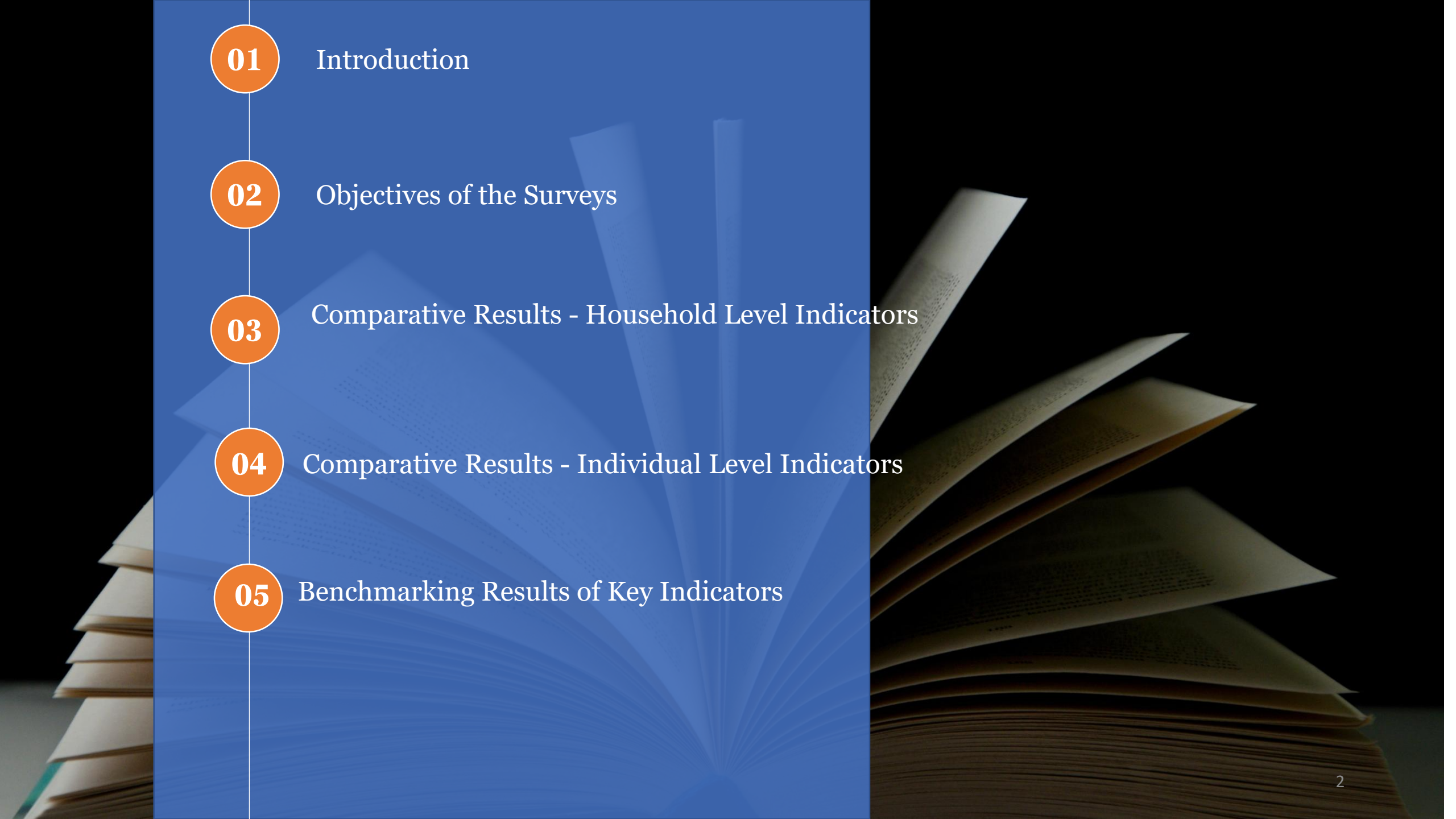
ICT ACCESS AND USE BY HOUSEHOLDS AND INDIVIDUALS

LESOTHO COMMUNICATIONS AUTHORITY

A COMPARATIVE ANALYSIS (2016-2023) & REGIONAL/INTERNATIONAL BENCHMARKING

2025



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Introduction

In its endeavour to provide reliable, comprehensive and comparable ICT statistics, Lesotho Communications Authority (LCA) conducted national household surveys to assess the state of ICT from the demand side, in collaboration with the Bureau of Statistics (BoS). The surveys were conducted in 2023, 2019 and 2016 with more or less the same scope, except that the 2023 survey was broader in scope than both the 2019 and 2016 surveys.

The main objective of the surveys was to measure access to and use of ICTs at household and individual 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.

In the main, the surveys used the core list of ICT indicators in the ITU Manual for Measuring ICT access and Use by Households and Individuals whose aim is to support countries in their efforts to collect and disseminate ICT statistics based on internationally agreed definitions and standards (https://www.itu.int/en/ITU-D/Statistics/Documents/publications/manual/ITUManualHouseholds2020_E.pdf).

This report presents a summary of the comparative analyses of the 2016 2019 and 2023 results. Detailed reports for the 2016 and 2023 results can be obtained in the LCA website (https://lca.org.ls/). In addition, key indicators are tracked against the 2023 targets of the 'Connect 2030 Agenda'

It should be noted that the results presents the household level indicators and the individual level indicators.

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. Individual level indicators measure access and use of ICT assets and services by individual household members.

Objectives of the Surveys

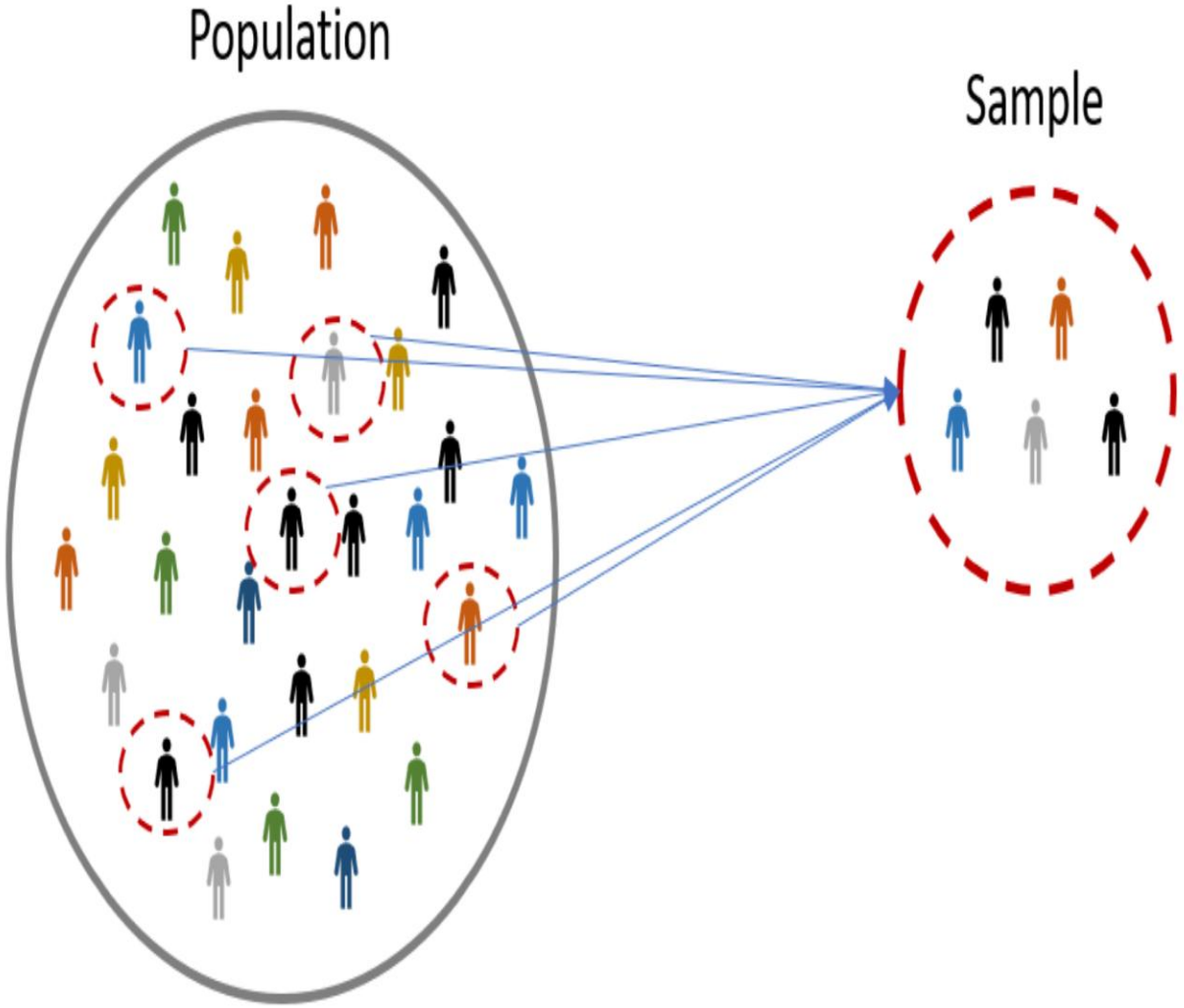
To establish the extent of access to and use of ICTs by households and Individuals to assess trends in ICT development

Track progress towards the attainment of ICT related developmental goals and targets set out at the organizational, national, regional & international levels

Update the database on access and usage of ICTs in Lesotho

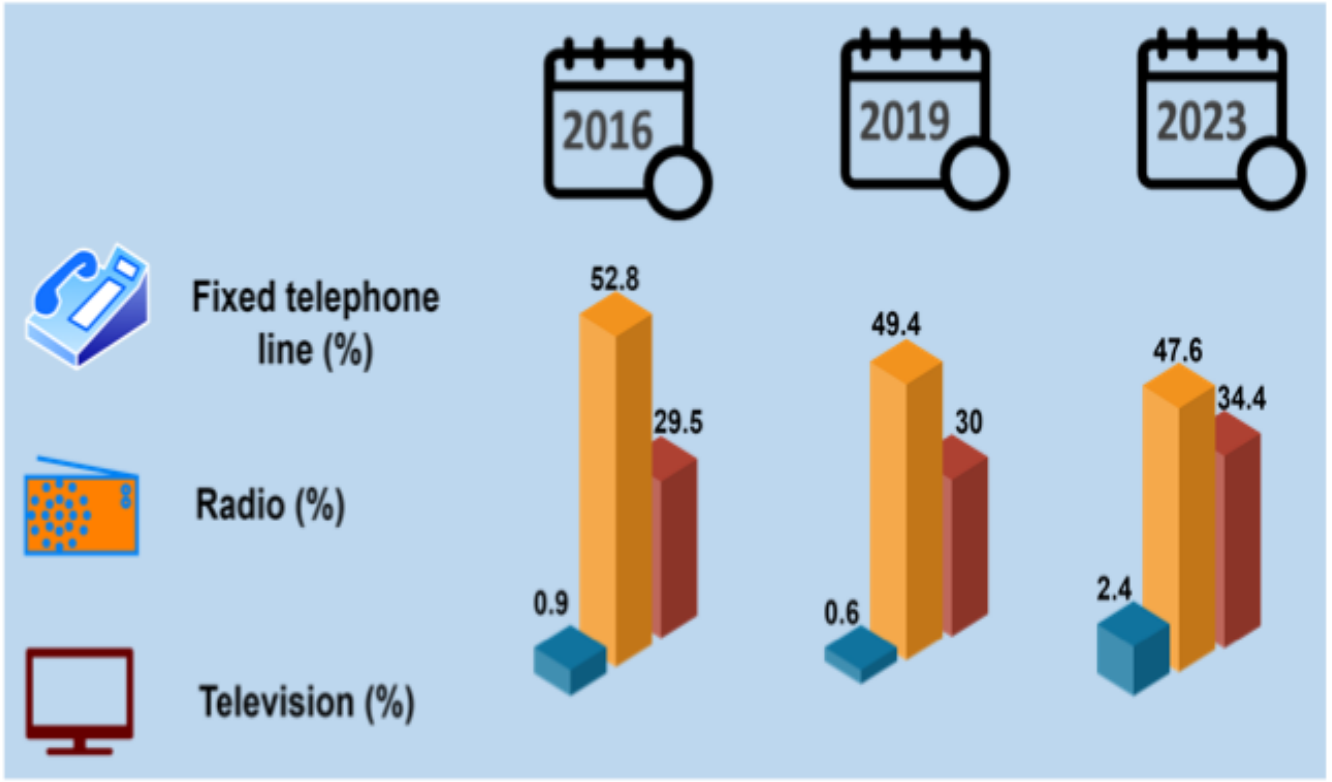
To continue to provide reliable statistics to assist in policy formulation and strategic planning of national development initiatives driven by the ICT sector

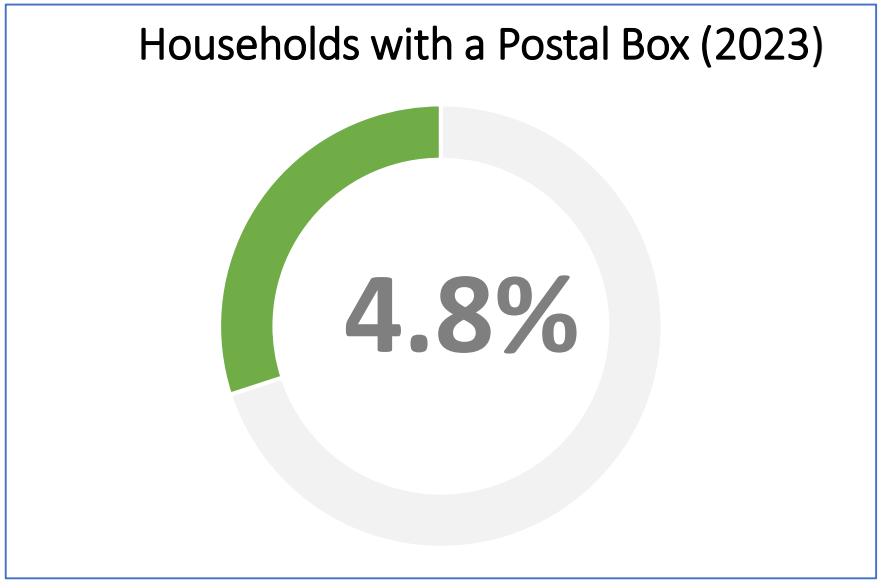
Methodology



- Survey was conducted
  - 10 districts
  - distributed in 2 settlements
    - Urban, Rural
- 135 Enumeration Areas (EAs) were sampled
  - 100% success rate
  - Household & individual weights were calculated and applied to the data for analysis to ensure nationally representative sample
- Household head
  - provided information on access of ICT assets & services at the household level
- Randomly selected Individual
  - provided detailed information in terms of his/her access and use of ICTs
- Collaboration
  - Bureau of Statistics (BoS)

Household Level Indicators – Household Assets





Less than 5% of households have a postal box

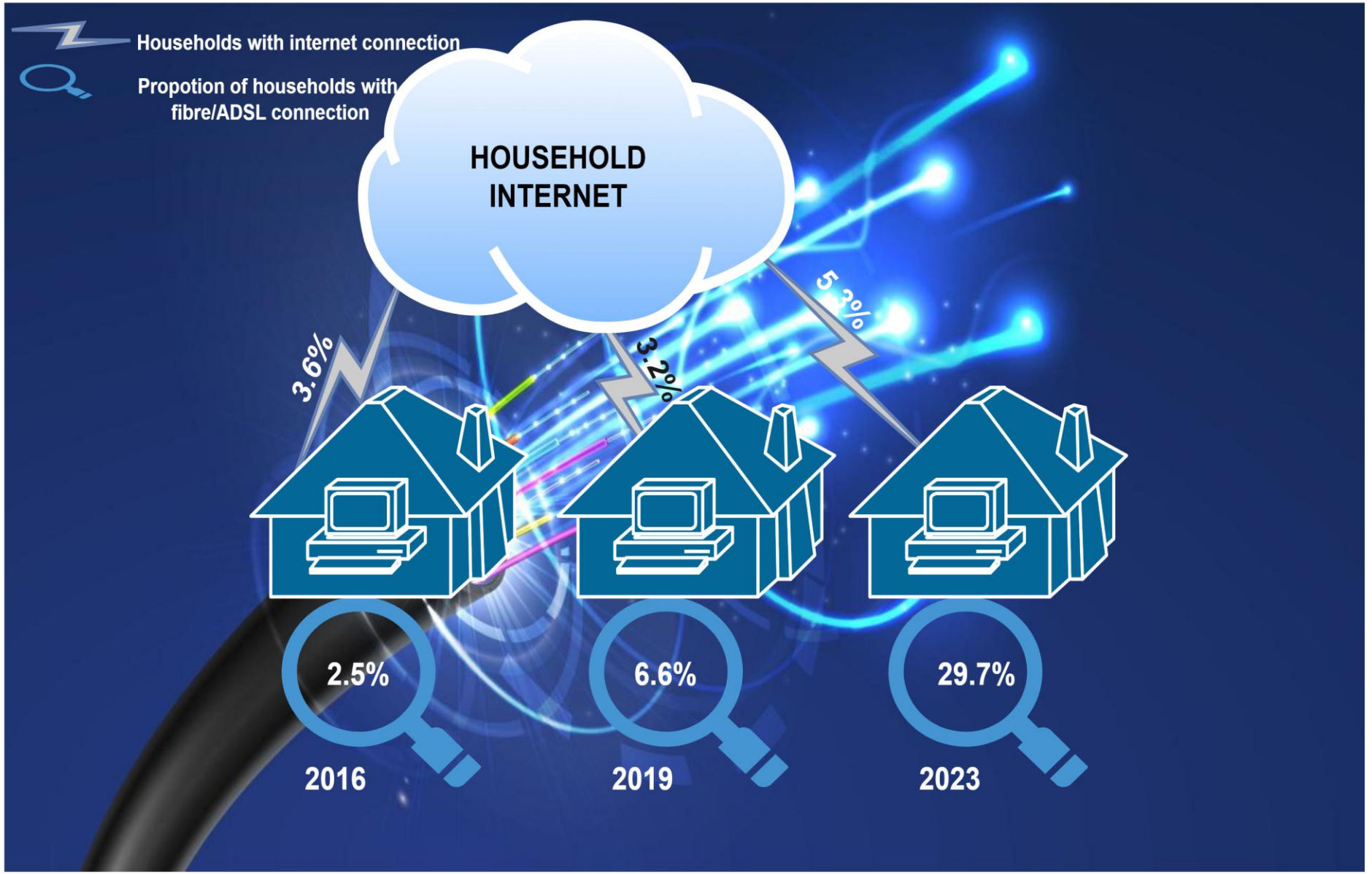
- Fixed telephone penetration is still low
  - 2.4 per 100 households had a fixed telephone connection in 2023
- Radio ownership among households is decreasing
- Ownership of TV among households has been slightly increasing

Radio and television play an important source of information especially where internet adoption is not yet universal.

Household Level Indicators – Internet Connection

- Although the share of households with internet is low, it has been increasing overtime

- Of those with internet connection, we see a significant increase with those with fibre connection



Household Level Indicators – Households Without Internet

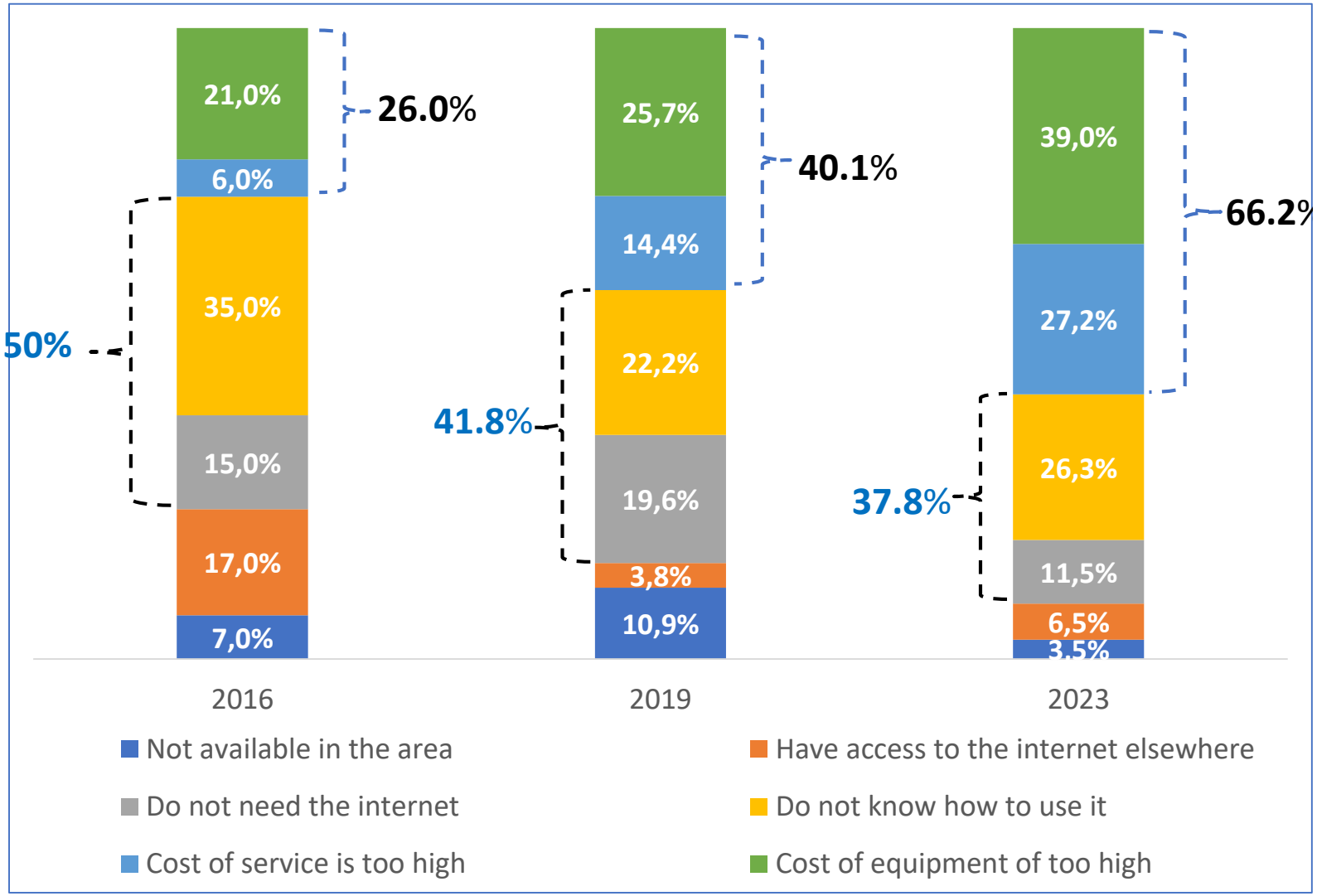
The main reasons for not having a household connection is that

- High Cost – Proportion of households that cite high cost to connecting internet has been increasing over time and by 2023, the proportion has increased to over 66.2%

- Lack of knowledge – in 2016, almost half of households (50%) cited that they do not know how to use internet and or do not need internet. While this proportion is decreasing overtime, it is still high (37.8%)

- It is notable that a small proportion of households cite none availability of Internet in the area and it has been decreasing overtime. It attests to country efforts of continuing to built ICT infrastructure (e.g. BTSs etc).

Main reasons cited by households for not having Internet connection



Individual Level Indicators – Ownership of Mobile Phone

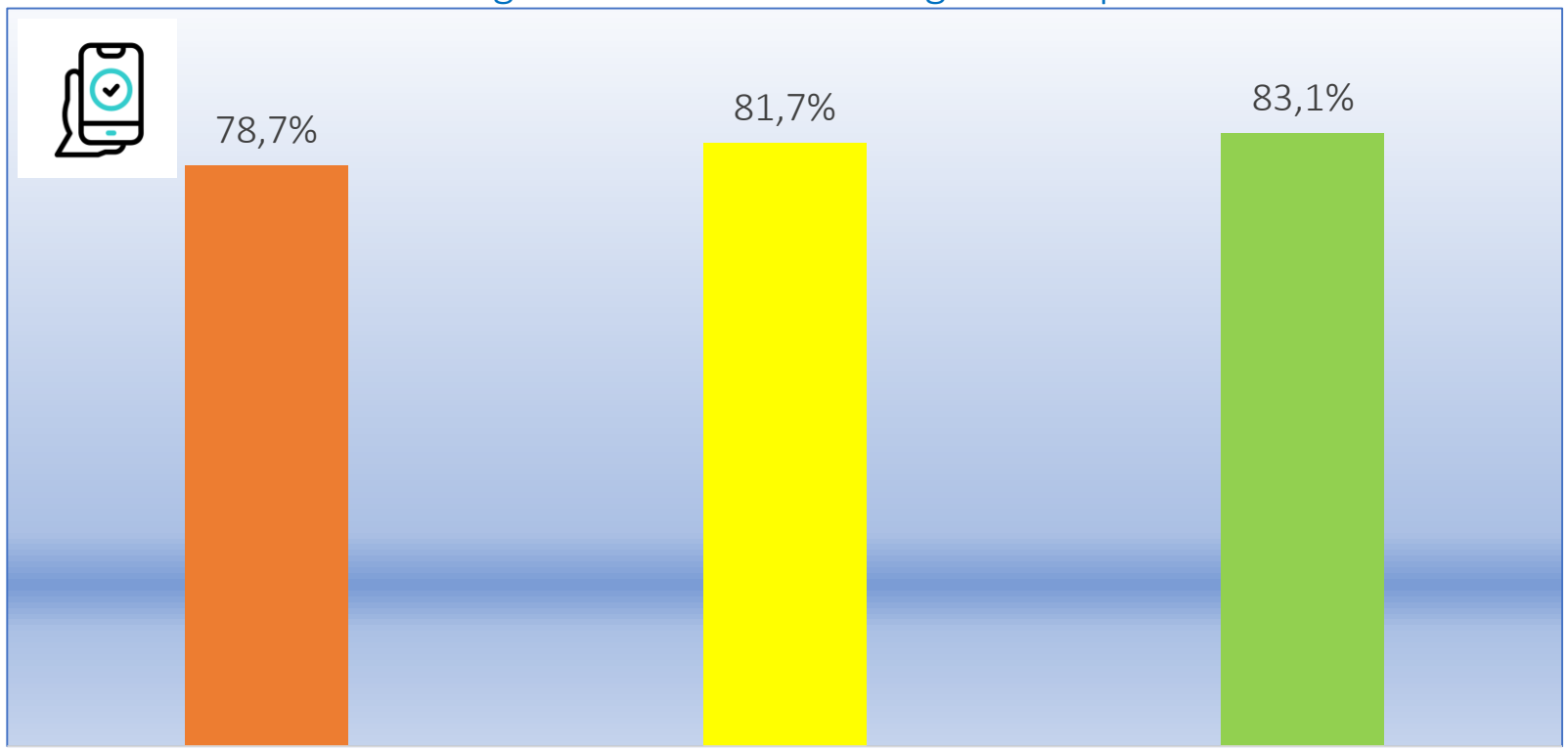
Proportion of individuals who use a mobile telephone is an important indicator to measure the uptake of mobile cellular technology.

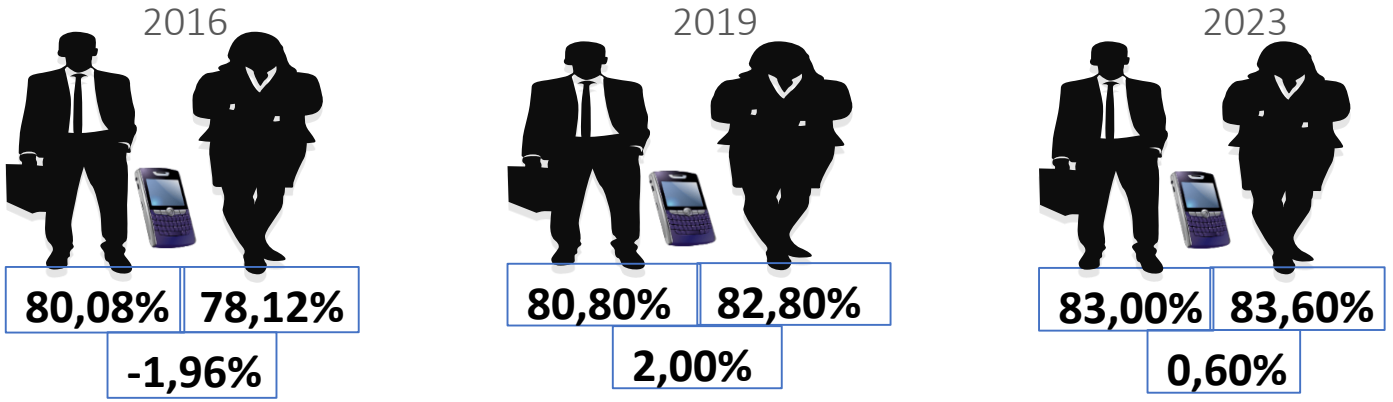
Mobile phone ownership and usage plays a significant role in enabling access to internet and the use of mobile money among others

The survey results show that

- Proportion of individuals that own a mobile phone has been increasing over the years

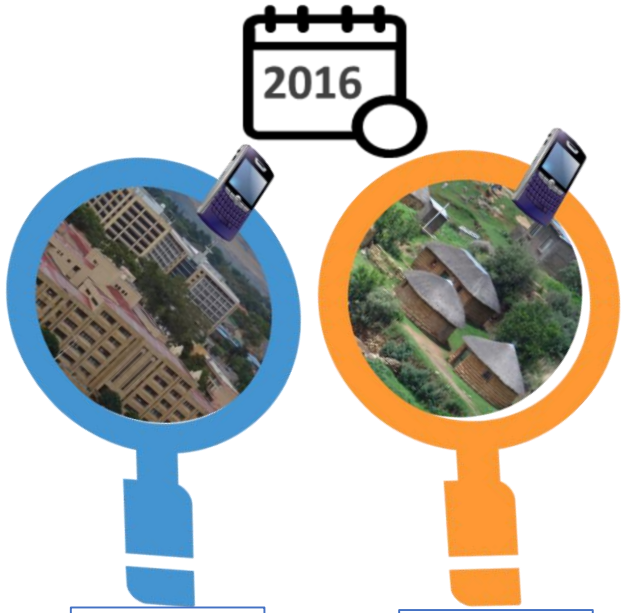
- There is no significant gender gap in terms of mobile phone ownership

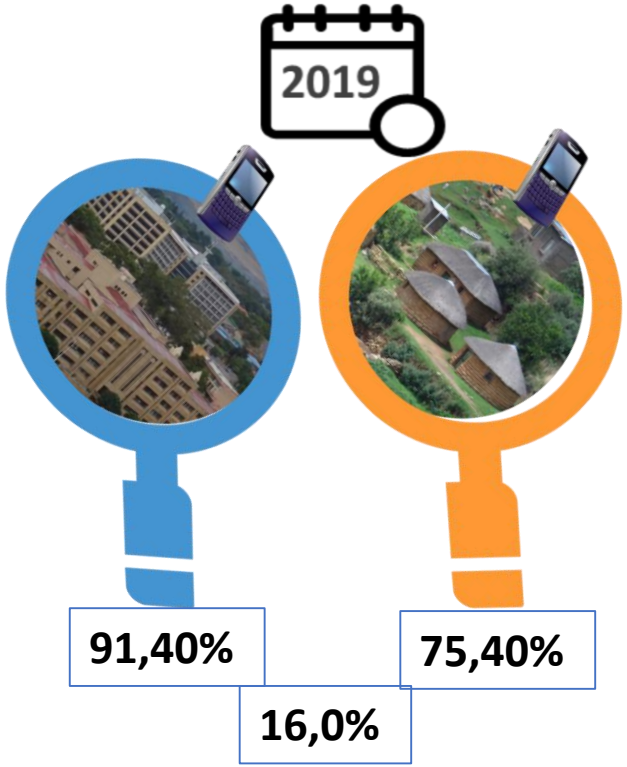


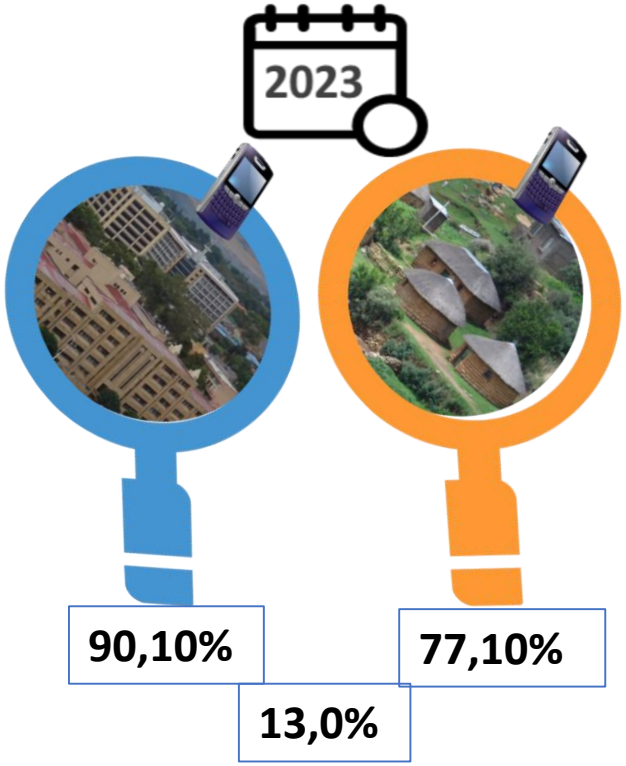


Individual Level Indicators - Ownership of Mobile Phone

Percentage of individuals owning mobile phone by urban-rural settlement







There is an urban-rural divide in terms of mobile phone ownership

- A higher proportion of urban residents own mobile phones compared to their rural counterparts
- While the urban-rural gap narrowed down between 2019 and 2023, it is still high

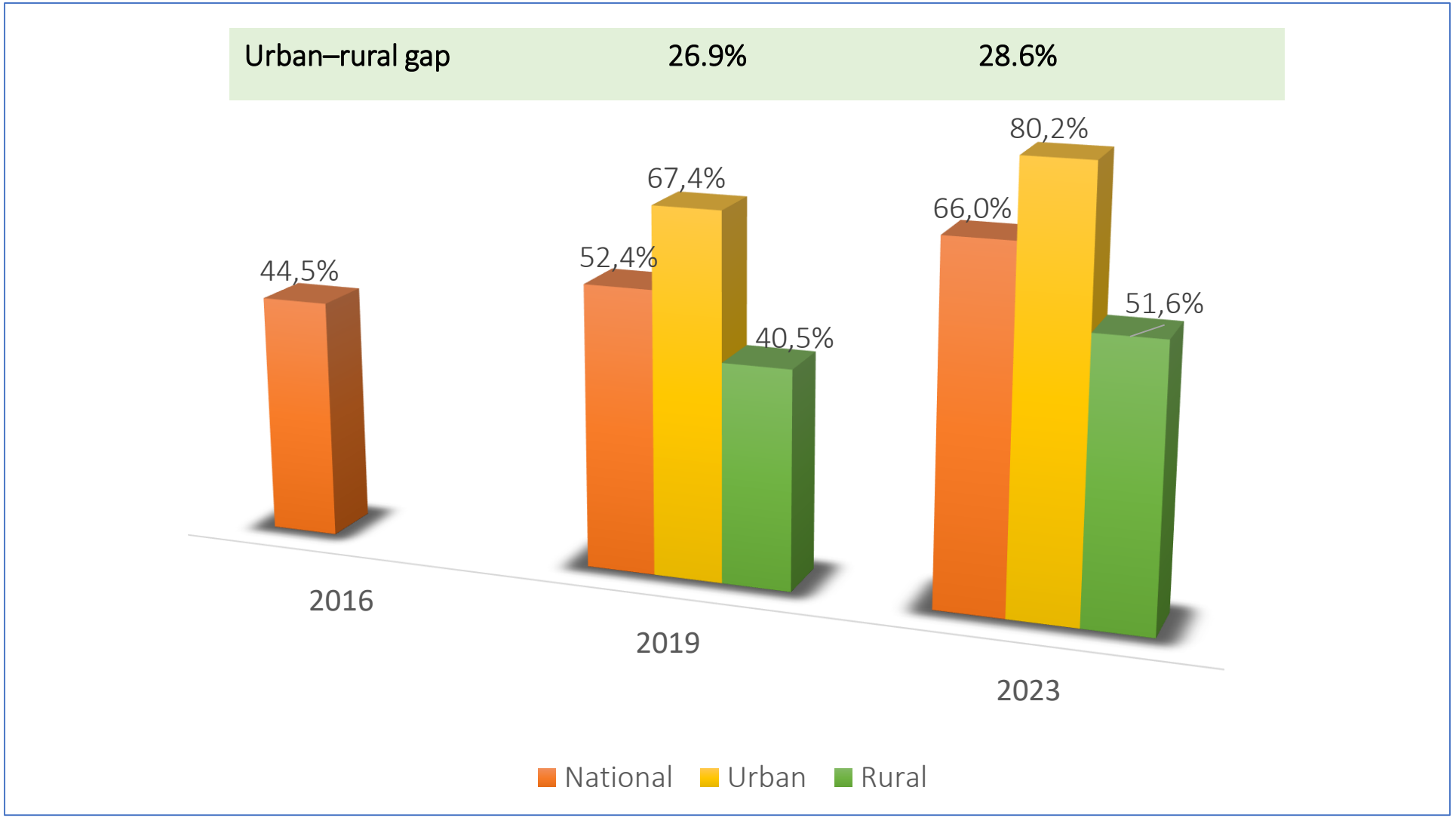
Individual Level Indicators - Ownership of Mobile Phone

ownership of smart phones has been increasing over time.

Urban-rural gap in terms of smartphone ownership is high in favour of urban residents.

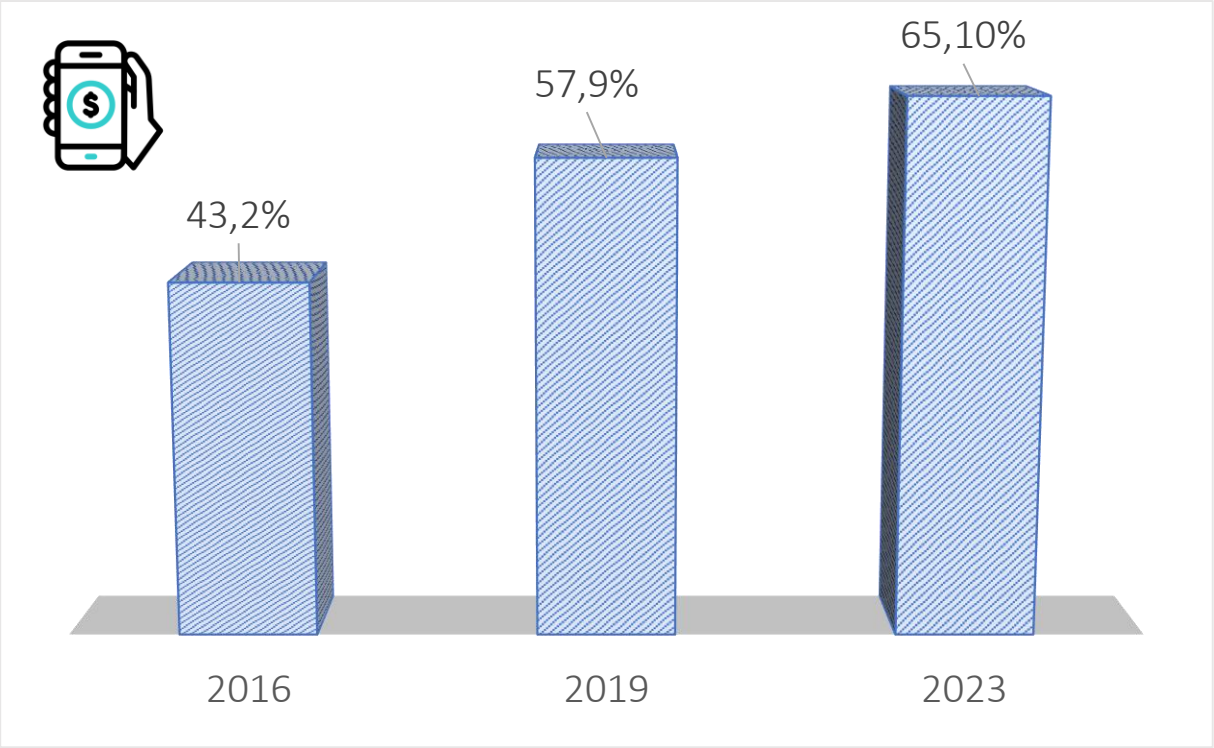
The gap seems to be increasing with time.

Percentage of individuals owning a smart phone



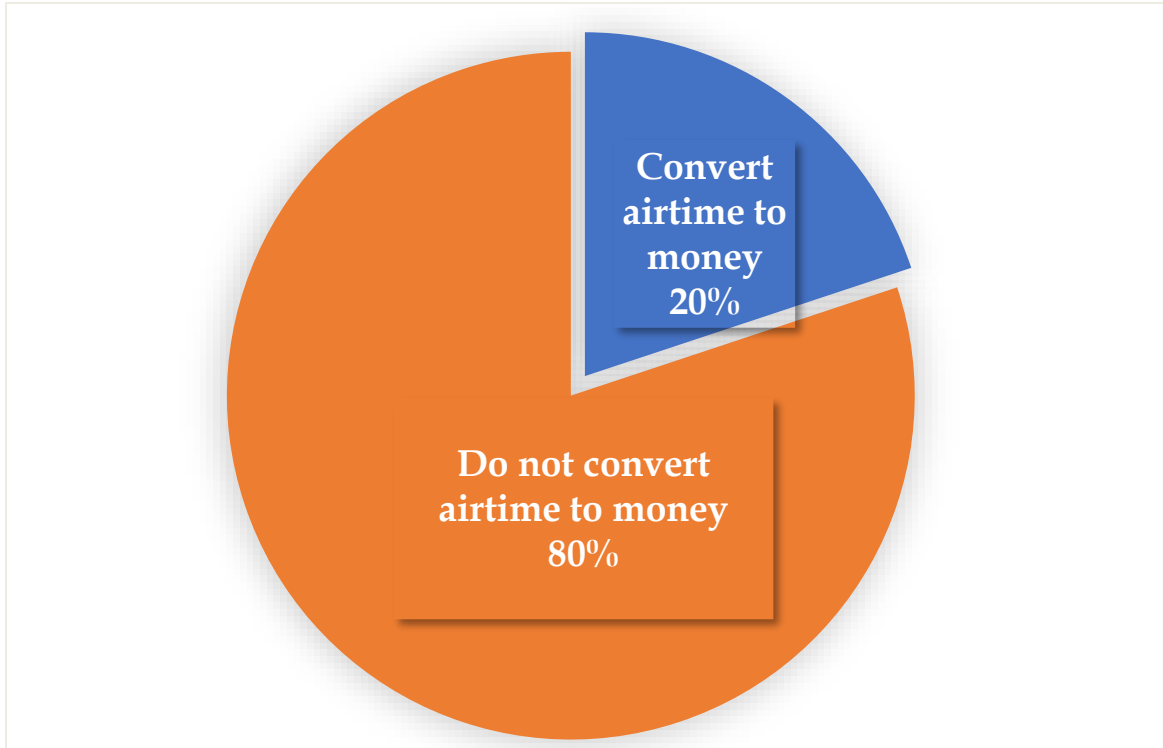
Individual Level Indicators – Use of Mobile Money

Individuals who use mobile money



The proportion of individuals who use mobile money has been increasing over time

Individuals who convert airtime to money - 2023



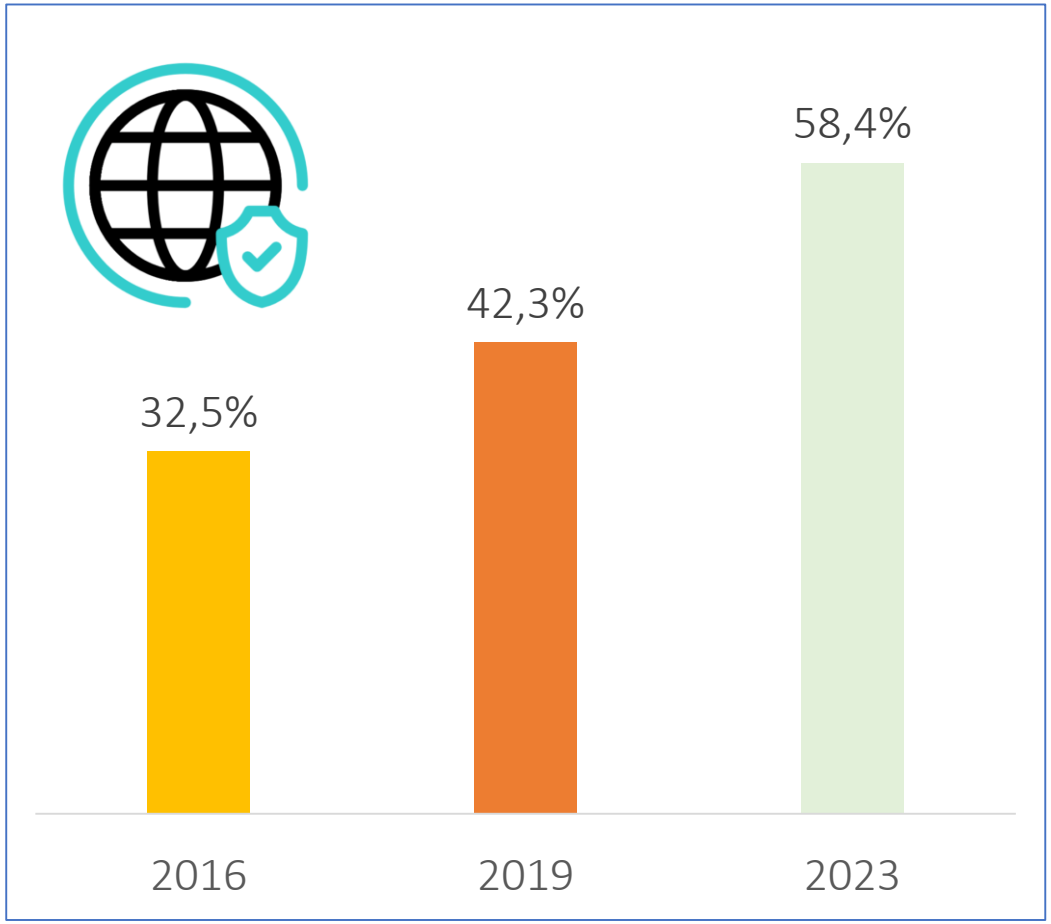
Of those that use mobile money, 20% convert it to airtime.

Reasons for conversion:

- Desperate to send money quickly (43.7%)
- No agent nearby to deposit money (42.7%)
- Accidentally converted airtime to money (11.3%)

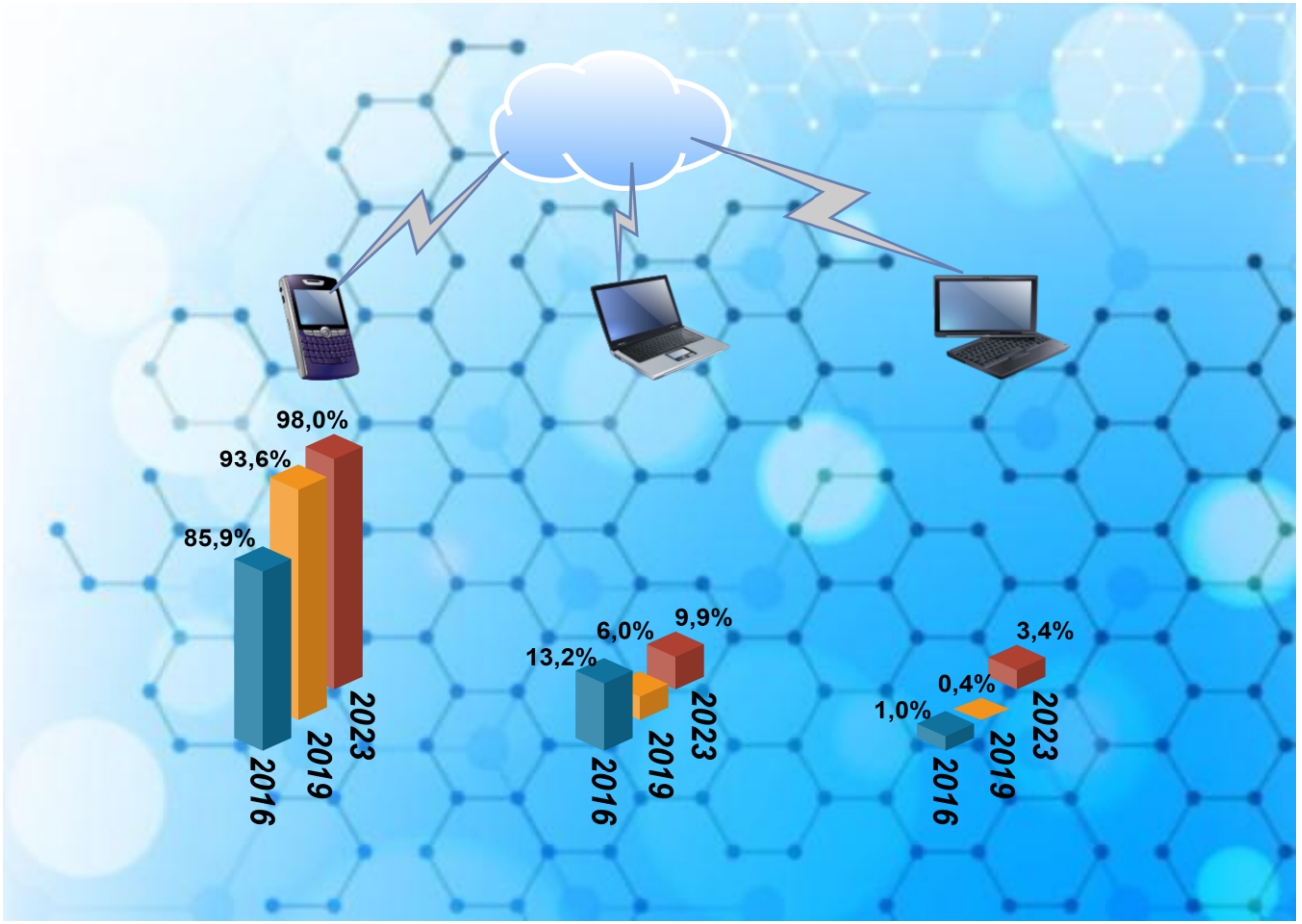
Individual Level Indicators – Internet Usage

Percentage of individuals who use Internet



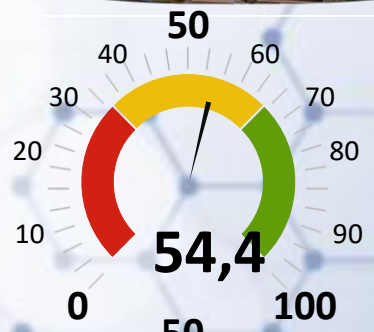
The proportion of individuals who use internet has been increasing over time

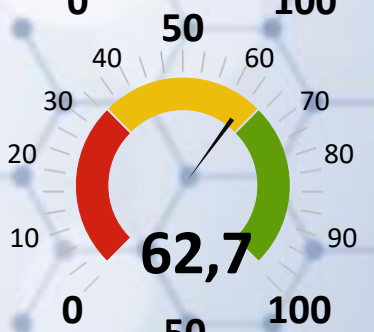
Devices individuals use to access Internet

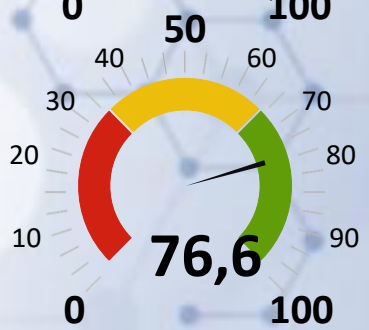


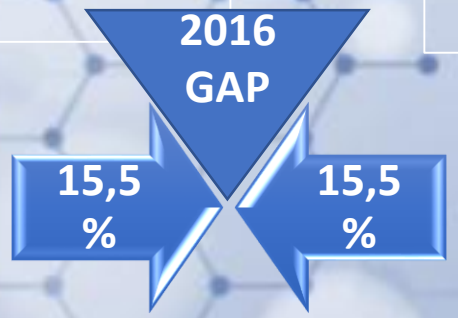
Most people were accessing the Internet through their mobile phones

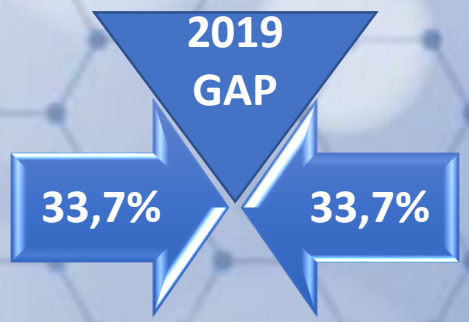
Individual Level Indicators – Internet use by settlement

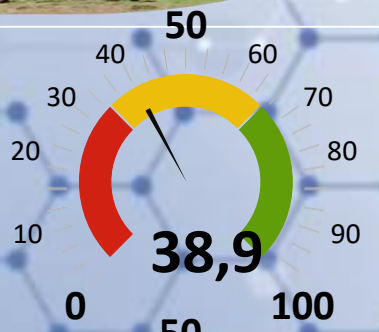


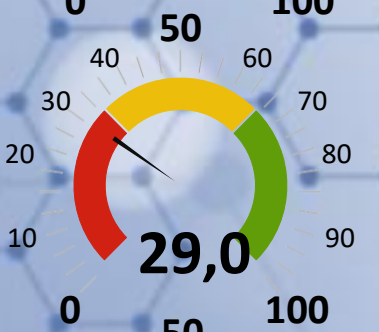


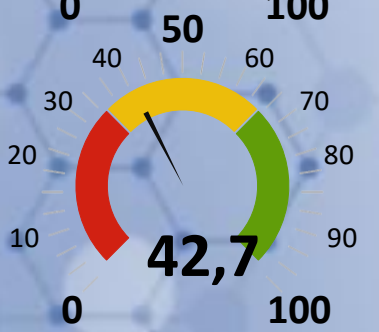












There is a significant gap between rural and urban residents in terms of Internet usage by individuals in favour of urban residents.

The gap more than doubled from 2016 to 2023.

Individual Level Indicators – Internet use by gender

31,0% 36,4% -5,4%

44,9% 38,3% 6,6%

54.8% 59.9% -5.1%

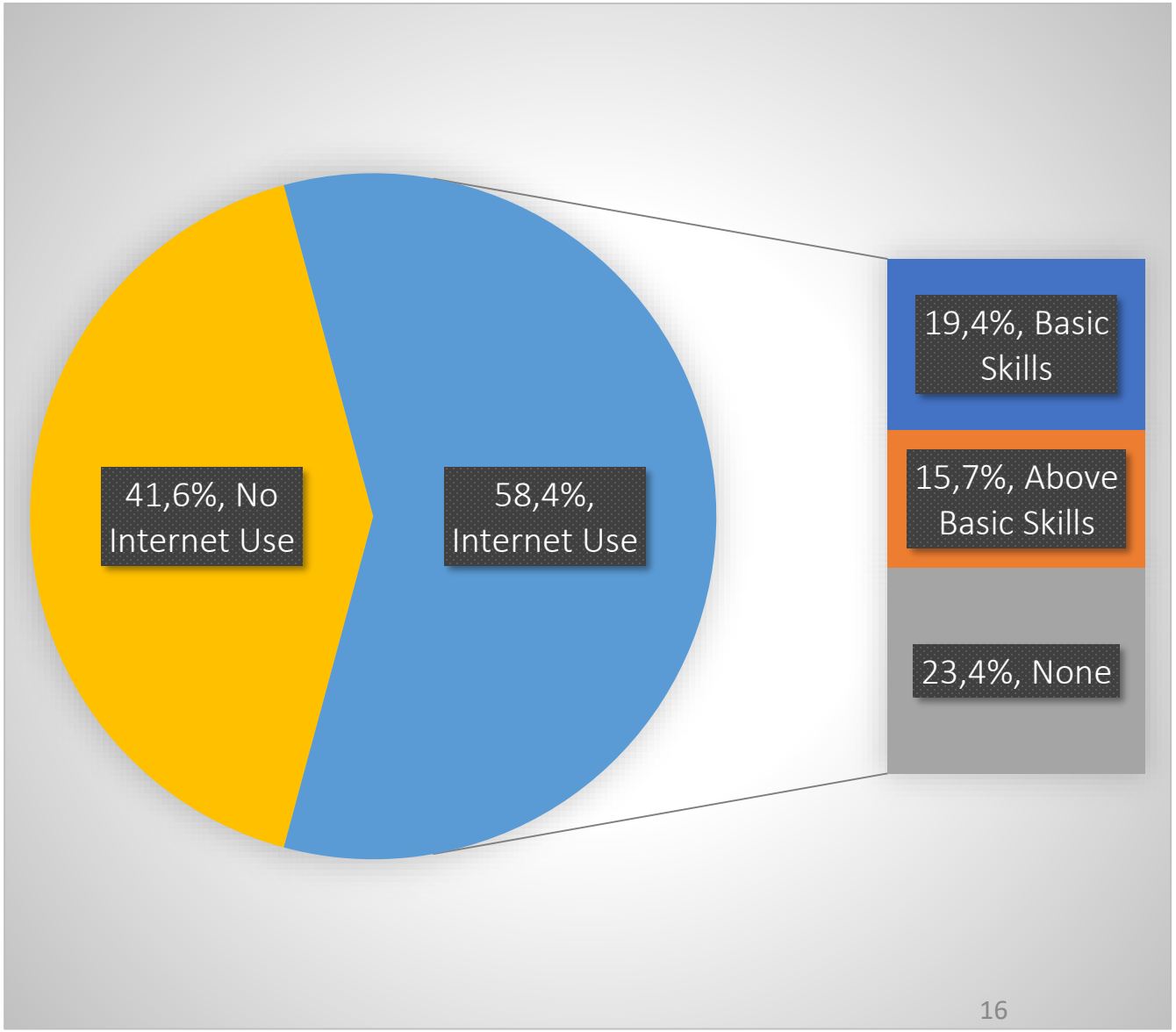
The results show that there is no significant gap in terms of internet usage by either males of females in all the 3 years.

Individual Level Indicators – ICT Skills

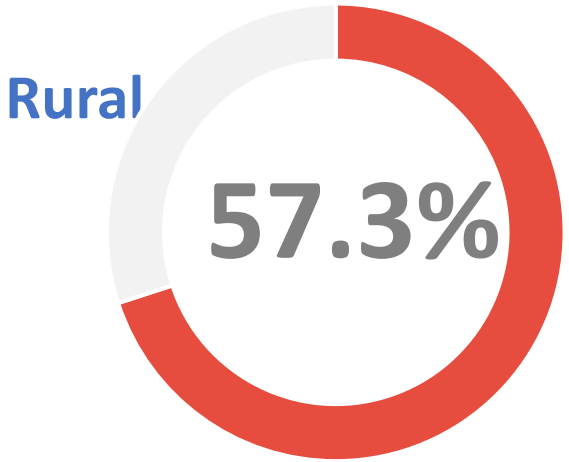
- 15.7% of individuals had above basic ICT skills
- 19.4% of individuals possessed basic ICT skills
- ICT skills = 35.1%
- While 58.4% of individuals use internet, only 35.1% had ICT skills resulting in a gap of 23.3%

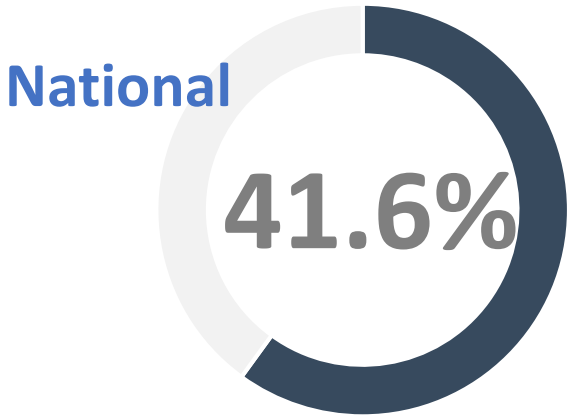
This gap between individuals using the Internet and those with digital skills demonstrates that many may be using the Internet without being able to fully benefit from it or avoid its dangers.

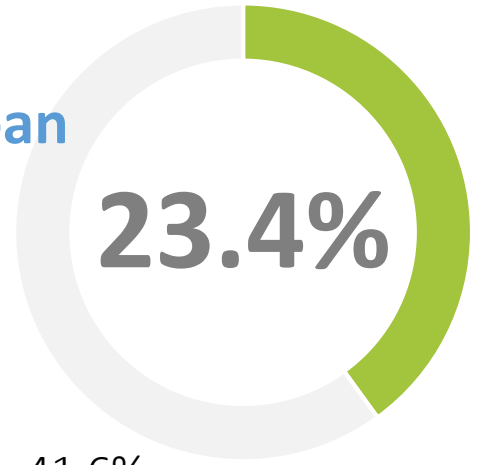
Percentage of individuals with ICT skills



Non-Internet Users - 2023



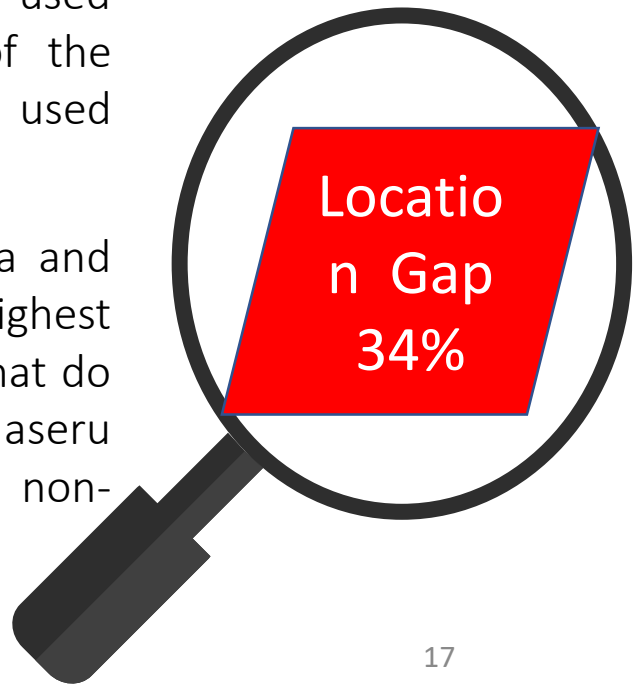




District name	Non-Internet users %
Thaba-Tseka	66.1
Mokhotlong	65.6
Mohale's Hoek	52.8
Mafeteng	49.5
Quthing	48.7
Qacha's Nek	46.0
Botha-Bothe	43.0
Berea	41.8
Leribe	36.8
Maseru	26.0

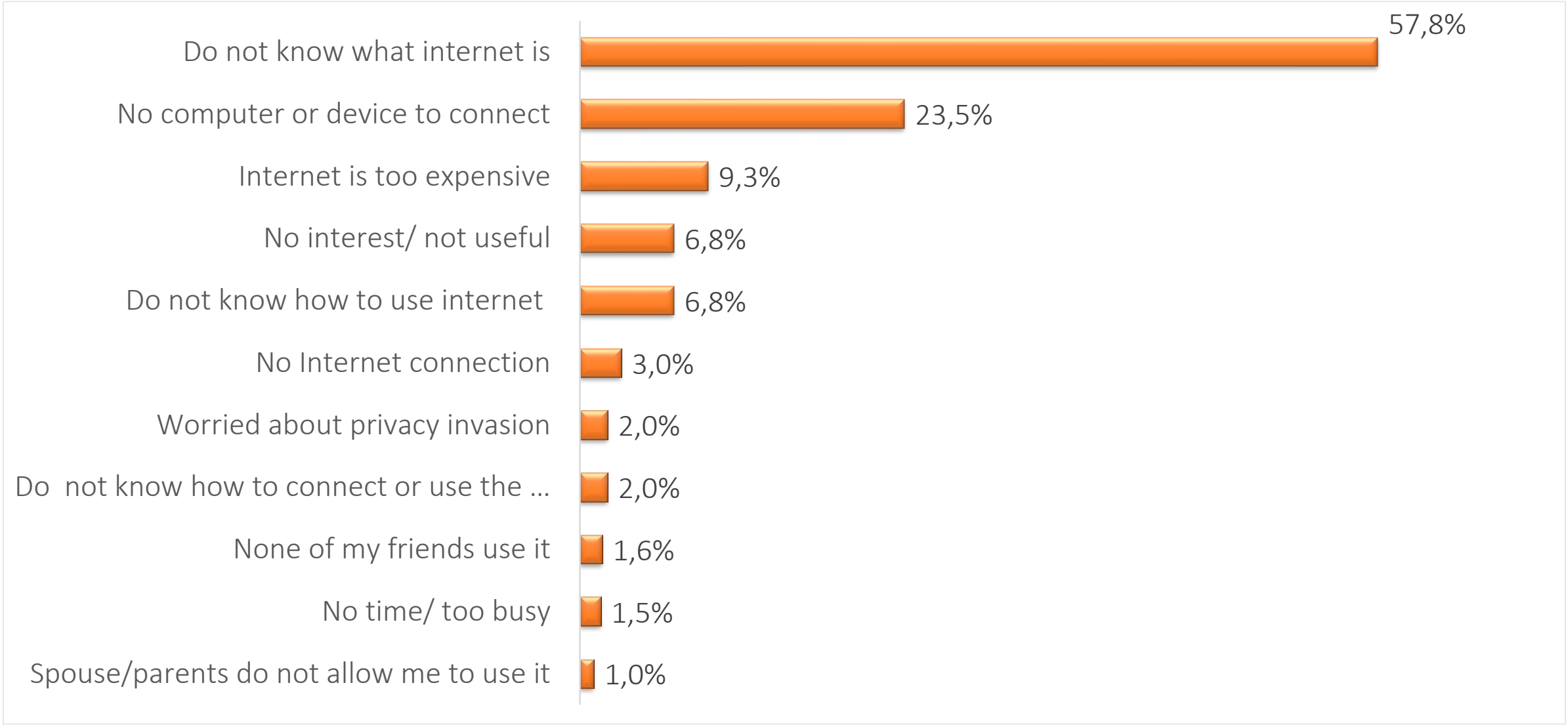
It is shown that in 2023, 41.6% of the population had not used Internet and over half of the rural dwellers have never used the Internet.

Disaggregated, Thaba-Tseka and Mokhotlong have the highest proportion of individuals that do not use Internet while Maseru has the least number of non-Internet users



Non-Internet users - 2023

Main reasons cited for not using Internet

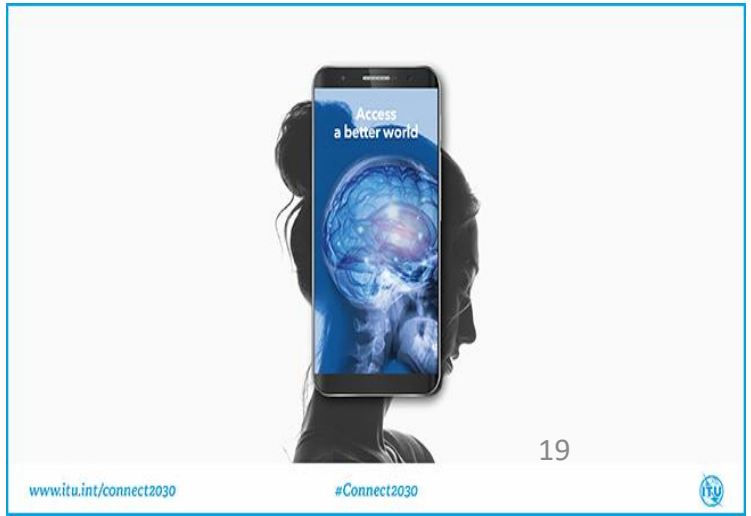


The lack of e-skills is evident in the reasons cited for not using the Internet

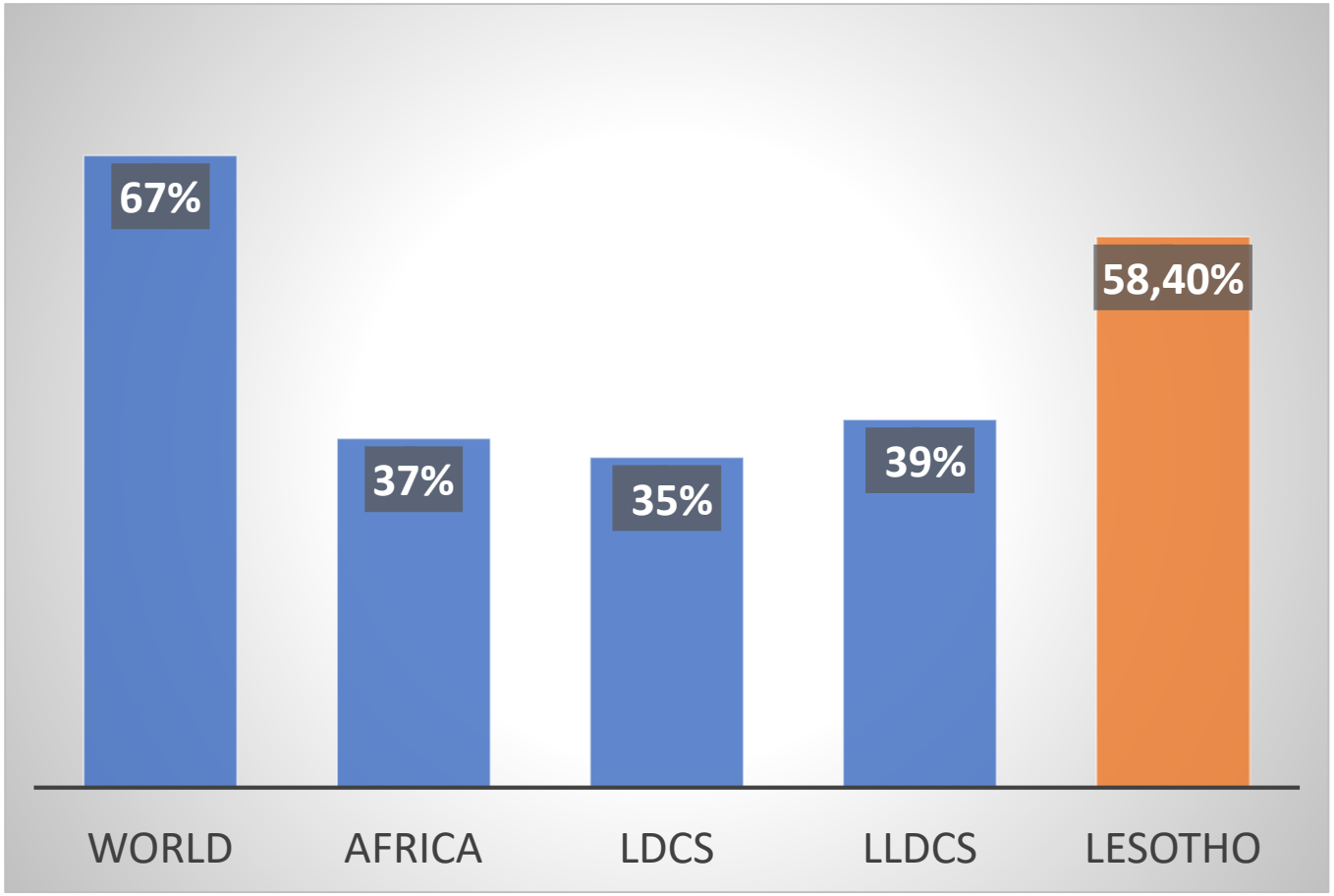
Benchmarking Results of Key Indicators

- Benchmark Lesotho using global statistics
  - World
  - Africa
  - Least Developed Countries (LDCs)
  - Landlocked Developing Countries (LLDCs)

- Track the 'Connect 2030 Agenda' targets
  - ITU had set goals and targets for member states
    - on how technological advances will contribute to accelerate the achievement of the SDGs by 2030.
    - The targets were set for 2023
  - Some of the targets had to tracked using the demand-side data



Percentage of individuals using the Internet - 2023

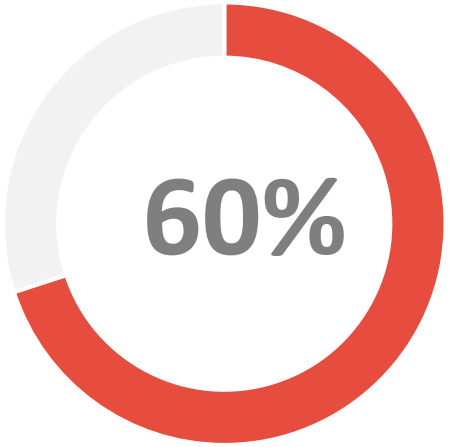


Source: Measuring Digital Development – Facts and Figures 2023 by ITU
https://www.itu.int/hub/publication/d-ind-ict_mdd-2023-1/

- While more than half of the population of the world is online, almost 60 percent of the population in the Africa is offline.
- Lesotho's Internet usage rates have surpassed the estimated average rates of LDCs, LLDCs but still below the average usage rates of the world

Individuals that will be using Internet by 2023

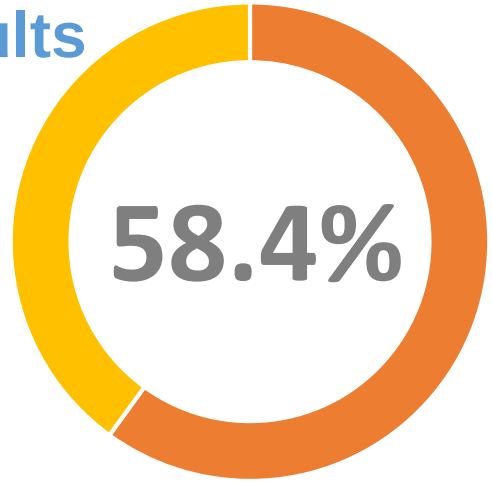
Targets



By 2023, in the developing world, 60% of individuals will be using the Internet

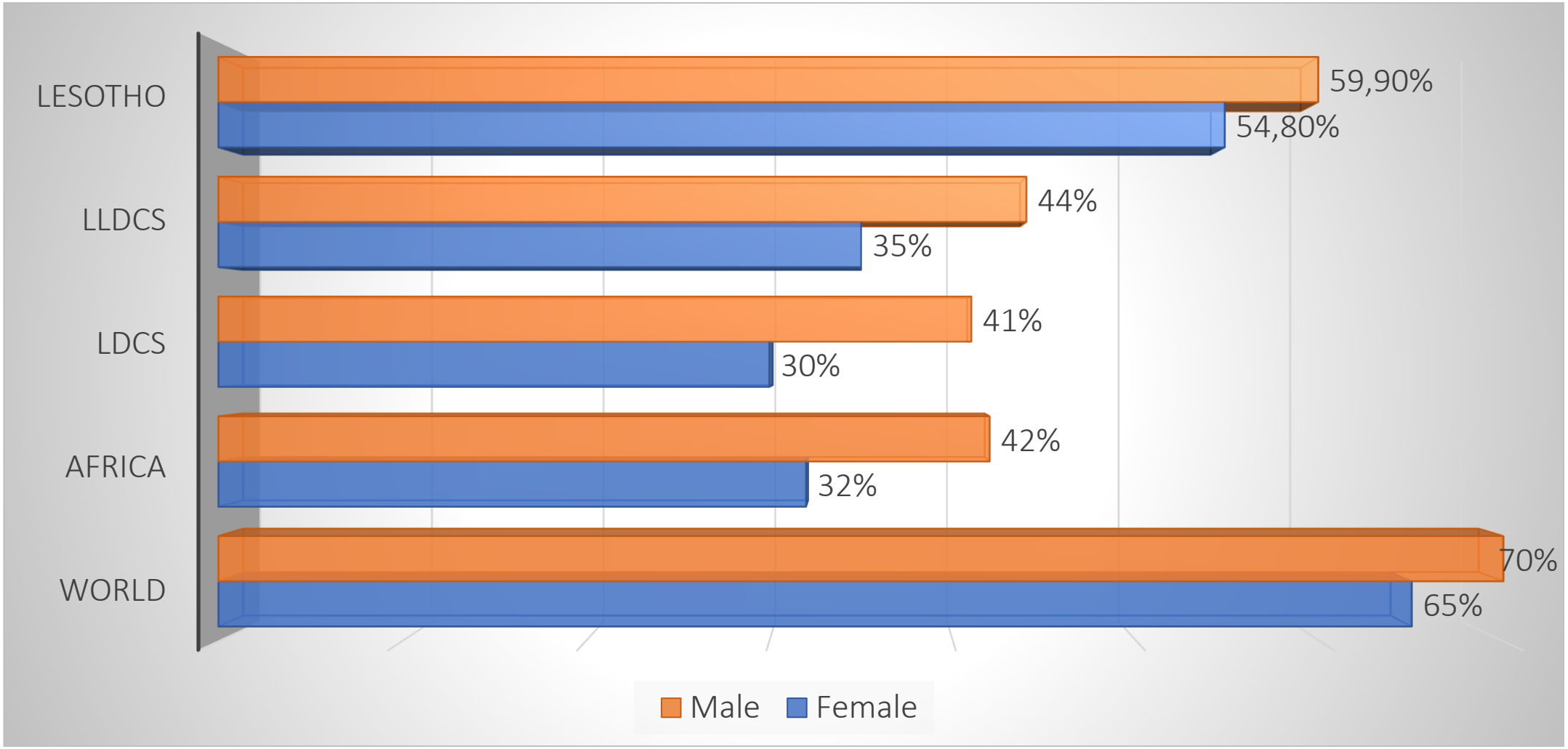
By 2023, in the least developed, 30% of individuals will be using the Internet

Survey Results



- With the results of ICT Access & Use by Households and Individuals Survey, 2023, Lesotho has already surpassed the 2023 Target for the least developed countries

Internet penetration rate for men and women, 2023

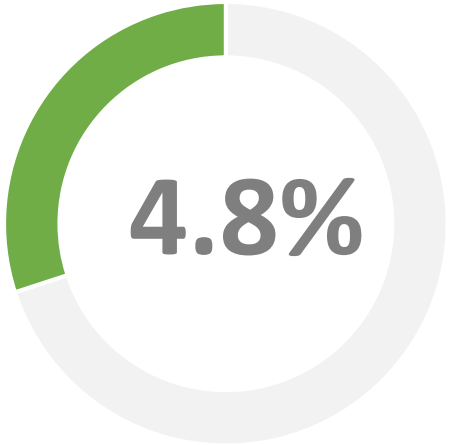


Source: Measuring Digital Development – Facts and Figures 2023 by ITU https://www.itu.int/hub/publication/d-ind-ict_mdd-2023-1/

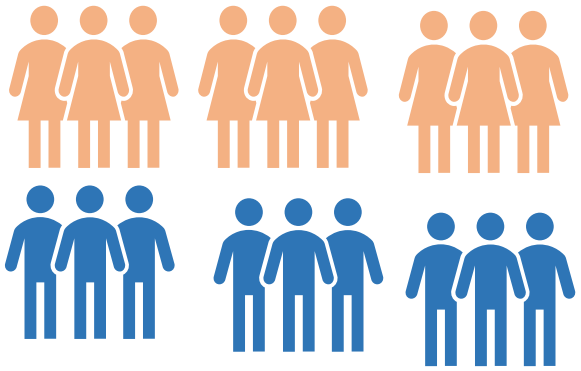
The world gender gap is 5%, almost the same as Lesotho's gap at 5.1% while the gender gap in Africa is at 11%.

Gender equality on Internet usage by 2023

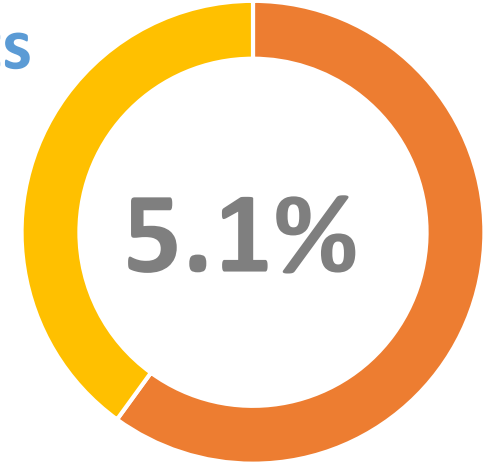
Target



By 2023, gender equality in Internet usage should be achieved



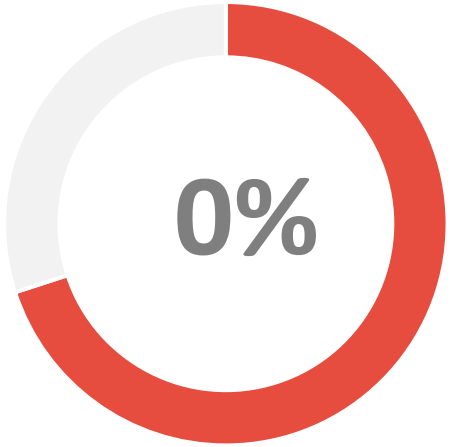
Survey Results



- The gender gap is still at 5.1 percentage points in favour of women.
- The country has to work towards reducing this gap.
- While there is a marginal gender gap, the location gap is more pronounced – it stands at 34 percentage points in favour of urban residents.

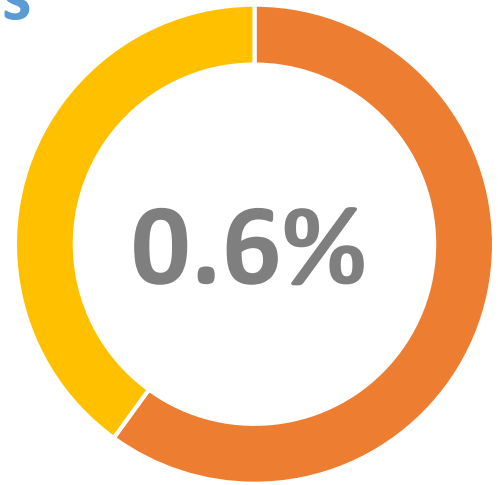
Gender equality on mobile phone ownership by 2023

Target



By 2023, gender equality on mobile phone ownership should be achieved

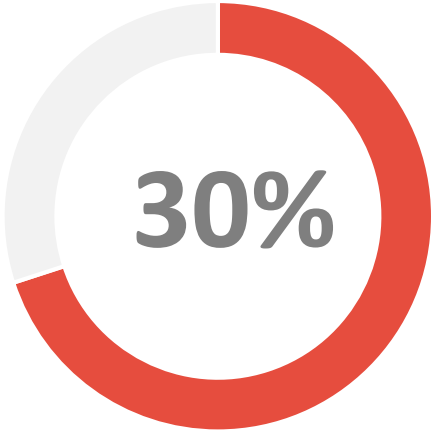
Survey Results



- The gender gap is at 0.6 percentage points in favour of women.
- While there is a marginal gender gap, the location gap is still a concern – it stands at 13 percentage points in favour of urban residents while the gap for owning a smartphone is at 28.6%

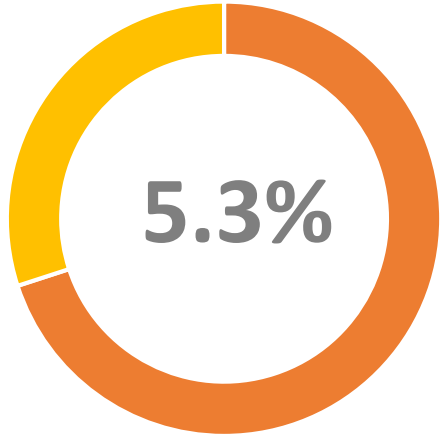
Households with access to the Internet

Target



By 2023, in least developed countries, 30% of households should have access to the Internet

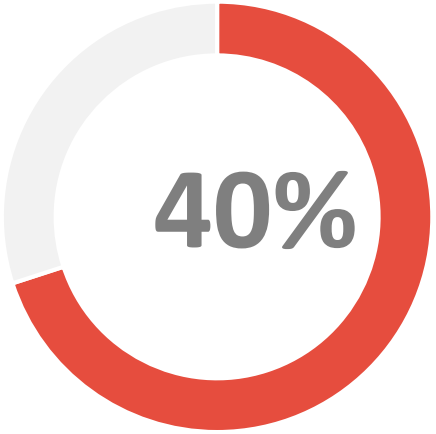
Survey Results



- A few homes in the country have Internet Connection
- This might be explained by the fact that household members use their own Internet from their devices for access.

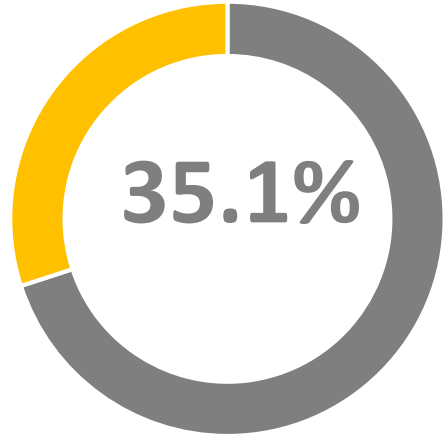
ICT skills

Target



By 2023, improve by 40% the proportion of youths/adults with ICT skills

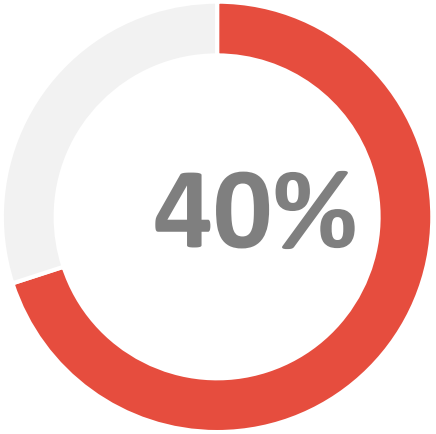
Survey Results



- An important barrier in the uptake and effective use of the Internet is a lack of ICT skills
- The results show that there is a strong need to develop digital skills

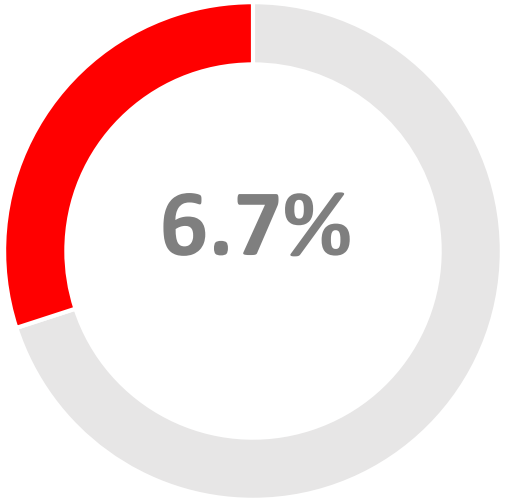
Government Services online

Target



By 2023, 40% of the population should be interacting with government services online

Survey Results



- a lot of work still has to be done to increase the proportion of the population that interacts with government services online
- At the same time, e-services have to be developed and be accessible to the public