



GBOS



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**BY THE
TOURISM, TRANSPORT AND COMMUNICATION STATISTICS UNIT**

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List of Acronyms and Abbreviations

GAMCEL	Gambia Cellular Company Limited
GAMTEL	Gambia Telecommunication Company Limited
GMD	Gambian Dalasi
GRTS	Gambia Radio and Television Services
GSM	Global System for Mobile communications
ICT	Information and Communication Technology
IDI	ICT Development Index
ISPs	Internet Service Providers
ITU	International Telecommunication Union
MICS	Multiple Indicator Cluster Survey
PURA	Public Utilities Regulatory Authority
SMS	Short Message Service

Foreword

This report presents the Information and Communication Technology (ICT) Statistics of The Gambia for the period 2013-2018¹. It presents the state of ICT infrastructure, access and use for the period under review. Most of the data in this report is from the Public Utilities Regulatory Authority (PURA), data on access to the media is from the 2018 Gambia Multiple Indicator Survey (MICS V1) and the data on Gross Domestic Product (GDP) is from the Gambia Bureau of Statistics, National Accounts Unit. PURA is mandated by an act to provide guidelines on rates and fees to ensure that public services are regulated and to protect the interest of the consumers and public utilities. Thus, it currently regulates the Telecommunication, Energy, Water and Sewage and Electricity sectors in the country.

The report contains data on internet subscription, volume of calls, tariffs charged, employment, the number and types of broadcasting media, the proportion of the population that had access to ICT and the Herfindahl-Hirschman Index (HHI). This report can be accessed on The Gambia Bureau of Statistics' website (<https://www.gbosdata.org/>). Users who have specific data needs can contact the Tourism, Transport and Communication Statistics Unit of GBoS for assistance.

The Gambia Bureau of Statistics wishes to express its profound gratitude to PURA for making available the necessary data for the compilation of the ICT Statistics. We hope that users will find this report useful.

Nyakassi M.B. Sanyang

Statistician General

¹ Data on Herfindahl-Hirschman Index covers 2017-2018

Information and Communication Technology (ICT) Statistics Report- 2013-2018

1: Introduction

This is the second report on Information and Communication indicators prepared by the Tourism, Transport and Communication unit of the Gambia Bureau of Statistics. The report highlights the of and access to ICT infrastructure in terms of internet subscription, volume of calls, tariffs charged, employment, number and types of broadcasting media, proportion of the population that had access to ICT and the Herfindahl-Hirschman Index (HHI).

The importance of ICT in a country cannot be overemphasized as it can help boost various sectors of an economy, such as health, education, agriculture, tourism among others. Improve communication network enhances the dissemination of information data and has made the world a global village. Social relationships have improved through the use of ICT products and services. In addition, learning has become easier for the population at large, thus, it is important to report on the state of ICT in the country to enable better planning.

2. ICT Infrastructure and Access

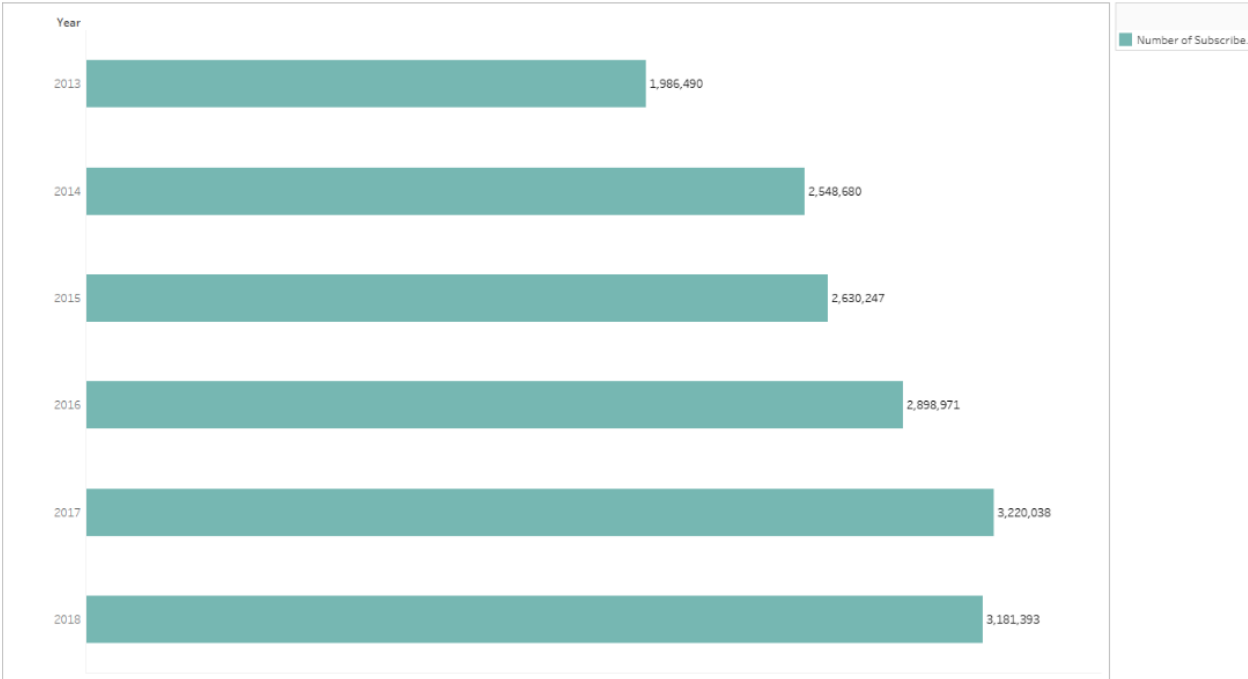
2.1 Service providers and available infrastructure

There has been significant growth in the telecommunication industry over the years. There are four mobile cellular service providers (GAMCEL, AFRICELL, COMIUM and QCELL) while GAMTEL is the only fixed line telephone provider. QCELL and GAMTEL in addition to Unique Solutions, NETPAGE, I-NET WORLD, INSIST Global and LANIX make up the Internet Service Providers (ISPs) in the country.

2.2 Mobile cellular subscriptions

The number of active mobile subscribers has decreased from approximately 3.2 million in 2017 to about 3.1 million subscribers in 2018 as shown in figure 1. It is evident that the number of subscribers is more than the total population in the Gambia; this is because of the availability of more than one sim card per individual which is due to the introduction of dual sim phones in the market and ownership of more than one phone by some subscribers.

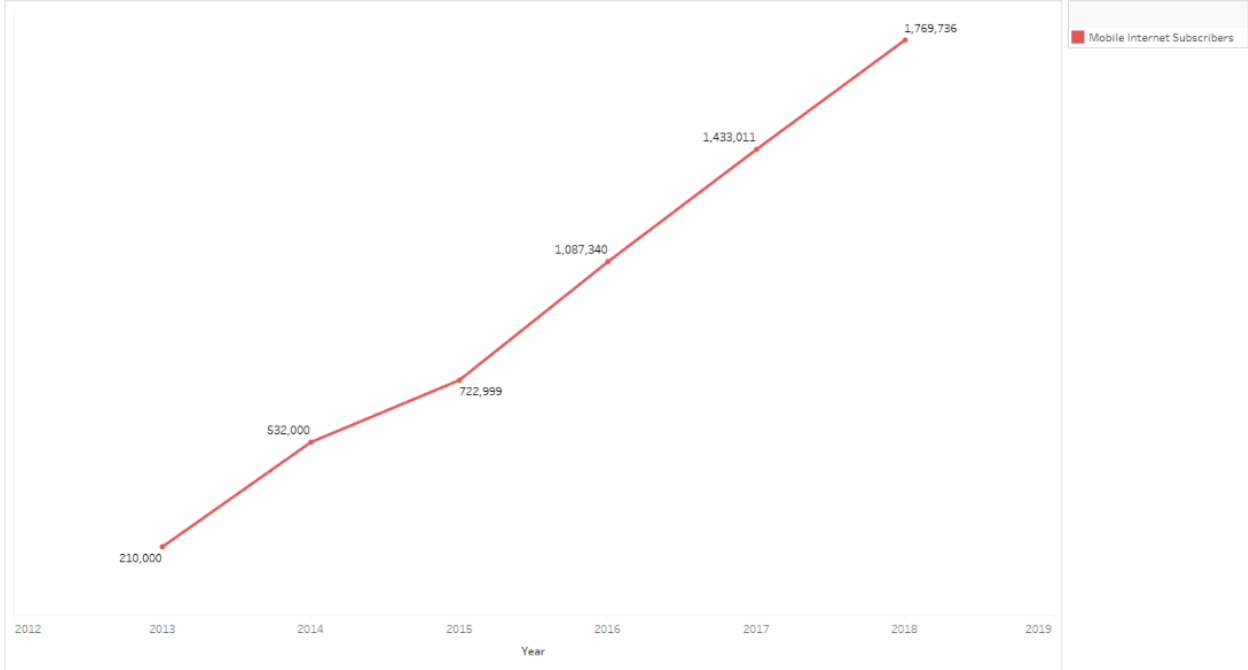
Figure 1: Mobile Active Subscribers, 2013-2018



2.3 Internet Subscriptions

The figure below shows the total number of mobile internet subscribers in The Gambia. The data shows an increasing trend for internet mobile subscription from 1,433,011 subscribers in 2017 to 1,769,736 in 2018. This could be due to the daily need for the use of the internet as a means of connecting with friends and families as well as for learning purposes among others.

Figure 2: Mobile Internet Subscriptions, 2013-2018

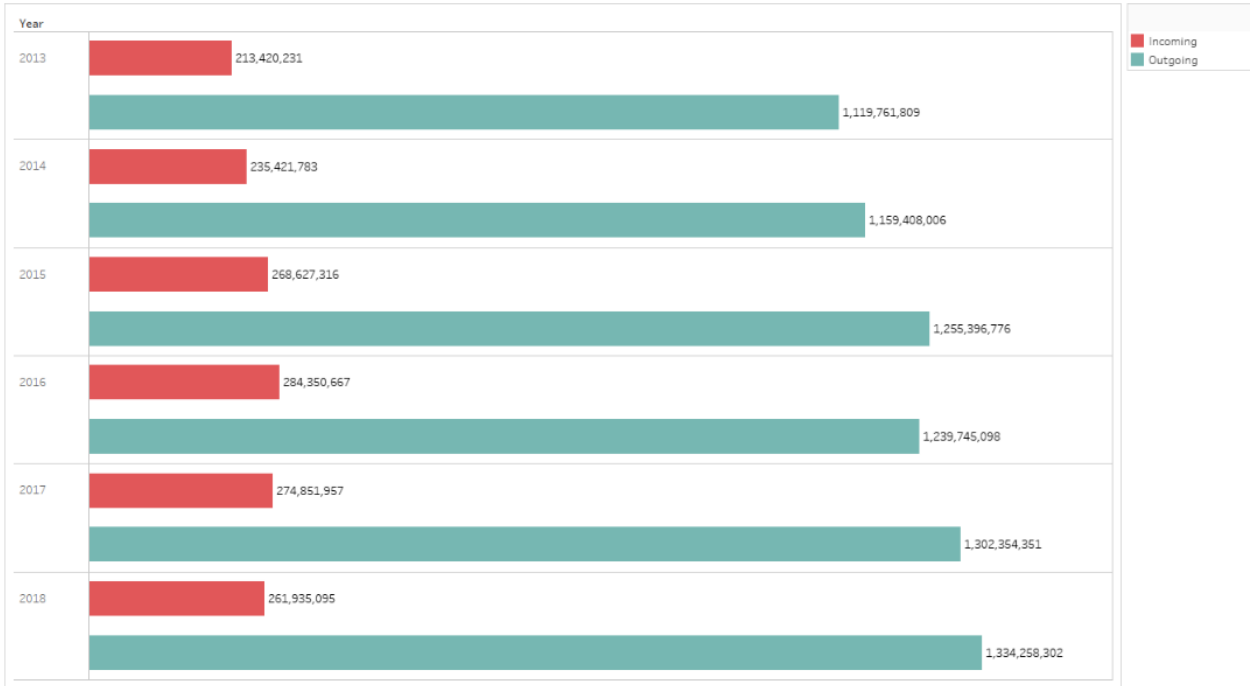


2.4 Communication Traffic

2.4.1 Local calls

Figure 3 shows that the volume of local calls in The Gambia has increased over the years. For the period 2017-2018, outgoing (1,334,258,301.87 minutes) calls were more than incoming (261,935,094.92 minutes) calls.

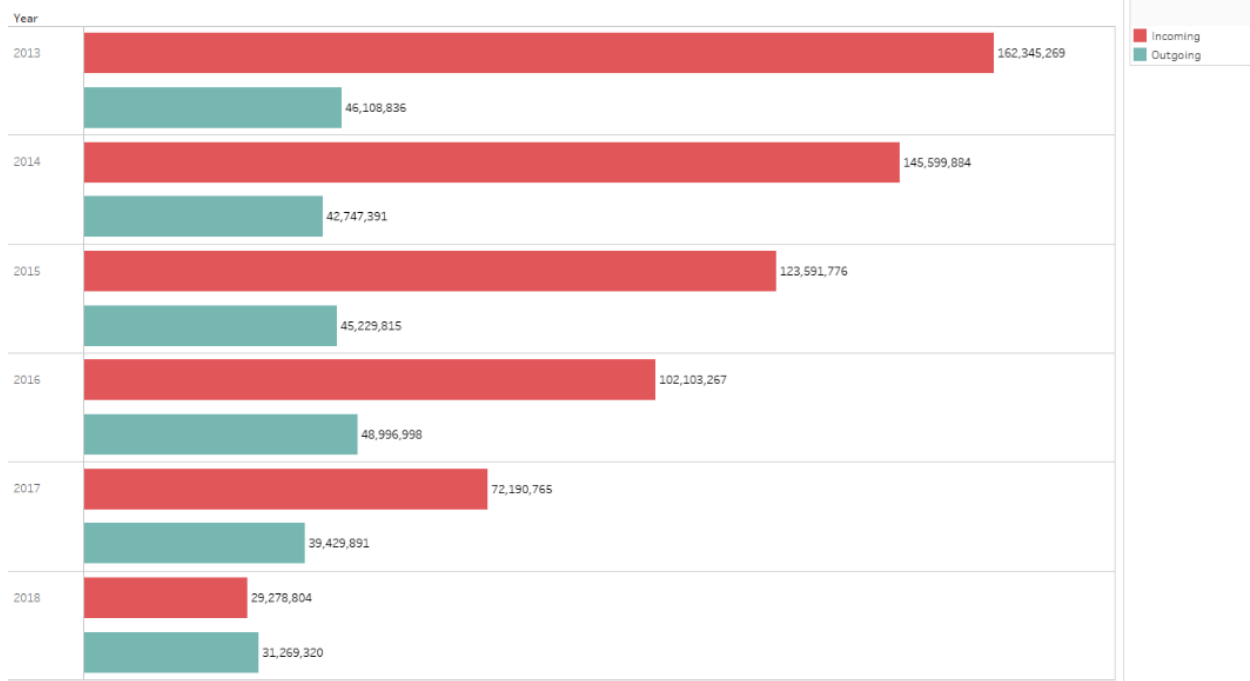
Figure 3: Volume of Local Calls, 2013-2018



2.4.2 International calls

Similarly, for international calls the outgoing international calls are more than the incoming international calls for the period 2017- 2018 as shown in the chart below. The traffic for both incoming and outgoing calls is lower in 2018 than 2017. This could be due to the increase in the use of the social media platforms especially WhatsApp, Viber and Facebook as other means of communication.

Figure 4: Volume of International Calls, 2013-2018

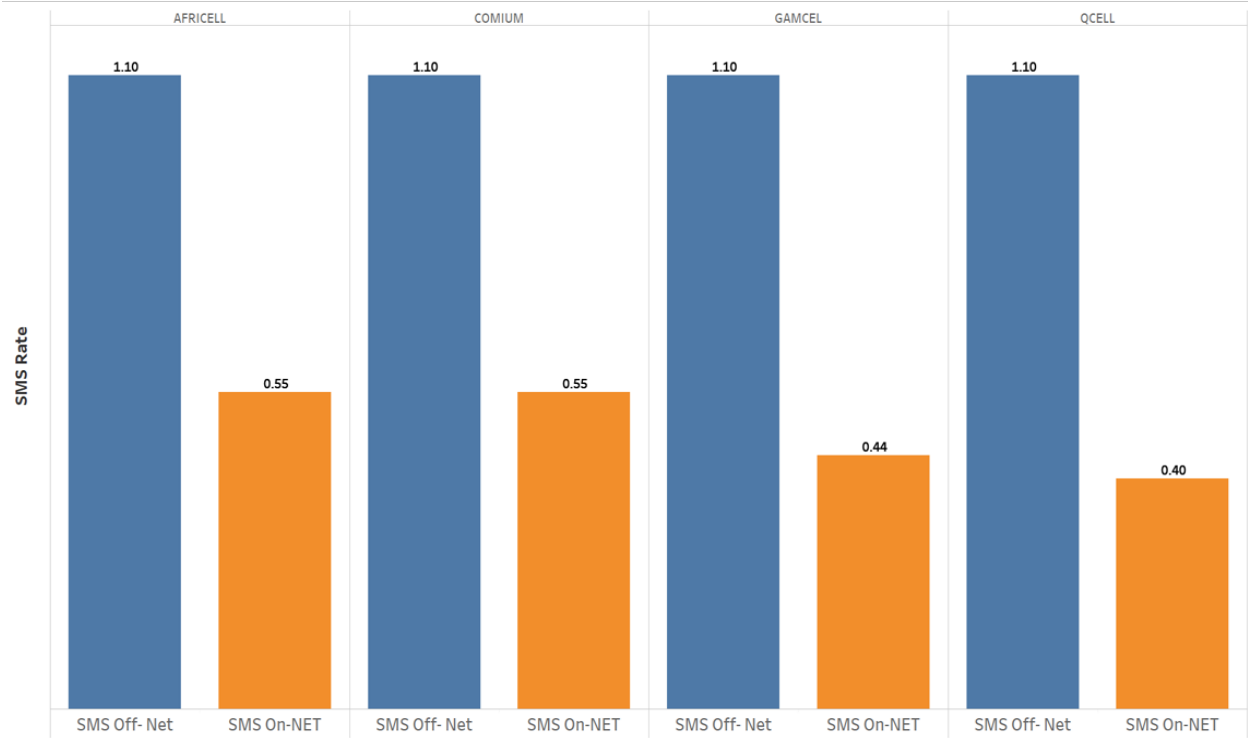


2.5 Tariffs

2.5.1 Short Message Service (SMS)

There is not much difference in tariffs for Short Message Service (SMS) charge by the Global System for Mobile communications (GSM) operators. For prepaid sms the average rate charge by all the GSM operators is GMD 1.1 per SMS for off-net (different network) SMS. However, for on-net (same network) SMS, QCELL charges a relatively smaller rate of GMD 0.40 per SMS than the other operators who charge GMD 0.44(GAMCEL) and GMD 0.55 by both AFRICELL and COMIUM.

Figure 5: Short Message Service Rates, 2013-2018



3. ICT access and use

3.1 ICT access by households

During the 2018 Gambia Multiple Indicator Survey (MICS), 7405 households were interviewed to assess the level of access to ICT infrastructure within households. The result shows that, 69.3 per cent of households have a radio, 52.6 per cent a TV. Results of the MICS 2018 also shows that 85.1 per cent of males aged 15-49 years own a mobile phone compared to 74.1 per cent of females. The data also shows that 98.4 per cent of households have a telephone (fixed line or mobile). About 19.0 per cent of the households have a computer and the proportion of the households who reported to have access to the internet by any device from home is 63.3 per cent.

4. Contribution of ICT sector to the economy

4.1 Employment

The telecommunication service providers employed 2,990 people in The Gambia in 2018, compared to 2,375 in 2017 reflecting a percentage increase of about 26.0 per cent. For 2018, GAMTEL was the highest employer of all the service providers in the industry with 1,156 employees, followed by Qcell and GAMCEL with 561 and 500 employees respectively. Africell and Comium each had 493 and 280 employees respectively.

4.2: ICT Contribution to Gross Domestic Product (GDP)

Gross Domestic Product is the market value of the final products of goods and services produced in an economy in a specific time period. Thus, it is the addition of value added of various sectors such as Agriculture, Manufacturing and other service sectors such as Education, Trade, Transport and ICT.

In The Gambia the ICT sector also plays a great role in economic activities, as of 2018, the sector generated a gross value added in current prices of about GMD2.5 billion which is slightly more than the value in 2017(GMD 2,3 billion).

The contribution of the ICT sector to GDP in 2018 is 3.4 per cent compared to 3.6 per cent in 2017.

5: Broadcasting Media

5.1: Television Stations

Initially, there was only one television station in the country, The Gambia Radio and Television Services (GRTS), which was established in 1995. In 2017, QTV was issued a license and began operation in the same year. In 2018, licenses were issued to 3 other television companies to operate as TV stations in the country – Paradise TV, MTV and Star TV (PURA, 2018).

5.2: FM Stations: Commercial and Community Radio Stations

There are two different types of radio stations in The Gambia i.e. commercial and community radio stations. The number of commercial radio stations decreased from 35 in 2017 to 34 in 2018.

There were 7 community radio stations in the country as at 2014. However, the number has increased to 8 as at 2015 and remains the same in 2017 and 2018.

6: Herfindahl-Hirschman Index – HHI

The Herfindahl-Hirschman Index (HHI) is a common measure of market concentration. It is a measure of the size of firms in relation to the industry and an indicator of the amount of competition among the operators.

According to the Horizontal Merger Guidelines, a market with an HHI above 2500 is considered highly concentrated.

The Herfindahl-Hirschman Index is 3114 in 2017 and 3383 in 2018, which indicates a highly concentrated market in the Telecommunication sector.

Table 1: HHI 2017-2018

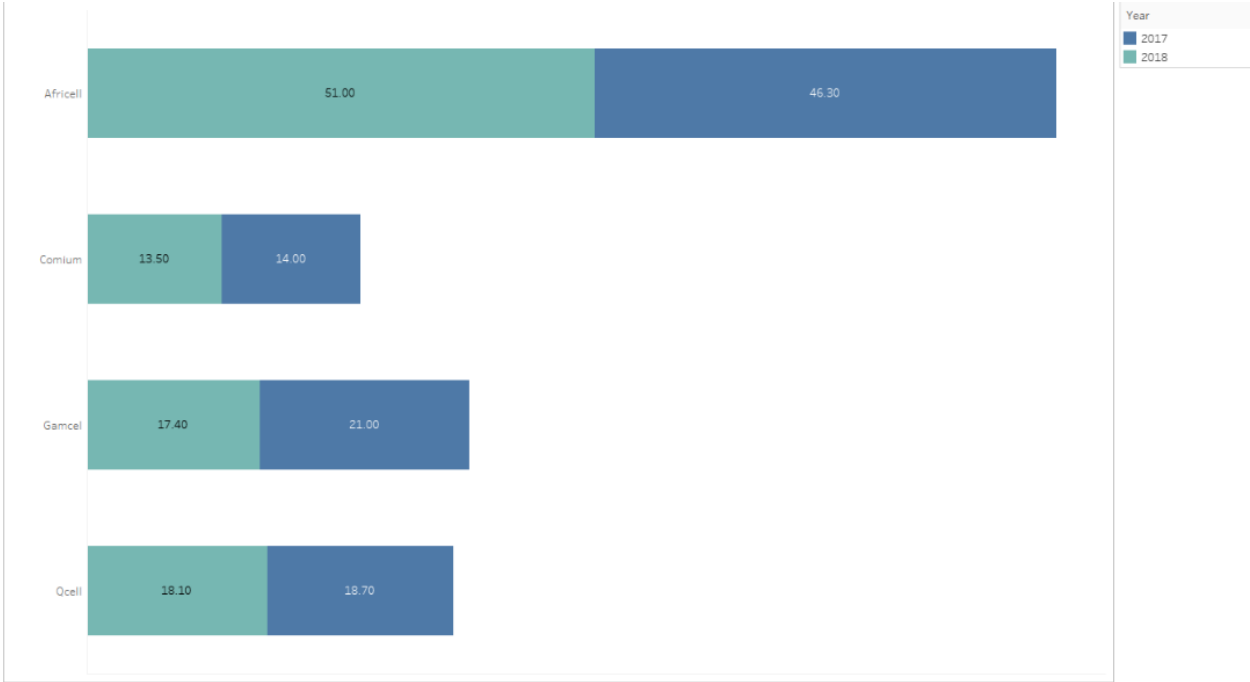
Operator	2017	2018
GAMCEL	441	289
AFRICELL	2116	2601
COMIUM	196	169
QCELL	361	324
TOTAL	3114	3383

7: Market Shares

The market shares were calculated using the number of subscribers of the GSM operators. In terms of ranking, in 2017, Africell continues to dominate with 46.3 per cent, followed by Gamcel with 21.0 per cent, Qcell with 18.7 per cent and Comium is the least market share holder with 14.0 per cent.

In 2018, Africell maintained its top position with 51.0 per cent an increase from 46.3 per cent in 2017. This is followed by Qcell with 18.1 per cent despite a slight decrease from 18.7 per cent in 2017 a position it took over from Gamcel in 2017. Gamcel accounted for 17.4 per cent registering a decrease from 21.0 per cent in 2017. Comium with the least market shares registered 14.0 per cent in 2017 with a slight decrease to 13.5 per cent in 2018.

Figure 6: Percentage Market Shares of the GSM Providers



Appendix

Table 1: Mobile Active Subscribers

Year	2013	2014	2015	2016	2017	2018
Mobile	1,986,490	2,548,680	2,630,247	2,898,971	3,220,038	3,181,393

Source: PURA, 2018

Table 2: Mobile Internet Subscribers

Year	2013	2014	2015	2016	2017	2018
Mobile Internet Subscribers	210,000	532,000	722,999	1,087,340	1,433,011	1,769,736

Source: PURA, 2018

Table 3: Local Call Traffic (Minutes)

Year	Incoming	Outgoing
2013	213,420,231	1,119,761,809
2014	235,421,783.5	1,159,408,006
2015	268,627,316.1	1,255,396,776
2016	284,350,667.3	123,9745,098
2017	274,851,957.4	1,302,354,351
2018	261,935,094.9	1, 334,258,301.9

Source: PURA, 2018

Table 4: International Call Traffic (Minutes)

Year	Incoming	Outgoing
2013	162,345,269	46,108,835.66
2014	145,599,883.6	42,747,390.61
2015	123,591,776	45,229,815.47
2016	102,103,266.6	48,996,998.16
2017	72,190,764.84	39,429,891.42
2018	29,278,804.04	31,269,320.06

Source: PURA, 2018

Table 5: SMS Rates

PREPAID	GAMCEL	AFRICELL	COMIUM	QCELL
On- Net Peak (same network)	2.8	2.2	3.3	2.3
Off-Net Peak (cross network)	3.25	3.3	3.3	2.9
On- Net (same network)	2.8	3	3.3	2.3
Off-Net (cross network)	3.25	3.3	3.3	2.9
Zone 1 (Senegal)	18.23	20.5	18.24	21
Zone 2 (US & Europe)	13.8	14.5	13	14
Zone 3 (Rest of The World)	16.8	16.5	15	15.3
SMS On-NET	0.44	0.55	0.55	0.4
SMS Off- Net	1.1	1.1	1.1	1.1
SMS Intl.	3.3	3	3.3	3.3

Source: PURA, 2018

Table 6: EMPLOYEES OF THE TELECOMMUNICATION SERVICE PROVIDERS

YEAR	GAMTEL	AFRICEL	GAMCEL	QCELL	COMUIM	TOTAL
2015	1,113	243	484	206	123	2,169
2016	1,100	295	484	250	133	2,262
2017	949	491	499	297	139	2,375
2018	1,156	493	500	561	280	2,990

Source: PURA, 2018

Table 7: Television Stations

No.	Name	Location
1.	GRTS	Kanifing
2.	QTV	Bijilo
3.	PTV	Pipeline
4.	MTV	Serre Kunda
5.	Star TV	Serre kunda

Source: PURA, 2018

Table 8: Commercial FM Radio stations

No	Name	Location	Frequency
1.	RFI	Abuko	89.0 MHz
2.	Light FM		89.6 MHz
3.	Senn FM	West Field	90.5 MHz
4.	Deegggo FM		91.5 MHz
5.	West Coast 2	Kotu	92.1 MHz
6.	City Limit	Kairaba Avenue	93.6 MHz
7.	West Coast 1	Kotu	95.3 MHz
8.	Sen FM	West Field	95.5 MHz
9.	Star FM	Ebo Town	96.6 MHz
10.	Taranga FM	Sinchu Alhagie	97.5 MHz
11.	GRTS FM	Mile 7	98.6 MHz
12.	DHK		99.5 MHz
13.	Capital FM	Kairaba Avenue	100.4 MHz
14.	Unique FM	Bakau New Town	100.7 MHz
15.	Janneh Koto FM	Gunjur	100.1 MHz
16.	Unique FM	Basse	101.7 MHz
17.	GRTS FM	GRTS Mile 7	102.6 MHz
18.	Radio 1 FM	Fajara Booster Station	102.1 MHz
19.	Kora FM	Kanifing South	103.9 MHz
20.	Hot FM	Bakau New Town	104.3 MHz
21.	Hill Top FM	Sukuta	104.7 MHz
22.	Paradise FM	Pipe Line near BSTS	105.7 MHz
23.	Paradise FM	Basse	105.8 MHz
24.	Paradise FM	Farafeni	105.5 MHz
25.	Vibes FM	Manjai	106.1 MHz
26.	Nexus	Sanchaba Junction Ba	106.4 MHz
27.	GRTS	Abuko	106.7 MHz
28.	AL FALAH FM	MDI Road kanifing	107.2 MHz
29.	Afri Radio	Kairaba Avenue	106.7 MHz
30.	Exit FM	Bakoteh	96.9 MHz
31.	Sahed Group FM	MDI Road, Kanifing	88.5 MHz
32.	Choice FM	Sanchaba Sullay Jobe	103.6 MHz
33.	SKY FM	Old Yundum	96.9 MHz
34.	Qradio	Qcity Bijilo	103.3 MHz

Source: PURA, 2018

Table 9: Community FM Radio stations

No.	Name	Location	Frequency
1.	Soma Community FM	Soma	88.8 MHz
2.	Bwiam Community FM	Bwiam	91.9 MHz
3.	Kerewan Community FM	Kerewan	100.5 MHz
4.	Bansang Community FM	Bansang	107.2 MHz
5.	Brikama Community FM	Brikamaba	96.8 MHz
6.	Brikama Community FM	Brikama	98.0 MHz
7.	Farafenni Community FM	Farafenni	99.9 MHz
8.	Kauranyning FM	Kuloro	107.9 MHz

Source: PURA, 2018

Table 20: HHI 2017-2018

Operator	2017	2018
GAMCEL	441	289
AFRICELL	2116	2601
COMIUM	196	169
QCELL	361	324
TOTAL	3114	3383

Source: PURA, 2018

Table 11: Percentage Market Shares of the GSM Providers

OPERATORS	2017	2018
GAMCEL	21.0	17.4
AFRICELL	46.3	51.0
COMIUM	14.0	13.5
QCELL	18.7	18.1
Grand Total	100.0	100.0