



UGANDA  
COMMUNICATIONS  
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# Market Performance Report 3Q FY 2023/24 (Jan - Mar 2024)





# Industry Snapshot March 2024



Telephone Subscriptions  
(Mobile)



Mobile Money Registered  
Subscriptions



\*Statistics from BOU



Domestic  
Mails



Mobile Internet Subscriptions  
(Active 90 Day)



Mobile Money Active  
Subscriptions (90 Day)



\*Statistics from BOU



East Africa  
Inbound Packages



On-Net Traffic (Minutes)



Mobile Money  
Transaction Counts (UGX)



\*Statistics from BOU



East Africa  
Outbound Packages



Off-Net Traffic (Minutes)



Smartphones



Express Mail  
Inbound (EMS)



Internet Traffic (GBs)



Towers



Express Mail  
Outbound (EMS)



ONA In Traffic (Minutes)



Fibre (Kilometres)



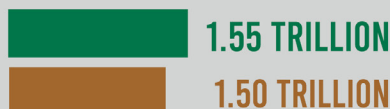
Rest of Africa  
Incoming Packages



ONA Out Traffic (Minutes)



Gross Telecom  
Revenue (UGX)



Rest of Africa  
Outgoing Packages



International In Traffic  
(Minutes)



International Out Traffic  
(Minutes)

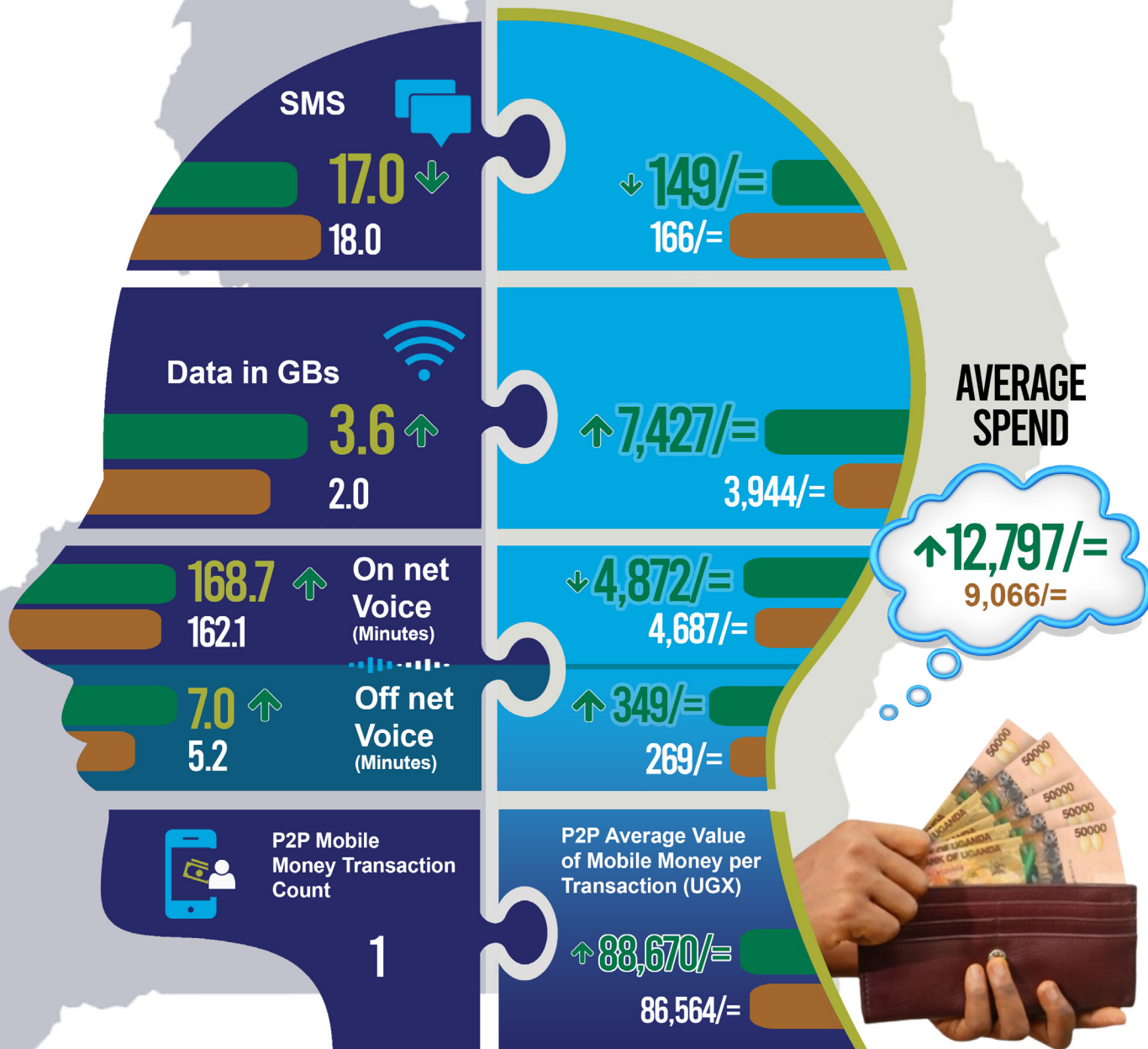


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# March 2024 Average User Profile

## Average Monthly Service Usage (Volumes)

## Monthly Service Usage Spend (UGX)



● 1Q24

● 4Q23



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- 1. The industry,*
- 2. Prospective entrants,*
- 3. Government,*
- 4. Academia and other stakeholders.*

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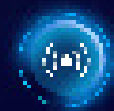
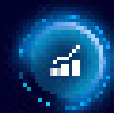
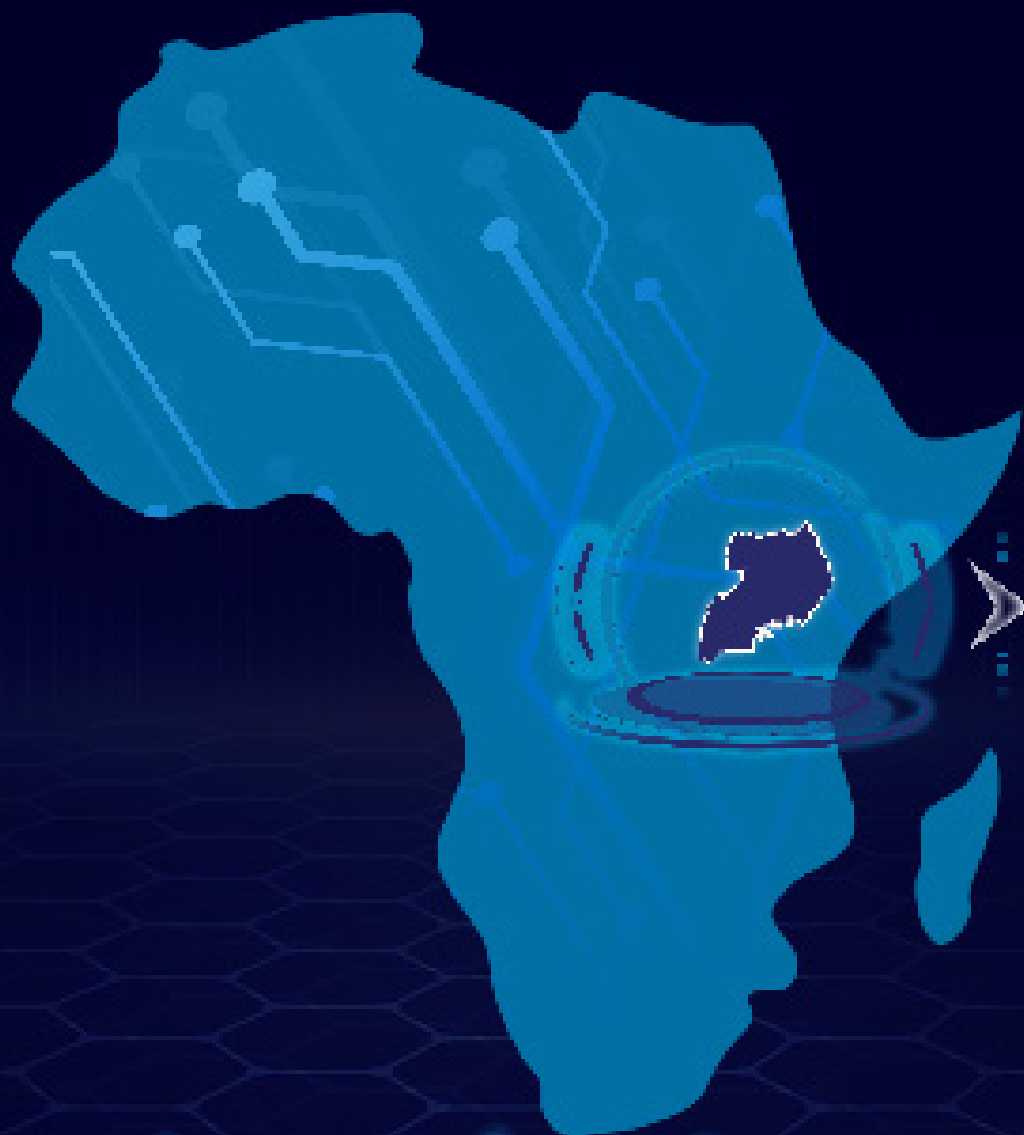


# Introduction

This is a review of the industry performance, trends and key developments for the third quarter of the 2023/24 Financial Year starting January to March 2024. The report covers:

1. Domestic Highlights
2. Service Access and Subscriptions
3. Traffic and Usage
4. Financial Performance
5. Post and Courier Sector
6. Broadcast and Multimedia

# Domestic Highlights





# Key Headlines (Jan - Mar 2024)



## January 15<sup>th</sup> - 20<sup>th</sup>, 2024

The 19th Non-Aligned Movement Summit took place in January 2024 in Kampala, Uganda. Approximately 90 out of 120 member states participated, including 30 heads of state.

During the 19th Summit of the Non-Aligned Movement (NAM) held in Kampala, Uganda, on January 19th, 2024, Uganda assumed the chairmanship. H.E President Yoweri Museveni received the office instruments from the Foreign Affairs Minister of Azerbaijan, representing President Ilham Aliyev, who had been the chair, and will lead NAM until 2027



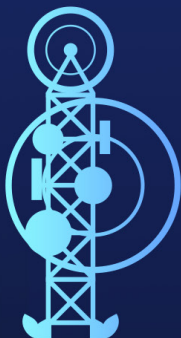
## 5<sup>th</sup> March 2024

MTN Uganda announces a 21.4% Growth in Profit after Tax to Shs 493 billion in the Financial Year ending December 2023.



## 7<sup>th</sup> March 2024

TowerCo of Africa Uganda, a telecommunications infrastructure company, secured \$40 million in long-term financing to improve mobile phone network coverage in rural areas across the East African nation.



# Service Access and Subscriptions





# 1<sup>st</sup> Quarter 2024 Subscriptions



**37.4 Million**

Active Mobile Subscriptions

**140.6 Thousand**

Fixed Line Subscriptions

## Devices and Terminals



**2.1 Million**  
Basic Phones



**25.4 Million**  
Feature Phones



**15.8 Million**  
Smart Phones

## Subscriptions



**42.5 Million**  
Mobile Money  
(Registered)

**16.1 Million**  
Mobile Internet

**60 Thousand**  
Fixed Internet

# Traffic and Usage



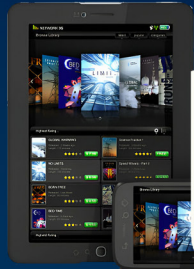


# 1<sup>st</sup> Quarter 2024 Traffic



**1.72  
Billion**

Mobile Money  
Transactions



**175.5  
Million**

GigaBytes (GBs)  
Downloaded



**14.2  
Billion**

USSD  
Sessions



**19.0  
Billion**

Domestic On  
Net Minutes



**775.7  
Million**

Domestic Off  
Net Minutes



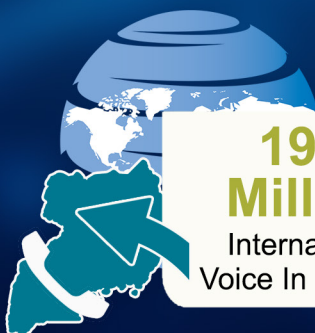
**314.1  
Million**

One Net Area  
(ONA) In Minutes



**34.5  
Million**

One Net Area  
(ONA) Out Minutes



**19.3  
Million**

International  
Voice In Minutes

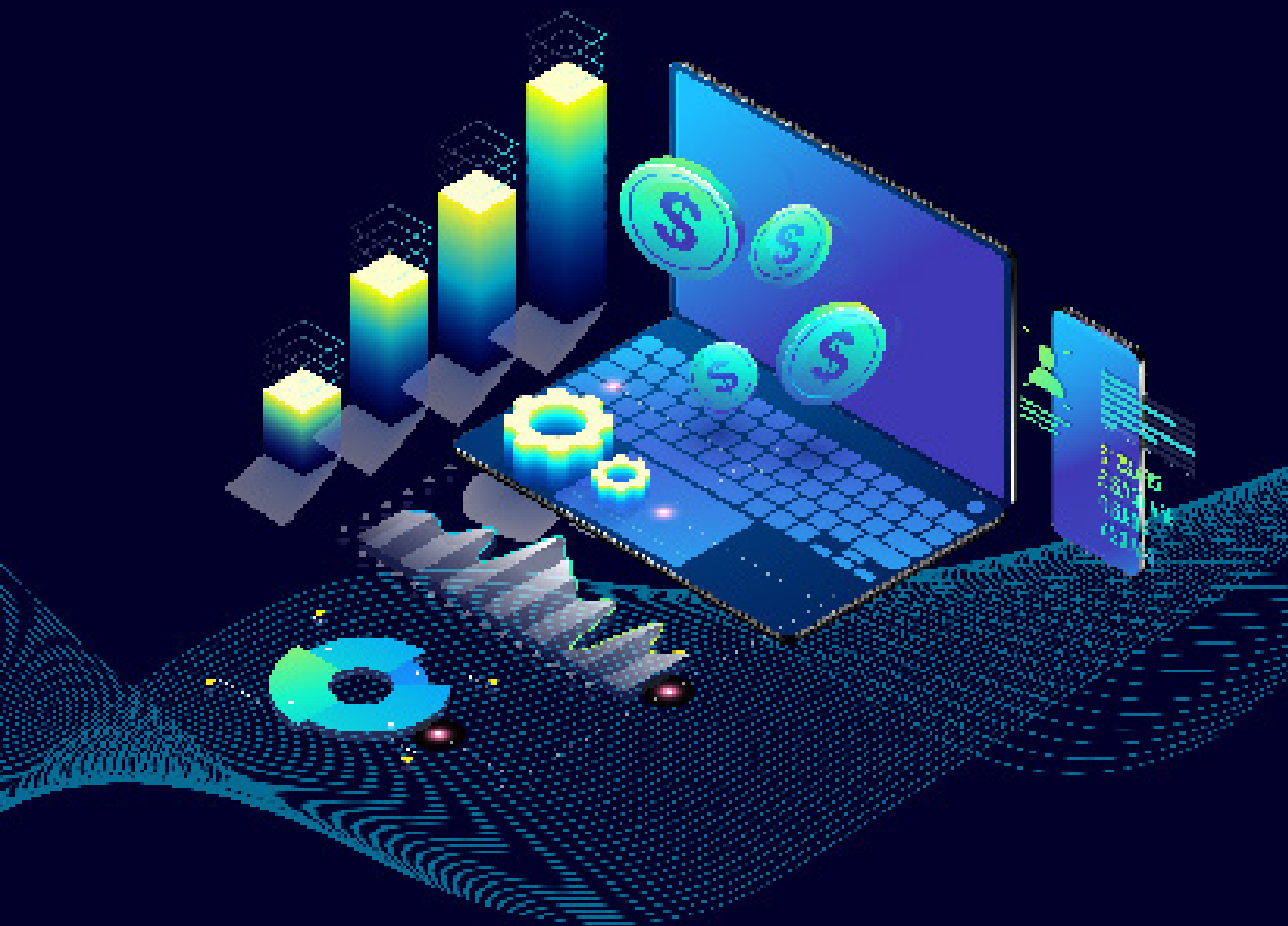


**7.7  
Million**

International  
Voice Out Minutes



# Financial Performance





# 1<sup>st</sup> Quarter 2024 Telecom Revenue



# Post and Courier Sector Highlights



# Post and Courier Overview

**2,592**

Express Mail Service  
(EMS) Outbound



**7,432**

East Africa  
Inbound



**1,980**

East Africa  
Outbound



**182,021**

Mails Delivered  
Country-wide



**2,752**

Express Mail Service  
(EMS) Inbound



**97,671**

Rest of the World  
Outbound

**130,145**

Rest of the World  
Inbound





# Broadcast and Multimedia



# Broadcasting Overview

## Country Mapping for The Pay-TV market in Uganda



**DStv**  
Satellite

Country  
Wide

**zuku**  
Satellite

Country  
Wide

**StarTimes**  
Satellite

Country  
Wide

**StarTimes**  
Satellite

Country  
Wide

**StarTimes**  
Terrestrial

Kampala, Wakiso,  
Mpigi, Masaka,  
Mbarara, Fortportal,  
Jinja, Mukono,  
Kalangala, Luweero,  
Gulu and Mbale

**GOtv**  
Terrestrial

Kampala, Jinja,  
Iganga, Mbale, Lira,  
Gulu, Arua, Kasese,  
Mbarara,  
Masaka and Wakiso

**Sun TV**  
Cable

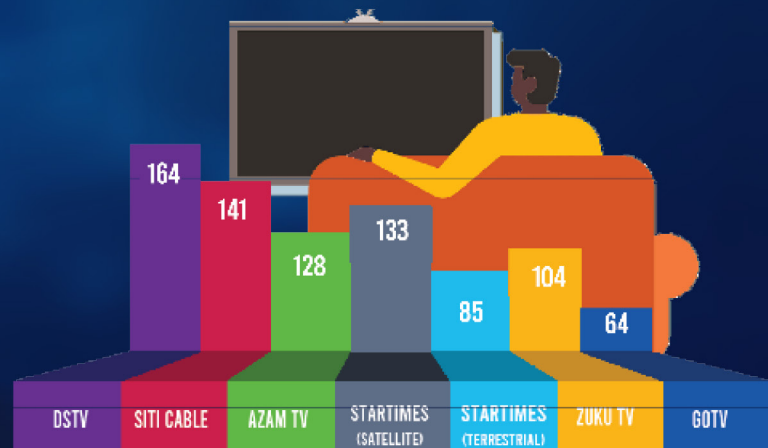
Kampala & Jinja

## PAY TV (MARCH 2024)

**1.47**  
Million  
Subscribers



## Channels Offered












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