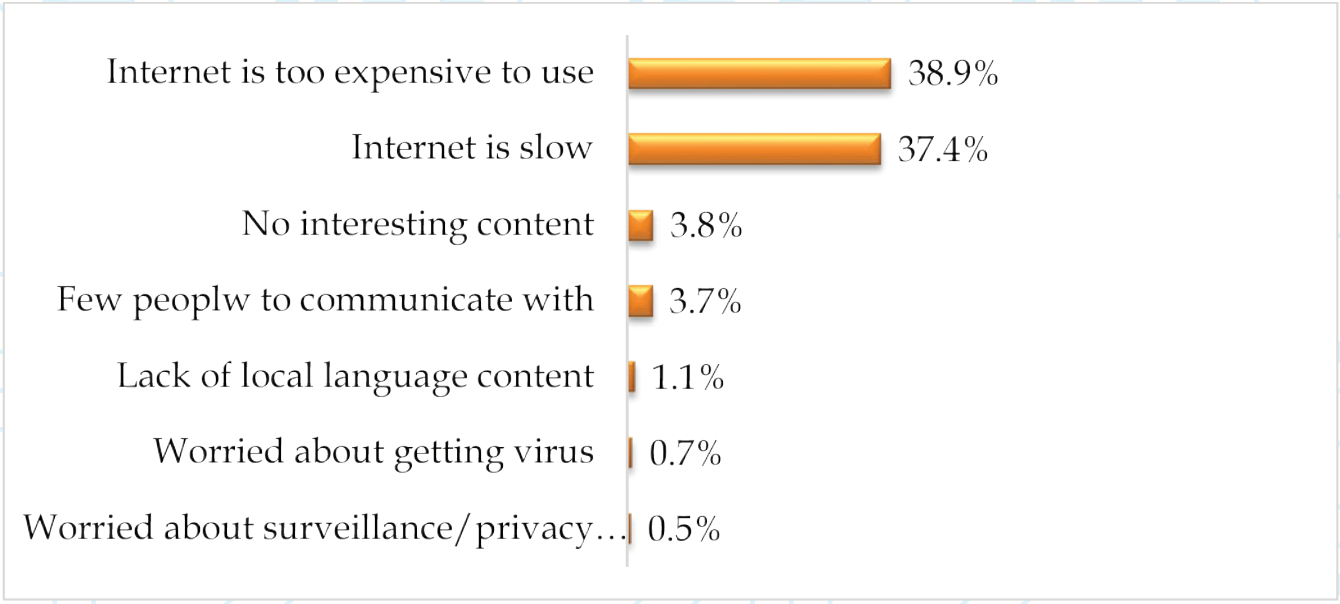
Figure 22: Factors limiting the use of the mobile phone



Regarding the factors that limit the use of Internet, most individuals cited cost of Internet as the main limiting factor for Internet use. About 38.9 percent of individuals indicated that the Internet was 'too expensive to use' and therefore it limited the time spent online (Figure 23). Another factor affecting Internet users was speed, which 37.4 percent indicated that Internet was slow, thus preventing more use of the Internet.

Even though Sesotho is the language commonly spoken by most households in Lesotho, the 'lack of local language content' on the Internet does not seem to pose much of a hindrance to users.

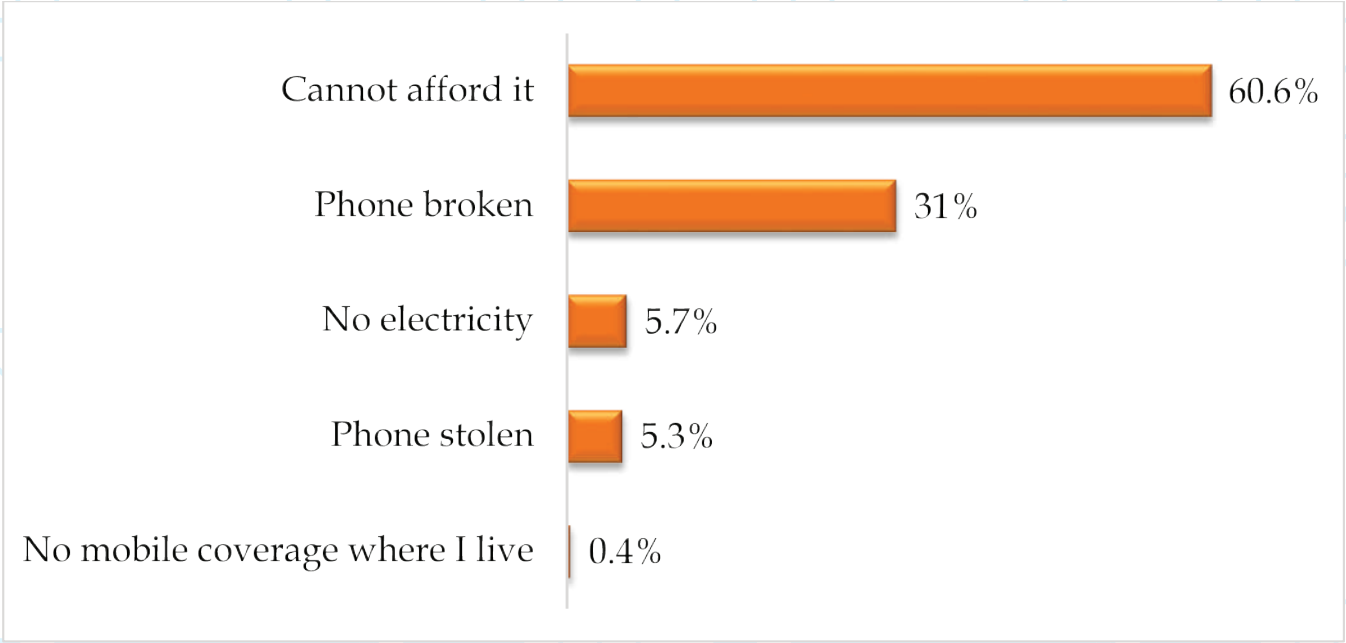
Figure 23: Things that limit the use of Internet amongst individuals



6.2 Non-use of mobile phones

In terms of non-users, the study found that the reason most cited by individuals for not having a mobile phone was related to affordability issues, which may stem from high costs. Over half of individuals (60.6%) indicated that they did not have a mobile phone because 'they cannot afford it' (Figure 24). This was followed by those who stated that they do not have mobile phones because their phones were broken (31%), lack of electricity (5.7%) and stolen (5.3%). A very small proportion indicated lack of coverage where they live as a reason for not having a mobile phone (0.4%).

Figure 24: Barriers to own mobile phone

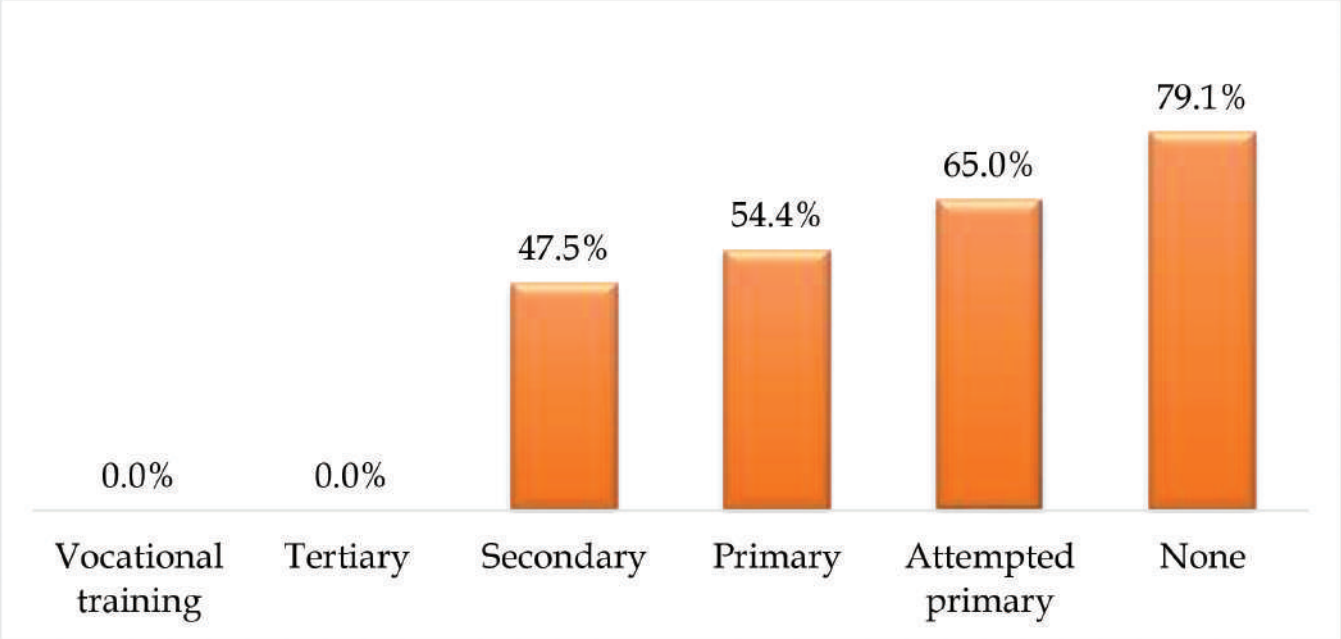


Further analyses of individuals who reported that they cannot afford a mobile phone revealed similar trend across the sexes, but a huge gap between urban and rural dwellers. The males that could not afford a mobile phone constituted 60.6 percent whereas their female counterparts comprised 61.6 percent (Table 28). Furthermore, people who cited affordability as the main reason why they did not own a mobile phone were more pronounced in rural compared to urban areas. The urban rural gap was 15.4 percent (Table 28).

Table 28: Individuals that cannot afford mobile phone by gender and location

People who cannot afford phone	National %	Male %	Female %	Gender gap %
	60.6	60.6	61.6	-1.5
		Urban %	Rural %	Location gap
		49.3	64.7	-15.4

Figure 25: Individuals that cannot afford mobile phone by level of education



Moreover, the results revealed that a proportion of individuals who could not afford a mobile phone was highest with those who did not attend school and decreased as the level of education attained increased (Figure 25).

6.3 Non-Internet users

The results revealed that 41.6 percent of the people in Lesotho still did not use the Internet (Table 29). To this end, there were more females than males that did not use Internet. The urban rural gap was even more pronounced than the gender gap in relation to Internet use. The survey revealed that 23.4 percent of people residing in urban areas did not use the Internet, which more than double the number of people in rural areas that do not use the Internet (57%).

Table 29: Non Internet users classified by gender

	National %	Male %	Female %	Gender gap %
Non-Internet users	41.6	40.1	45.2	-5.1
		Urban %	**Rural %**	**Location gap %**
		23.4	57,3	-33.9

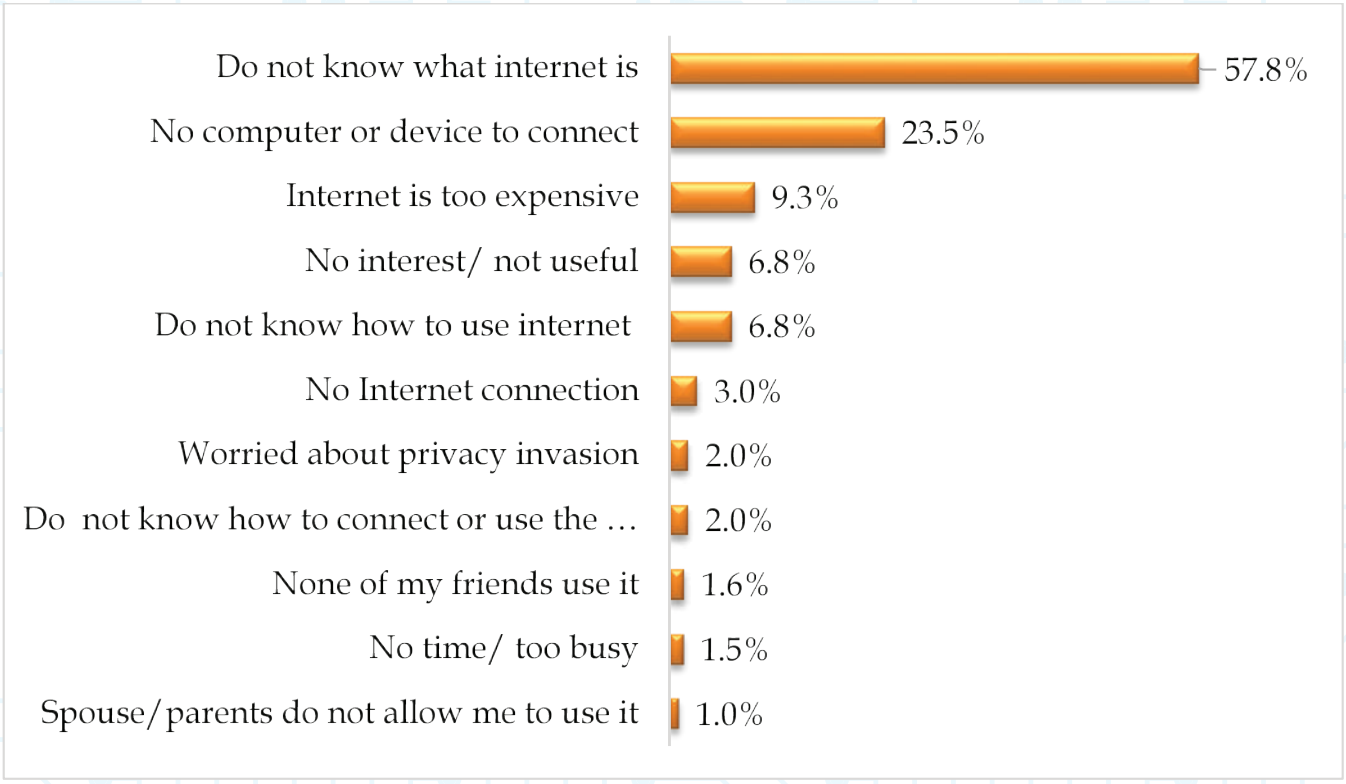
In terms of distribution of non-Internet users by districts, the survey results revealed that over 60 percent of individuals in Thaba-Tseka and Mokhotlong did not use the Internet (Table 30). The capital city of Maseru had the least number of people who did not use the Internet (26.0%) compared to other districts. In fact, in Maseru less than one third of the population did not use the Internet.

Table 30: Non-Internet users classified by districts

District name	Non-Internet users %
Thaba-Tseka	66,1%
Mokhotlong	65,6%
Mohale's Hoek	52,8%
Mafeteng	49,5%
Quthing	48,7%
Qacha's Nek	46,0%
Botha-Buthe	43,0%
Berea	41,8%
Leribe	36,8%
Maseru	26,0%

The survey asked respondents who did not use the Internet to state their reasons for not using the Internet and the results are presented in Figure 26. About 57.8 percent of non-Internet users stated that they 'do not know what Internet is', followed by those who said they do not have a computer or device to connect (23.5%). Low levels of ICT skills and lack of devices that connect to the Internet is an impediment to Internet adoption and use. Then there were those that did not use Internet because they said it was too expensive (9.3%). On the overall, the study shows low levels of e-skills is a major factor of digital exclusion.

Figure 26: Main reasons cited for not using Internet



The lack of e-skills is evident in the reasons cited for not using the Internet. A little over 57 percent of respondents indicated that they do not know what the Internet is. This was also the main reason cited by both sexes, with 57.3 percent of men and 59.0 percent of women stating that they do not know what the Internet is. The urban-rural digital divide was significantly high, where the urban residents that cited not knowing what the Internet comprised 18.2 percent while the rural residents were 81.8 percent.

Chapter 7: Access and Use of Radio and Television by Individuals

7.1 Individuals Listening to the Radio

The proportion of individuals listening to the radio across the country is 57.9 percent (Table 31). The results further show that males slightly listen to the radio (58.9%) than their female (57.6%) counterparts.

Analysis by location shows that urban residents (67.9%) listen to radio more than rural residents (49.3%), creating a location gap of 18.6% in favour of urban dwellers. This disparity may reflect differences in access to media infrastructure and lifestyle preferences between urban and rural populations.

Table 31: Proportion of individuals listening to the radio by gender

	National %	Male %	Female %	Gender gap %
Radio listeners	57.9	58.9	57.6	1.3
		Urban %	Rural %	Location gap %
		67.9	49.3	18.6

The results showed that radio listenership increases as the level of education attained increases (Figure 27). It is further shown that over half (50%) of individuals for the different age groups listen to a radio except for the youth age group (15 to 24 years) (Figure 28).

Figure 27: Proportion of Individuals Listening to a Radio by Level of Education

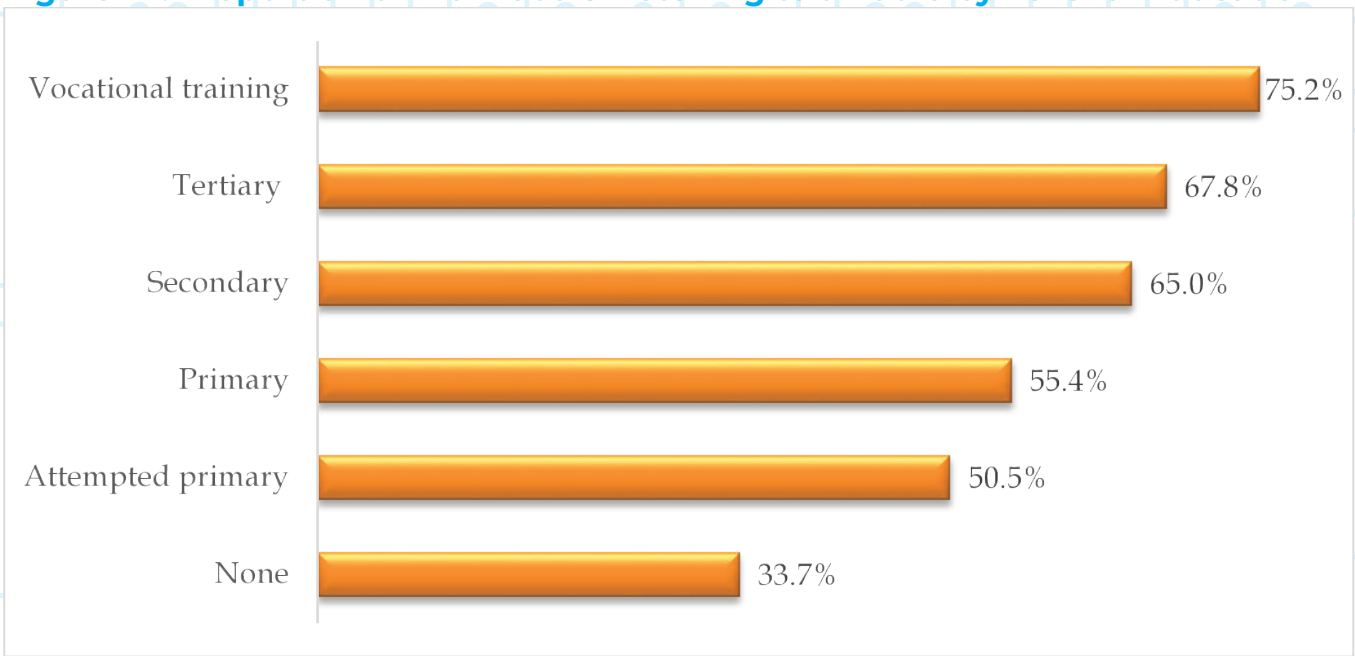
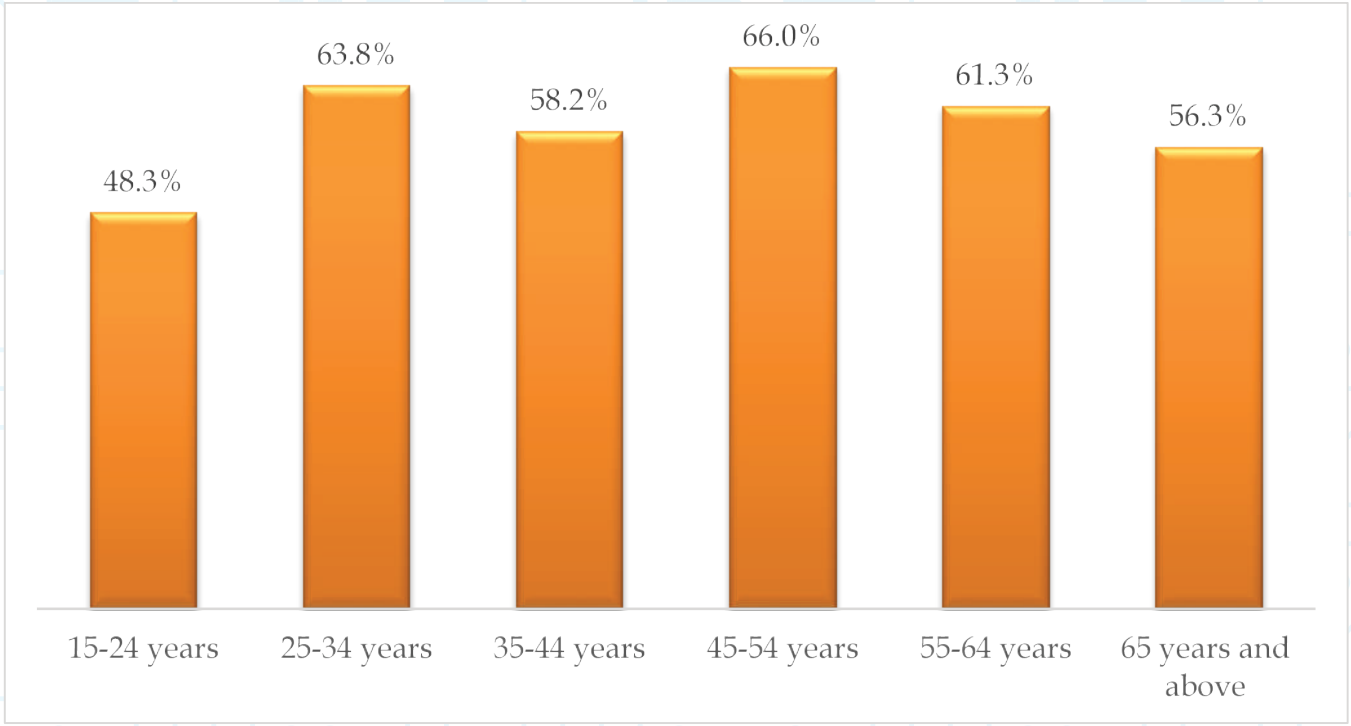


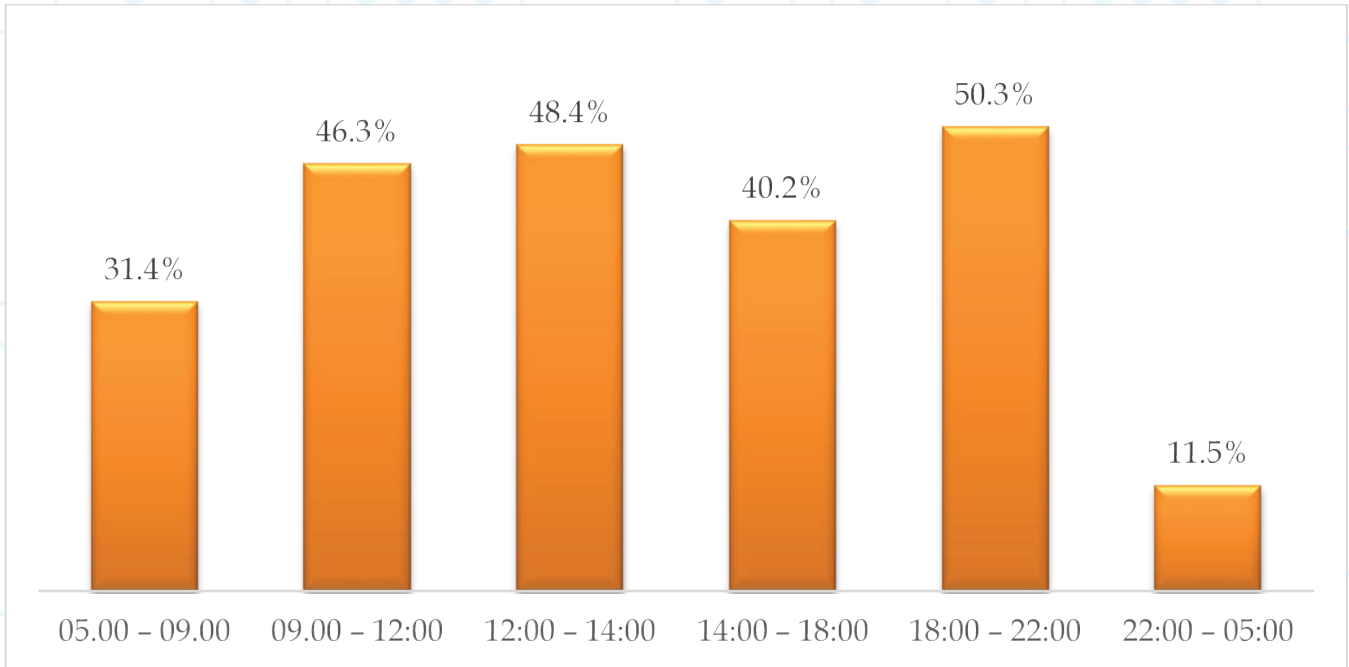
Figure 28: Proportion of Individuals listening to a Radio by age category



7.2 Times Individuals Listen to the Radio

The survey results show the different times at which individuals usually listened to the radio. The highest proportion of individuals (50.3%) listened to the radio from 18:00 to 22:00 hours, followed by the times between 12noon and 14:00 hours (48.4%) and thirdly, the times between 09:00 to 12:00 hours (Figure 29).

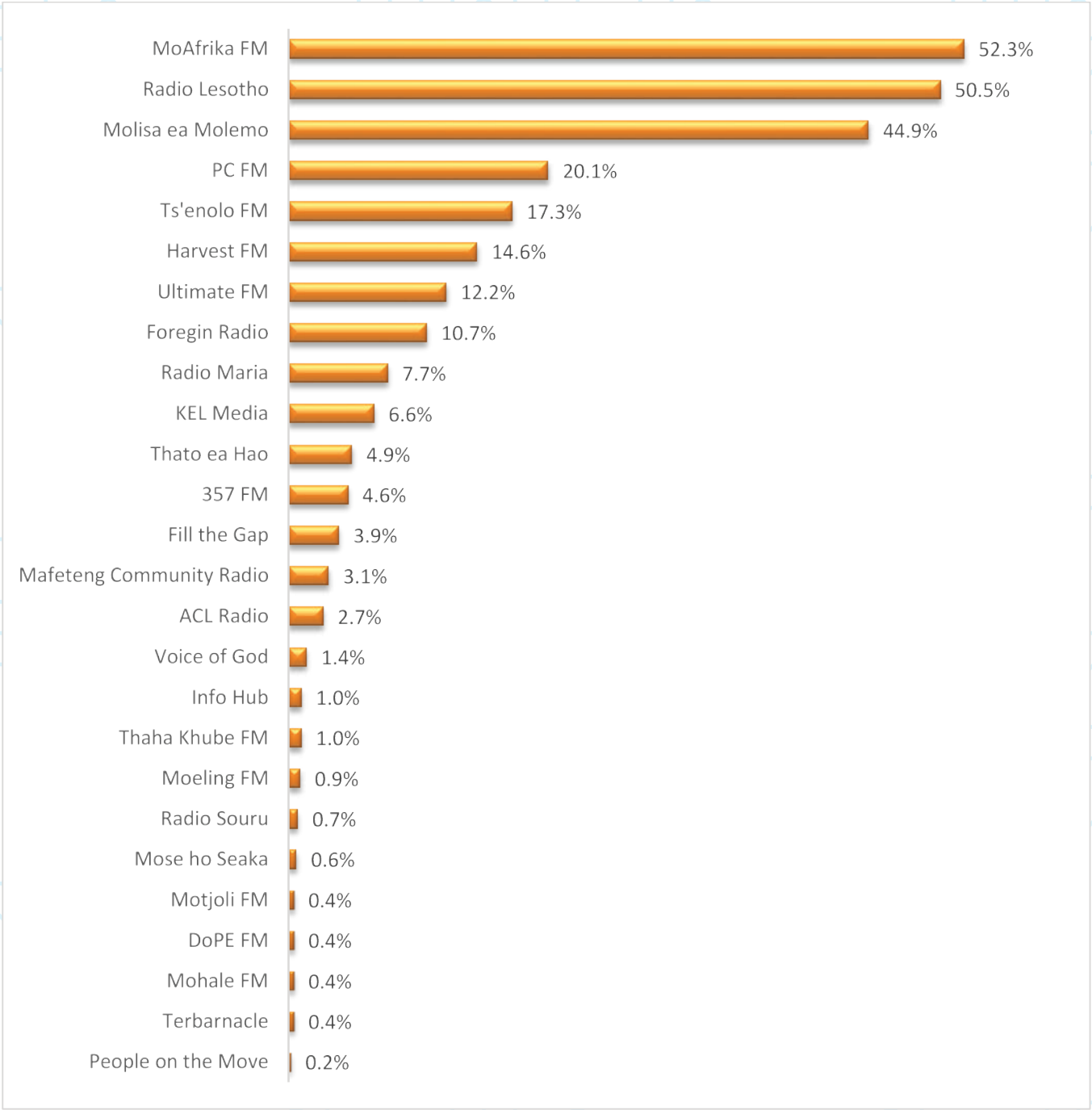
Figure 29: Proportion of Individuals Listening to the Radio at Specific Times of the Day



7.3 Radio Listenership to Specific Radio Stations

During the survey, individuals were asked to mention the radio stations they listen to. It is important to note that the survey allowed an individual to mention more than one radio station in their responses. About 52 percent of individuals were usually listening to MoAfrika FM, followed by Radio Lesotho (51%) and then Molisa-ea-Molemo (45%).

Figure 30: Proportion of Individuals Listening to Specific Radio Stations

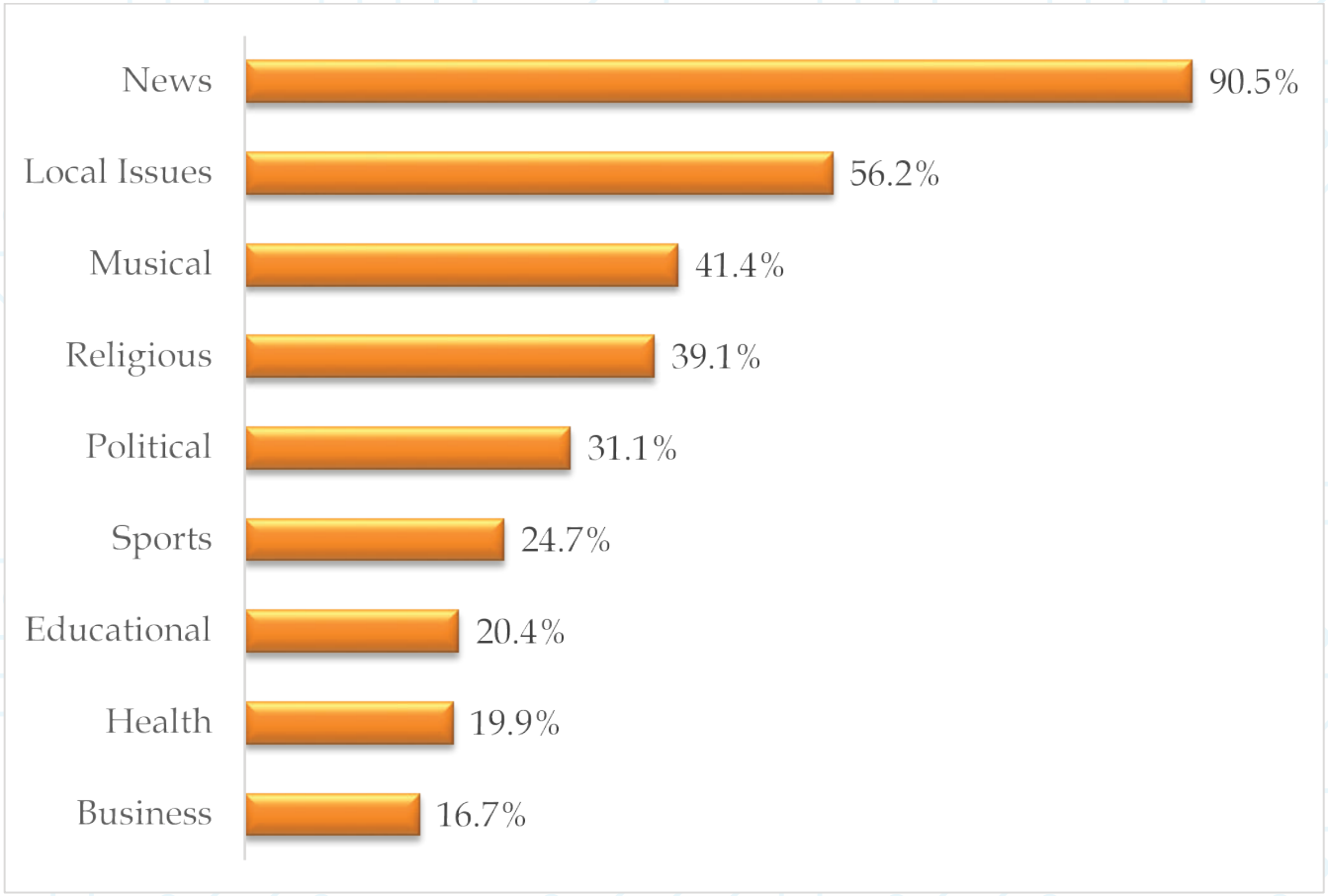


While Figure 30 is providing very useful insights, it should be noted that the different radio stations do not have the same reach throughout the country. Figure 30 also include community radio stations.

7.4 Reasons for Listening to the Radio

The results show that majority of individuals (90.5%) cited news as the reason for listening of the radio, followed by those that listen to local issues (56.2%) (Figure 31).

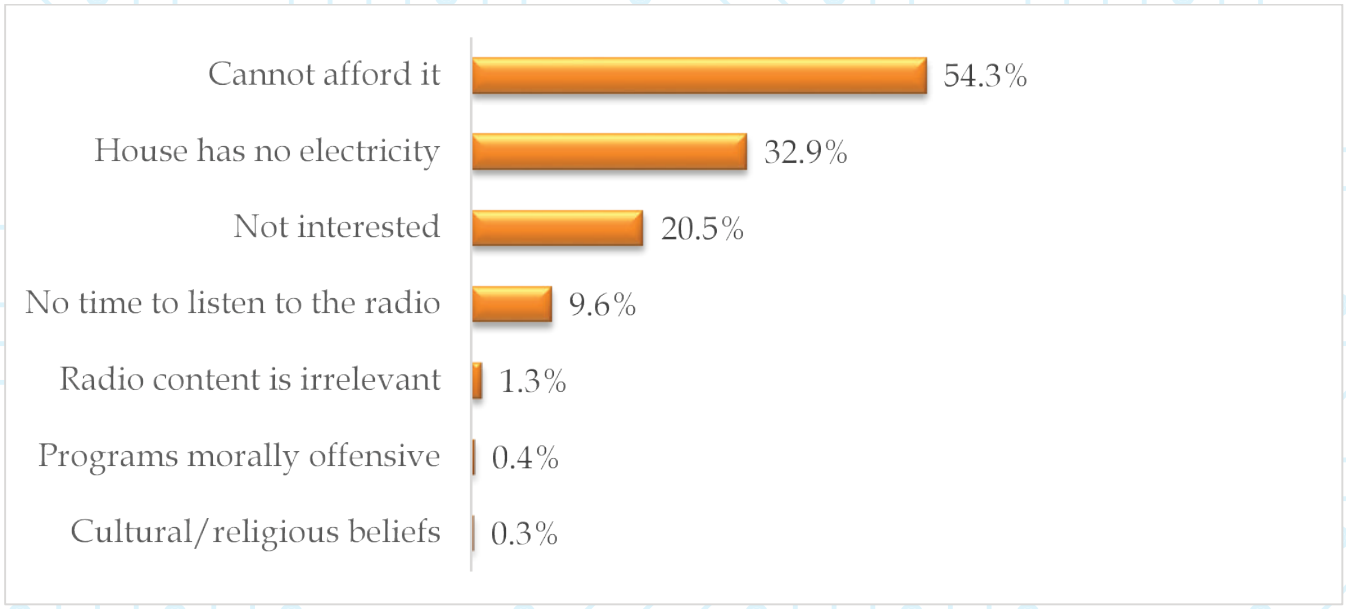
Figure 31: Proportion of Individuals by Reasons for Listening to the Radio



7.5 Reasons for not Listening to the Radio

The highest proportion (54.3%) of individuals cited that they could not afford to have a radio, 32.9 percent indicated that their households do not have electricity and 20.5 were not interested to listening to the radio (Figure 32).

Figure 32: Proportion of Individuals by Reasons for not Listening to the Radio



7.6 Individuals Watching Television

The proportion of individuals who watch television across the country is 38.7 percent (Table 32). The results further show that there are slightly more females (39.5%) than males (38.4%), that do watch television.

Urban areas show a much higher proportion of TV viewers (62.4%) compared to rural areas (11.4%), resulting in a significant location gap of 51 percent in favour of urban dwellers (Table 32). This disparity could be attributed to limited access to electricity and television sets in rural areas.

Table 32: Proportion of Individuals Watching Television by Settlement and gender

	National %	Male %	Female %	Gender gap %
Individuals watching TV	38.7	38.4	39.5	- 1.1
		Urban %	Rural %	Location gap %
		62.4	11.4	51.0

On one hand, the results showed that the proportion of individuals that watch television increases as the level of education attained increases (Figure 33). On the other hand, the reverse is true for the relationship between age and watching television. The results showed that the proportion of individuals that watch television decreases as age of individuals increase (Figure 34).

Figure 33: Proportion of Individual watching TV by Level of Education

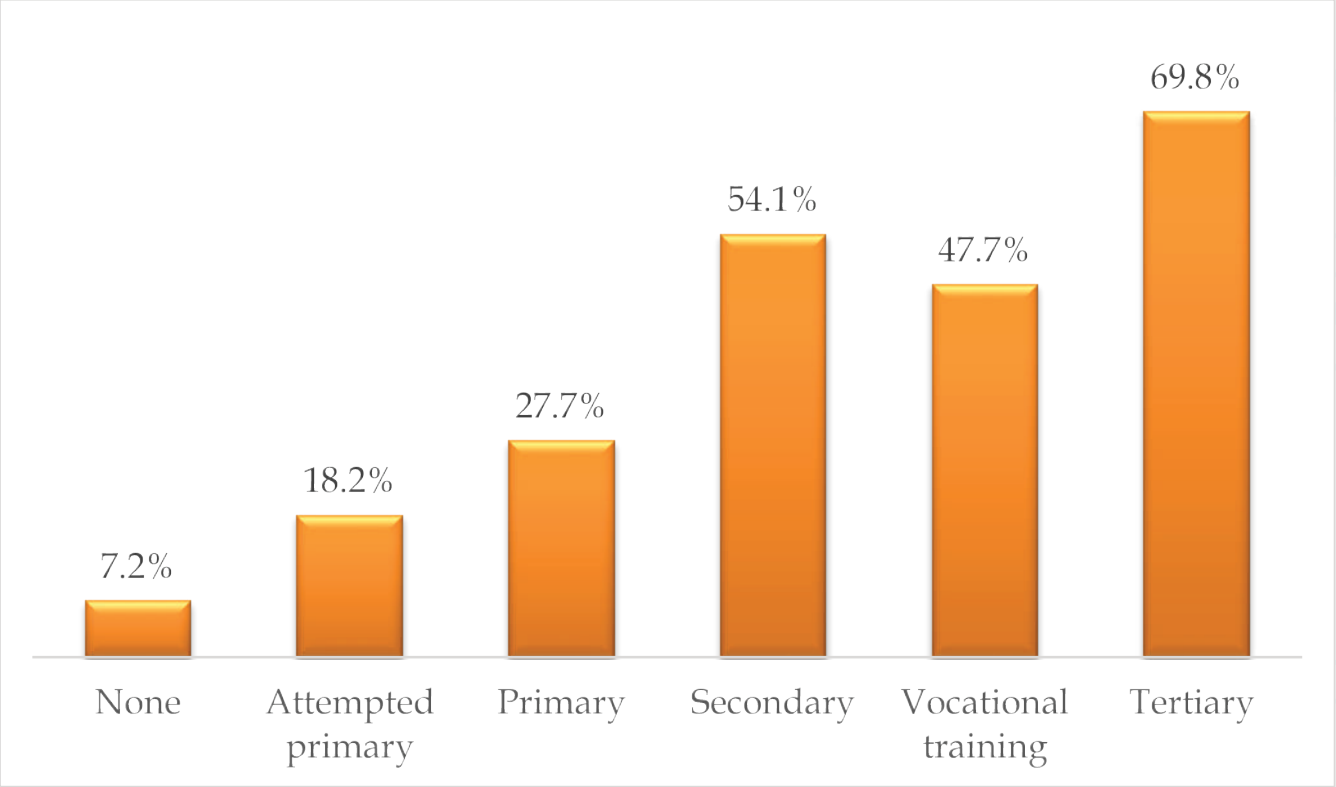
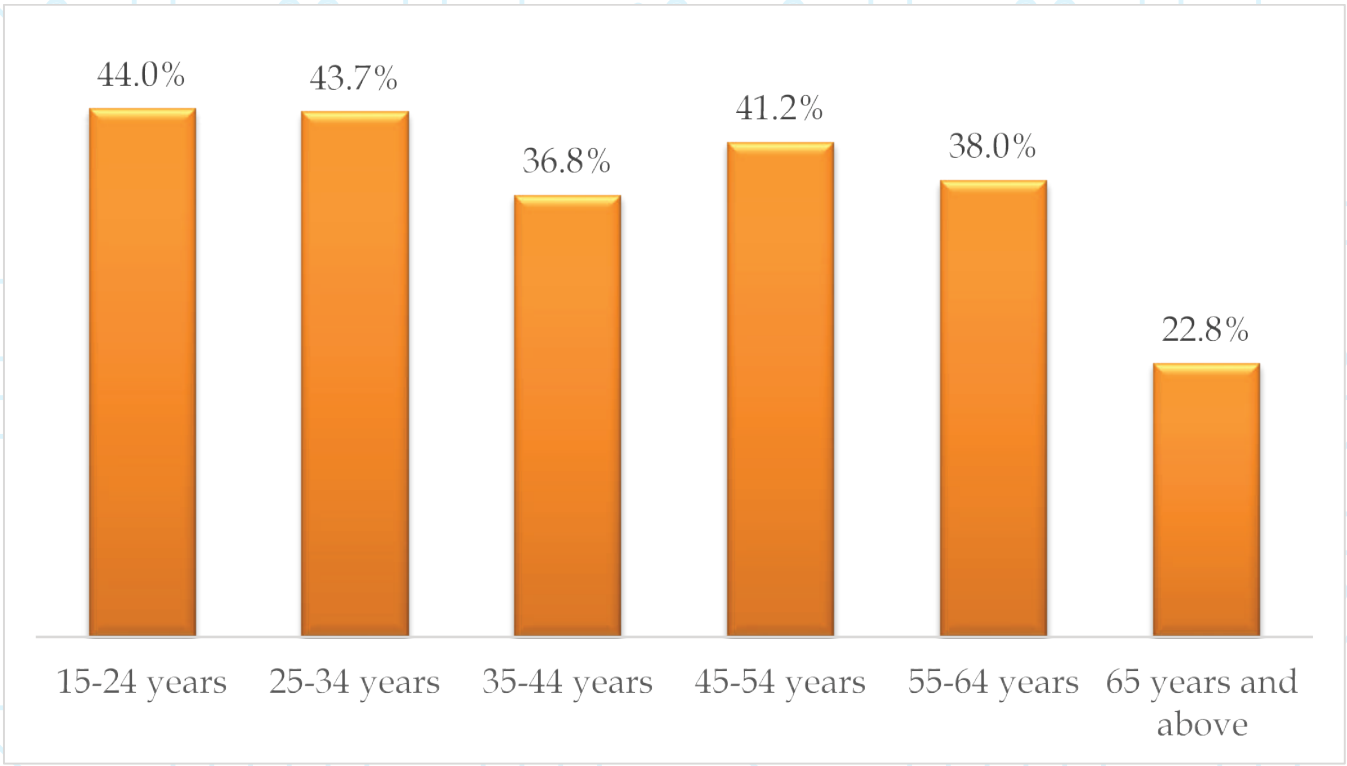


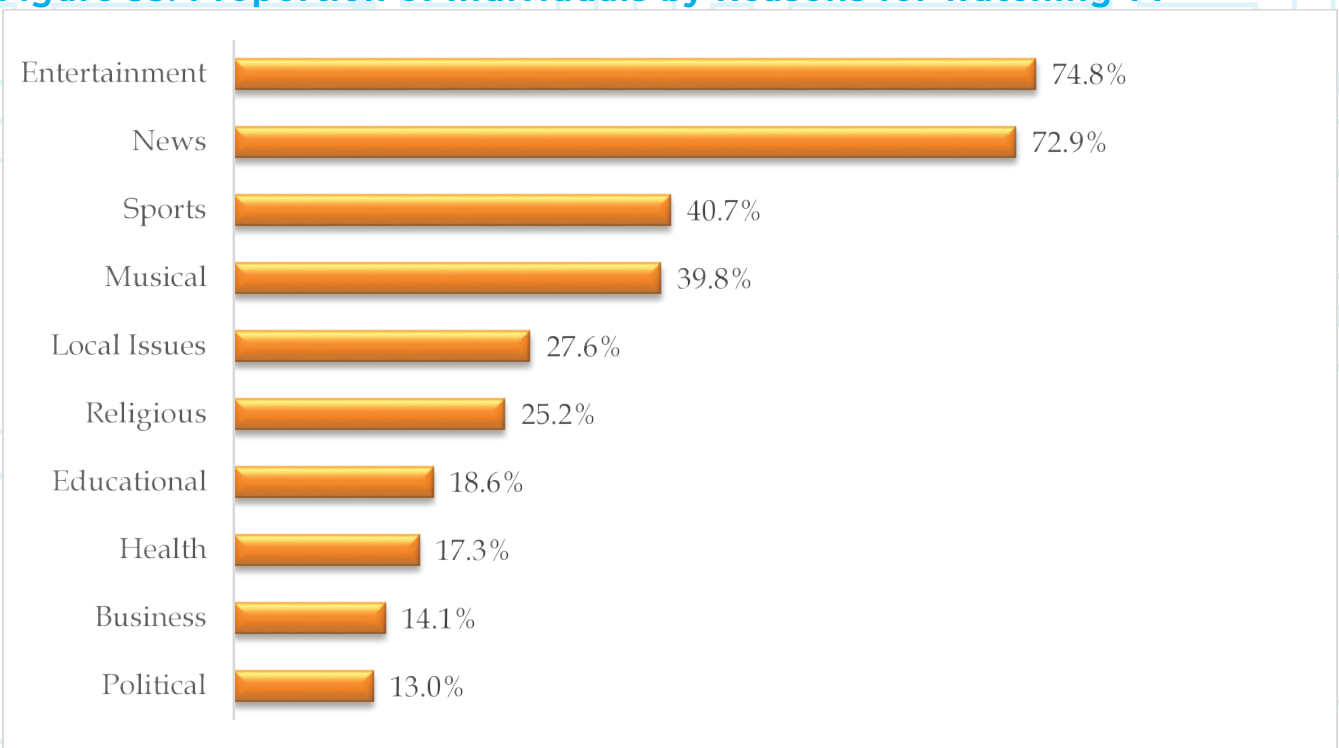
Figure 34: Proportion of Individual watching TV by age category



7.7 Most Viewed Television Programs

The most viewed television program by individuals was entertainment (74.8%), followed by news (72.9%), then sports (40.7%) (Figure 35).

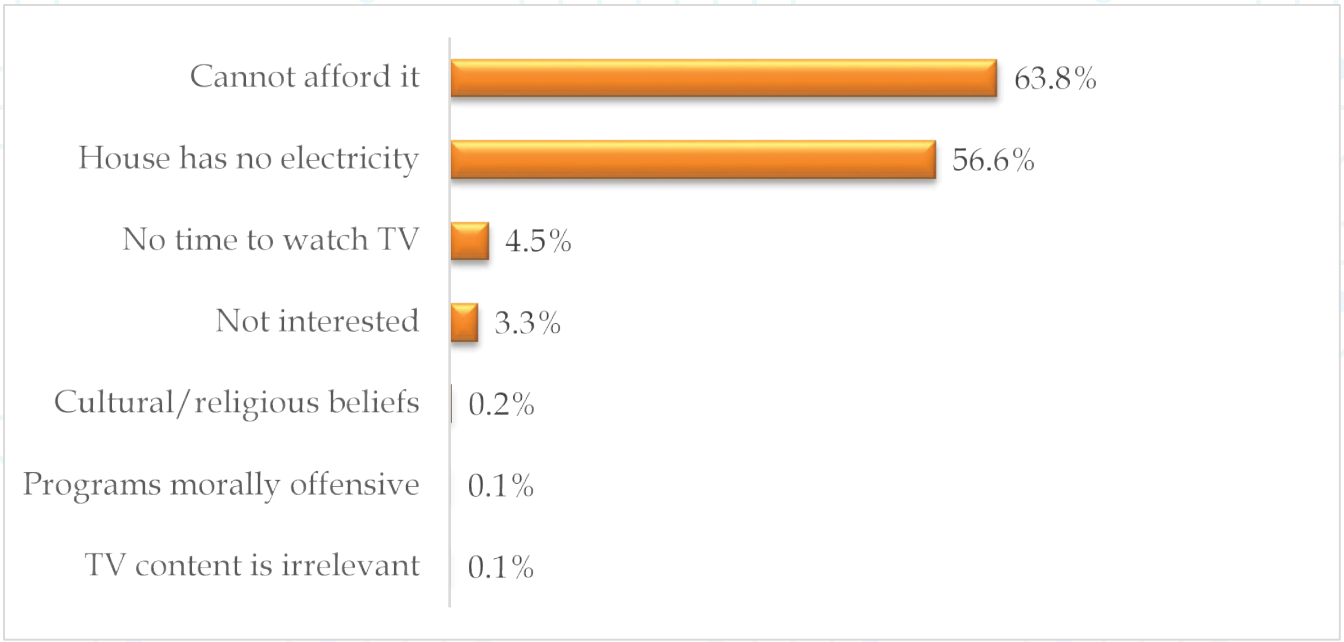
Figure 35: Proportion of Individuals by Reasons for watching TV



7.8 Reasons for not watching TV

The respondents that did not watch the television were asked to give reasons for not watching television. The results show that the most common reason cited was that they could not afford the television (64%), followed by lack of electricity (57%), then 5 percent of individuals had no time to watch television (Figure 36).

Figure 36: Proportion of Individuals by Reasons for not watching TV



Chapter 8: Access and Use of Postal Services by Individuals

8.1 Individual Use of Postal Services

Information was sought from individuals to establish whether they have accessed or used postal services in the last twelve months prior to the survey.

The results showed that 4.2 percent of individuals accessed postal services (Table 33). The results further showed that there were no significant differences between males and females regarding access to postal services.

Analysis by location showed a higher proportion (6.8%) of individuals who accessed postal services was from urban areas than those from rural areas (1.9%). This significant urban-rural divide might be reflecting the differences in access to postal infrastructure by urban compared to rural residents.

Table 33: Proportion of Individuals Accessing Postal Services by settlement and gender

	National %	Male %	Female %	Gender gap %
Individuals using postal services	4.2	4.1	4.2	- 0.1
		Urban %	**Rural %**	**Location gap %**
		6.8	1.9	4.9

The use of postal services varies significantly across levels of education and age groups. Individuals who have attained tertiary education have the highest usage rate of 17.3 percent (Figure 37) and the highest usage observed among individuals aged 45–54 years at 8.5 percent (Figure 38).

Figure 37: Proportion of Individuals Accessing Postal Services by level of education

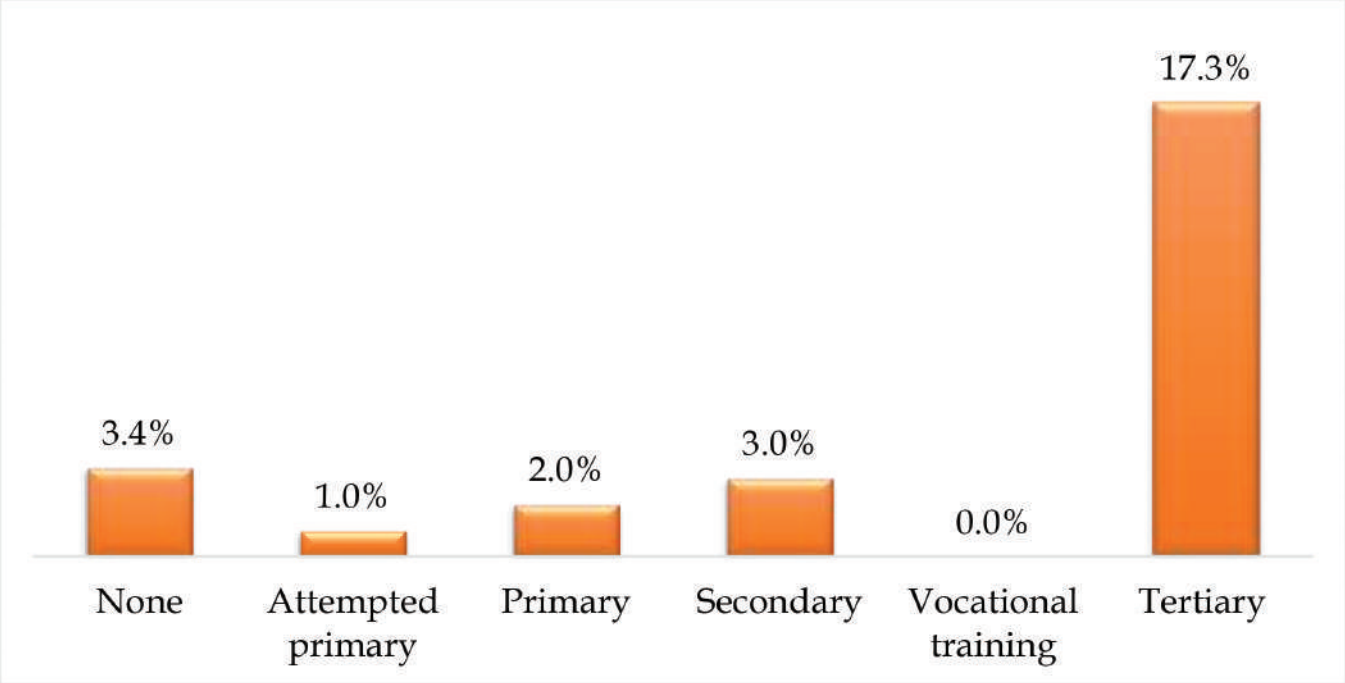
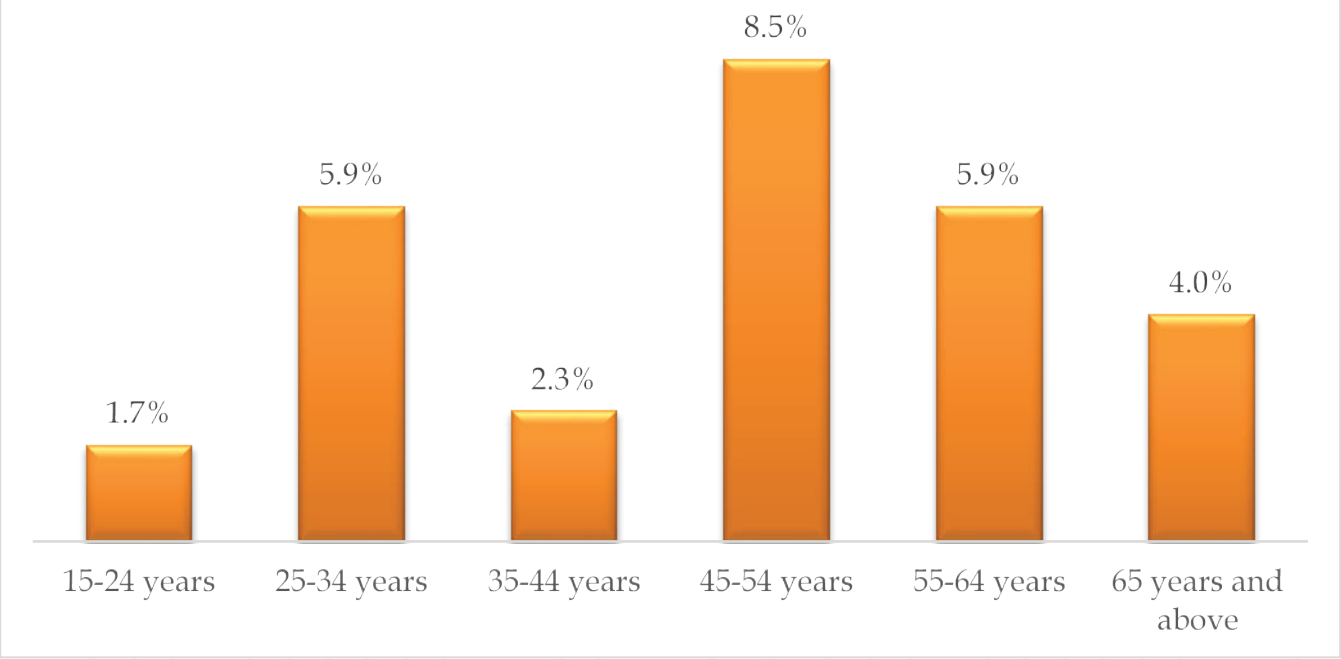


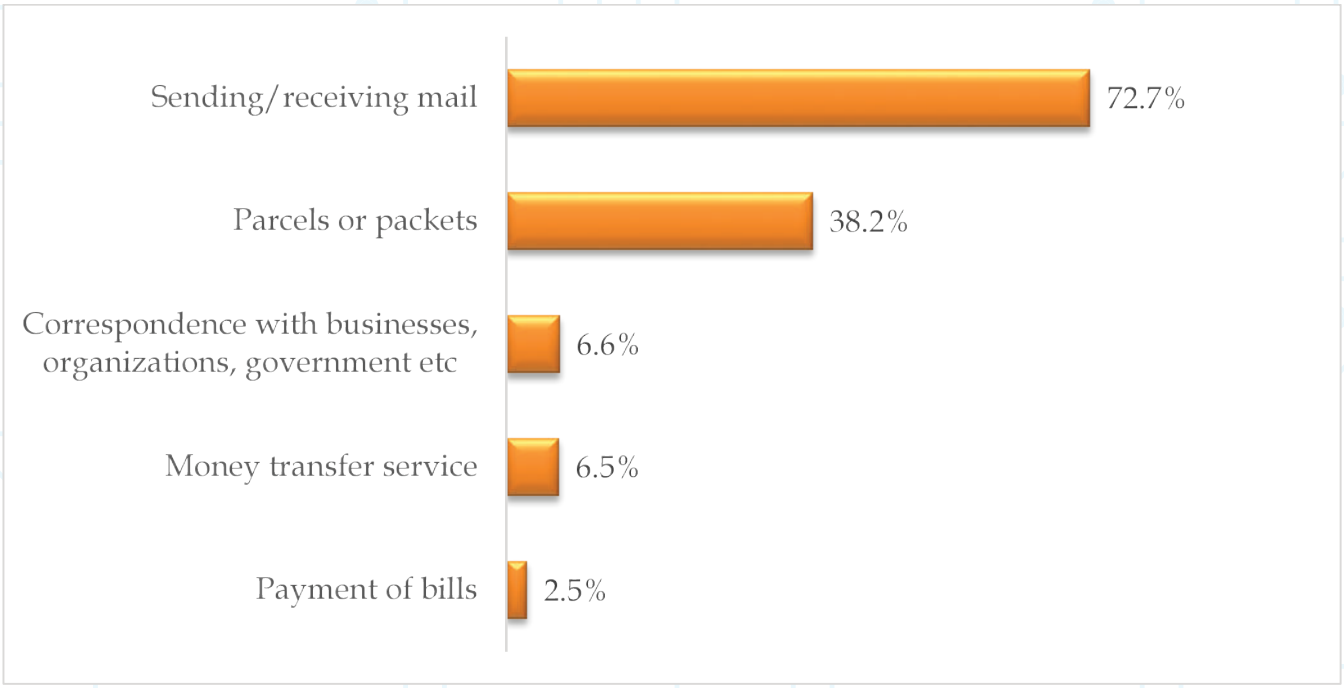
Figure 38: Proportion of Individuals Accessing Postal Services by Age Category



8.2 Type of Postal Services Accessed

The most common use of postal services is for sending and receiving mail (72,7%), followed by sending or receiving packets (38,2%). Payment of bill accounts was the least used service at 2,5 percent (Figure 39).

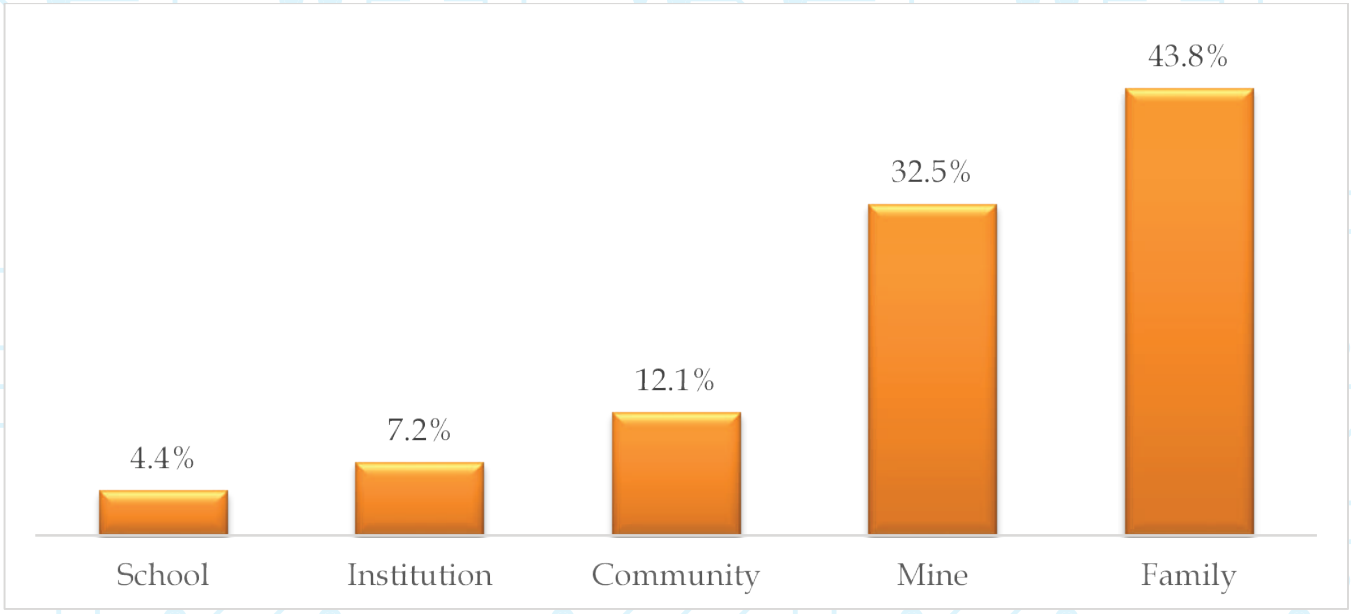
Figure 39: Proportion of Individuals Accessing Postal Services by Type of Service



8.3 Ownership of Post Box Used

Individuals were asked to indicate the owner of the Post Office Box that they reported to have used. The results reveal that family-owned postal boxes were the most used (43,8%) and the least proportion used a school post office box (4,4%) (Figure 40).

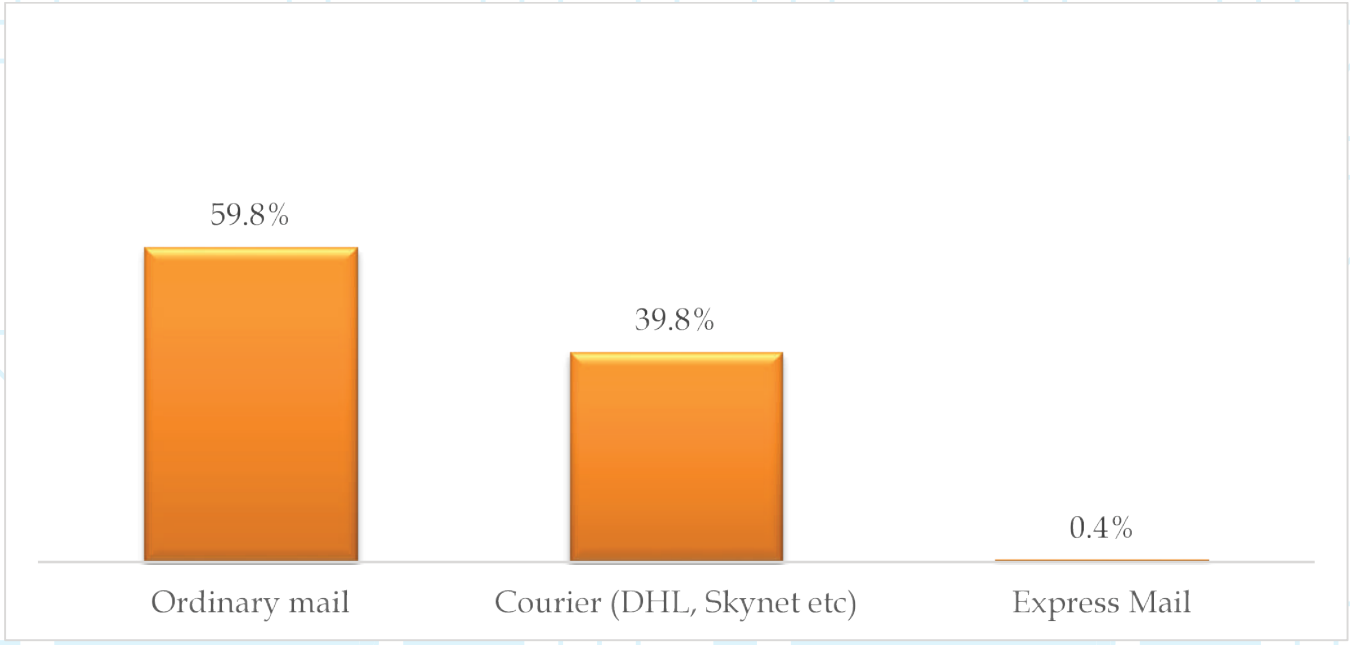
Figure 40: Proportion of Individuals with Access to Post Office Box Used



8.4 Type of Service used when Sending or Receiving Mail

Ordinary mail is the most used service for sending or receiving mail, accounting for 59,8 percent. Courier services, such as DHL and Skynet, are used by 39,8 percent of individuals, reflecting a preference for faster and more reliable delivery for specific needs. Express mail services are the least utilized, with only 0.4 percent of individuals opting for this option (Figure 41).

Figure 41: Proportion of Individuals Accessing Postal Services by Type of Service



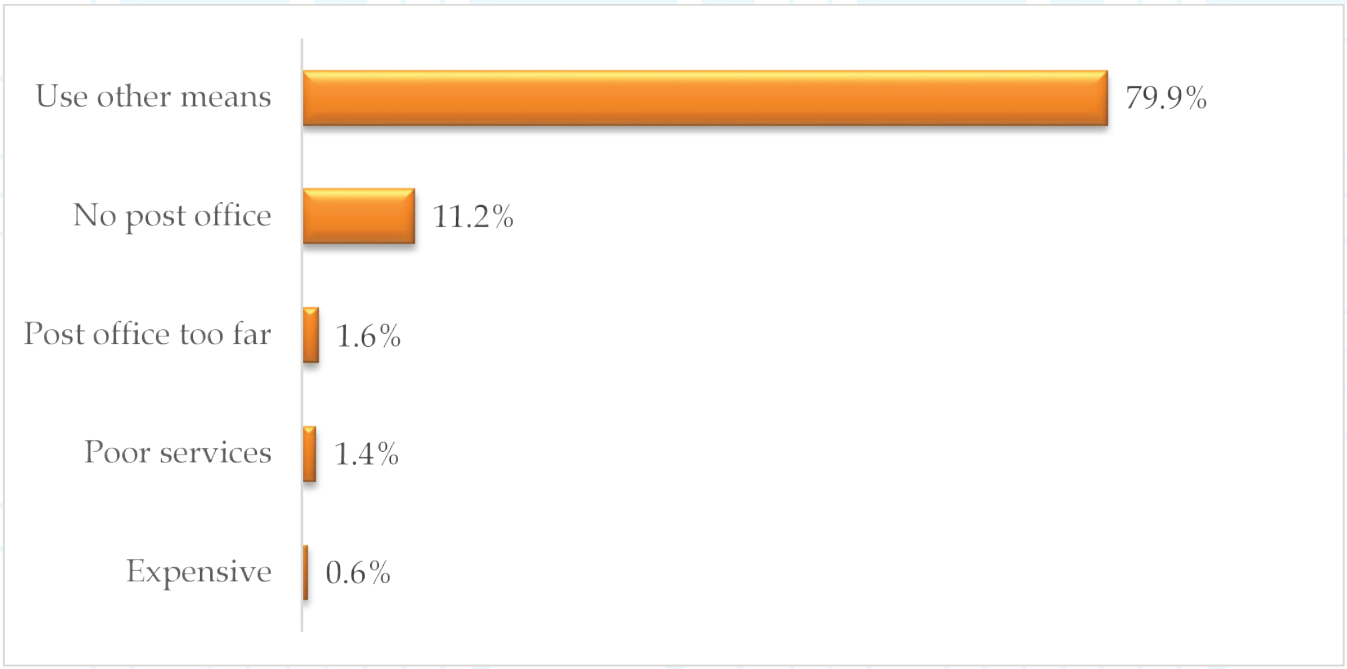
8.5 Challenges faced when using postal services

Although various challenges exist in postal services, a few are particularly noteworthy due to their significant impact. About 54,2 percent of respondents mentioned poor services as a prominent challenge they face when using postal services. This encompasses long waiting times to be assisted and delays in mail delivery, reflecting inefficiencies in operational processes. Additionally, 10.4 percent of users reported experiencing lost mail, including receiving mail intended for others.

8.6 Reasons for not using postal services

Individuals that did not use postal services were asked to provide reasons for not using these services. About 80 percent cited using other means as the primary reason for not utilizing postal services, indicating a shift toward alternative communication or delivery options (Figure 42). About 11 percent of individuals reported the absence of a post office as a barrier, highlighting accessibility challenges in certain areas. Cost was the least common reason, with only 0.6% citing postal services as being too expensive.

Figure 42: Proportion of Individuals not Accessing any Postal Services by Reason




LESOTHO
COMMUNICATIONS
AUTHORITY

9.1 Individuals aware of LCA

Information was sought from individuals to establish whether they know and are aware of the Lesotho Communications Authority, which regulates the Communications Sector in Lesotho.

The results showed that 28 percent of individuals across the country have heard about the LCA (Figure 43). Disaggregated by districts, the results show that Maseru and Leribe had the highest level of awareness of LCA while individuals from the Mokhotlong and Qachas Nek recorded a lower level of awareness compared to all other districts.

Figure 43: Proportion of Individuals that have Heard about LCA

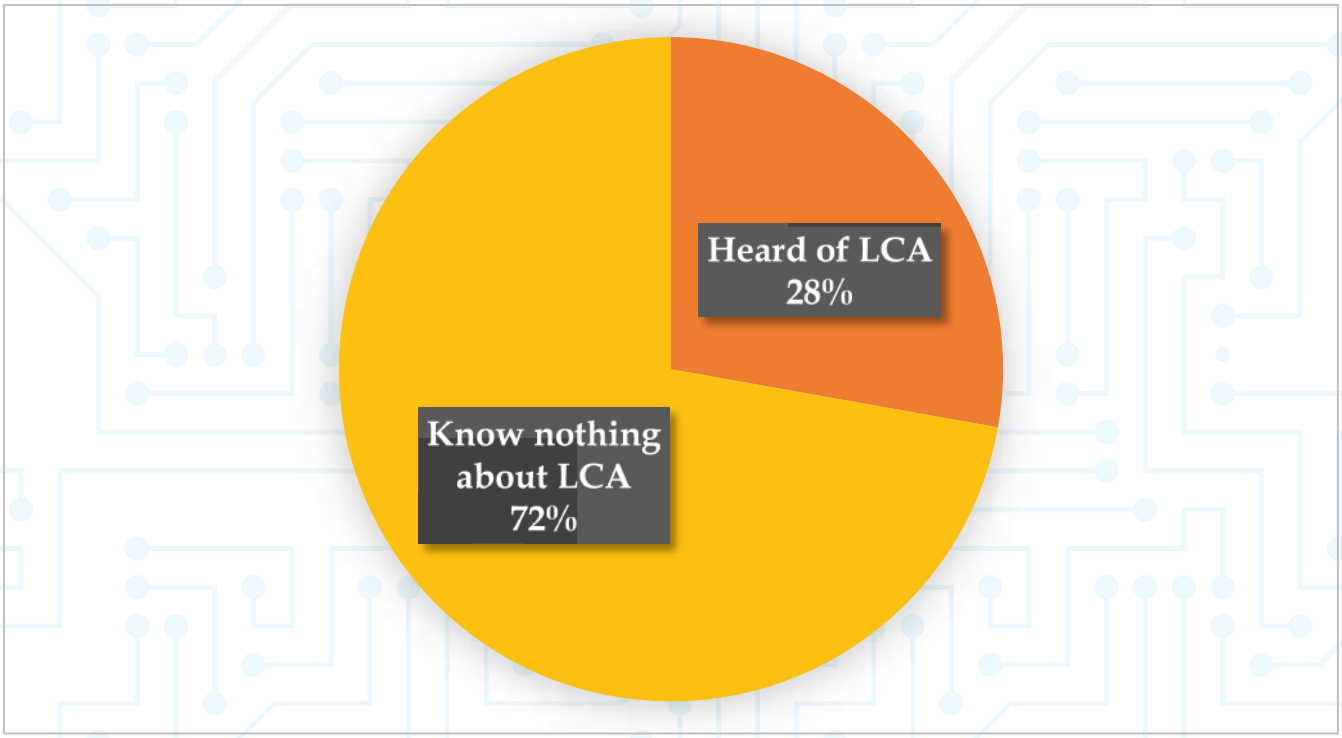


Figure 44: Proportion of Individuals who have Heard about LCA Classified by District

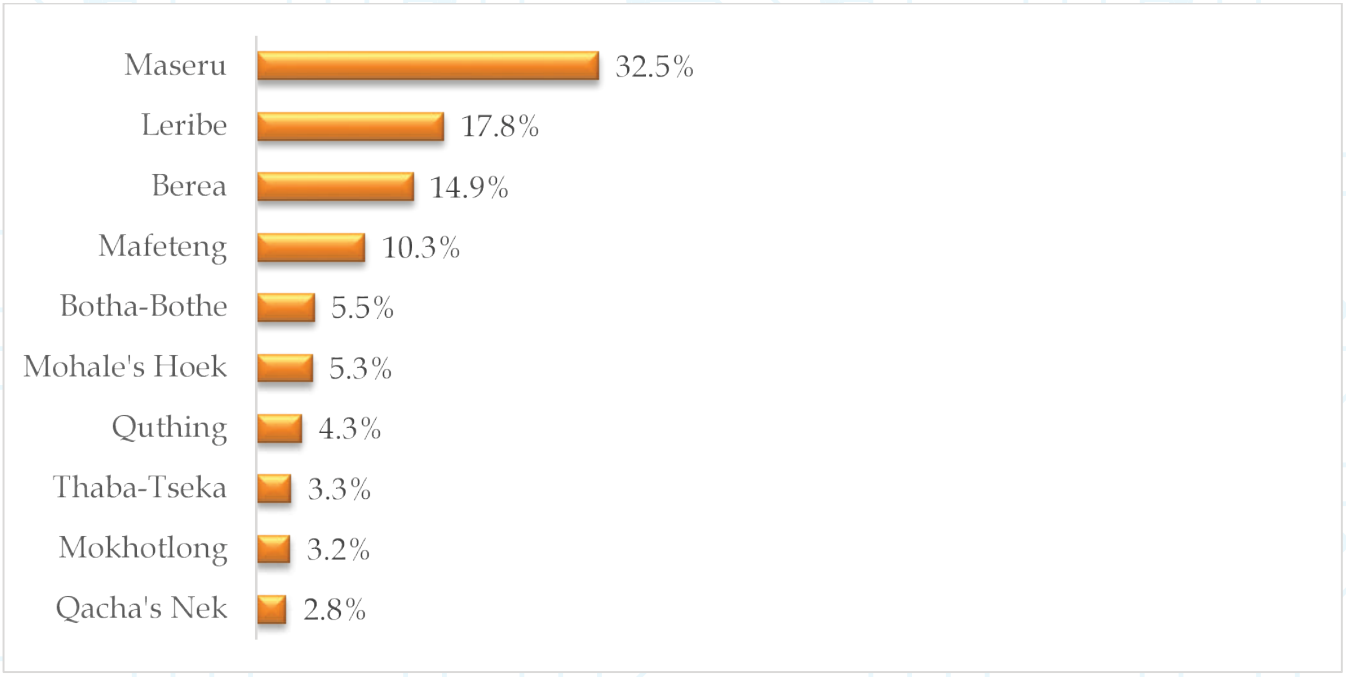
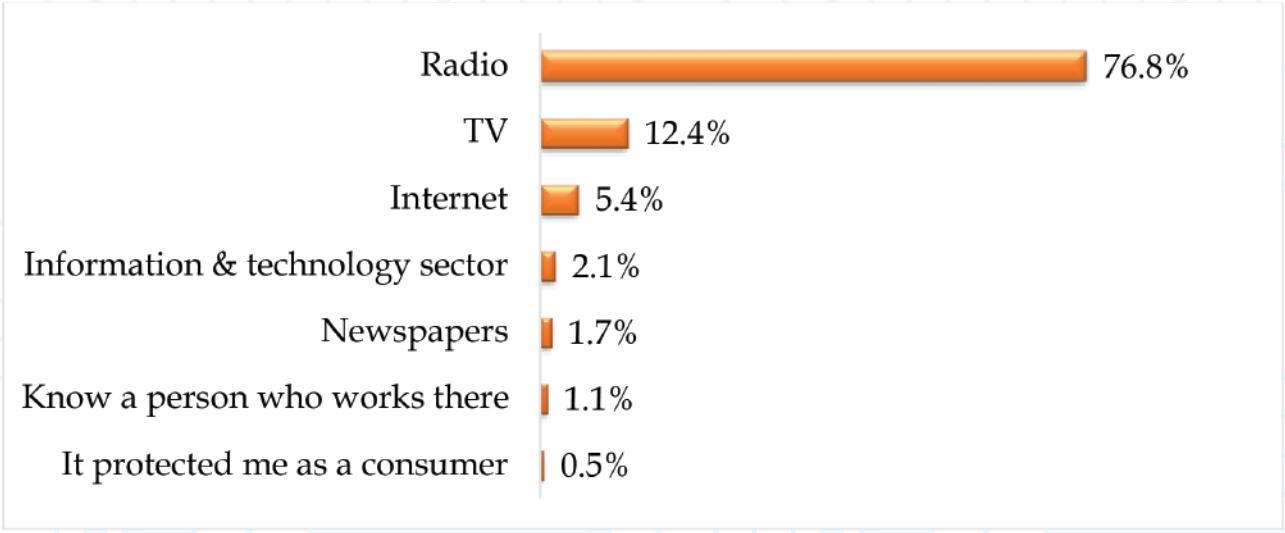


Figure 45: Sources of Information and Awareness about LCA

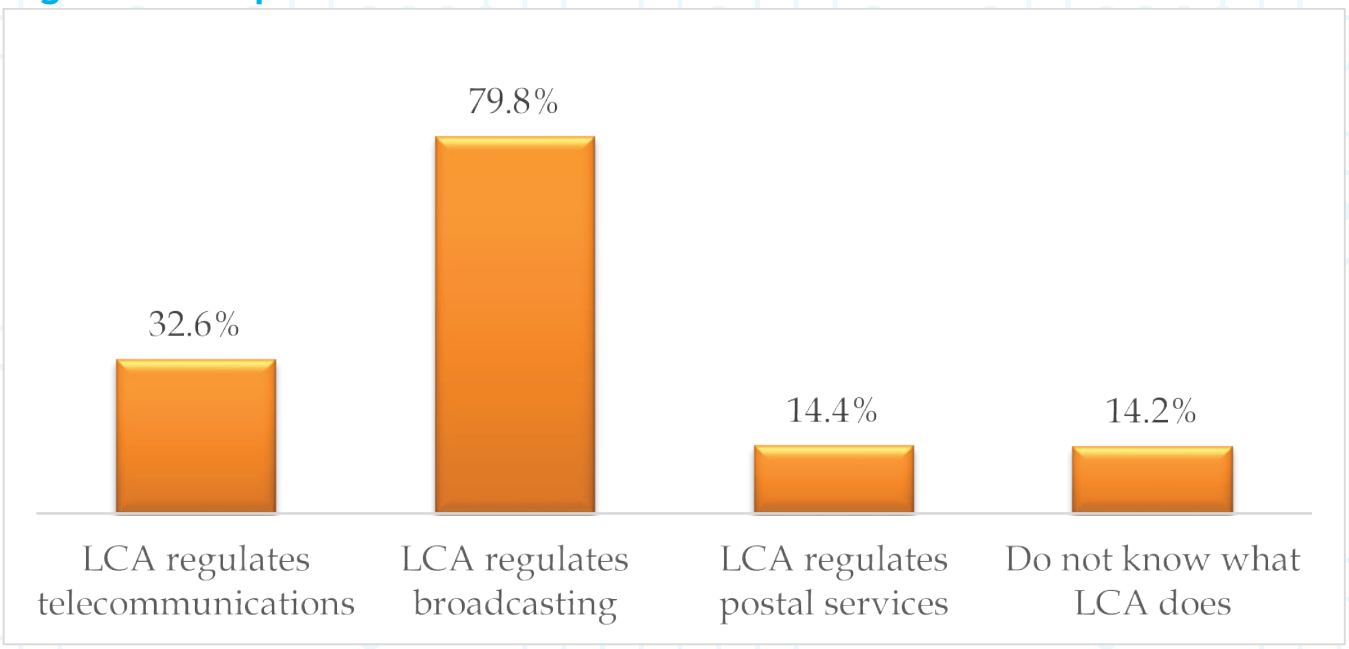


Asked about their source of information and awareness about LCA, majority of individuals heard about LCA from the radio (76.8%) (Figure 45).

9.2 Mandate of LCA

Of the individuals that were aware of LCA, almost 80 percent (79.8%) knew that the Authority regulates the broadcasting sub-sector (79.8%), followed by almost one third that knew that the Authority regulates the telecommunications sub-sector (32.6%). About 14.4 percent were aware that the Authority also regulates the postal sub-sector while the other 14.2 percent have heard about LCA but did not know what it does (Figure 46).

Figure 46: Proportion of Individuals Who Know LCA Mandate



This report has presented the results of a nation-wide survey that was carried out in 2023. It has provided comprehensive insights into the state of ICT access and usage by households and individuals in the country. The survey collected data on access and use of computers, mobile-phones, internet, broadcasting and postal services as well as barriers to access. Information was also collected about awareness and mandate of LCA. The observations and recommendations emanating from issues in the report are as follows:

i.Radio and television play an important source of information especially where internet adoption is not yet universal. They play a very important role in delivering education or services in the areas of agriculture and health among others. The survey results indicate that while affordability and lack of electricity are still challenges, most individuals lack interest in listening to a radio or in watching television. Therefore, there is a need for government support in fostering local content development, which has a potential to revive viewers' and listeners' interest as well as the potential to enhance the quality and relevance of programs.

ii.Ownership and use of computers allow people to improve on the ICT skills. Moreover, computers are important devices used for accessing internet, in particular, advanced applications and services. In our case, the results showed that ownership and use of computers is still very low, and it is worse in the rural areas. Since there is growing evidence (OECD, 2010) of a strong positive association of school performance and access and use of computers, government should provide incentives to schools to integrate computer usage by students and teachers in their daily operations.

iii.The proportion of individuals who use a mobile telephone is an important indicator to measure the uptake of mobile cellular technology. Moreover, the mobile phone plays a significant role in enabling access to internet and the use of mobile money among others. With the country's extensive mobile network coverage of the population at 98 percent, the survey results showed that Lesotho fares well in terms of mobile phone ownership and usage. However, the ownership and usage of smart phones remains low, and it is more pronounced in the rural areas. Affordability of devices constrains the ownership of mobile phones, hence the need to develop policies and regulations that assure affordable access to smart devices.

iv.Internet uptake by households and individuals is one of the key indicators that show a country's progress towards becoming an information society. The survey results indicate that internet usage among households and individuals has improved significantly, which reflects the country's efforts to improving digital inclusion. However, low internet usage in the rural areas persists despite the extended network coverage in the unserved and underserved rural communities. There is a need to promote the importance of internet usage, which can be done among others through comprehensive public awareness campaigns that address the benefits of the internet usage thus contributing to an inclusive information society.

v.Despite lack of affordability of devices to connect internet to, the lack of ICT skills is equally an important factor that contributes to the low uptake of internet. ICT skills are essential for meaningful use of internet and one way to improve the skills could be to adapt ICT literacy courses in schools and formulate targeted interventions for rural communities.

vi.Over two thirds of the public were not aware of the LCA and its mandate. To amplify reach and impact, LCA should consider public awareness campaigns to educate citizens about the LCA mandate.

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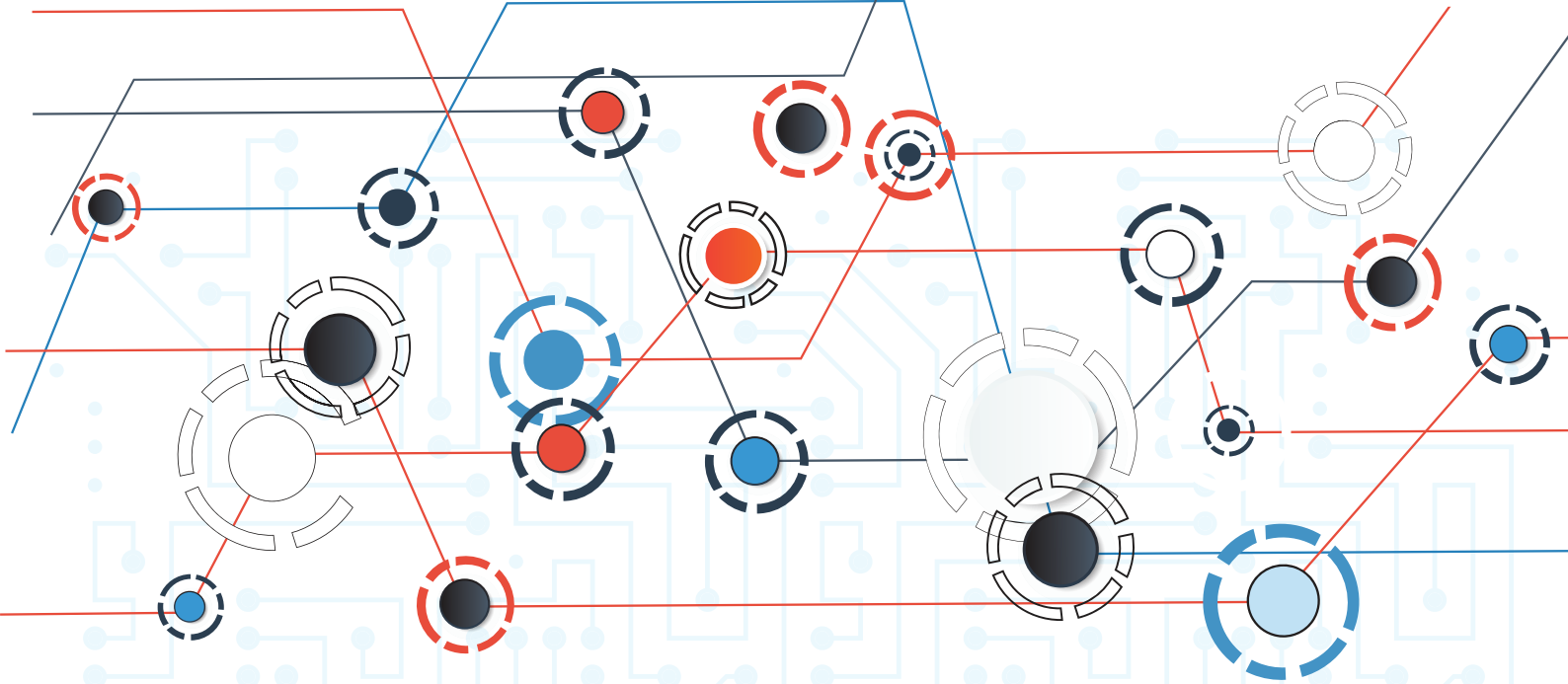

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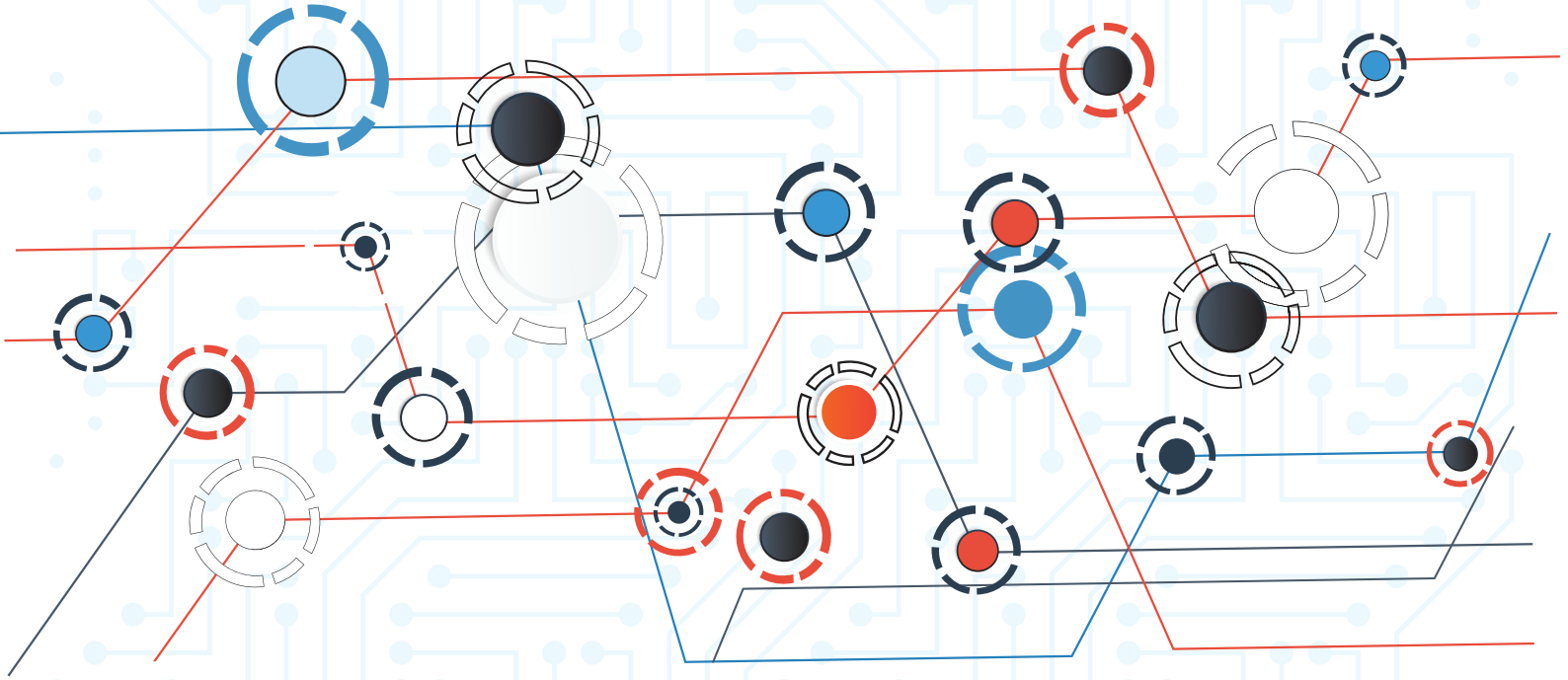

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