EACO Regional Report 2024

Contents

Dr. Ally Yahaya Simba

EACO, Executive Director

Dear Esteemed Stakeholders,

It is with great pleasure that I present to you the 2024 Communications Statistics Report, which provides an overview of the state of communications across East Africa. This year has been marked by remarkable growth and transformation within the sector, driven by multiple factors that have reshaped the landscape of mobile and internet services in the region.

Key Growth Indicators:

Throughout 2024, we have observed a significant increase in mobile active subscriptions, mobile money subscriptions, mobile internet subscriptions, on-net and off-net voice traffic, mobile money transactions, and internet traffic measured in gigabytes (GBs). These metrics demonstrate a dynamic shift in how East Africans are interacting with GSM and Mobile Financial Services.

The most notable growth has occurred in the following areas:

1. Mobile Subscriptions: There has been a rise in active mobile subscriptions across all member states, from 199.7 million in 2023 to 226.7 million in 2024. This expansion is closely linked to the region's vibrant young population, which continues to drive the demand for mobile services. As mobile access becomes increasingly essential for daily life, it is no surprise that usage levels have climbed significantly.
2. Mobile Money Services: Mobile money subscriptions and transactions have experienced an increase in 2024. We have seen growth in active subscriptions from 129 million to 149 million active mobile money subscriptions. In transaction valuation terms, the East African market has grown to an $84 Million market as people utilize the mobile to remit across networks.
3. This growth reflects not only the widespread adoption of mobile money services but also the deepening integration of mobile money into various sectors of the economy. Industries such as agriculture, retail, and education are tapping into mobile money solutions to streamline financial transactions, demonstrating its immense value beyond traditional banking.
4. Mobile Internet: Internet subscriptions and traffic have also seen an upward trajectory. The rise in mobile internet subscriptions to 138 million active connections is largely attributed to the availability of affordable internet-enabled smartphones, increased mobile data bundles, and more competitive pricing strategies. The consumption of internet data has surged, with GB traffic hitting new highs as digital content consumption and e-commerce continue to gain momentum.
5. Voice Traffic: Both on-net and off-net voice traffic have experienced notable increases, driven by the affordability and accessibility of voice bundles across the region. The reduction in pricing for voice traffic, coupled with the availability of all-network voice bundles, has incentivized more people to communicate across networks without worrying about high costs.

Key Drivers of Growth include:

1. Young, Tech-Savvy Population: A rapidly growing, young, and tech-savvy population is at the heart of these developments. As East Africa's youth embrace digital technologies, they are reshaping consumption patterns across mobile, internet, and financial services. This demographic is actively driving demand for both mobile data and mobile money services.
2. Innovation in Products and Services: New product offerings, such as all-network voice bundles and affordable smartphones, have significantly contributed to the increase in subscriptions and usage. Consumers now have more flexible options for accessing both voice and data services, making communication and connectivity more inclusive and affordable.
3. Declining Voice Traffic Prices: Reductions in voice traffic pricing have played a key role in stimulating traffic growth. As network providers continue to reduce costs for both on-net and off-net calls, users are more inclined to make long-duration calls, leading to increased voice traffic volumes across all networks.
4. Mobile Money Service Adoption: The growth of mobile money services has become a defining feature of East Africa's digital transformation. Beyond person-to-person transfers, mobile money is now widely used for bill payments, international remittances, and even savings and insurance products. This adoption is expanding across different industries and has contributed to the financial inclusion of millions of people in previously underserved communities.
5. Competition and New Entrants: The competitive landscape, particularly in the fixed internet segment, has been invigorated by both existing players and new entrants like Starlink, who are providing alternative, high-speed internet access solutions. This has led to improved quality of service and innovative pricing, which benefits consumers and accelerates the uptake of broadband services.

The communications sector in East Africa continues to show remarkable growth, driven by technological advancements, evolving consumer needs, and a competitive market environment. The collaboration between regulators, telecom operators, and other stakeholders has played an instrumental role in this progress.

Looking ahead, we remain optimistic about the sector's future, with further innovations on the horizon and a continued focus on expanding connectivity, driving digital inclusion, and fostering a vibrant economy. We thank all our partners for their commitment and hard work, and we look forward to another year of growth and success in 2025.

Enjoy the reading.

Summary Statistics 2024

Access

Mobile Subscriptions (Count)

227M

13%

Mobile Internet Subscriptions(GBs)

138.1M

18%

Mobile Money Subscriptions (Count)

149.2M

16%

Mobile Money Agents (Count)

2.46M

20%

Traffic

Onnet Voice Traffic (Mins)

279.2B

11%

Offnet Voice Traffic (Mins)

115.5B

25%

Mobile Internet Traffic (GBs)

4.5B

ONA Traffic

ONA Incoming Voice Traffic (Mins)

1.95B

ONA Outgoing Voice Traffic(Mins)

1.23B

Mobile Money

P2P Transactions (Count)

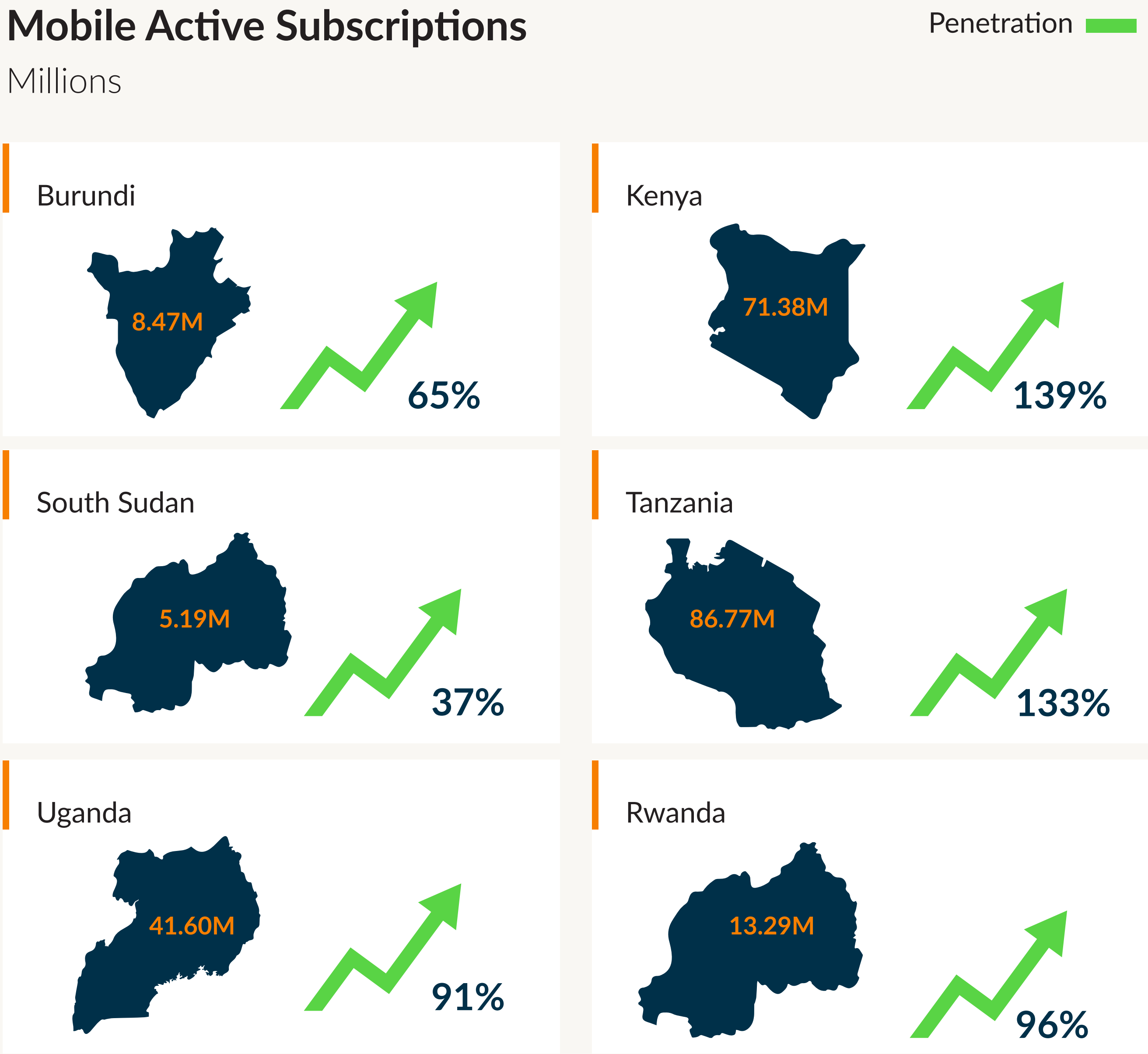
11.41B

P2P Transaction Values (USD)

83.90B

Mobile Active Subscriptions

Millions



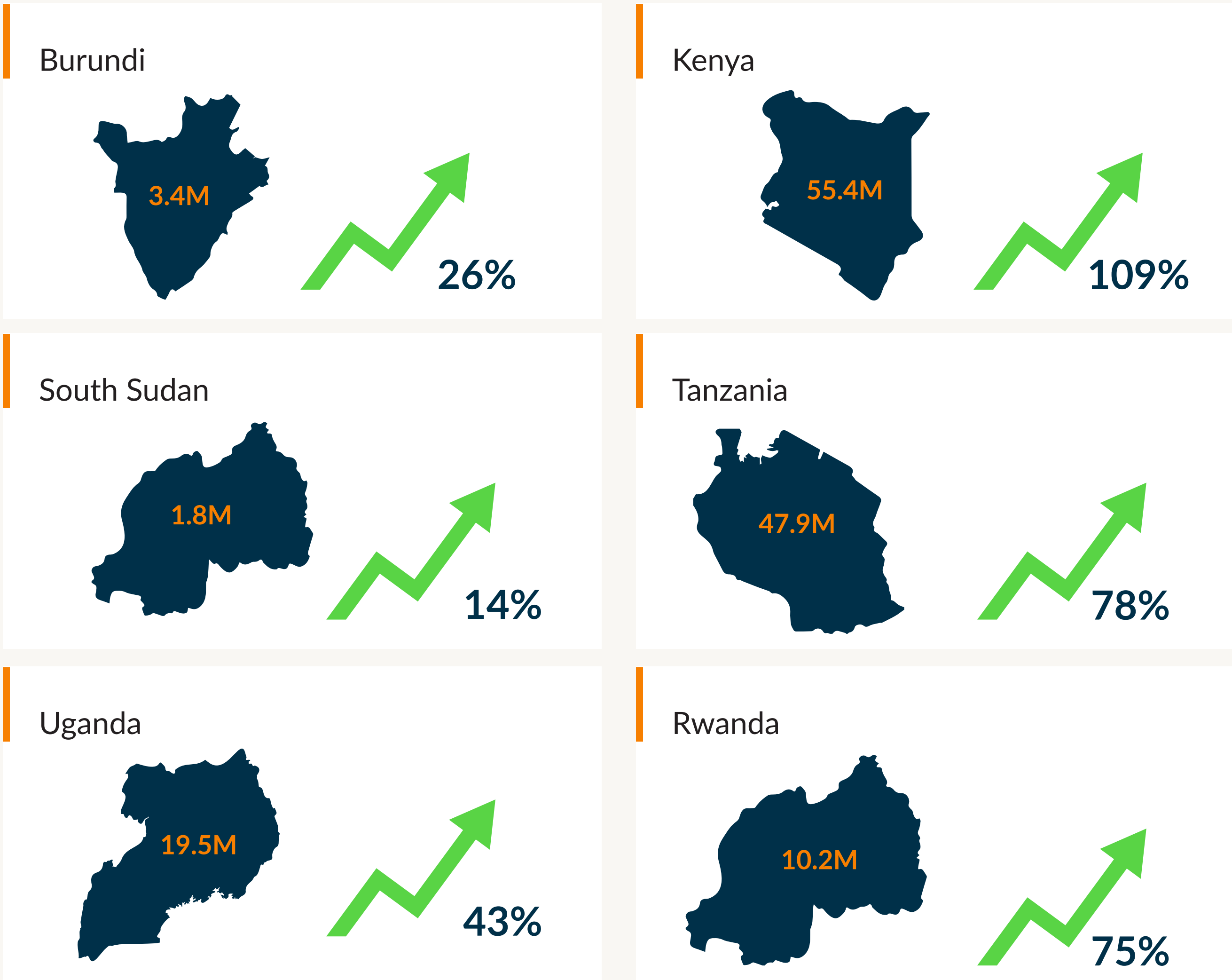
The East African Community (EAC) has established itself as a leader in mobile connectivity, demonstrating significant progress in digital adoption across its member states. From 2023 to 2024, the region's mobile active subscriptions grew by 13%, increasing from 199.7 million to 226.7 million. This expansion reflects the EAC's growing dependence on mobile technology as a foundation for communication, commerce, and digital innovation. The regional penetration rate rose from 86% in 2023 to 93% in 2024. This milestone highlights the EAC's critical role in advancing Africa's digital transformation, driven by rapid urbanization, improved infrastructure, and increased demand for mobile services.

Tanzania and Kenya emerged as the region's leaders in mobile connectivity. Tanzania achieved the highest penetration 114%, reaching 86.8 million in 2024. This substantial growth underscores the country's robust digital economy and widespread adoption of mobile services, particularly in urban areas. Kenya, meanwhile, maintained its position as the EAC's leader in penetration, recording a 139% rate in 2024, up from 129% the previous year. This rate, exceeding 100%, indicates prevalent use of multiple SIM cards per individual. Uganda also showed notable progress, with subscriptions rising by 12.7% to 41.6 million, resulting in a 91% penetration rate signalling sustained market growth. Rwanda, however, maintained consistent progress, with its penetration rate increasing from 94% to 96%.

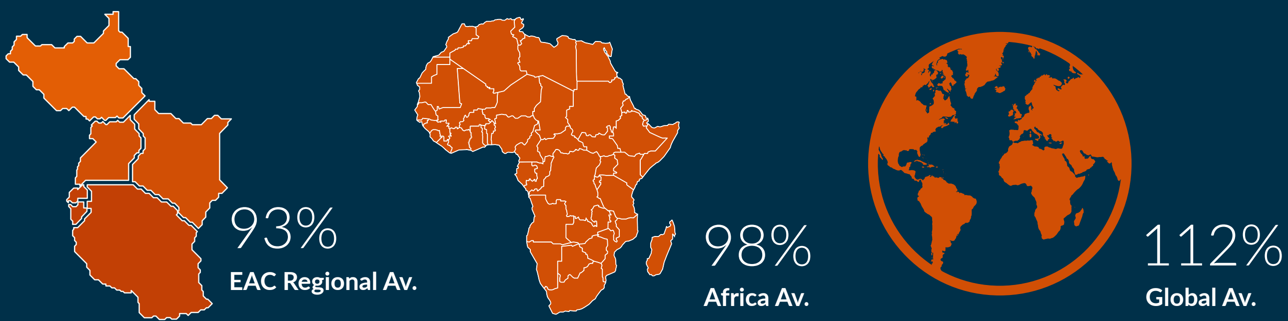
Mobile Internet Subscriptions

Millions

Penetration



Penetration



The East African Community (EAC) continues to demonstrate robust growth in mobile internet adoption, reinforcing its role as a leader in Africa's digital landscape. Between 2023 and 2024, mobile internet subscriptions across the EAC surged by 18%, rising from 116.7 million to 138.1 million. This expansion reflects the region's increasing reliance on mobile internet as a critical tool for communication, education, and economic activity. The EAC's internet penetration rate climbed from 44% in 2023 to 56% in 2024.

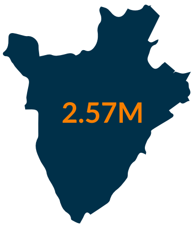
Kenya and Tanzania emerged as the region's frontrunners in mobile internet adoption. Kenya recorded an internet penetration rate of 107% in 2024, up from 101% in 2023, with subscriptions growing from 51.0 million to 55.4 million. This penetration rate, exceeding 100%, highlights the widespread use of multiple internet-enabled devices or connections per individual, reflecting Kenya's advanced digital ecosystem and urban connectivity. Tanzania's internet penetration grew with subscriptions soaring by 33.3% to 47.9 million. This remarkable growth underscores Tanzania's rapid digital transformation, particularly in urban centers and emerging rural markets.

Rwanda and Uganda also made significant strides in mobile internet adoption. Rwanda's subscriptions increased from 9.3 million to 10.2 million, raising its penetration rate from 68% to 75%. This growth reflects Rwanda's strategic focus on technology as a driver of economic development. Uganda saw subscriptions rise by 22.4% to 19.5 million. These gains highlight Uganda's expanding digital infrastructure and increasing access to mobile internet services.

Mobile Money Subscriptions and Agent Footprint

Millions

Burundi



Penetration

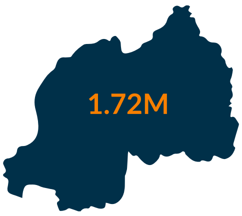
26%

Kenya

Penetration

82%

South Sudan



Penetration

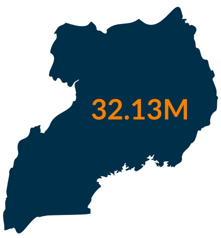
12%

Tanzania

Penetration

97%

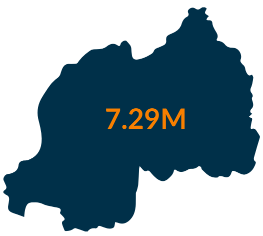
Uganda



Penetration

70%

Rwanda



Penetration

53%

From 2023 to 2024, mobile money subscriptions in the EAC surged by 16%, rising from 128.7 million to 149.2 million, reflecting the region's growing reliance on mobile financial services for transactions, savings, and economic empowerment. The mobile money penetration rate increased from 50% in 2023 to 56% in 2024,. This growth underscores the EAC's role as a pioneer in mobile money adoption, fueled by robust digital infrastructure, widespread mobile penetration, and innovative financial ecosystems.

Tanzania maintains its position with the highest number of mobile wallets with a penetration of 97%, followed by Kenya at 82% and Uganda at 70%. Tanzania's subscriptions grew by 20% from 52.9 million in 2023 to 63.2 million in 2024. This near-universal adoption highlights Tanzania's dynamic mobile money ecosystem, as well as multi e-wallets across different networks. Kenya, saw subscriptions rise by 11% from 38.0 million to 42.3 million, pushing its penetration rate from 75% to 82%.

Uganda also showed strong progress, with subscriptions rising by 17% from 27.5 million to 32.1 million, lifting its penetration rate from 60% to 70%. Rwanda's subscriptions grew by 7%, from 6.8 million to 7.3 million, increasing its penetration rate from 50% to 53%, reflecting steady advancements in digital economy. Burundi, while improving, recorded a penetration rate at 19% in 2024, up from 17%, with subscriptions rising by 13% to 2.6 million.

Agent Footprint

2024

Burundi

Agent to Customer Ratio 2024

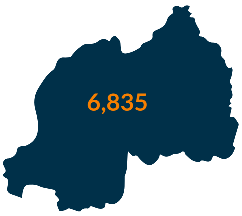
21

Kenya

Agent to Customer Ratio 2024

107

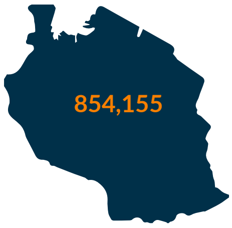
South Sudan



Agent to Customer Ratio 2024

251

Tanzania



Agent to Customer Ratio 2024

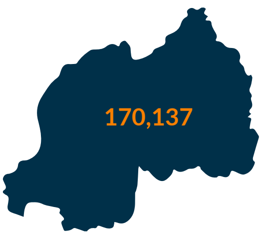
74

Uganda

Agent to Customer Ratio 2024

35

Rwanda



Agent to Customer Ratio 2024

43

Fixed Internet Subscriptions

Country	2024	2023	Growth
Burundi	2,869	2,785	3%
Kenya	1,718,679	1,308,959	31%
Rwanda	84,919	62,175	37%
Tanzania	168,955	69,963	141%
Uganda	106,797	44,422	140%

The fixed internet landscape in the East African region has experienced notable growth between 2023 and 2024, with varying drivers shaping the expansion in different countries.

Uganda recorded one of the highest growth rates in the region, with a 140% increase in fixed internet subscriptions—from 44,422 in 2023 to 106,797 in 2024. This rapid growth is primarily driven by the entry of new players in the Fiber-to-the-Home (FTTH) and Fixed Wireless Access (FWA) segments. The momentum has been fueled by new spectrum awards in 2023, which created a more competitive environment and opened up opportunities for infrastructure deployment and service expansion.

In Kenya and South Sudan, the fixed internet markets are being disrupted by the entry of Starlink, which has introduced satellite broadband services. In Kenya, fixed subscriptions rose by 31%, from 1,308,959 to 1,718,679, signaling strong market responsiveness to this new form of connectivity. Although South Sudan's specific figures aren't provided here, the trend aligns with reports of Starlink's market entry reshaping broadband access, especially in areas previously underserved by terrestrial infrastructure.

Tanzania, Rwanda, and Burundi have shown more organic or seasonal growth, reflecting steady improvements in infrastructure and gradual subscriber uptake. Tanzania saw the largest numerical and percentage increase in this group, growing by 141% from 69,963 to 168,955. Rwanda's growth was also strong at 37%, increasing from 62,175 to 84,919, while Burundi saw a modest yet consistent rise of 3%, from 2,785 to 2,869 subscribers.

Domestic Voice Traffic

Onnet Voice Traffic in Billion Mins

Mins Per Customer 2024

Country	Onnet Voice Traffic (Billion Mins)	Mins Per Customer 2024	Growth
Burundi	1.93	228.00	29%
Kenya	88.17	1,235.25	15%
South Sudan	4.89	1,251.66	27%
Tanzania	81.92	955.21	5%
Uganda	76.34	1,835.36	9%
Rwanda	26.03	1,959.10	13%

Onnet Voice traffic largely grew across member states. South Sudan and Burundi recorded the most significant increases in on-net voice traffic. South Sudan saw a 27% growth, with traffic rising from 3.8 billion minutes in 2023 to 4.8 billion minutes in 2024. Burundi also demonstrated strong growth, with a 29% increase in voice traffic from 1.5 billion to 1.9 billion minutes.

Kenya and Rwanda exhibited steady growth in voice traffic. Kenya, with the region's highest mobile penetration at 139%, saw a 15% increase in traffic, from 76.5 billion to 88.2 billion minutes. This growth reflects Kenya's mature market, where high penetration supports consistent voice usage across a large subscriber base. Rwanda's traffic grew by 13%, from 23.0 billion to 26.0 billion minutes.

Tanzania's traffic increased by 5%, from 77.8 billion to 81.9 billion minutes. Uganda recorded a 9% increase in traffic, from 70.1 billion to 76.3 billion minutes.

Offnet Traffic in Billion Mins

Mins per Subscriber 2024

Burundi

56%

1.9B

19.31

Kenya

27%

15.49B

217.03

South Sudan

13%

0.35B

155.76

Tanzania

14%

76.22B

888.73

Uganda

165%

3.91B

93.96

Rwanda

72%

19.40B

1,459.76

The off-net voice traffic segment experienced growth across member states, driven primarily by reductions in mobile termination rates in countries such as Uganda and the introduction of new products like cross-network voice bundles. Consequently, all member states recorded year-on-year positive growth in offnet traffic.

Burundi experienced a 23% surge, with traffic rising from 0.13 billion minutes in 2023 to 1.93 billion minutes in 2024. This translated into a consumer usage of 19 minutes of offnet calls per active customers in 2024.

Rwanda and Uganda also demonstrated substantial growth in off-net voice traffic. Rwanda's traffic increased by 72%, from 11.3 billion to 19.4 billion minutes, with traffic per customer rising by 65%, from 884.50 to 1,459.76 minutes. Uganda recorded a 165% increase in traffic, from 1.5 billion to 3.9 billion minutes, with traffic per customer surging by 135%, from 40.01 to 93.96 minutes. This growth, supported by Uganda's 91% mobile penetration, indicates a growing reliance on off-net calls, largely driven by the Mobile Termination Rate reduction in September 2024 and cross-network voice bundles.

Kenya's traffic rose by 27%, from 12.2 billion to 15.5 billion minutes, with a 19% increase in traffic per customer from 182.70 to 217.03 minutes. As the EAC's leader in mobile penetration at 139%, Kenya's steady growth reflects its mature market, where cross-network communication is well-established. Tanzania, saw a 14% increase in traffic, from 67.1 billion to 76.2 billion minutes, but experienced a 7% decline in traffic per customer, from 955.79 to 888.73 minutes.

Mobile Internet Traffic (Million GBs)

Country	Data Traffic 2024 (Million GBs)	Data per Mobile Customer (GBs)	Data per Month (GBs)
BURUNDI	61.90	18.2	1.5
KENYA	1,917.20	34.6	2.9
RWANDA	308.30	30.2	2.5
SOUTH SUDAN	60.00	21.3	1.8
TANZANIA	1,363.82	28.5	2.4
UGANDA	815.88	41.8	3.5

In 2024, total mobile internet traffic across the EAC reached approximately 4.5 million Gigabytes (GBs), reflecting the region's growing reliance on mobile data for communication, commerce, and access to digital services. Variations in data traffic per customer across member states highlight diverse usage patterns, driven by differences in infrastructure, market maturity, and digital adoption.

Kenya and Tanzania, as the EAC's leading digital markets, accounted for the largest shares of mobile internet traffic in 2024. Kenya recorded 1.92 Billion GBs of data traffic, driven by its 55.4 million mobile internet customers, resulting in an average of 34.62 gigabytes per customer annually, or 2.89 gigabytes per month. This high usage reflects Kenya's 107% internet penetration and mature digital ecosystem, where data supports a wide range of activities, from mobile banking to streaming services. Tanzania followed closely with 1.36 Billion GBs of traffic across 47.9 million customers, yielding 28.50 gigabytes per customer annually, or 2.37 gigabytes per month. Tanzania's 74% internet penetration and rapid subscription growth underscore its increasing data consumption, particularly in urban centers.

Uganda and Rwanda also demonstrated significant mobile internet engagement. Uganda led the region in per-customer data usage, with 41.78 gigabytes annually, or 3.48 gigabytes per month, across 19.5 million customers, generating 815.8 Million GBs. This high per-customer usage suggests intensive data consumption among connected users, driven by growing access to affordable smartphones and content streaming platforms like TikTok. Rwanda recorded 308.3 Million GBs of traffic across 10.2 million customers, averaging 30.20 gigabytes per customer annually, or 2.52 gigabytes per month.

South Sudan and Burundi showed notable per-customer usage. South Sudan generated 59 Million GBs of traffic across 2.8 million customers, averaging 21.25 gigabytes per customer annually, or 1.77 gigabytes per month. Burundi recorded 61.9 Million GBs across 3.5 million customers, with 17.35 gigabytes per customer annually, or 1.45 gigabytes per month.

ONA Incoming Voice Traffic (Million Mins)

Burundi

89.64

Kenya

387.69

South Sudan

194.40

Uganda

1,103.16

Rwanda

76.14

Tanzania

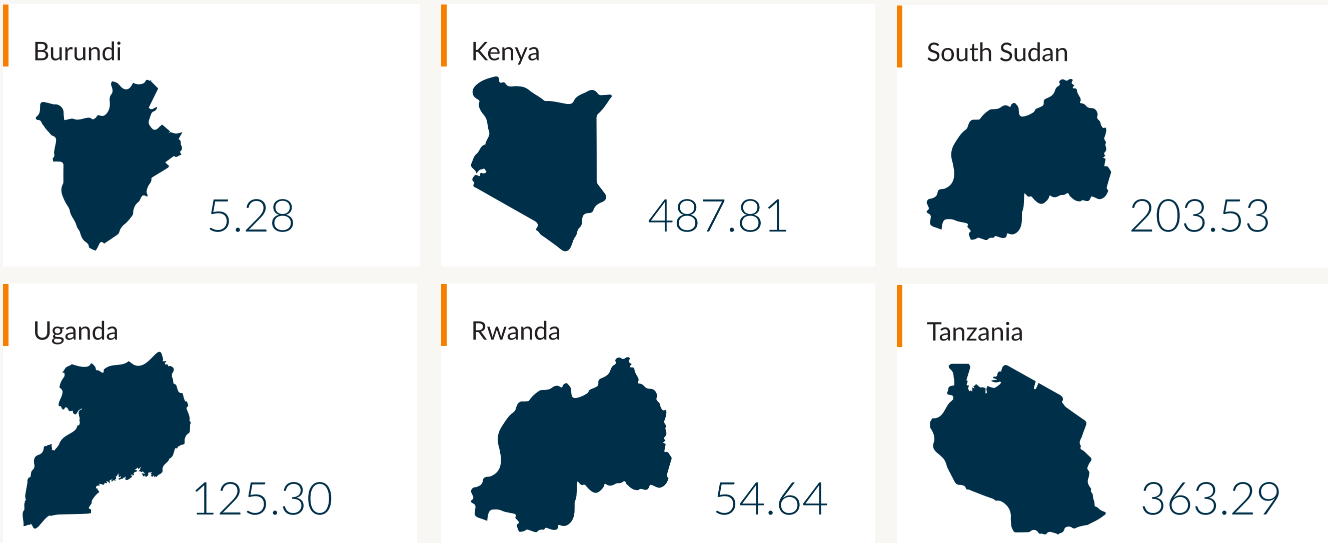
108.50

As of 2024, the One Network Area (ONA) Framework in the East African Community (EAC) represents an integrated initiative aimed at harmonizing the telecommunications landscape across member states to promote regional connectivity, reduce cross-border tariffs, and foster economic growth. The EAC member states, under the guidance of the East African Communications Organization (EACO), have continued to build on the One Network Area concept, primarily focusing on simplifying and reducing the cost of mobile communication services, especially for cross-border voice traffic.

Within the EACO region, member states are primarily net importers of East African voice traffic, making voice services a key driver of the ONA Framework. As more operators across member states onboard new countries into the ONA, voice traffic continues to grow.

Uganda led the region in incoming voice traffic. Uganda recorded 1.10 billion minutes, the highest total in the EAC, followed by Kenya at 387.7 million minutes. Burundi and Rwanda exhibited moderate ONA incoming voice traffic. Burundi recorded 89.6 million minutes while Rwanda generated 76.1 million minutes. Tanzania recorded 108.5 million minutes.

ONA Outgoing Voice Traffic (Million Mins)

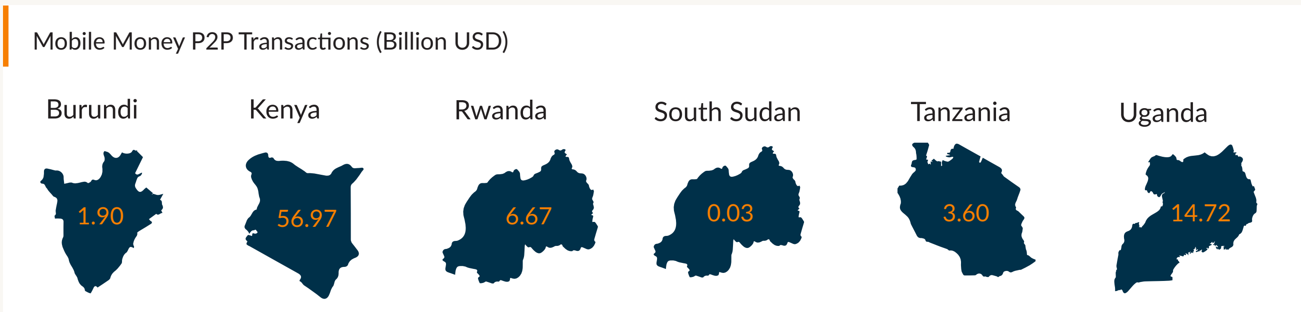


ONA Outgoing traffic is largely driven by travellers and business people across the member states, but is also threatened by Over-the-Top (OTT) Messaging platforms such as WhatsApp. South Sudan recorded 203.5 million minutes while Kenya recorded 487.8 million minutes.

Similarly, Tanzania and Rwanda exhibited steady ONA outgoing traffic. Tanzania, recorded 363.3 million minutes, while Rwanda generated 54.6 million minutes. Uganda logged 125.3 million minutes while Burundi recorded 5.3 million minutes across its networks.

Person to Person Mobile Money Transactions

Value of Person to Person Mobile Money Transactions



Mobile money has quickly become a cornerstone of financial inclusion in East Africa, especially for peer-to-peer (P2P) transactions. Over the years, the region has seen substantial growth in the value of mobile money transactions, although each country demonstrates distinct trends in transaction volumes and average transaction values.

Kenya stood out as the leader in mobile money P2P transactions, with a total annual transaction value of $56.97 billion. This translates into an average transaction value of $1,347 per customer in 2024. The success of platforms like M-Pesa has played a pivotal role in establishing Kenya as the dominant force in mobile money, with the service deeply embedded in the daily financial activities of individuals and businesses alike.

Uganda followed closely, with $14.72 billion in total annual P2P mobile money transactions, averaging $458 per customer per year. This strong performance reflects the increasing adoption of mobile money in Uganda, where it serves as an essential tool for both personal and business transactions.

Burundi recorded $1.90 billion in annual P2P transaction value, with an average of $740 per customer per year. In Rwanda, the total value of mobile money P2P transactions reached $6.67 billion, with each customer transacting an average of $914 annually. Tanzania on the other hand recorded $3.60 billion in P2P mobile money transactions, with an average transaction value of $57 per customer per year.

Number of Mobile Money Person to Person Transactions

Country	P2P Transactions (Number)	Transactions Per Customer
Burundi	44,915,804	17
Kenya	9,746,870,177	230
Rwanda	743,669,160	102
Tanzania	256,619,338	4
Uganda	624,043,963	19
South Sudan	3,041,579	1

In 2024, mobile peer-to-peer (P2P) transactions continued to play a vital role in the financial systems of East African countries, driving financial inclusion and facilitating easy access to money across the region. The volume and frequency of these transactions vary widely across member states, reflecting differences in market maturity, mobile money penetration, and customer engagement.

Kenya lead the region, with 9.75 billion domestic P2P transactions conducted by 42.3 million customers, resulting in an average of 230 transactions per customer. This highlights Kenya's advanced mobile money infrastructure, largely driven by the popularity of M-Pesa and its widespread adoption for daily financial activities, ranging from small remittances to business transactions.

Uganda followed with 624 million domestic P2P transactions and 32.1 million customers, averaging 19 transactions per customer. This indicates strong engagement with mobile money services, though on a smaller scale compared to Kenya. Rwanda totalled 743 million domestic P2P transactions, serving 7.3 million customers. With an average of 102 transactions per customer. In Burundi, there were 44.9 million domestic P2P transactions conducted by 2.57 million customers, averaging 17 transactions per customer.

Tanzania saw 256.6 million P2P transactions conducted by 63.2 million customers, but with a lower average of 4 transactions per customer. This indicates that while mobile money is widely used in Tanzania, the frequency of transactions per individual is lower, suggesting less frequent engagement or more irregular usage for specific purposes, such as remittances. South Sudan saw 3.04 million transactions conducted by 3.55 million customers, averaging 1 transaction per customer.