Tanzania Communications Regulatory Authority

Communications Statistics Report

Quarter ending June 2025

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Version 1.0

About this report

This report presents the communication statistics for the fourth quarter of the financial year 2024/2025. The report provides statistics on telecommunication and internet, broadcasting, postal and courier services.

The statistics reported are in line with the International Telecommunications Union (ITU) standards for collecting and reporting administrative/supply-side data on telecommunications/ICT services.

Table of Contents

Communication Statistics Snapshot

Telecommunication subscriptions

92.7 M

136%

79%

Penetration rate

Internet subscriptions

54.1 M

Local voice traffic

43.3 B

Incoming international voice traffic

39.8 M

Internet usage

633 PB

Active decoders subscription

2.0M

17.6K

Cable TV subscription

Broadband population coverage

3G **93%**

4G **92%**

5G **26%**

Smartphone

37%

Penetration rate

25 M

559,529 Posted items **61,602**

954,732 Delivered items **76,784**

Chapter 01

Telecommunications and Internet Services

1. Telecommunications and Internet Services

This chapter provides status on subscriptions, traffic, tariffs, user devices, Quality of Services, mobile money, fraudulent attempts, telecom towers, radio base station distribution, domain names and licensees on a monthly and quarterly basis.

1.1. Telecom subscriptions

A count of all active SIM cards and fixed lines that have registered activity or have been used at least once in the past three months.

The total number of subscriptions increased by 2.6% from 90.4 million during the quarter ending March 2025 to 92.7 million subscriptions as of June 2025.

As of March 2025

90.4 Million

As of June 2025

92.7 Million

2.6%

Table 1.1 shows the total number of mobile and fixed subscriptions for the quarter ending June 2025.

Table 1.1 Mobile (P2P & M2M) and fixed subscriptions

Month	Mobile subscriptions	Fixed subscriptions	TOTAL
April	89,145,691	78,719	89,224,410
May	90,650,353	79,774	90,730,127
June	92,656,179	79,619	92,735,798

SIM card subscriptions are categorized for Person to Person (P2P) and for Machine to Machine (M2M) .

1.1.1 P2P subscriptions

Figure 1.1.1 P2P subscriptions

As of June 2025

91.7 Million

89.3 Million

2.6%

As of March 2025

SIM card subscriptions for P2P communication has increased by 2.3 million in the quarter ending June 2025

SIM card subscriptions for P2P per operator in the quarter ending June 2025 are shown in Table 1.1.1.

Table 1.1.1 Number of P2P subscriptions per operator

Month	Airtel	Halotel	Yas	TTCL	Vodacom	TOTAL
April	20,322,140	13,669,464	24,646,337	1,643,019	27,882,187	**88,163,147**
May	20,288,906	14,071,466	25,526,729	1,661,697	28,108,722	**89,657,520**
June	20,437,692	14,363,854	25,987,528	1,682,212	29,181,157	**91,652,443**

1.1.2 M2M subscriptions

Figure 1.1.2 M2M subscriptions

SIM card subscriptions for M2M has increased by 33,078 in the quarter ending June 2025

As of June 2025

1.08 Million 3.1%

1.05 Million

As of March 2025

Table 1.1.2 shows SIM cards subscribed for M2M communications per operator for the quarter ending June 2025.

Table 1.1.2 Number of M2M subscriptions per operator

Month	Airtel	Halotel	Yas	TTCL	Vodacom	TOTAL
April	346,113	77,687	58,409	4,510	574,544	1,061,263
May	348,872	77,487	60,541	4,504	581,203	1,072,607
June	350,749	78,687	61,370	4,501	588,048	1,083,355

1.1.3 Subscriptions per Operator

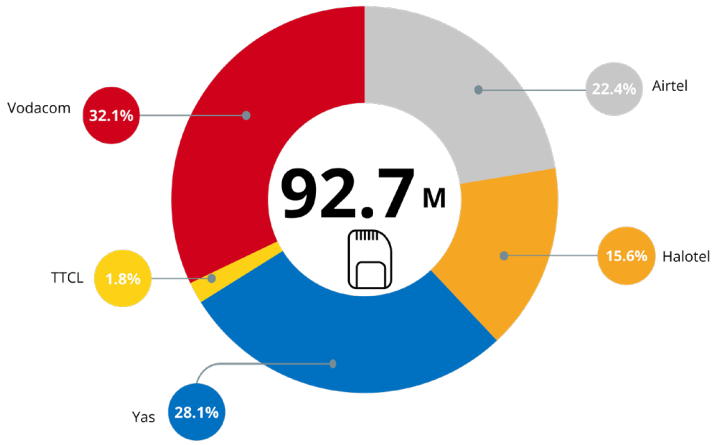
The subscriptions per operator for the quarter ending June 2025 is presented in the table 1.1.3

Table 1.1.3 Subscriptions per Operator

Month	Airtel	Halotel	Yas	TTCL	Vodacom	TOTAL
April	20,668,253	13,747,151	24,704,746	1,647,529	28,456,731	89,224,410
May	20,637,778	14,148,953	25,587,270	1,666,201	28,689,925	90,730,127
June	20,788,441	14,442,541	26,048,898	1,686,713	29,769,205	92,735,798

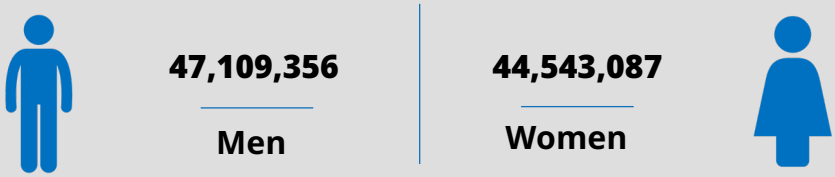
Vodacom had the larger market share of 32.1% followed by Yas 28.1% and Airtel 22.4% as shown in Chart 1.1.3.

Chart 1.1.3 Market share per Operator



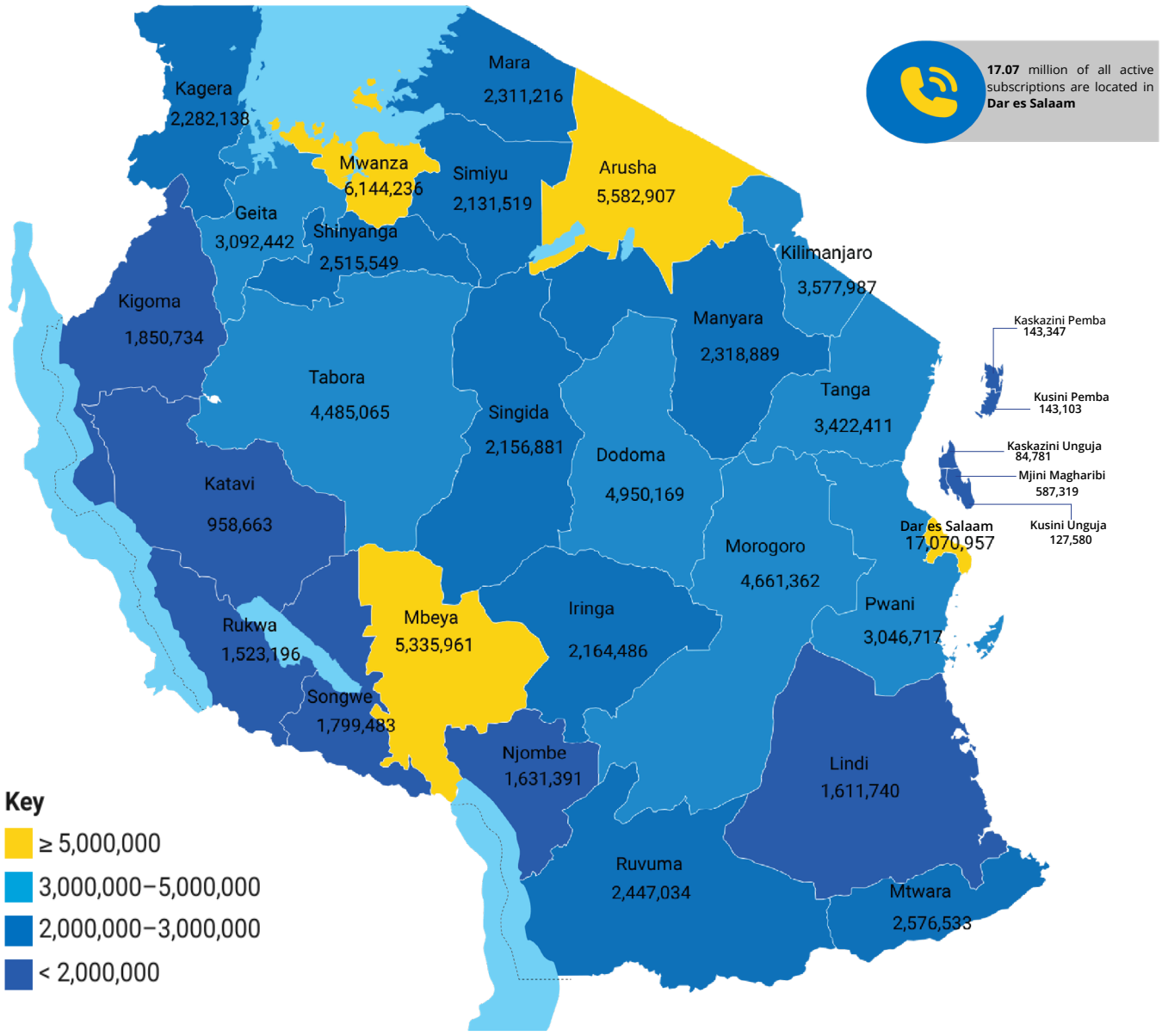
1.1.4 Telecom services subscriptions by gender and region

Figure 1.1.4 Telecom services (P2P) subscriptions by gender



During the quarter under review, Dar es Salaam ranked first by having 17.07 million of all active subscriptions, Mwanza ranked second with 6.14 million subscriptions, Arusha ranked third with 5.58 million subscriptions, Mbeya ranked fourth with 5.34 million subscriptions, and Dodoma ranked fifth by having 4.95 million of all active subscriptions. The distribution of telecom subscriptions per region is depicted in map 1.1.4.

Map 1.1.4 Telecom services subscriptions by region



1.1.5 Trend of telecom subscriptions

The quarterly and annual trends of telecom subscriptions is as shown in Table 1.1.5a and 1.1.5b.

Table 1.1.5a Quarterly trend of telecom subscriptions

	September 2024	December 2024	March 2025	June 2025
Mobile Subscriptions	80,583,993	86,769,161	90,298,941	92,656,179
Fixed Subscriptions	78,048	78,299	79,054	79,619
Total Subscriptions	**80,662,041**	**86,847,460**	**90,377,995**	**92,735,798**
PENETRATION	**124.0%**	**133.5%**	**132.6%**	**136.1%**

Table 1.1.5b Trend of telecom subscriptions for the past five years

	2020	2021	2022	2023	2024
Mobile Subscriptions	51,220,233	54,044,384	60,192,331	70,215,144	86,769,161
Fixed Subscriptions	72,469	71,834	84,696	75,732	78,299
Total Subscriptions	**51,292,702**	**54,118,218**	**60,277,027**	**70,290,876**	**86,847,460**
PENETRATION	**81.0%**	**88.0%**	**98.0%**	**111.0%**	**133.5%**

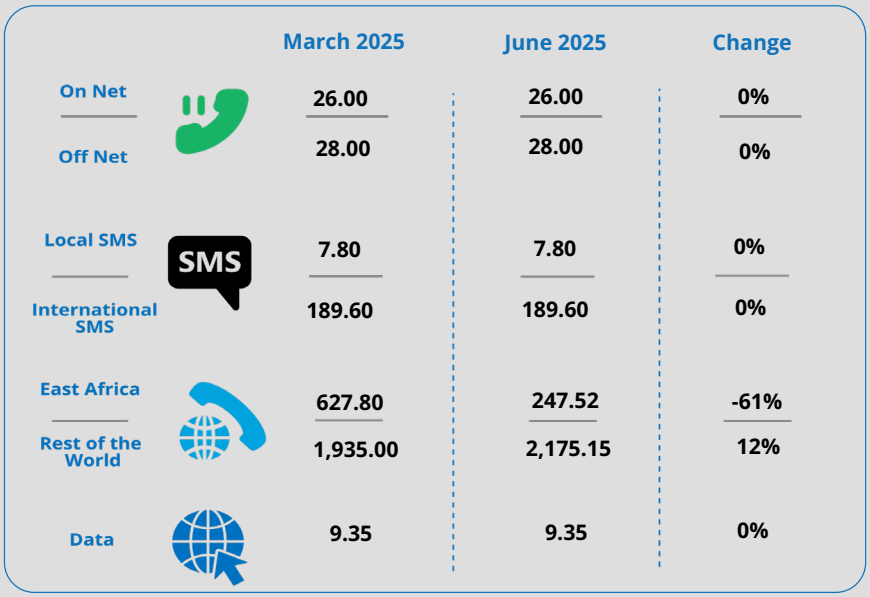
1.2 Telecommunication tariffs

This section presents average basic and bundle tariffs (Tax inclusive) for voice per minute, SMS and data services per MB, for local, East Africa (EA) and Rest of the World (RoW).

1.2.1 Basic tariff (Pay as You Go)

Basic tariffs are the prices charged for voice per minute, SMS and data per MB services without subscribing to a bundle. They are also known as Pay as You Go or standard tariffs.

Figure 1.2.1 Basic tariff (Pay as You Go) change



As shown in the summary above, while on-net, off-net, data, and local and international SMS tariffs remained unchanged, there was a decrease in EA voice tariffs by 61% and an increase in RoW voice tariffs by 12%. The EA voice tariffs for quarter ending June 2025 are EAC harmonised roaming framework.

1.2.1.1 Voice tariffs (in TZS)

The voice tariffs for the quarter ending June 2025 for local and international services per operator are shown in Table 1.2.1.1. These are one-minute voice charges when a consumer makes a local or international call without subscribing to a bundle.

Table 1.2.1.1 Local, EA and RoW voice tariffs (in TZS) per operator

Operator	On-net	Off-net	EA	RoW
Airtel	30.00	30.00	260.00	2,050.00
Halotel	10.00	20.00	250.00	1,424.44
Yas	30.00	30.00	260.00	1,846.67
TTCL	30.00	30.00	217.60	2,871.33
Vodacom	30.00	30 .00	250.00	2,383.33
Industry Average	**26.00**	**28.00**	**247.52**	**2,175.15**

Table 1.2.1.1 shows no difference in charges when calling within and outside the network. All operators charged TZS 30 per minute, except Halotel who charged TZS 10 (on-net) and TZS 20 (off-net) per minute.

The industry average for local voice tariff in the quarter ending June 2025 remained the same at TZS 26 and TZS 28 per minute for on-net and off-net respectively, as in quarter ending March 2025.

Table 1.2.1.1 further shows that RoW voice tariffs differ across networks, unlike local tariffs with the exception of Halotel. The industry average rate for voice tariff per minute EA and RoW are TZS 247.50 and 2,175.15 respectively.

1.2.1.2 SMS and data tariffs (in TZS)

The Pay as You Go tariffs (Tax inclusive) for SMS and data as of June 2025 are shown in Table 1.2.1.2.

Table 1.2.1.2 SMS and Data tariffs (in TZS)

Operator	Local SMS	International SMS	Data (in TZS per MB)
Airtel	8.00	215.00	9.35
Halotel	5.00	95.00	9.35
Yas	8.00	215.00	9.35
TTCL	10.00	138.06	9.35
Vodacom	8.00	285.00	9.35
Industry Average	**7.80**	**189.60**	**9.35**

The industry average tariffs for the local SMS (TZS 7.80), data (TZS 9.35) and international SMS (TZS 189.60) for June 2025 have remained the same as in the quarter ending March 2025.

1.2.2 Disaggregated Bundle tariffs (in TZS)

The disaggregated bundle tariffs per unit prices (Tax inclusive) of voice per minute, SMS and data (MB) for consumers subscribed to bundled telecommunication services are shown in Table 1.2.2a.

Table 1.2.2a Disaggregated bundle tariffs (in TZS)

Period	On-net	Off-net	SMS	Data
June 2025	4.80	5.96	1.52	2.12
March 2025	4.80	6.07	1.55	2.12
	0.00%	**-1.92%**	**-2.06%**	**0.00%**

The above summary indicates that unit bundle tariffs have changed at different rates for the quarter ending June 2025 compared to the quarter ending March 2025 as shown in Table 1.2.2a.

The tariffs for the quarter ending June 2025 per operator is as shown in Table 1.2.2b.

Table 1.2.2b Disaggregated bundle tariffs (in TZS) per operator

Operator	On-Net	Off-Net	SMS	Data
Airtel	4.39	7.62	1.68	2.05
Halotel	3.02	4.76	1.00	2.16
Yas	5.40	4.80	0.80	2.05
TTCL	6.80	6.80	2.07	2.08
Vodacom	4.39	5.80	2.07	2.28
Industry average	**4.80**	**5.96**	**1.52**	**2.12**

1.2.3 Industry average tariffs (in TZS)

The industry average basic and bundle tariffs for telecommunications services for the quarter ending June 2025 are shown in Table 1.2.3.

Table 1.2.3 Industry average for basic and bundle tariffs (in TZS)

	On-Net	Off-Net	SMS	Data
Average basic tariff	26.00	28.00	7.80	9.35
Average bundle tariff	4.80	5.96	1.52	2.12

It is shown that average tariffs for all Pay as You Go services are significantly higher compared to bundle services, hence attracting majority of users (99.9%) to subscribe to bundle services.

1.2.4 Trend of industry average basic tariffs (in TZS)

The quarterly and annual trend of domestic and international industry average basic tariffs for voice calls are shown in Table 1.2.4a, 1.2.4b, 1.2.4c, 1.2.4d, 1.2.4e, 1.2.4f, 1.2.4g and 1.2.4h.

Table 1.2.4a Quarterly trend of average basic local tariffs per minute in TZS

	September 2024	December 2024	March 2025	June 2025
On-net	26.00	26.00	26.00	26.00
Off-net	28.00	28.00	28.00	28.00

Table 1.2.4b Trend of average basic local tariffs per minute in TZS over the past five years

	2020	2021	2022	2023	2024
On-net	57.00	34.00	32.00	29.00	26.00
Off-net	57.00	34.00	32.00	30.00	28.00

Table 1.2.4c Quarterly trend of average basic international tariffs (in TZS) per minute

	September 2024	December 2024	March 2025	June 2025
EA	696.68	597.40	627.80	247.52
RoW	1,948.22	2,016.70	1,935.00	2,175.15

Table 1.2.4d Trend of average basic international tariffs (in TZS) per minute over the past five years

	2020	2021	2022	2023	2024
EA	830.00	966.00	1,103.00	1,171.00	684.00
RoW	1,379.00	1,564.00	1,817.00	1,776.00	2,055.00

Table 1.2.4e Quarterly trend of average basic local and international SMS tariffs in TZS

	September 2024	December 2024	March 2025	June 2025
Local SMS	7.80	7.80	7.80	7.80
International SMS	189.60	189.60	189.60	189.60

Table 1.2.4f Trend of average basic local and international SMS tariffs in TZS over the past five years

	2020	2021	2022	2023	2024
Local SMS	20.00	13.00	11.00	11.00	7.80
International SMS	176.00	172.00	193.00	200.00	189.60

Table 1.2.4g Quarterly trend of average bundle tariffs in TZS

	September 2024	December 2024	March 2025	June 2025
On-net	4.75	4.79	4.80	4.80
Off-net	6.34	6.27	6.07	5.96
SMS	1.47	1.57	1.55	1.52
Data	2.17	2.16	2.12	2.12

Table 1.2.4h Trend of average bundle tariffs in TZS over the past five years

	2020	2021	2022	2023	2024
On-net	9.38	7.84	7.27	4.90	4.68
Off-net	11.21	8.69	7.78	6.30	6.22
SMS	3.45	3.35	2.69	1.37	1.46
Data	1.73	1.61	1.86	2.14	2.17

1.3 Telecommunication traffic

This section presents local and international telecom traffic volume for voice and SMS.

1.3.1 Voice traffic

1.3.1.1 Local voice traffic (in minutes)

The local on-net and off-net voice traffic for the quarter ending March 2025 and June 2025 are summarised below.

As of March 2025

40.6 Billion

As of June 2025

43.3 Billion

6.6%

The summary above shows an increase of 6.6% of voice traffic

Figure 1.3.1.1 Local voice traffic in minutes

	Quarter ending March 2025	Quarter ending June 2025	Change (%)
On Net	20.2 Billion	21.5 Billion	6.3%
Off Net	20.4 Billion	21.8 Billion	6.9%

Table 1.3.1.1a shows that around 43.3 billion minutes were spent in the quarter ending June 2025 compared to 40.6 billion minutes spent in the quarter ending March 2025. The month of June had the highest traffic compared to other months of the quarter. The quarterly trend of local voice traffic in minutes is also shown in Table 1.3.1.1b and 1.3.1.1c.

Table 1.3.1.1a On-net and off-net voice traffic (in minutes)

	April	May	June	Total
On-net	6,857,484,028	7,192,651,662	7,442,821,262	21,492,956,952
Off-net	6,882,436,627	7,364,253,101	7,512,515,634	21,759,205,362
Total	**13,739,920,655**	**14,556,904,763**	**14,955,336,896**	**43,252,162,314**

The traffic minutes share per operator for on-net and off-net traffic calls shown in Chart 1.3.1.1a and Chart 1.3.1.1b indicate that more on-net and off-net traffic were generated in the Airtel network (35.1% and 28.4%, respectively).

Chart 1.3.1.1a Shares of on-net traffic by operator

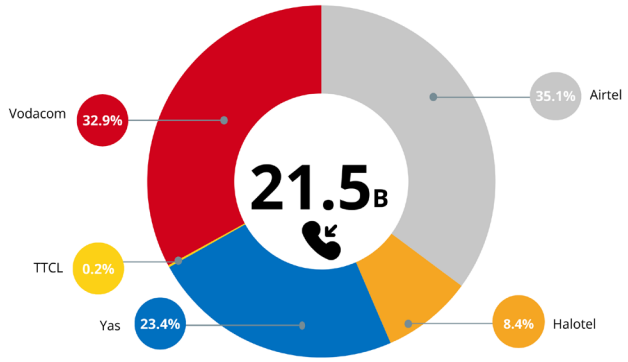


Chart 1.3.1.1b Shares of off-net traffic by operator

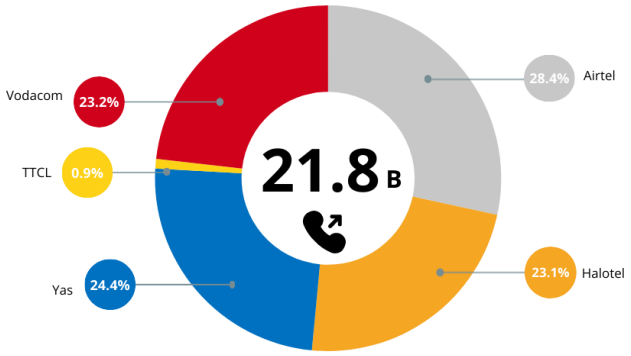


Table 1.3.1.1b Quarterly trend of local voice traffic in minutes

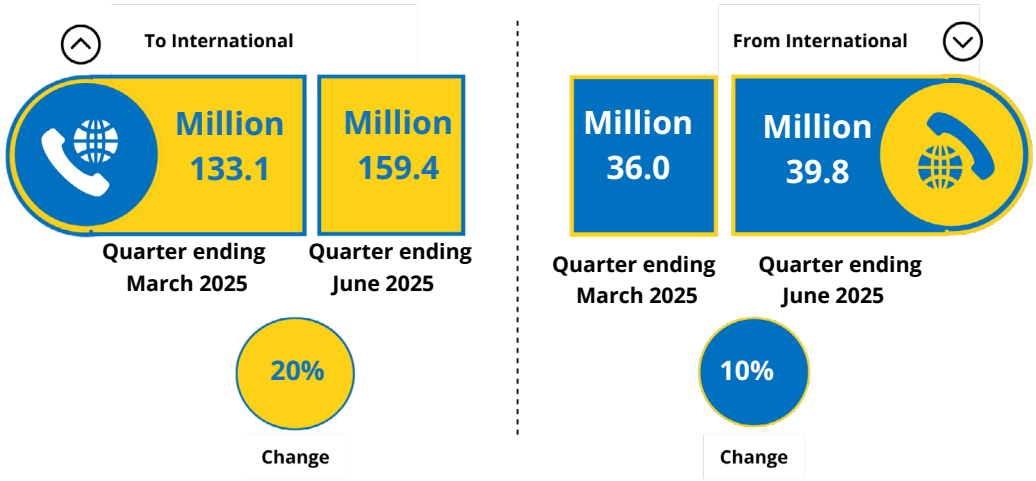
	September 2024	December 2024	March 2025	June 2025
On-net traffic	21,088,541,912	20,990,181,336	20,223,164,062	21,492,956,952
Off-net traffic	20,033,335,066	21,487,957,832	20,345,309,688	21,759,205,362
Total	**41,121,876,978**	**42,478,139,168**	**40,568,473,750**	**43,252,162,314**

Table 1.3.1.1c Trend of local voice traffic in minutes for the past five years

	2020	2021	2022	2023	2024
On-net Traffic	54,561,254,851	51,673,651,476	62,678,814,642	77,770,241,513	81,916,822,649
Off-net Traffic	27,084,539,242	43,194,917,029	60,064,367,493	67,100,445,506	76,215,903,038
Total	**81,645,794,093**	**94,868,568,505**	**122,743,182,135**	**144,870,687,019**	**158,132,725,687**

1.3.1.2 International voice traffic

The voice traffic in minutes to/from international are summarised below.



The summary shows an increase in traffic minutes to and from international in this quarter by 20% and 10% respectively. The results further show that subscribers terminated more calls to international than received from international in this quarter.

Total traffic to/from East Africa (EA), Southern African Development Community (SADC) and Rest of the World (RoW) for the quarter ending June 2025 is summarized in Table 1.3.1.2a. The trend of internal voice traffic is also shown in table 1.3.1.2b and 1.3.1.2c

Table 1.3.1.2a Total traffic (in minutes) to/from East Africa (EA), Southern African Development Community (SADC) and Rest of the World (RoW) for the quarter ending June 2025

	April	May	June	Total
To East Africa	50,126,613	53,913,461	52,873,867	**156,913,941**
From East Africa	11,082,820	11,676,979	12,001,259	**34,761,058**
To SADC	94,527	119,174	96,905	**310,606**
From SADC	208,727	377,331	249,592	**835,650**
To the Rest of the World	735,574	727,968	761,322	**2,224,864**
From the Rest of the World	1,289,112	1,475,819	1,390,204	**4,155,135**

Share of voice traffic in minutes to/from EA, SADC and RoW are shown in Chart 1.3.1.2a, 1.3.1.2b and 1.3.1.2c

Chart 1.3.1.2a Share of voice traffic in minutes to/from EA

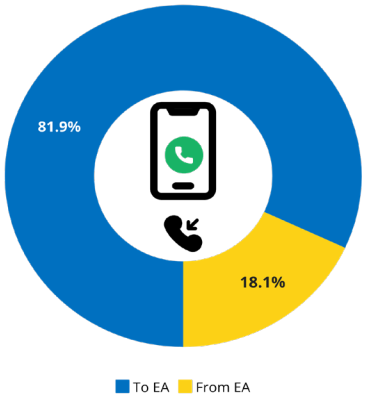


Chart 1.3.1.2b Share of voice traffic in minutes to/from SADC

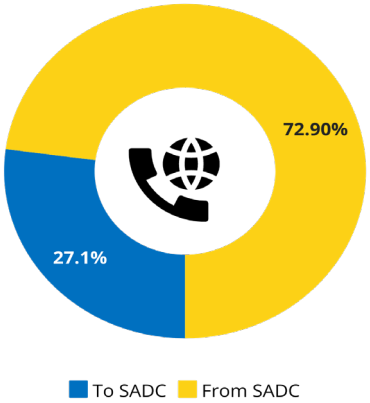


Chart 1.3.1.2C Share of voice traffic in minutes to/from RoW

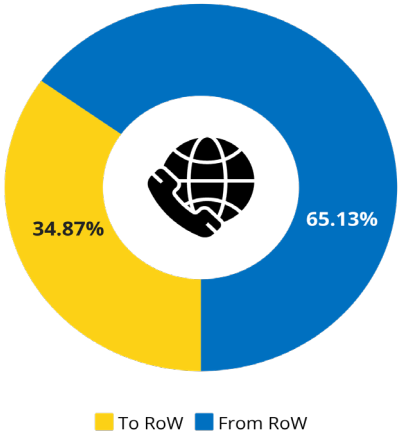


Table 1.3.1.2b Quarterly trend of EA, SADC and RoW voice traffic in minutes

	September 2024	December 2024	March 2025	June 2025
To EA	101,188,767	124,483,791	129,398,936	156,913,941
From EA	26,794,839	30,688,068	31,009,232	34,761,058
To SADC	385,614	328,305	281,939	310,606
From SADC	760,089	754,317	591,422	835,650
To RoW	10,900,864	5,276,392	3,715,324	2,224,864
From RoW	6,032,139	6,642,832	5,023,166	4,155,135

Table 1.3.1.2c Annual trend of EA and RoW voice traffic in minutes

	2020	2021	2022	2023	2024
To EA	9,738,521	9,097,165	8,927,113	95,473,684	363,293,881
From EA	15,406,649	15,853,362	13,594,473	34,994,641	108,663,455
To RoW	38,014,133	24,856,947	26,034,131	9,510,999	36,294,294
From RoW	45,172,263	49,885,142	33,374,619	23,681,940	24,858,074

1.3.2 SMS traffic

1.3.2.1 Local SMS traffic

The summary shows an increase in SMS traffic by 6% as shown below.

As of March 2025
50.0 Billion

As of June 2025
52.8 Billion

6%

Quarter	Onnet SMS	Offnet SMS	Total
June 2025	22.3 Billion	30.5 Billion	52.8 Billion
March 2025	21.1 Bilion	28.9 Bilion	50.0 Bilion
Change	**6%**	**5%**	**6%**

Table 1.3.2.1a shows local SMS traffic for the quarter ending June 2025 . The table further shows that the month of June experienced the highest traffic compared to April and May.

Table 1.3.2.1a Local SMS traffic

	April	May	June	Total
On-Net SMS	7,424,445,399	7,323,523,648	7,553,431,197	**22,301,400,244**
Off-Net SMS	10,101,481,970	10,019,896,806	10,394,691,630	**30,516,070,406**
Total	**17,525,927,369**	**17,343,420,454**	**17,948,122,827**	**52,817,470,650**

The quarterly and annual trend of local SMS is as shown in Table 1.3.2.1b and 1.3.2.1c.

Table 1.3.2.1b Quarterly trend of local SMS traffic

	September 2024	December 2024	March 2025	June 2025
On-net SMS traffic	20,222,806,831	22,246,288,233	21,081,683,531	22,301,400,244
Off-net SMS traffic	27,374,852,630	30,644,175,708	28,937,308,450	30,516,070,406
Total	**47,597,659,461**	**52,890,463,941**	**50,018,991,981**	**52,817,470,650**

Table 1.3.2.1c The trend of local SMS traffic in the past five years

	2020	2021	2022	2023	2024
On-net SMS	61,971,569,487	58,875,779,663	65,358,270,089	84,818,793,761	84,909,556,665
Off-net SMS	71,072,186,913	78,200,512,436	88,154,239,625	121,727,776,013	116,828,465,147
Total	**133,043,756,400**	**137,076,292,099**	**153,512,509,714**	**206,546,569,774**	**201,738,021,812**

1.3.2.2 International SMS traffic

The summary of EAC, SADC and RoW SMS traffic for the quarter ending June 2025 is shown in Table 1.3.2.2a.

Table 1.3.2.2a SMS traffic to/from EA, SADC and RoW

	April	May	June	Total
To EA	143,467	141,812	142,475	**427,754**
From EA	3,770,431	3,166,427	3,558,822	**10,495,680**
To SADC	27,534	27,724	30,585	**85,843**
From SADC	321,912	312,054	318,459	**952,425**
To the Rest of the World	343,349	366,089	418,854	**1,128,292**
From the Rest of the World	694,589,237	757,065,392	666,663,720	**2,118,318,349**

It is shown in Table 1.3.2.2a that more SMS were received than sent to RoW, also more SMS were received from EA than sent to EA. The proportions of SMS sent and received to/from EA, SADC and RoW are shown in Chart 1.3.2.2a, 1.3.2.2b and 1.3.2.2c.

Chart 1.3.2.2a Percentage share of SMS traffic to/from EA

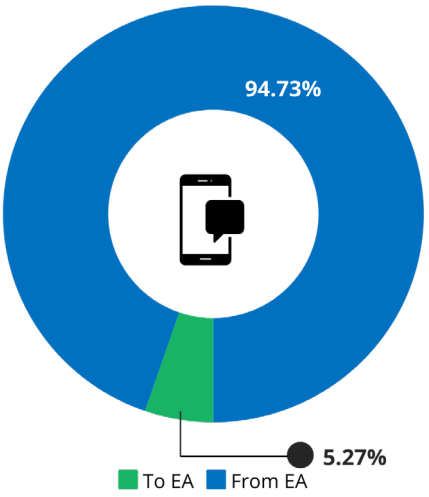


Chart 1.3.2.2b Percentage share of SMS traffic to/from SADC

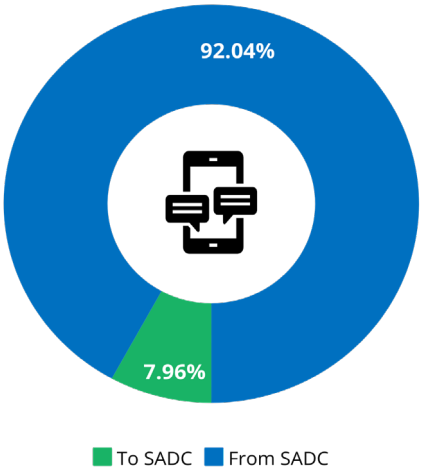
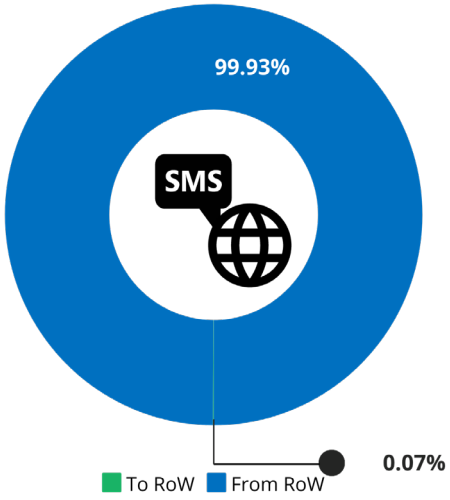


Chart 1.3.2.2C Percentage share of SMS traffic to/from RoW



The quarterly and annual trend of EA, SADC and RoW SMS are shown in Table 1.3.2.2b and 1.3.2.2c.

Table 1.3.2.2b Quarterly trend of EA, SADC and RoW SMS traffic

	September 2024	December 2024	March 2025	June 2025
To EA	477,221	494,451	435,676	427,754
From EA	8,083,034	8,147,519	7,835,696	10,495,680
To SADC	194,337	105,338	89,400	85,843
From SADC	1,146,923	1,294,957	1,033,306	952,425
To RoW	1,131,776	1,531,911	1,256,169	1,128,292
From RoW	1,365,055,223	1,548,631,201	1,785,739,892	2,118,318,349

Table 1.3.2.2c Trend of EA and RoW SMS traffic in the past five years

	2020	2021	2022	2023	2024
To EA	1,235,692	1,425,624	1,700,525	2,233,288	1,896,295
From EA	50,880,982	89,717,530	58,344,672	37,592,410	41,662,728
To RoW	2,718,443	3,191,041	3,574,956	5,448,764	13,342,306
From RoW	3,935,379,714	4,599,468,894	4,664,200,079	5,562,047,440	5,798,188,788

1.4 Roaming traffic

This section presents Voice in minutes, SMS and Data traffic volume in Petabytes for roaming traffic to and from EA, SADC and RoW for the quarter ending June 2025.

Figure 1.4 Roaming traffic

	Voice	SMS	Data
Roaming to	8.05 Billion	11.54 Million	5,972 PB
Roaming from	0.82 Billion	9.05 Million	157,279 PB

1.4.1 Voice roaming traffic (in minutes)

The voice roaming traffic to and from EA, SADC and RoW for the quarter ending June 2025 is shown in table 1.4.1.

Table 1.4.1 Voice roaming traffic (in minutes)

	EA	SADC	RoW	Total
Roaming to	13,620,217	34,585	8,038,960,081	8,052,614,883
Roaming from	669,379,449	4,705,185	145,342,427	819,427,061

1.4.2 SMS roaming traffic

The SMS roaming traffic to and from EA, SADC and RoW for the quarter ending June 2025 is shown in table 1.4.2.

Table 1.4.2 SMS roaming traffic

	EA	SADC	RoW	Total
Roaming to	4,118,782	316,106	7,104,495	**11,539,383**
Roaming from	6,128,638	798,783	2,117,793	**9,045,214**

1.4.3 Data roaming traffic (in MB)

The Data roaming traffic in MB to and from EA, SADC and RoW for the quarter ending June 2025 is shown in table 1.4.3.

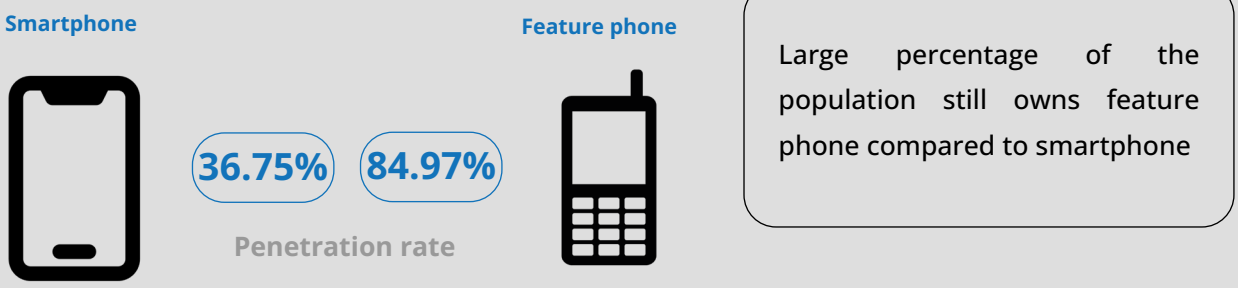
Table 1.4.3 Data roaming traffic (in MB)

	EA	SADC	RoW	Total
Roaming to	2,080,795	868,838	5,972,835,691,294	**5,972,838,640,927**
Roaming from	4,337,601,288,203	5,660,659,934,054	147,281,230,242,922	**157,279,491,465,179**

1.5 User devices

User devices are the key driver in promoting the uptake of telecommunication/ICT services. The status of mobile phone penetration attached to operators' networks is shown in Figure 1.5.

Figure 1.5 Mobile phone penetration



As of June 2025, the penetration of smartphones increased to 36.75% from 35.29% recorded in March 2025. Furthermore, penetration of feature phones also increased to 84.97% from 82.64% in March 2025. The penetration for other devices is as indicated in Table 1.5.

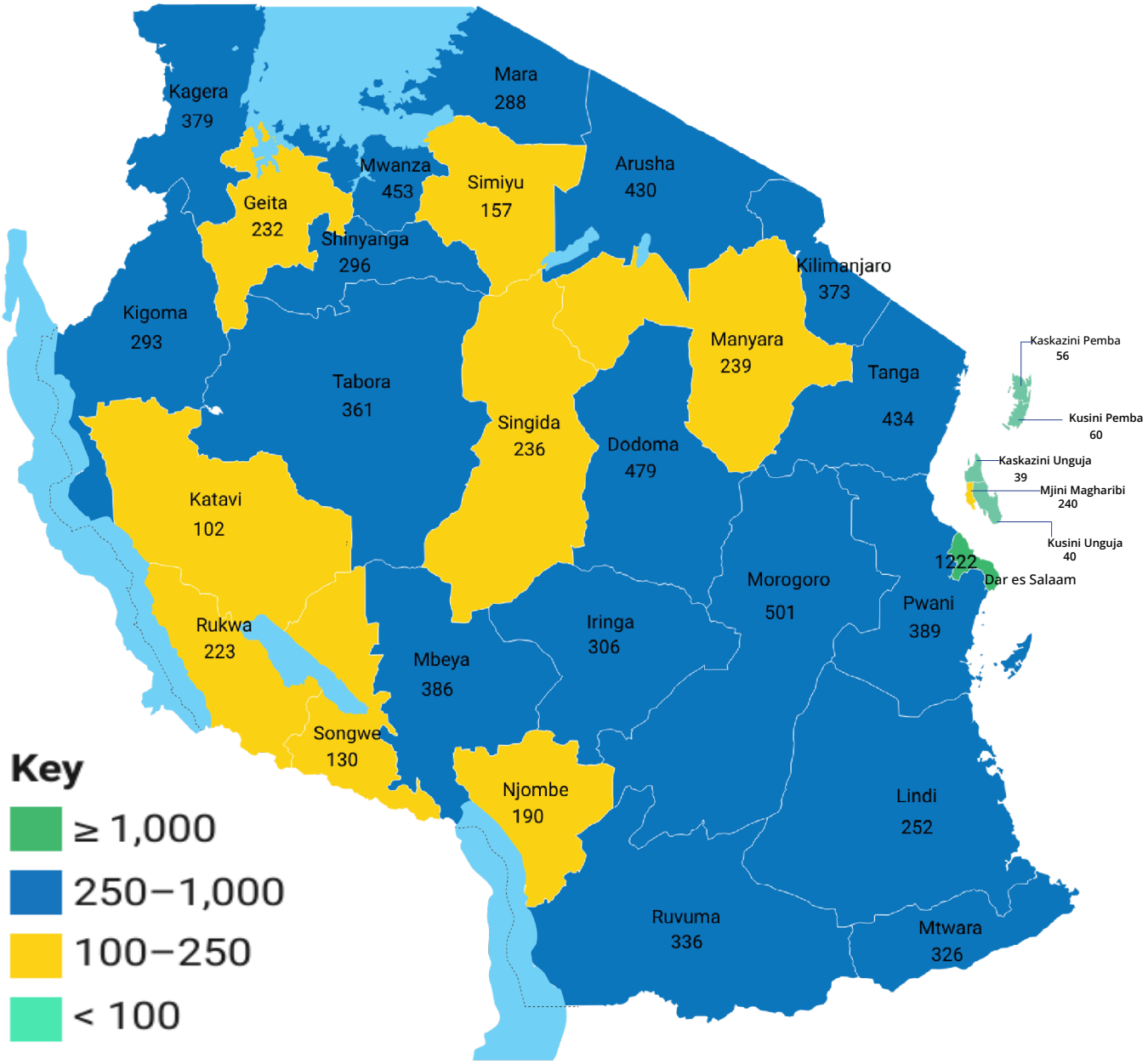
Table 1.5 User devices attached to operators' networks

Device Type	Number of devices	Penetration
Mobile Phone/Feature phone	57,911,926	84.97%
Smartphone	25,048,038	36.75%
Handheld	1,584,279	2.32%
Modem	712,857	1.05%
Tablet	552,358	0.81%
WLAN Router	280,067	0.41%
IoT Device	160,984	0.24%
Dongle	89,104	0.13%
Module	74,655	0.11%
Portable(include PDA)	48,566	0.07%
Connected Computer	13,092	0.02%
Vehicle	9,154	0.01%
Wearable	9,060	0.01%
Device for the Automatic Processing of Data (APD)	4,083	0.01%

1.6 Number of telecom towers

The total number of 9,448 towers was recorded in the quarter ending June 2025. Dar es Salaam was leading with 1,222 towers. The distribution of telecom towers per region is shown in Map 1.6.

Map 1.6 Distribution of telecom towers per region



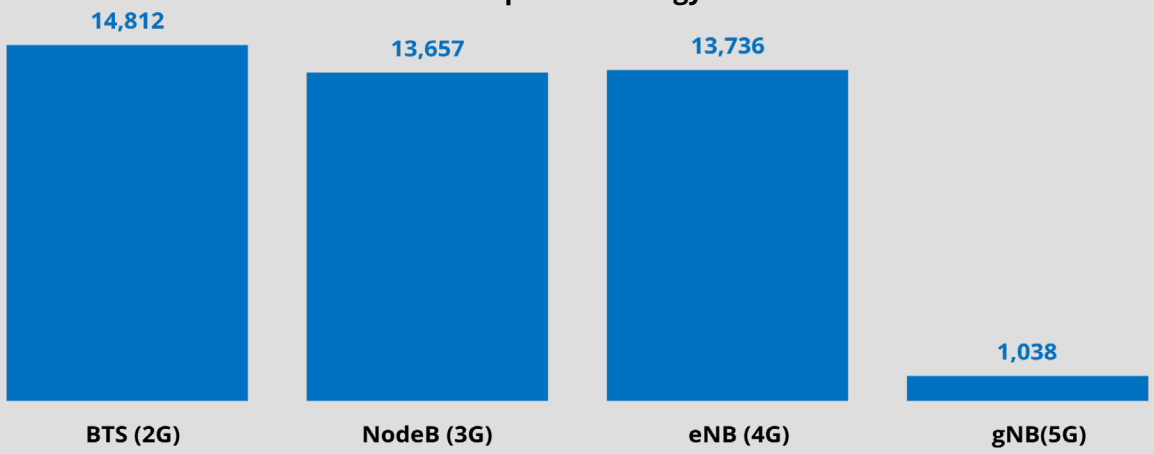
1.7 Radio base stations distribution

Table 1.7 presents the distribution of deployed Base Transceiver Stations (BTS), NodeB, eNB and gNB across regions of Tanzania, reflecting the extent of 2G, 3G, 4G, and 5G network coverage as of the quarter ending June 2025.

Table 1.7 Distribution of radio base stations per region

Region	Number of radio base stations			
	BTS (2G)	NodeB (3G)	eNB (4G)	gNB (5G)
Tanzania Mainland				
Arusha	726	693	691	37
Dar-es-salaam	2390	2469	2479	688
Dodoma	723	604	644	50
Geita	409	391	378	8
Iringa	414	366	378	6
Kagera	538	509	483	2
Katavi	176	154	157	2
Kigoma	487	439	421	5
Kilimanjaro	570	538	540	11
Lindi	354	271	295	3
Manyara	367	301	313	1
Mara	428	388	389	5
Mbeya	593	571	581	19
Morogoro	740	649	675	13
Mtwara	434	361	374	2
Mwanza	769	745	739	46
Njombe	322	283	287	3
Pwani	545	472	515	13
Rukwa	291	259	251	1
Ruvuma	446	361	375	4
Shinyanga	397	377	362	6
Simiyu	303	267	261	2
Singida	363	330	327	4
Songwe	253	223	219	13
Tabora	555	497	451	6
Tanga	647	557	572	9
Zanzibar				
Kaskazini Pemba	64	63	57	2
Kaskazini Unguja	88	88	87	4
Kusini Pemba	67	68	66	2
Kusini Unguja	107	103	106	6
Mjini Magharibi	246	260	263	65
Total	**14,812**	**13,657**	**13,736**	**1,038**

Figure 1.7 Radio base stations distribution per technology



The country exhibits a substantial rollout of 2G and 3G technologies, with 14,812 BTS and 13,657 NodeB demonstrating a well-established mobile communication infrastructure. 4G technology, while not as widespread as 2G and 3G, still shows significant coverage with 13,736 eNBs. However, gNBs expanded by 11% to 1,038 concentrated primarily in urban areas like Dar es Salaam and Mjini Magharibi. Notably, Dar es Salaam leads in all categories, underscoring its status as the country's major hub for connectivity. The data shows a progressive transition towards advanced mobile technologies, emphasising the need for enhancing 4G and introducing 5G networks to meet future communication demands.

1.8 Roll out of mobile network coverage

Investment in the telecommunication infrastructure has increased the rollout of mobile network coverage as shown in Table 1.8

Table 1.8 Network coverage for mobile network signal

		March 2025	June 2025
Population Coverage	2G	98.4%	98.6%
	3G	92.2%	93.4%
	4G	90.7%	92.0%
	5G	23.0%	26.0%
Geographical Coverage	2G	76.2%	77.4%
	3G	74.1%	75.0%
	4G	73.6%	75.0%
	5G	3.6%	5.9%

Significant achievements were attained in the sector during this quarter, as shown in Table 3.4, including expanding 2G, 3G, 4G and 5G coverage to reach population coverages of 98.6%, 93.4%, 92.0% and 26%, respectively. Furthermore, the geographical coverage for 2G, 3G, 4G and 5G has expanded to 77.4%, 75.0%, 75.0% and 5.90% respectively.

1.9 Internet services

1.9.1 Internet subscription

The subscription to mobile and fixed Internet is the total number of SIM cards and fixed lines that have accessed and used internet services in the last three months, regardless of the technology used (FTTX, GPRS, 3G, 4G, 5G, among others).

The summary of internet subscriptions for the quarter ending June 2025 is shown below.

As of March 2025

49.3 Million

As of June 2025

54.1 Million

9.6 %

There was an increase of 9.6% in subscriptions from 49.3 million as of March 2025 to 54.1 million as of June 2025.

Monthly internet subscriptions for the quarter ending June 2025 are shown in Table 1.9.1a. The table shows that mobile wireless is the mostly preferred compared to other internet services. As of June 2025, it comprises of 99.5% of all subscriptions.

Table 1.9.1a Monthly internet subscriptions for the quarter ending June 2025

Reporting Month	Mobile Wireless Subs	Fixed Wireless Subs	Fixed Wired Subs	Total
April	52,186,717	153,484	92,999	**52,433,200**
May	52,839,236	154,080	97,146	**53,090,462**
June	53,815,513	164,945	98,072	**54,078,530**
Internet Penetration				**79.3%**

Mobile broadband is the most popular means of accessing internet, with 30,232,986 subscriptions. 2G technology holds significant usage with 23,582,527 subscriptions. Fibre technologies like Fiber to the Home (FTTH) and Fiber to the Office (FTTO) have fewer subscriptions, at 83,175 and 14,897 respectively as shown in Figure 1.9.1a.

Table 1.9.1b Internet subscriptions by technology

Technology	April	May	June
2G Subs	23,048,147	23,124,280	23,582,527
3G Subs	5,190,642	5,077,965	4,987,535
4G Subs	22,762,488	23,396,945	23,933,438
5G Subs	1,185,440	1,240,046	1,312,013
FTTH Subs	78,890	83,474	83,175
FTTO Subs	14,109	13,672	14,897
Terrestrial fixed wireless Subs	146,552	147,200	158,048
Satellite subs	1,351	1,372	1,390
Other fixed subs	5,581	5,508	5,507
Total	**52,433,200**	**53,090,462**	**54,078,530**

Figure 1.9.1a Internet Subscription by technology

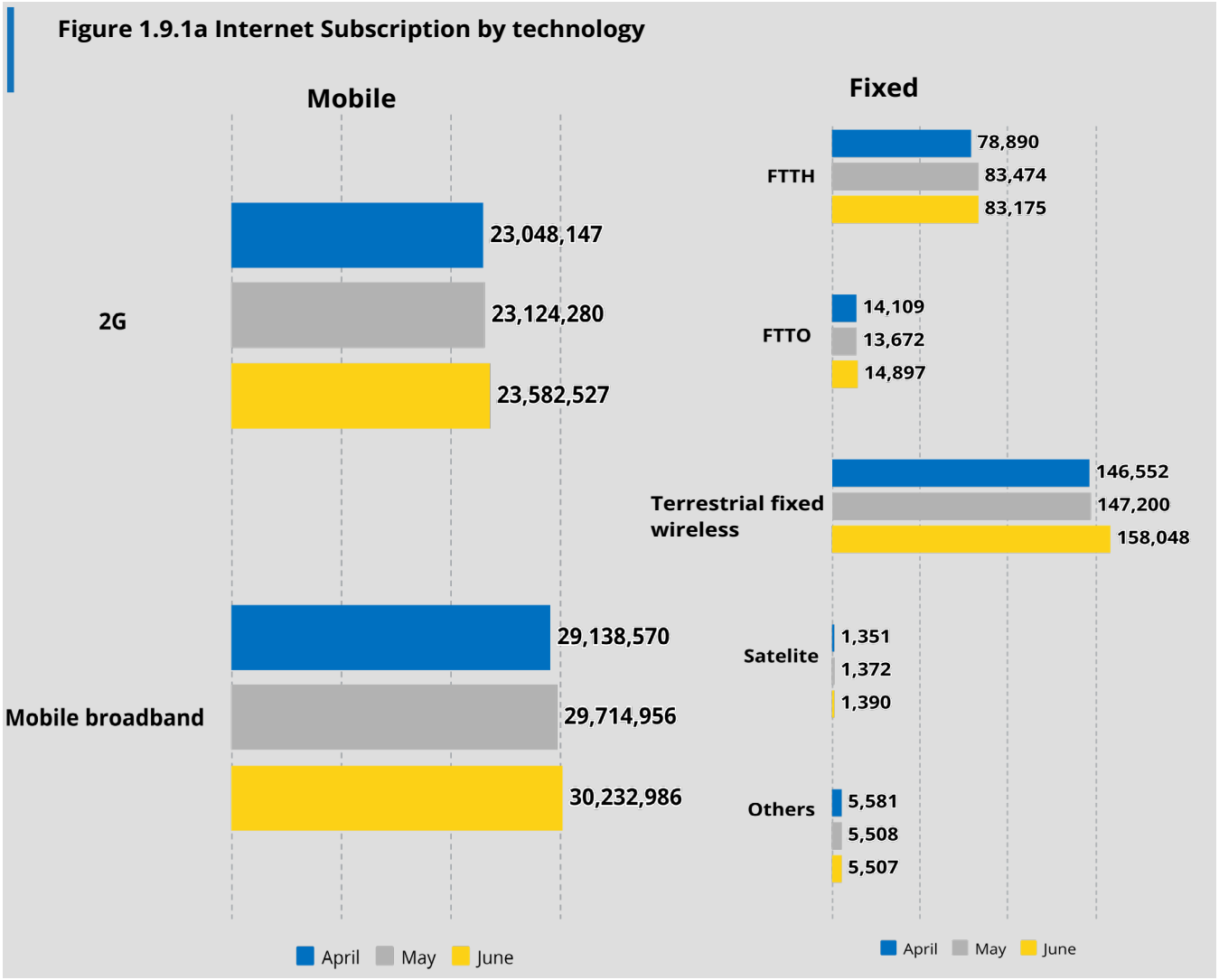


Chart 1.9.1a Mobile internet market share by subscription per Operator for the quarter ending June 2025

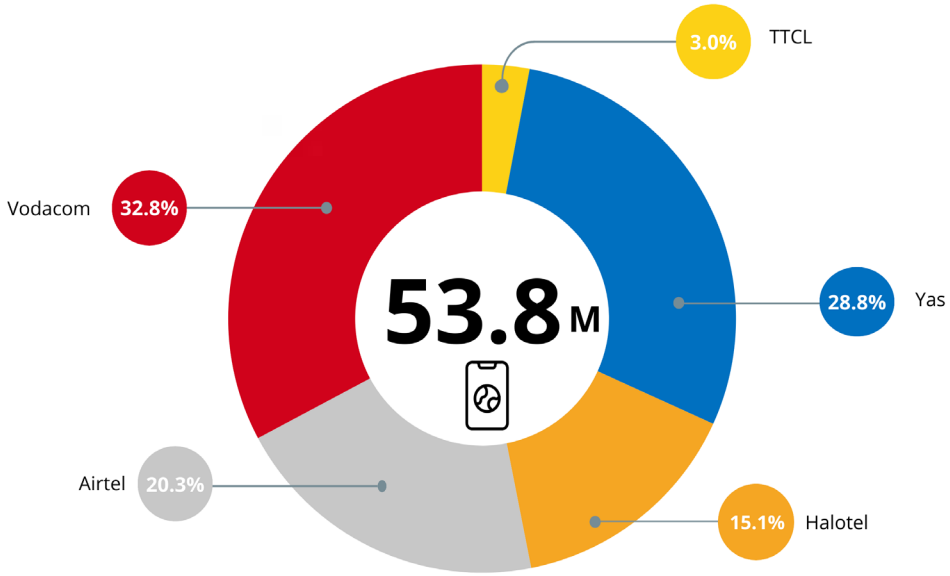


Chart 1.9.1b Fixed internet subscriptions per Operator for the quarter ending June 2025

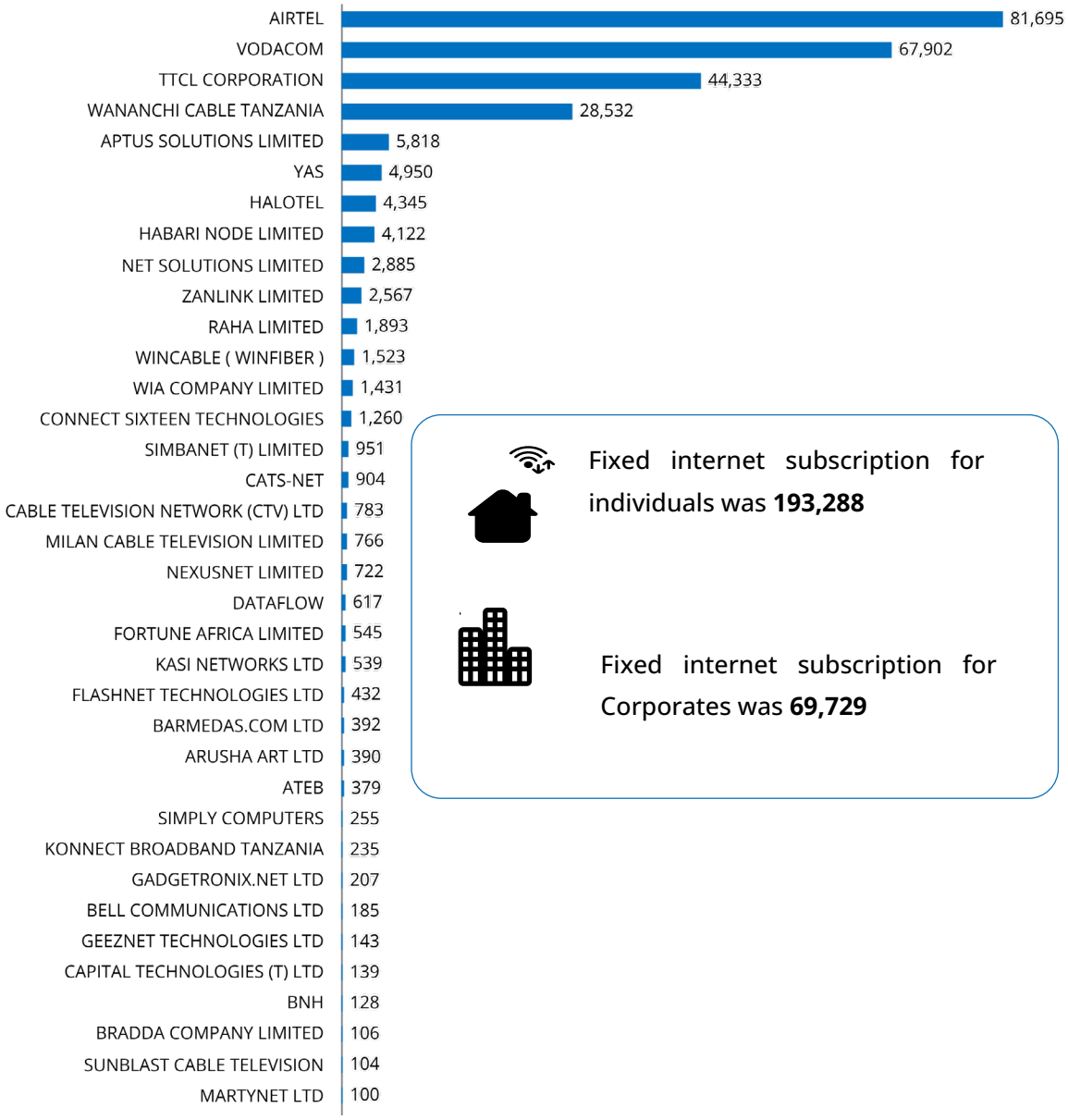


Table 1.9.1c Fixed internet subscriptions by speed

Fixed Internet Speed	Subscriptions
<256 Kbps	7
>= 256 Kbps< 2Mbps	1,189
>= 2Mbps< 10Mbps	23,330
>= 10Mbps< 100Mbps	233,275
>= 100Mbps< 1Gbps	4,885
>= 1Gbps	331
Total	**263,017**

Figure 1.9.1b Quarterly trend of Internet Subscription

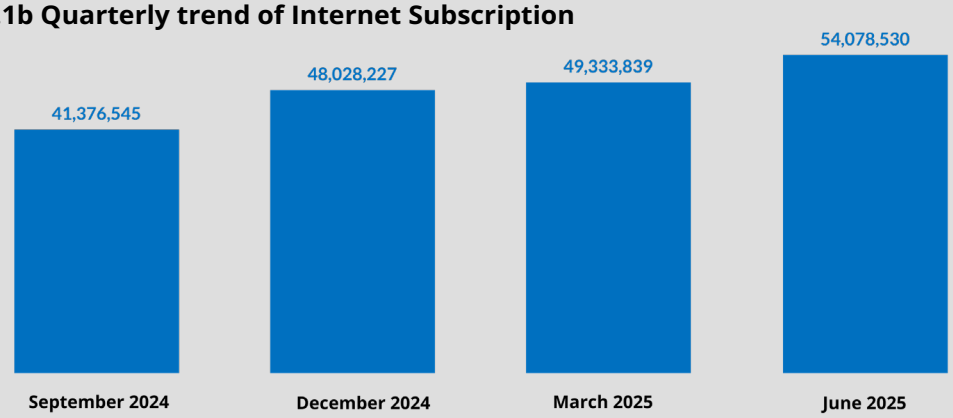
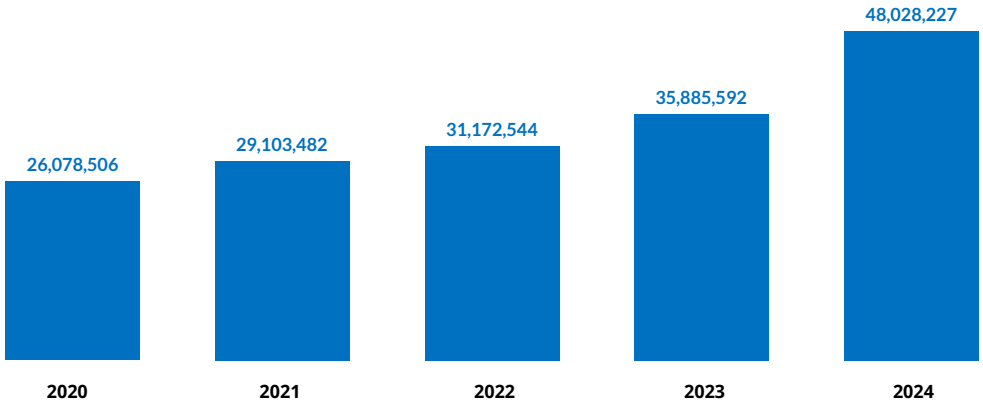


Figure 1.9.1b indicates an average quarterly growth rate of 9.5% in internet subscriptions from September 2024 to June 2025.

Chart 1.9.1c Trend of Internet subscriptions for the past five years



1.9.2 Internet usage per month

Internet usage is counted as the amount of data traffic (in Petabytes) used in a given period. (Note that 1 Petabyte =1000^3 Megabytes). The summary for internet usage is shown below.

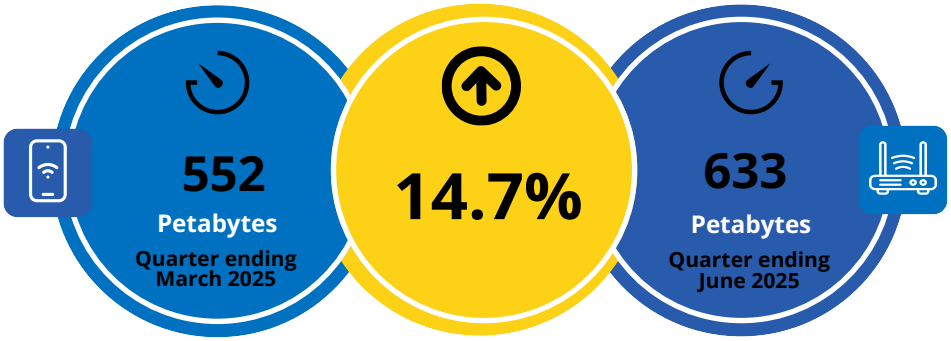


Table 1.9.2 Amount of data used in the quarter ending June 2025

	April	May	June
GB	208,882,149	206,408,453	217,798,231
Subscriptions	52,433,200	53,090,462	54,078,530
GB Per Subscriptions	3.98	3.89	4.03

Data traffic in gigabytes shown in Table 1.9.2 indicates that 4.03 GB per subscriber were used in June which is higher than April and May 2025.

1.9.3 Average Internet speed and latency

Figure 1.9.4 Average Internet Speed and Latency

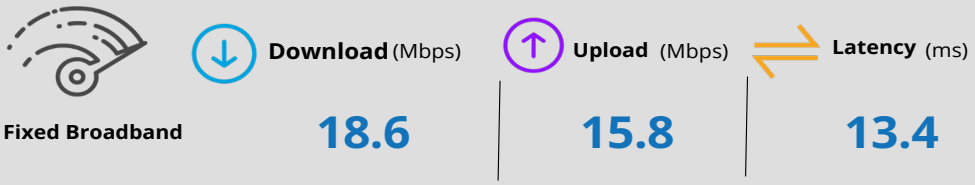


Table 1.9.3a Operators' download speed (Mbps) in measured service areas in the quarter ending June 2025

Region	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	16.5	22.4	28.3	15.0	17.1	19.85
Dodoma	15.5	15.4	19.4	15.4	13.5	15.85
Katavi	7.9	14.4	23.4	23.1	19.7	17.67
Kilimanjaro	21.8	21.6	27.1	19.8	22.1	22.49
Manyara	17.4	20.4	19.8	20.0	17.3	18.97
Mbeya	18.6	19.1	25.8	24.9	13.5	20.35
Mtwara	15.1	20.7	27.1	23.7	21.3	21.57
Mwanza	24.7	18.4	22.3	23.8	14.8	20.81
Pemba	9.0	14.4	24.6	12.5	20.4	16.18
Rukwa	10.8	17.3	25.7	23.8	17.8	19.08
Singida	15.8	18.1	25.0	18.4	23.3	20.14
Songwe	21.3	15.6	21.7	20.4	9.5	17.71
Tabora	20.7	19.5	21.9	22.2	18.3	20.51
Unguja	13.5	18.7	23.2	20.3	27.4	20.60
Industry Average						**19.41**

Table 1.9.3b Operators' latency (ms) in measured service areas in the quarter ending June 2025

Region	Airtel	Halotel	Yas	TTCL	Vodacom	Average
Arusha	222	61	88	111	57	108
Dodoma	192	65	82	109	54	100
Katavi	262	101	93	135	125	143
Kilimanjaro	166	72	65	105	83	98
Manyara	182	62	61	107	60	94
Mbeya	156	80	106	203	78	124
Mtwara	168	64	74	109	78	99
Mwanza	205	76	99	243	74	139
Pemba	214	90	103	259	67	146
Rukwa	219	81	90	288	63	148
Singida	176	109	81	270	50	137
Songwe	182	97	82	200	88	130
Tabora	192	98	95	215	58	132
Unguja	189	69	81	175	52	113
Industry Average						**122**

1.9.4 International Internet link capacity

For international links, the outgoing and incoming capacity support internet usage locally and internationally. Table 1.9.4 shows that the country has a 15,051.00 Gbps duplex capacity for new activation. This means only 14.4% of all international link capacity has been utilized.

Table 1.9.4 International Internet capacity as of June 2025

	Outgoing capacity (Gbps)	Incoming capacity (Gbps)
Total /Owned	17,590	17,590
Activated	2,539	2,539
Available for new activation	15,051	15,051

1.9.5 Country Code Top Level Domains

The total cumulative number of registered domain names increased from 33,494 at the end of March 2025 to 34,342 by the end of June 2025, as shown in Table 1.9.5.

Table 1.9.5 Number of domain names

Zone	March 2025	June 2025
co.tz	26,196	26,905
or.tz	2,790	2,813
ac.tz	1,173	1,194
go.tz	921	931
.tz	2,085	2,170
sc.tz	273	273
ne.tz	31	30
me.tz	11	12
info.tz	2	2
hotel.tz	2	2
mobi.tz	3	3
tv.tz	3	3
mil.tz	4	4
Total	**33,494**	**34,342**

1.10 Mobile money services

This section presents statistics on mobile money services provided by Mobile Network Operators (MNOs) in terms of subscriptions (number of mobile money accounts) and transactions.

1.10.1 Mobile money subscriptions

Mobile money subscriptions refer to the count of all active SIM cards with mobile money service accounts that have registered an activity/have been used at least once in the past three months. The subscriptions increased by 2% from 66.5 million accounts in the quarter ending March 2025 to 68.1 million in June 2025.

Figure 1.10.1 Mobile money subscriptions

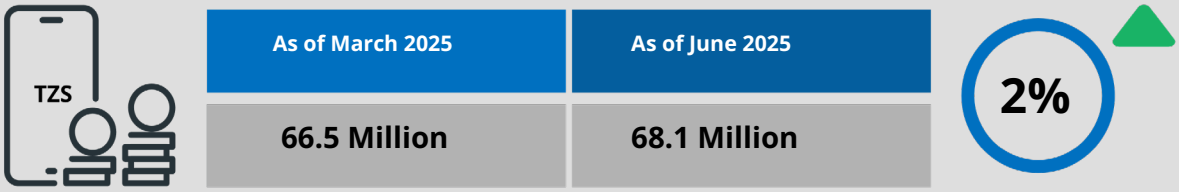


Table 1.10.1 Mobile money service subscriptions (number of accounts)

	April	May	June
Airtel Money	11,779,914	11,656,785	11,722,925
Azam Pesa	37,266	42,453	38,212
HaloPesa	5,907,180	6,082,865	6,249,543
Mixx by Yas	20,430,998	20,839,733	20,672,815
T-Pesa	1,508,952	1,369,088	1,355,046
M-pesa	27,396,996	27,552,750	28,020,749
Total	**67,061,306**	**67,543,674**	**68,059,290**

Table 1.10.1 shows that there is an average increase of 0.7% per month in the quarter ending 2025. Market share on mobile money subscriptions is shown in Chart 1.10.1.

Chart 1.10.1 Market share on mobile money subscriptions

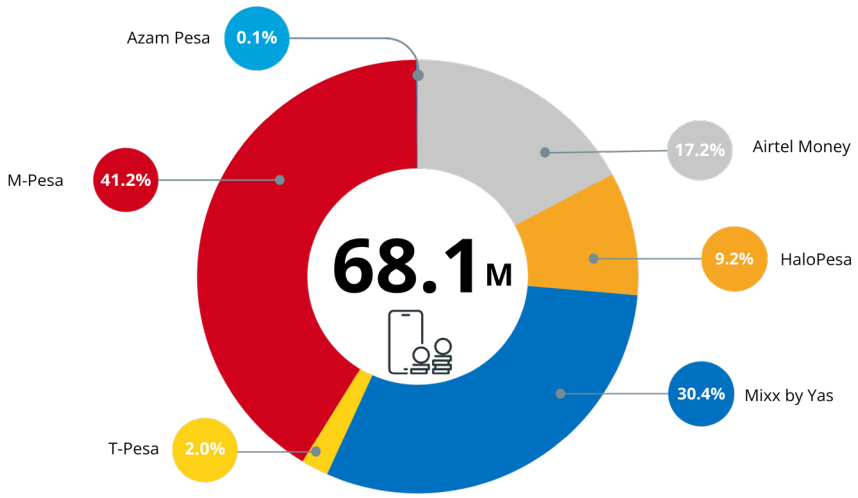


Chart 1.10.1 indicates that the mobile money market is very competitive as Mixx by Yas, M-Pesa, and Airtel money control around 89% of the market share by subscription, led by M-Pesa with 41.2% market share.

1.10.2 Mobile money transactions

Mobile money transactions refers to the number of deposits and transfers from one account to another in the past three months. The mobile money transactions for the quarter ending June 2025 are shown in table 1.10.2a. Furthermore, the quarterly and annual trends are shown in table 1.10.2b and 1.10.2c.

Table 1.10.2a Mobile money transactions

	April	May	June
Airtel Money	91,968,780	99,788,680	91,810,220
Azam Pesa	1,499,761	1,496,526	1,806,932
HaloPesa	42,215,295	44,253,101	42,113,968
T-Pesa	339,735	339,735	393,949
M-pesa	135,531,019	141,748,127	107604281
Mixx by Yas	191,439,688	200,043,936	198,289,442
Total	**462,994,278**	**487,670,105**	**442,018,792**

Table 1.10.2b Trend of mobile money transactions in the past four quarters

Quarter	No. of Subscriptions	No. of Transactions
September 2024	60,815,533	879,361,166
December 2024	63,207,569	1,100,700,205
March 2025	66,542,276	1,366,334,366
June 2025	68,059,290	1,392,683,175

Table 1.10.2c Trend of mobile money subscriptions and transactions in the past five years

Year	No. of Subscriptions	No. of Transactions
2020	32,268,630	3,412,210,062
2021	35,285,767	3,752,084,894
2022	40,953,496	4,195,899,414
2023	52,875,129	5,273,086,154
2024	63,207,569	3,737,202,434

1.11 Quality of Service (QoS)

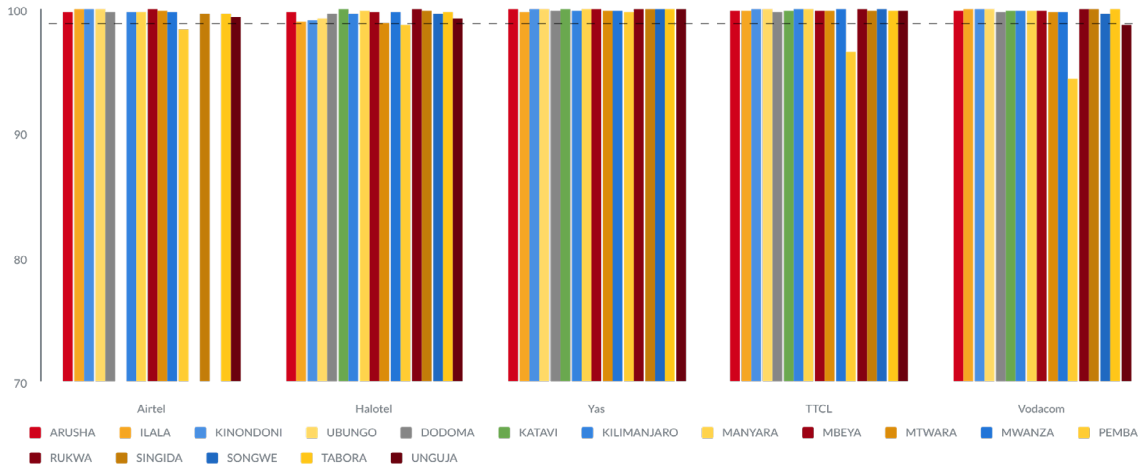
Measurements were conducted considering the QoS parameters and measurement methods specified in the Electronic and Postal Communications (Quality of Service) Regulations, 2025. The following is the summary of the results on the QoS of mobile networks in Tanzania from April to June 2025.

1.11.1 Network availability

Network Availability measures how well the mobile network is available when consumers want to use mobile network services. The threshold for compliance is greater than 99%.

Yas passed the target in all Seventeen measured service areas. TTCL passed the target in sixteen out of seventeen measured service areas, Vodacom passed the target in fifteen out of seventeen measured service areas and Halotel passed the target in fourteen out of seventeen measured service areas and Airtel passed the target in thirteen out of seventeen measured areas as shown in Chart 1.11.1.

Chart 1.11.1. Network Availability (%) (Target is above 99%)

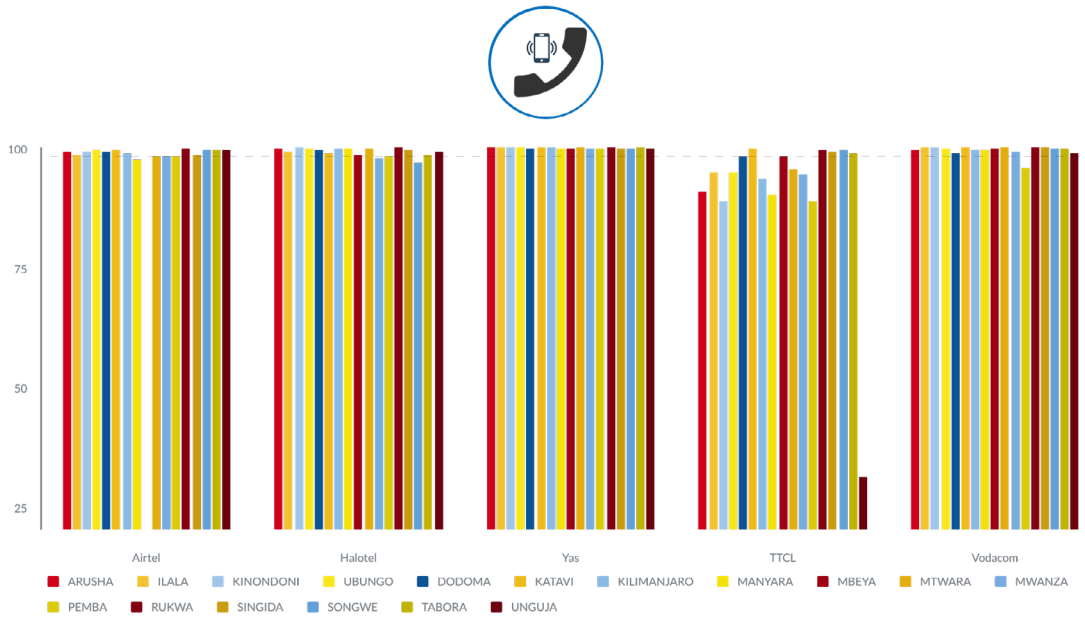


1.11.2 Call Connection Success Rate

The Call Connection Success Rate measures the percentage of calls that have successfully connected after dialing. The threshold for compliance is 98% and above.

Yas passed the target in all seventeen measured service areas, Vodacom passed the target in sixteen out of seventeen measured service areas, Airtel passed the target in fifteen out of sixteen measured service areas, Halotel passed the target in fourteen out of seventeen measured service areas and TTCL passed the target in seven out of seventeen measured service areas as shown in chart 1.11.2.

Chart 1.11.2 Comparative results on the Call Connection success rate Rate

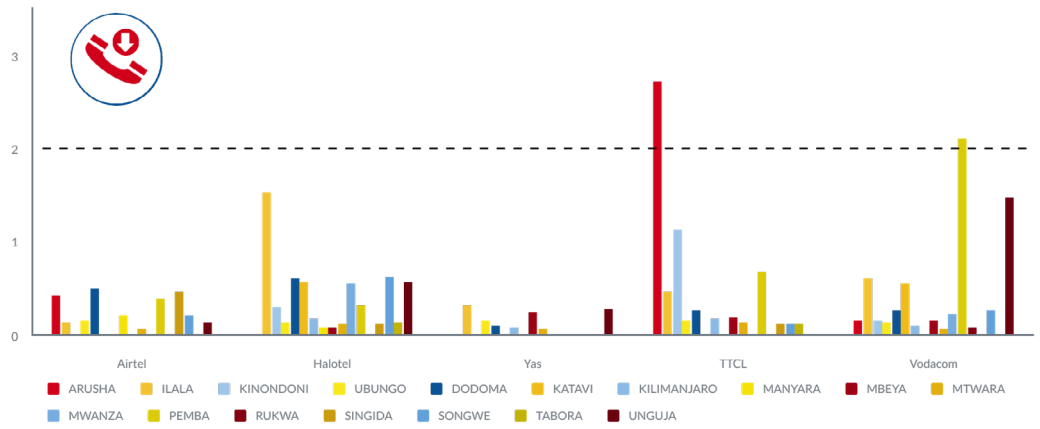


1.11.3 Call drop rate

Call Drop Rate measures the percentage of calls cut off due to technical reasons before the speaking parties finish their conversation and one of them hangs up (dropped calls). The threshold for compliance is less than 2%.

Halotel and Yas passed the target in all seventeen measured service areas. TTCL and Vodacom passed the target in sixteen out of seventeen measured service areas while Airtel passed the target in all sixteen measured service areas as shown in Chart 1.11.3.

Chart 1.11.3. Comparative results on the Call Drop Rate

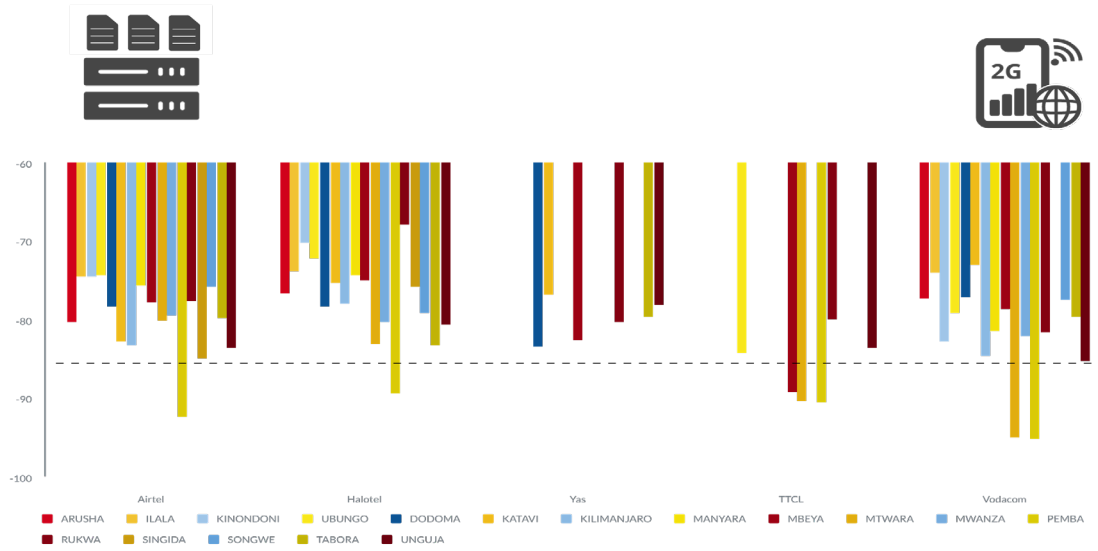


1.11.4 2G Service coverage

2G Service coverage indicates how well service areas are covered by a particular mobile network operator signal for consumers to get mobile network service. Consumers cannot get 2G mobile network services in areas with no coverage or very poor coverage. The threshold for compliance for 2G technologies is -85 dBm.

Airtel and Halotel passed in sixteen out of seventeen measured service areas, Vodacom passed the target in fourteen out of seventeen measured service areas, TTCL passed the target in thirteen out of sixteen measured service areas and Yas passed the target in all twelve measured service areas as shown in Chart 1.11.4.

Chart 1.11.4. Comparative results on 2G Coverage

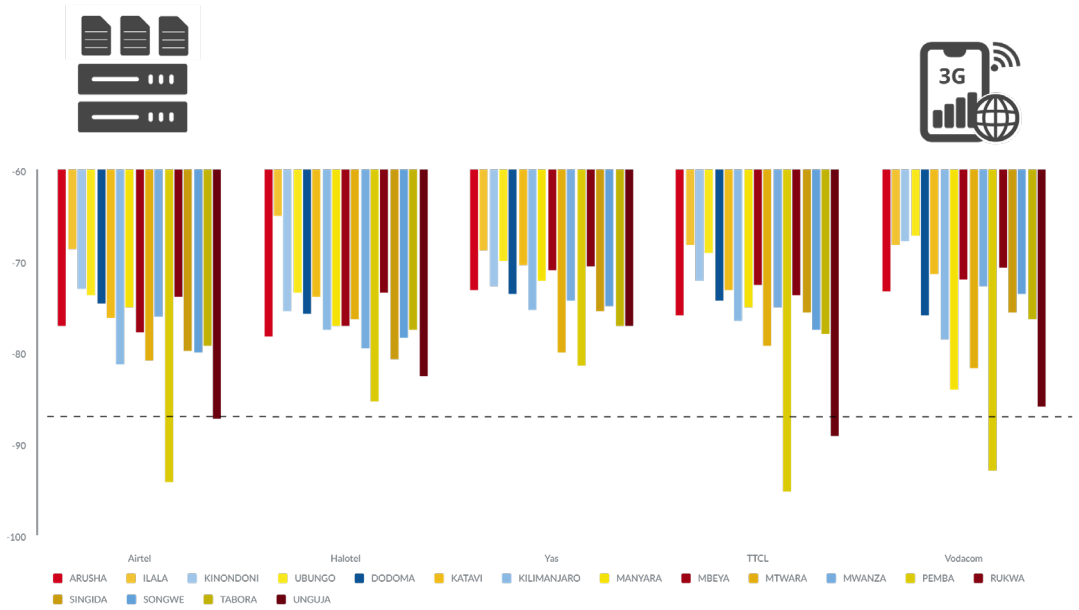


1.11.5 3G service coverage

The 3G Service coverage indicates how well service areas are covered by a particular mobile network operator signal for consumers to get mobile network service. Consumers cannot get 3G mobile network services in areas with no coverage or very poor coverage. The threshold for compliance for 3G technologies is -85 dBm.

Airtel, Halotel,Yas and Vodacom passed the target in all seventeen measured service areas while TTCL passed the target in sixeen out of seventeen service areas, as shown in Chart 1.11.5.

Chart 1.11.5. Comparative results on 3G Coverage

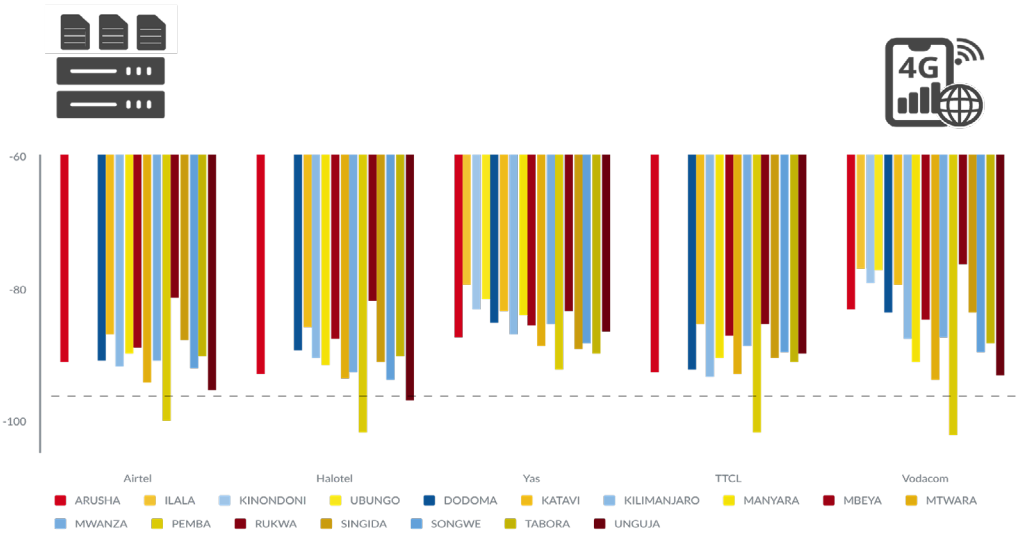


1.11.6 4G service coverage

4G service coverage indicates how well service areas are covered by a particular mobile network operator signal for consumers to get mobile network service. Consumers cannot get 4G mobile network services in areas with no coverage or very poor coverage. The threshold for compliance for 4G technology is -95 dBm.

Yas passed the target in all seventeen measured service areas. Vodacom passed the target in sixteen out of seventeen measured service areas while Airtel, Halotel and TTCL passed the target in thirteen out of fourteen measured service areas, as shown in Chart 1.11.6.

Chart 1.11.6. Comparative results on 4G coverage

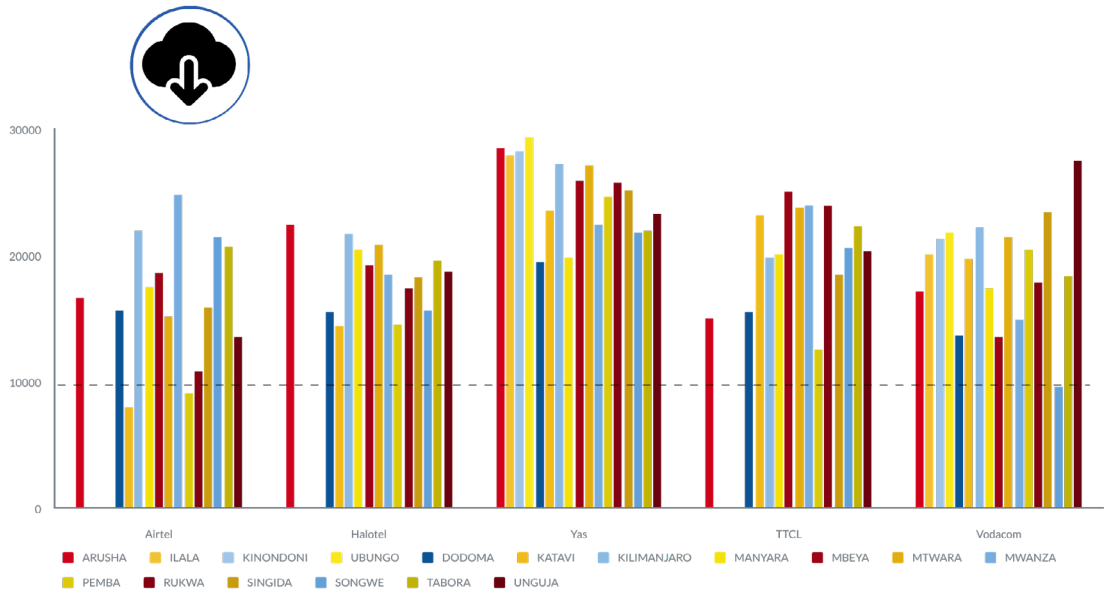


1.11.7 Download Speed

Download Speed is a measure of the rate of data transfer on a network. It measures how fast data is transferred from a file transfer protocol (FTP) server to a mobile device. The compliance threshold is average, greater or equal to 10,000 kbps.

Yas passed the target in all seventeen measured service areas. Vodacom passed the target in sixteen out of seventeen measured service areas, Halotel and TTCL passed the target in all fourteen measured service areas and Airtel passed the target in twelve out of fourteen measured service areas as shown in Chart 1.11.7.

Chart 1.11.7. Comparative results on Download Speed

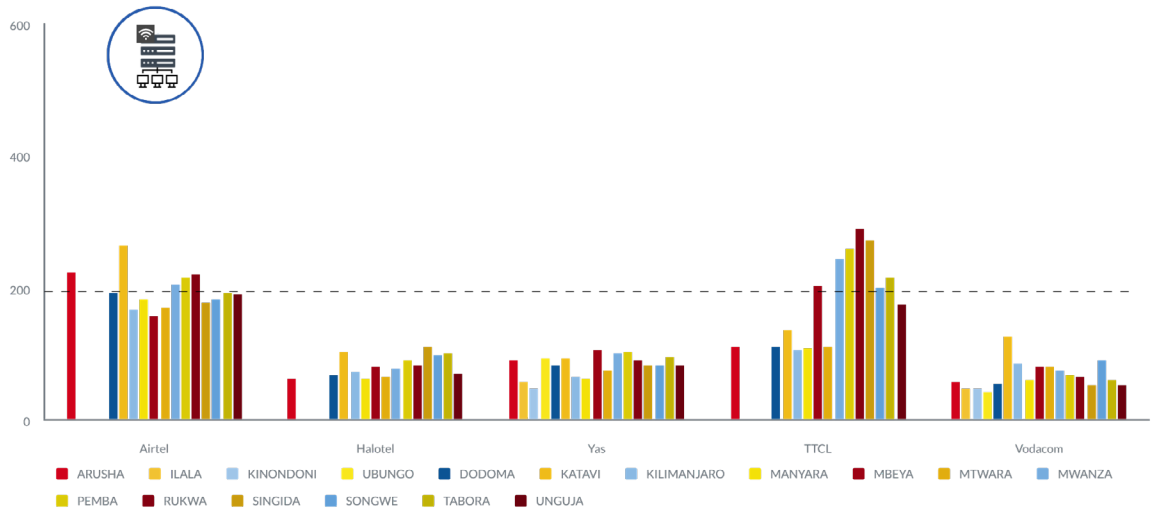


1.11.8 Data Access delay (Latency)

Data Access delay measures the time the user equipment takes to send a request and receive a response from the server. The threshold for compliance is average, being less than 200 ms.

Yas and Vodacom passed the target in all seventeen measured service areas, Halotel passed the target in fourteen measured service areas, Airtel passed the target nine out of fourteen measured service areas while TTCL passed the target in seven out of fourteen measured service areas areas as shown in Chart 1.11.8.

Chart 1.11.8. Comparative results on Data Access delay

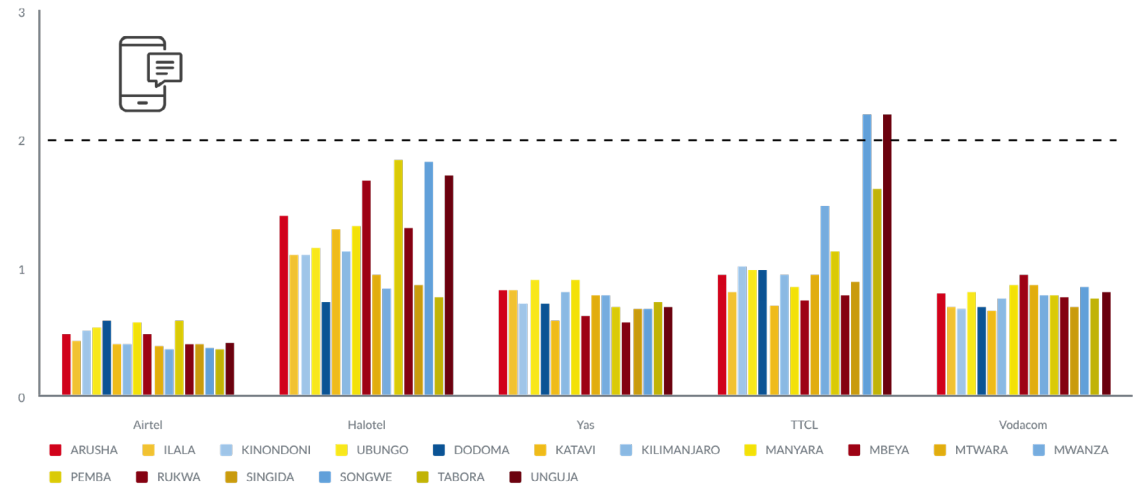


1.11.9 SMS Delivery Time

SMS Delivery Time measures the amount of time an SMS takes from when it is sent to when it is delivered. The threshold for compliance is less than 2 seconds.

Airtel, Halotel, Yas and Vodacom all passed the target in all seventeen measured service areas while TTCL passed the target in fifteen out of seventeen measured service areas as shown in Chart 1.11.9.

Chart 1.11.9. Comparative results on SMS Delivery Time

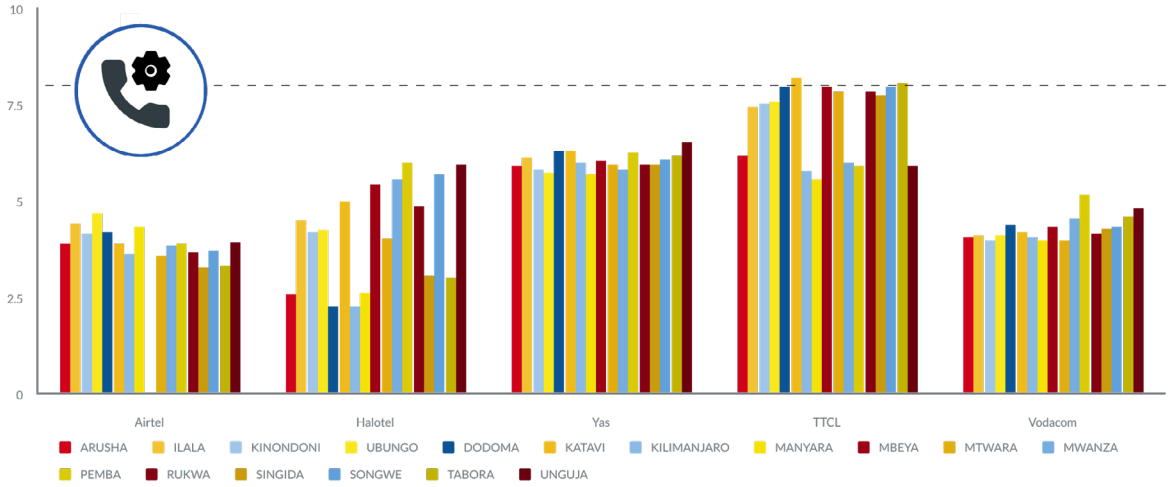


1.11.10 Call Setup Time

Call Setup Time measures the time a call takes to connect after dialling. The threshold for compliance is less than 8 seconds.

Halotel, Yas and Vodacom passed the target in all seventeen measured service areas measured service areas while Airtel passed the target in all sixteen measured service areas and TTCL passed the target in fifteen out of seventeen measured service areas as shown in Chart 1.11.10.

Chart 1.11.10. Comparative results on call Setup Time



The general quality of service results from April to June 2025 indicates that Yas scored 100%, Halotel 95.0%, Airtel 92.9%, Vodacom 94.7% and TTCL 81.3%

Table 1.11 Summary of QoS scores per MNO for the quarter ending June 2025

Operator	Score
Yas	100%
Halotel	95.0%
Airtel	92.9%
Vodacom	94.7%
TTCL	81.3%
Industry average	**92.8%**

1.12 Fraudulent attempts

Fraudulent Table 1.12a shows the number fraudulents attempts per region made via SMS and Voice services for the quarter ending June 2025.

Table 1.12a Number of fraudulent attempts per region

Region	Airtel	Halotel	Yas	TTCL	Vodacom	Total
Tanzania Mainland						
Rukwa	362	1,544	453	1,269	725	4,353
Morogoro	1,092	108	968	9	2,108	4,285
Dar es salaam	538	119	233	26	236	1,152
Mbeya	64	298	148	130	163	803
Kilimanjaro	24	17	40	0	491	572
Songwe	29	151	63	50	0	293
Katavi	0	117	17	64	72	270
Mwanza	97	21	53	9	81	261
Iringa	32	169	29	6	11	247
Arusha	69	9	27	17	105	227
Pwani	20	51	39	7	25	142
Dodoma	26	34	42	18	9	129
Tabora	32	20	19	17	31	119
Kagera	17	12	38	0	44	111
Tanga	14	25	59	3	8	109
Manyara	20	48	9	1	8	86
Geita	36	5	25	5	11	82
Ruvuma	19	17	32	2	6	76
Shinyanga	15	20	9	4	22	70
Mara	19	4	15	1	20	59
Kigoma	11	17	15	1	13	57
Njombe	9	21	16	2	9	57
Mtwara	12	9	17	8	6	52
Singida	6	12	12	4	9	43
Lindi	5	12	15	4	2	38
Simiyu	11	14	9	1	3	38
Zanzibar						
Mjini Magharibi	16	4	24	0	6	50
Kusini Pemba	0	2	16	0	0	18
Kaskazini Unguja	0	0	17	0	0	17
Kaskazini Pemba	0	2	11	0	0	13
Kusini Unguja	0	0	8	0	0	8
Total	**2,595**	**2,882**	**2,478**	**1,658**	**4,224**	**13,837**

Table 1.12b shows fraudulent attempts per operator for the quarter ending March 2025 and June 2025. Vodacom has recorded the highest number of fraudulent attempts compared to other MNOs, while TTCL has the least.

Table 1.12b Fraudulent attempts per operator

Quarter ending	Airtel	Halotel	Yas	TTCL	Vodacom	Total
June 2025	2,595	2,882	2,478	1,658	4,224	13,837
March 2025	5,876	1,724	2,484	3,925	3,143	17,152
Percentage change	**-56%**	**67%**	**-0.2%**	**-58%**	**34%**	**-19%**

The statistics show that fraudulent attempts have decreased by 19%. Chart 1.12a shows the distribution of fraudulent attempts per region. Rukwa and Morogoro had the highest number of fraudulent attempts.

Chart 1.12a Distribution of fraudulent attempts per region in the quarter ending June 2025

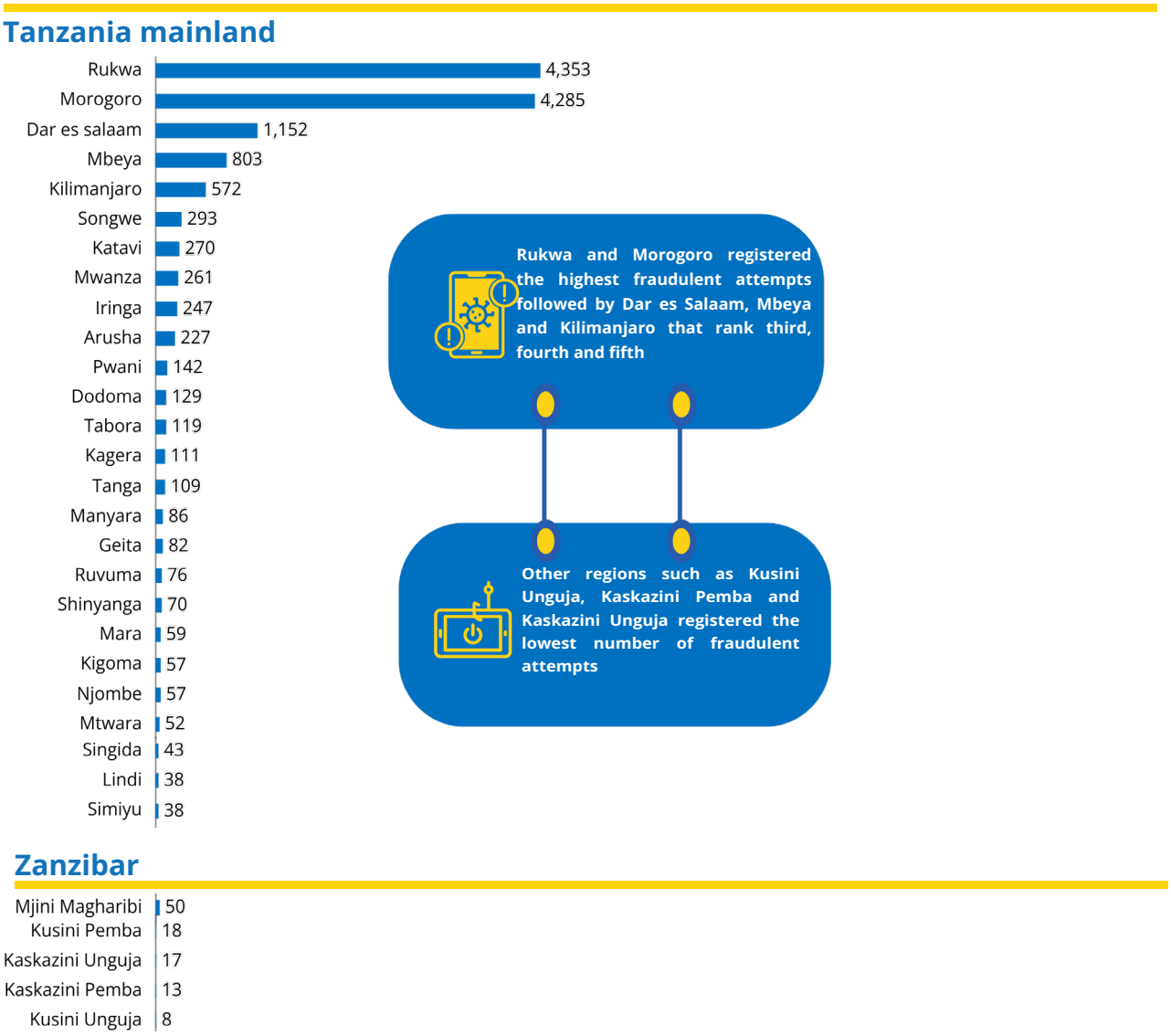
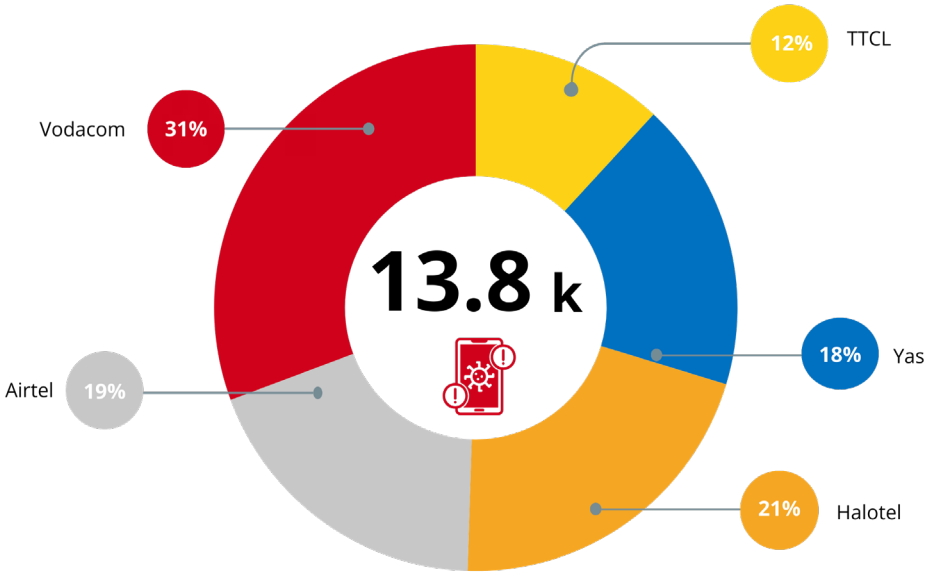


Table 1.12c Fraudulent attempts per district for the four leading regions

Region	District	Fraudulent attempts
Rukwa	Kalambo	617
	Nkasi	915
	Sumbawanga Rural	1,536
	Sumbawanga Urban	1,285
Morogoro	Gairo	8
	Kilombero	3,955
	Kilosa	44
	Morogoro Rural	70
	Morogoro Urban	16
	Mvomero	13
	Ulanga	102
	Malinyi DC	40
	Mlimba DC	37
Dar es Salaam	Ilala	230
	Kigamboni	28
	Kinondoni	357
	Temeke	238
	Ubungo	299
Mbeya	Chunya	105
	Kyela	22
	Mbarali	57
	Mbeya Rural	323
	Mbeya Urban	242
	Rungwe	54

Chart 1.12b Fraudulent attempts per operator in the quarter ending June 2025



1.13 Telecommunication and Internet service licenses

Telecommunications and Internet		
Category	**Number licenses**	
	March 2025	**June 2025**
Network Facilities Licences	44	44
Network Services Licences	18	19
Application Services Licences	144	150
Aircraft Stations	187	163
Amateur Stations	20	18
Fixed VSAT Terminals	37	26
Mobile VSAT Terminals	2	2
Satellite Ground Earth Stations	1	1
Ship Stations	30	30
HF Radio Stations	19	16
VHF- UHF Radio Repeaters	2	1
VHF - UHF Radio Station with Pair of Frequency	109	113
VHF - UHF Radio Station with Single Frequency	182	183
Numbering	529	187

1.14 Certificates

Category	**Number certificates**	
	March 2025	**June 2025**
Global Maritime Distress and Safety Systems	231	245
Type Approval	5,120	5,253
Registration for Satellite Mobile Phones	46	46

Chapter 02

Broadcasting Services

2. Broadcasting Services

This section presents statistics on the number of television (TV) subscriptions (pay television) through Digital Terrestrial Television (DTT), Digital to the Home (DTH), and Cable Television as well as the geographical and population coverage of broadcasting signals in the country.

The section further provides the compliance status on broadcasting quality of service indicators for the quarter ending June 2025.

2.1 Active decoders

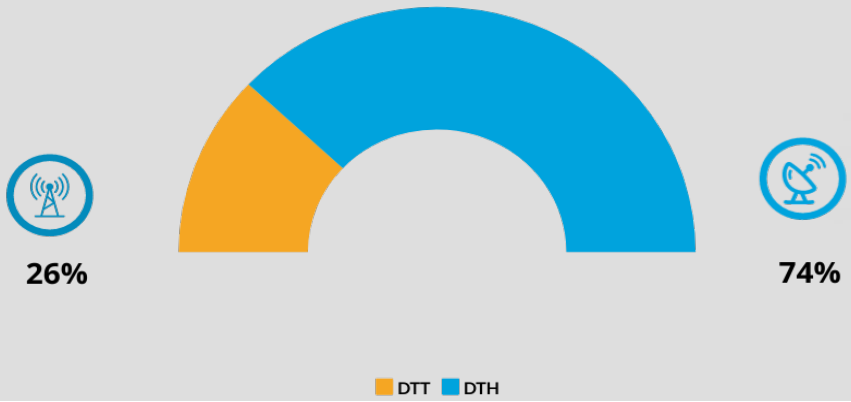
The number of active decoders (set-top boxes which were subscribed to a paid TV package atleast once in a three month period) accessing TV broadcasting services, decreased by 1.1% as shown in the summary below.

As of March 2025
2.1 Million

As of June 2025
2.0 Million

1.1%

Figure 2 Pay TV Subscription per technology



In the quarter ending June 2025, Azam Media Limited had the highest number of active decoders followed by StarMedia Limited as shown in Table 2.1

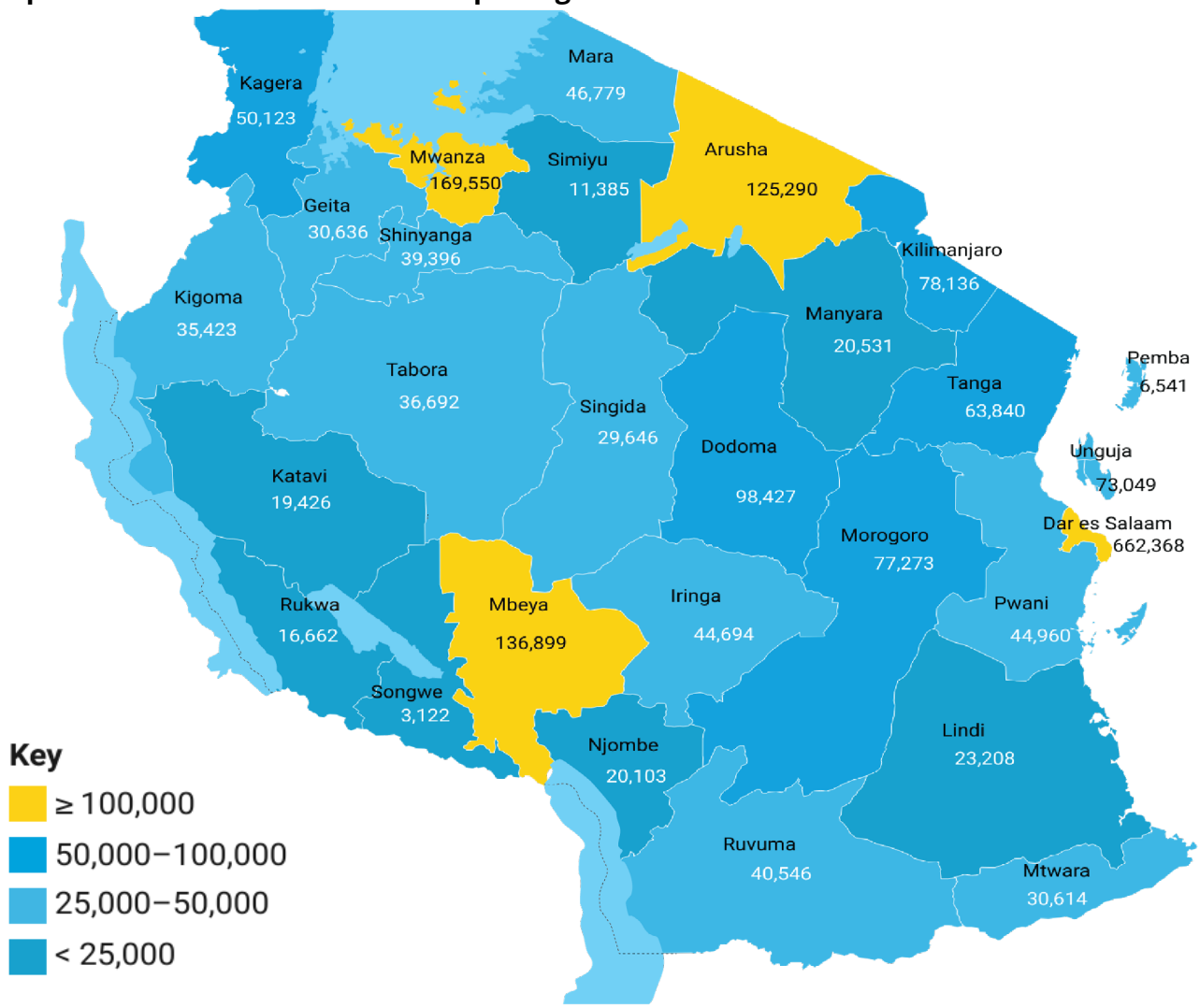
Table 2.1 Number of active decoders per operator as of June 2025

OPERATOR	DTT	DTH	TOTAL
Azam Media Limited	296,385	1,048,367	**1,344,752**
Basic Transmissions Limited (Continental)	35,063	28,810	**63,873**
Multichoice Tanzania Limited (DStv)	0	189,272	**189,272**
Star Media Limited	203,640	213,978	**417,618**
Zuku	0	19,804	**19,804**
Total	535,088	1,500,231	2,035,319

Agape Associates Limited and Basic Transmissions Limited (Digitek) had no active subscriptions for the quarter ending June 2025.

Based on the regional distribution of active decoders shown in Map 2.1, Dar es Salaam is ranked first with 662,368 active decoders, followed by Mwanza with 169,550 active decoders, Mbeya is ranked third with 136,899 active decoders and Arusha is ranked fourth with 125,290 decoders.

Map 2.1 Number of active decoders per region



2.2 Cable TV subscriptions

The number of cable TV subscriptions increased by 3% from 17,185 as of March 2025 to 17,657 as of June 2025, as shown below.

Figure 2.2 Cable TV subscriptions

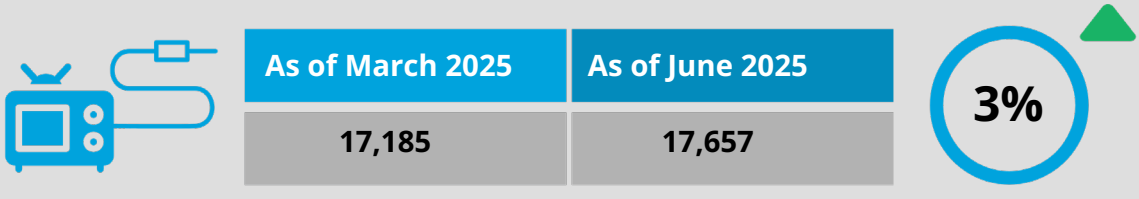
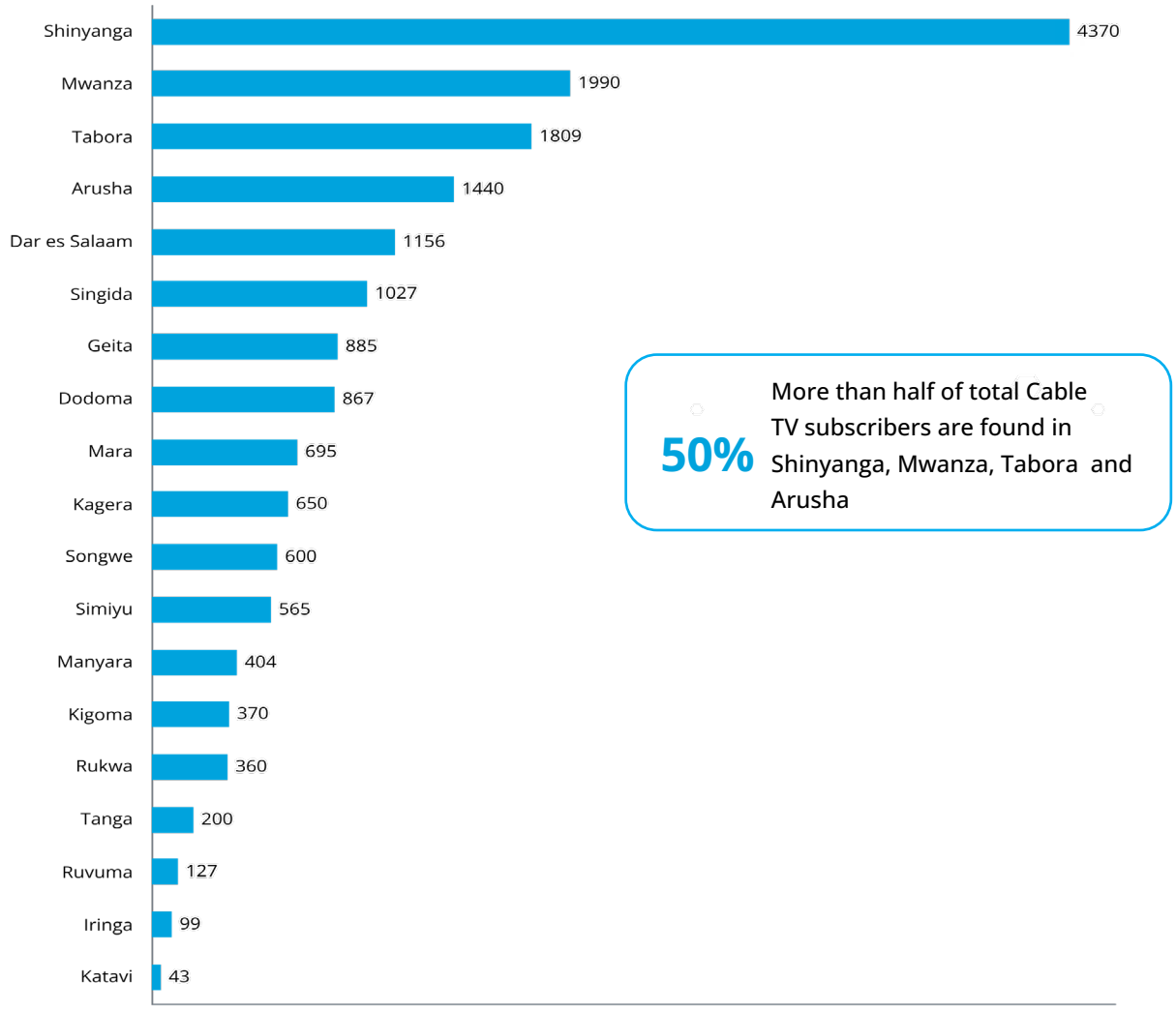


Chart 2.2 Cable TV subscriptions as of June 2025



Among all regions of Tanzania mainland, Shinyanga (4,370) ranked first followed by Mwanza (1,990), Tabora (1,809) and Arusha (1,440). Regions with the least Cable TV subscriptions are Katavi (43), Iringa (99) and Ruvuma (127).

The Quarterly and annual trend for cable TV subscriptions are shown in Table 2.2a and 2.2b.

Table 2.2a Quarterly trend of Cable TV subscription

	September 2024	December 2024	March 2025	June 2025
Subscriptions	19,153	16,767	17,185	17,657

Table 2.2b Trend of Cable TV subscriptions for the past five years

	2020	2021	2022	2023	2024
Subscriptions	14,350	19,739	22,295	16,223	16,767

2.3 Coverage of broadcasting network

The broadcasting signal coverage shown in Table 2.3 highlights significant disparities among DTT, DTH, and FM broadcasting technologies. DTH provides complete coverage geographically and in terms of population, serving as a critical infrastructure for reaching remote areas.

Table 2.3 Broadcasting signal coverage as of June 2025

Indicator	March 2025	June 2025
Percentage of the population covered by DTT signal	58.00%	58.00%
Percentage of the population covered by DTH signal	100.00%	100.00%
Percentage of the population covered by FM broadcasting signal	81.45%	83.40%
Percentage of the geography covered by DTT signal	33.00%	33.00%
Percentage of the geography covered by DTH signal	100.00%	100.00%
Percentage of the geography covered by FM broadcasting signal	56.95%	58.30%

2.4 Compliance indicators

Content monitoring was carried out for National Broadcasters (Television and Radio) from April to June 2025 as specified in the Electronic and Postal Communications (Quality of Service) Regulations, 2025. Compliance was based on the criteria of adherence to program line up submission, 90 minutes for presentation of news,

National Broadcasters are required to provide schedules (timing, order, and duration) and adhere to the programs submitted.

2.4.1 Program line up submission and its adherence

The compliance to submission and adherence of television and radio program lineup of the National Broadcasters licensees for the quarter ending June 2025 is shown in Table 2.4.1a and Table 2.4.1b respectively.

Table 2.4.1a Television program line up submission and adherence for the quarter ending June 2025

Television name	Program Line Up Submission	Adherence to Program Line-Up Submitted
ITV	Compliant	Compliant
UTV	Compliant	Compliant
Tumaini TV	Compliant	Compliant
Channel Ten Television	Compliant	Non-compliant
East Africa TV	Compliant	Compliant
Star TV Tanzania	Non-compliant	Non-compliant
TBC 1	Compliant	Compliant
TV Imaan	Non-compliant	Non-compliant
Arise and Shine TV	Compliant	Compliant
WRM TV	Compliant	Compliant
Clouds TV	Compliant	Compliant
Hope Channel Tanzania	Compliant	Compliant
Upendo TV	Compliant	Non-compliant
Mahaasin TV	Compliant	Non-compliant
Channel Ten Plus	Compliant	Non-compliant
TVE	Compliant	Compliant

Table 2.4.1b Radio program line up submission and adherence for the quarter ending June 2025

Radio name	Program Line Up Submission	Adherence to Program Line-Up Submitted
Radio One	Compliant	Compliant
TBC Taifa	Compliant	Compliant
Adventist World Radio (AWR)	Compliant	Non compliant
Clouds FM	Compliant	Compliant
East Africa Radio	Compliant	Compliant
EFM	Compliant	Non compliant
Wasafi FM	Compliant	Compliant
Magic FM	Compliant	Compliant
TBC International	Compliant	Compliant
Radio Free Africa	Non compliant	Non compliant
Bongo FM	Compliant	Non compliant
Radio Maria	Compliant	Compliant

2.4.2 Program diversity

National Broadcasters are required to provide broad range of content that is fairly diverse in providing information, education and entertainment content so as to cater for different tastes, cultures, and interests of Tanzanians.

The compliance to program diversity, content of educational nature, adherence to presentation of news for television and radio stations for the quarter ending June 2025 is shown in Table 2.6.2a and Table 2.6.2b

Table 2.4.2a Television program diversity for the quarter ending June 2025

Television name	Program diversity	Content of Education Nature	Adherence to 90 minutes for News
ITV	Compliant	Compliant	Compliant
UTV	Compliant	Compliant	Compliant
Tumaini TV	Compliant	Compliant	Compliant
Channel Ten Television	Compliant	Compliant	Compliant
East Africa TV	Compliant	Compliant	Compliant
Star TV Tanzania	Compliant	Compliant	Compliant
TBC 1	Compliant	Compliant	Compliant
TV Imaan	Compliant	Compliant	Compliant
Arise and Shine TV	Compliant	Compliant	Compliant
WRM TV	Non-compliant	Non-compliant	Compliant
Clouds TV	Compliant	Compliant	Compliant
Hope Channel Tanzania	Compliant	Compliant	Compliant
Upendo TV	Compliant	Compliant	Compliant
Mahaasin TV	Compliant	Compliant	Compliant
Channel Ten Plus	Compliant	Compliant	Non-compliant
TVE	Compliant	Compliant	Compliant

Table 2.4.2b Radio program diversity for the quarter ending June 2025

Radio Name	Program Diversity	Content of Education Nature	Adherence to 90 minutes for News
Radio One	Compliant	Compliant	Compliant
TBC Taifa	Compliant	Compliant	Compliant
Adventist World Radio (AWR)	Compliant	Compliant	Non compliant
Clouds FM	Compliant	Compliant	Compliant
East Africa Radio	Compliant	Compliant	Non compliant
EFM	Compliant	Compliant	Non compliant
Wasafi FM	Compliant	Compliant	Non compliant
Magic FM	Non compliant	Non compliant	Compliant
TBC International	Compliant	Compliant	Compliant
Radio Free Africa	Compliant	Compliant	Compliant
Bongo FM	Compliant	Compliant	Compliant
Radio Maria	Compliant	Compliant	Compliant

2.4.3 Adherence to local content

National Broadcasters are required to ensure that 60% of aired content is produced locally, reflecting the culture, language, and interests of the local audience.

The compliance to adherence to local content for the quarter ending June 2025 is shown in Table 2.4.3a and Table 2.4.3b below.

Table 2.4.3a Television adherence to local content for the quarter ending June 2025

Television name	Adherence to local content		
	Relevance to society	Language (Kiswahili or English)	60% local content production
ITV	Compliant	Compliant	Compliant
UTV	Compliant	Compliant	Compliant
Tumaini TV	Compliant	Compliant	Compliant
Channel Ten Television	Compliant	Compliant	Compliant
East Africa TV	Compliant	Compliant	Compliant
Star TV Tanzania	Compliant	Compliant	Compliant
TBC 1	Compliant	Compliant	Compliant
TV Imaan	Compliant	Compliant	Compliant
Arise and Shine TV	Compliant	Compliant	Compliant
WRM TV	Compliant	Compliant	Compliant
Clouds TV	Compliant	Compliant	Compliant
Hope Channel Tanzania	Compliant	Compliant	Compliant
Upendo TV	Compliant	Compliant	Compliant
Mahaasin TV	Compliant	Non-Compliant	Compliant
Channel Ten Plus	Compliant	Compliant	Compliant
TVE	Compliant	Compliant	Compliant

Table 2.4.3b Radio adherence to local content for the quarter ending June 2025

Radio name	Adherence to local content		
	Relevance to society	Language (Kiswahili or English)	60% local content production Diversity
Radio One	Compliant	Compliant	Compliant
TBC Taifa	Compliant	Compliant	Compliant
Adventist World Radio (AWR)	Compliant	Compliant	Compliant
Clouds FM	Compliant	Compliant	Compliant
East Africa Radio	Compliant	Compliant	Compliant
EFM	Compliant	Compliant	Compliant
Wasafi FM	Compliant	Compliant	Compliant
Magic FM	Compliant	Compliant	Compliant
TBC International	Compliant	Compliant	Compliant
Radio Free Africa	Compliant	Compliant	Compliant
Bongo FM	Compliant	Compliant	Compliant
Radio Maria	Compliant	Compliant	Compliant

2.5 Broadcasting service licences

Category	Number of licenses	
	March 2025	June 2025
National Content Television (FTA) Licences	17	17
District Content Television (FTA) Licences	21	21
National Content Radio Licences	14	14
Regional Content Radio Licences	33	36
District Content Radio Licences	187	184
Community Radios	17	17
National Content Televisions by Subscription	30	30
District Content Televisions by Subscription	1	1
National Content (support services)	3	3
Online Content Aggregators	6	6
Weblogs (Blogs)	64	72
Online Radios	10	11
Online Televisions	196	213
Cable Televisions	50	56

Chapter 03

Postal and Courier Services

3. Postal & Courier Services

This section presents statistics for postal and courier customers, posted and delivered items, such as mail, parcels and documents, to and from domestic, East Africa (EA) and the Rest of the World (RoW).

3.1 Letter boxes and private bags

Tanzania Posts Corporation (TPC) provides basic postal services of letter boxes and private bags to private individuals and corporate customers. During the period from April to June 2025, there was no change in the number of letter boxes and private bags as shown in Table 3.1.

Table 3.1 TPC letter boxes and private bags

Month	No. of Letter Boxes	No. of Private Bags	Total
April	158,006	67	158,073
May	158,006	67	158,073
June	158,006	67	158,073

3.2 Courier customers

Courier customers for this quarter are shown in Table 3.2.

Table 3.2 Courier customers

Month	Corporate Customers	Individual Customers	Total
April	1,661	89,235	90,896
May	3,948	51,407	55,355
June	1,042	63,972	65,014

Data in Table 3.2 indicates that there were more individual courier service customers than corporate customers.

3.3 Posted items

3.3.1 Domestic posted items

The number of domestic posted items in this quarter is shown in Table 3.3.1 The statistics show that parcels were the most posted items in this quarter, followed by letter mails. Packets were the least posted items in the quarter.

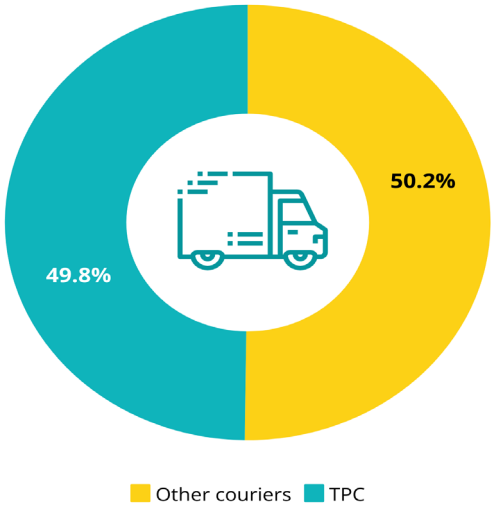
The number of international items posted through TPC and other couriers is shown in the Table 3.3.2a.

Table 3.3.1 Domestic posted items

Month	Letter Mails	Parcels	Packets	Documents	Cargo	Total
April	55,796	84,297	5,862	48,648	15,471	210,074
May	49,320	60,091	6,998	52,407	8,879	177,695
June	49,489	60,968	7,537	50,363	3,400	171,757
Total	**154,605**	**205,356**	**20,397**	**151,418**	**27,750**	**559,526**

During the period under review, other courier operators posted 281,099 items (50.2%) and TPC posted 278,427 items (45%). The market share for domestic posted items is shown in Chart 3.3.1.

Chart 3.3.1 Market share for Domestic posted items



3.3.2 International posted items

The number of international items posted through TPC and other couriers is shown in the Table 3.3.2a.

Table 3.3.2a Number of international posted items per operator

Operator	Jan to Mar 2025	Apr to June 2025
TPC	41,966	36,096
Other Couriers	25,495	25,506
Total	**67,461**	**61,602**

Table 3.3.2b shows the number of international posted items which indicates that letter mails were the most posted items to international in this quarter, followed by documents and parcels.

Table 3.3.2b Number of international posted items

Month	Letter Mails	Parcels	Packets	Documents	Postal Cargo	Total
April	9,667	5,811	186	3,732	17	19,413
May	8,675	5,907	261	4,372	4	19,219
June	14,312	4,233	136	4,285	4	22,970
Total	**32,654**	**15,951**	**583**	**12,389**	**25**	**61,602**

3.4 Delivered items

3.4.1 Domestic delivered items

The total number of domestic delivered items through TPC and other couriers is shown in Table 3.4.1.

Table 3.4.1 Domestic delivered items

Month	Letter Mails	Parcels	Packets	Documents	Postal Cargo	Total
April	209,695	73,098	4,609	38,767	14,642	**340,811**
May	171,679	51,519	6,879	58,558	8,326	**296,961**
June	212,325	52,210	6,776	42,492	3,157	**316,960**
Total	**593,699**	**176,827**	**18,264**	**139,817**	**26,125**	**954,732**

3.4.2 International delivered items

The number of international delivered items in the quarter ending June 2025 is shown in Table 3.4.2a.

Table 3.4.2a International delivered items for the quarter ending June 2025

Operator	Jan to Mar 2025	April to June 2025
TPC	66,989	56,001
Other Couriers	52,465	20,783
Total	**119,454**	**76,784**

The international delivered items in Table 3.4.2b shows that packets were the most delivered and cargo were the least delivered items in this quarter.

Table 3.4.2b International delivered items for the quarter ending June 2025

Month	Letter Mails	Parcels	Packets	Documents	Postal Cargo	Total
April	8,501	5,492	8,333	6,965	26	29,317
May	6,699	6,857	9,369	2,073	25	25,023
June	12,107	1,559	7,757	1,006	15	22,444
Total	**27,307**	**13,908**	**25,459**	**10,044**	**66**	**76,784**

The market shares of international posted and delivered items are shown in Chart 3.4. The chart shows that Tanzanians posted fewer items (45%) compared to delivered (55%).

Chart 3.4 Share of international posted and delivered items

3.5 Quality of Service (QoS)

During the period under review, Quality of Service (QoS) tests were conducted as specified in the Electronic and Postal Communications (Quality of Service) Regulations, 2025 in Inter- Town zone A, B and C to evaluate how effectively domestic courier services complied with the delivery standards set by QoS regulations.

Inter-Town Zone A, includes towns of Arusha, Kilimanjaro, Tanga, Morogoro, Dodoma, Iringa, Zanzibar and Mwanza, the standard requires that 90% of items be delivered by the next day (D+1). Inter-Town Zone B, includes towns of Mbeya, Njombe, Ruvuma, Mtwara, Singida and Lindi, and Inter-Town Zone C, includes towns of Tabora and Geita, the standard requires 90% of items to be delivered within two days (D+2). The tests are presented in Table 3.5a and 3.5b.

Table 3.5a QoS indicator – Speed of delivery for Inter-Town Zone A target: Day+1(90%)

Licensee name	Compliance status
Advanced Logistics Limited	Not compliant
Couriemate Tanzania Limited	Not compliant
H&N Courier Express Limited	Not compliant
Cmtl Group Limited	Not compliant
Marathon Logistics Limited	Not compliant
Ab Courier Express Limited	Compliant
Blaze Concierge And Courier Services Limited	Compliant
Mwananchi Communications Limited	Compliant
Geamos Company Limited	Compliant
Air Tanzania Company Limited	Compliant
Madeira Courier Services	Compliant
Ndengaro Company Limited	Compliant
Precision Air Services Plc	Compliant
Zan Fast Ferries Company Limited	Compliant

Table 3.5b QoS indicator – Speed of delivery for Inter-Town Zone B and C target: Day +2 (90%)

Licensee name	Compliance status
Simba Logistic Equipment Supply Co. Ltd	Not compliant
Couriemate Tanzania Limited	Not compliant
H&N Courier Express Limited	Not compliant
Cmtl Group Limited	Not compliant
Advanced Logistics Limited	Not compliant
Ndengaro Company Limited	Not compliant
Mwananchi Communications Limited	Compliant
Marathon Logistics Limited	Compliant
Ab Courier Express Limited	Compliant
Blaze Concierge And Courier Services Limited	Compliant
Geamos Company Limited	Compliant
Air Tanzania Company Limited	Compliant
Precision Air Services Plc	Compliant
Malitabu Musa Ntamala T/A Skygo Express	Compliant

TCRA has taken and will continue to take regulatory measures to all licencees who fail to comply with QoS parameters as provided in the Electronic and Postal Communications (Quality of Service) Regulations, 2025.

3.6 Postal and Courier service licences

Category	Number of licenses	
	March 2025	June 2025
International Courier	5	6
East Africa Courier	2	-
Intercity Transporters	79	71
Intracity Courier	15	13
Domestic Courier	49	55
Public Postal	1	1

4. Conclusion

The Communications sector demonstrated stable performance during the quarter ending June 2025, showing consistency compared to the previous quarter (March 2025). All three subsectors of telecommunications, postal and courier services, and broadcasting, continued to expand in service volume and competitive offerings.

In telecommunications and internet services, subscriptions, traffic, and coverage saw notable growth, while tariffs for voice, data, and SMS services remained largely unchanged. The telecom market continued to exhibit competitiveness, with the three leading MNOs collectively controlling 82.6% of market shares by subscription. None of these operators surpassed the dominant market share threshold of 35%. Internet subscriptions and usage volumes grew by 9.6% and 14.7%, respectively, driven by ongoing expansions of 4G and 5G high-speed broadband across the country, aligning with population growth and broader geographic coverage.

Broadcasting service penetration, as measured by active decoder usage, maintained stable levels during this quarter. There was, however, a shift in subscriber preferences, with increased adoption of Direct-to-Home (DTH) television, benefiting from 100% national coverage, and a concurrent decrease in Digital Terrestrial Television (DTT) subscriptions, which covered only 33% geographically and 58% population-wise. The broadcasting market remained dynamic and attractive to new entrants, particularly online TV services, bloggers, and cable TV providers. The sector recorded an additional 32 licensees, marking a growth rate of 5%, bringing the total to 681 licensees.

The Tanzania Posts Corporation and other courier service providers continued to perform their role of supporting the postal and courier subsector by handling letters, parcels, packets, documents, and postal cargo. This activity significantly contributes to facilitating e-commerce and supporting the broader digital economy. Efficiency in service provision is anticipated to further improve following the recent revision of the Electronic and Postal Communication (Postal) Regulations, 2024, which removed geographical limitations within the local postal market, enabling operators to strategically position themselves in competitive market areas.

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