



2017

NIGERIA MOBILE TRENDS REPORT

GENERAL OVERVIEW



- Mobile Usage in Nigeria
- Share of desktop versus Mobile Traffic
- Mobile traffic comparisons
- Web usage by operating system and Device Vendor.
- Top 20 Multi-sim phone use comparisons.



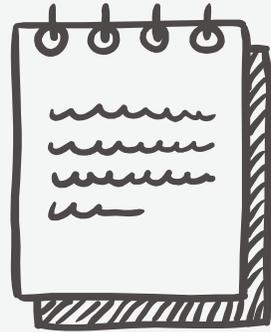
MOBILE TRENDS

- Active mobile subscribers by mobile operators.
- Active voice and internet subscriptions.
- Market share of mobile by browser.
- Top weekly smartphone and desktop online activities.
- Nigerian behavioural study on future opportunities in other tech sectors.

MOBILE LIFESTYLE



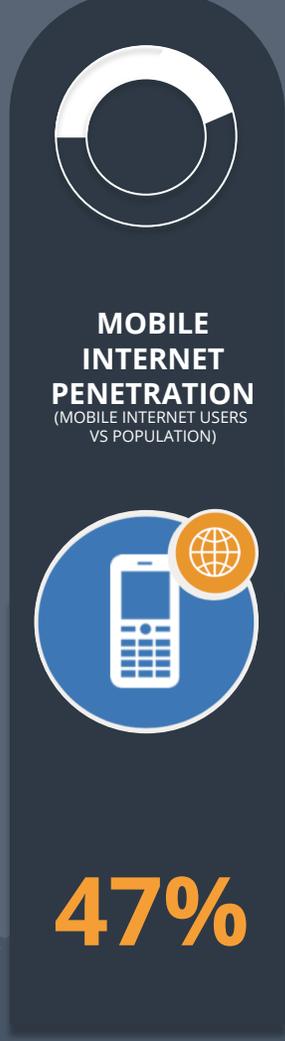
- Mobile Video
- Mobile Money
- M-commerce



OVERVIEW

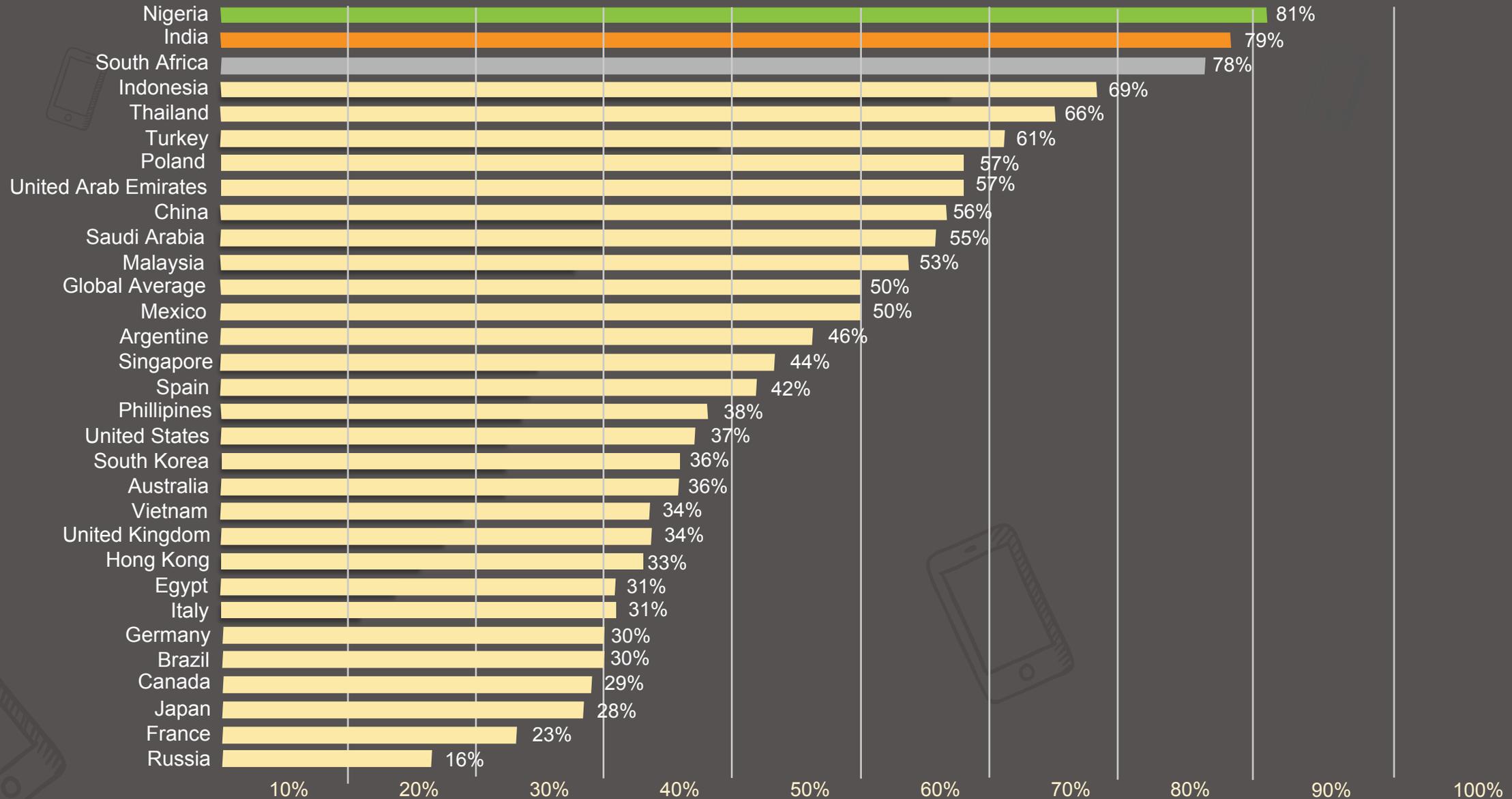
OF THE

**NIGERIAN
MOBILE MARKET**



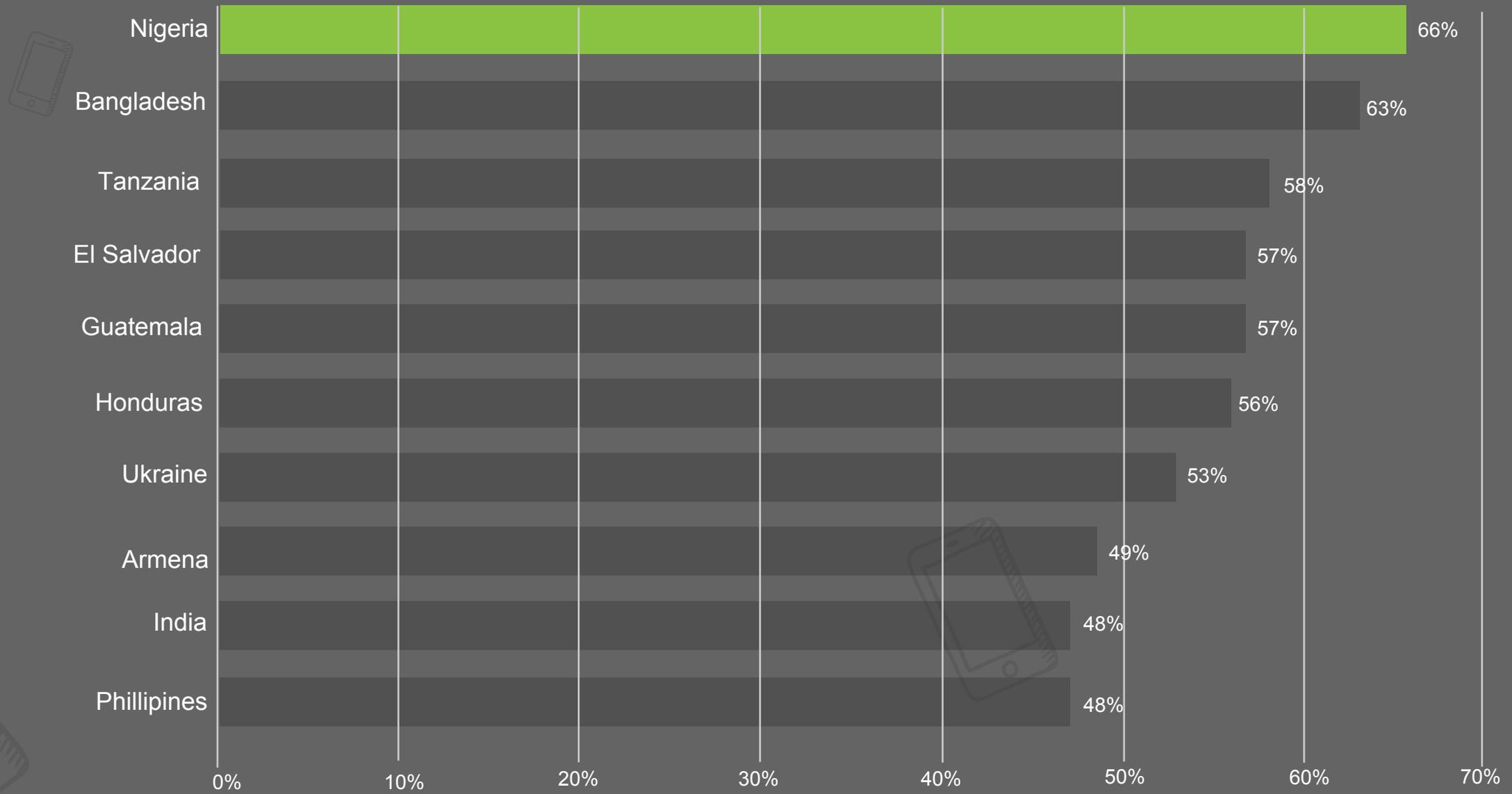
Source: Worldometer, NCC, Stat Counter

Nigeria remains world's most mobilized country, mobile traffic grew from 76% to 81%



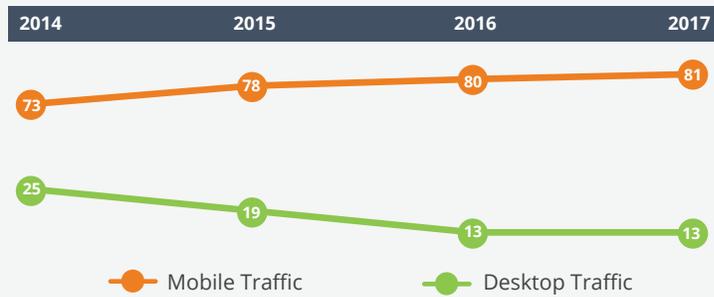
Source: Statcounter

Nigerian usage of multi-sim phones is highest in the world



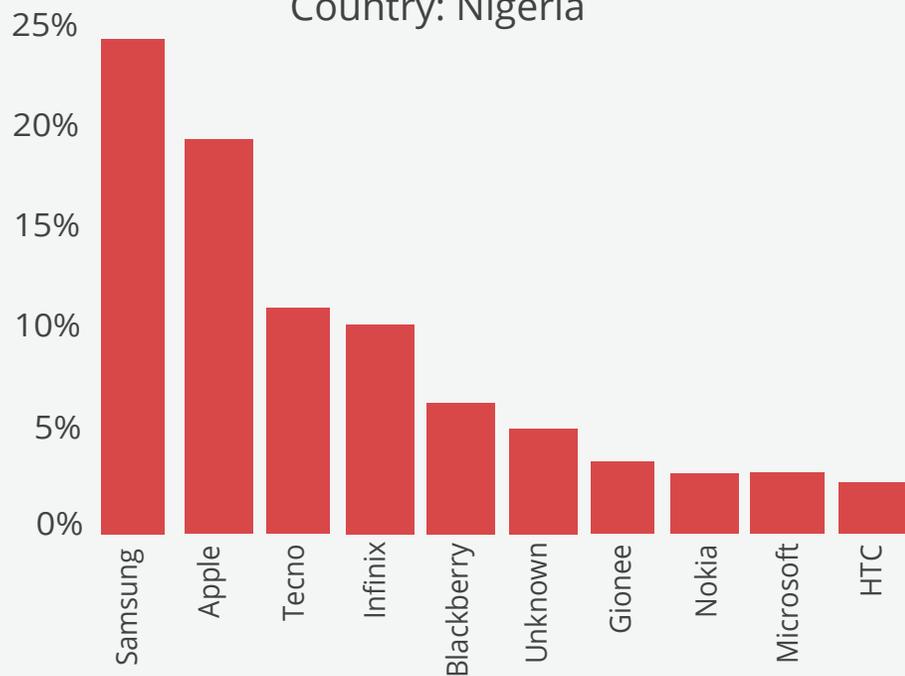
Share of Desktop versus mobile traffic in Nigeria

Mobile traffic overtook desktop traffic since 2012, and has continued to dominate since then.



Web usage by Device Vendors

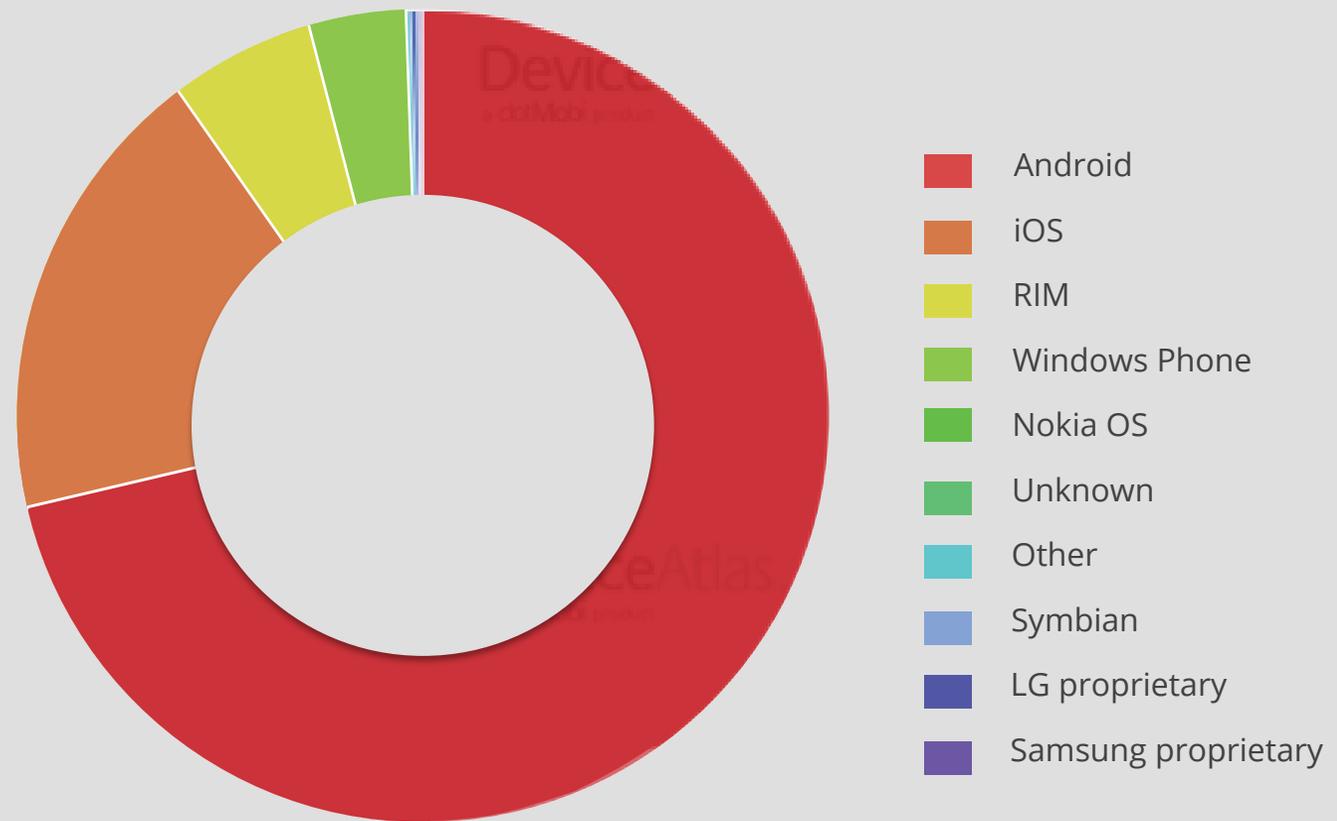
Country: Nigeria



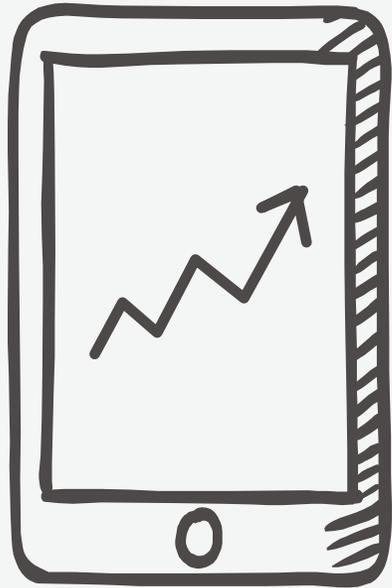
Device Atlas, 2017

Web usage by OS Name

Country: Nigeria

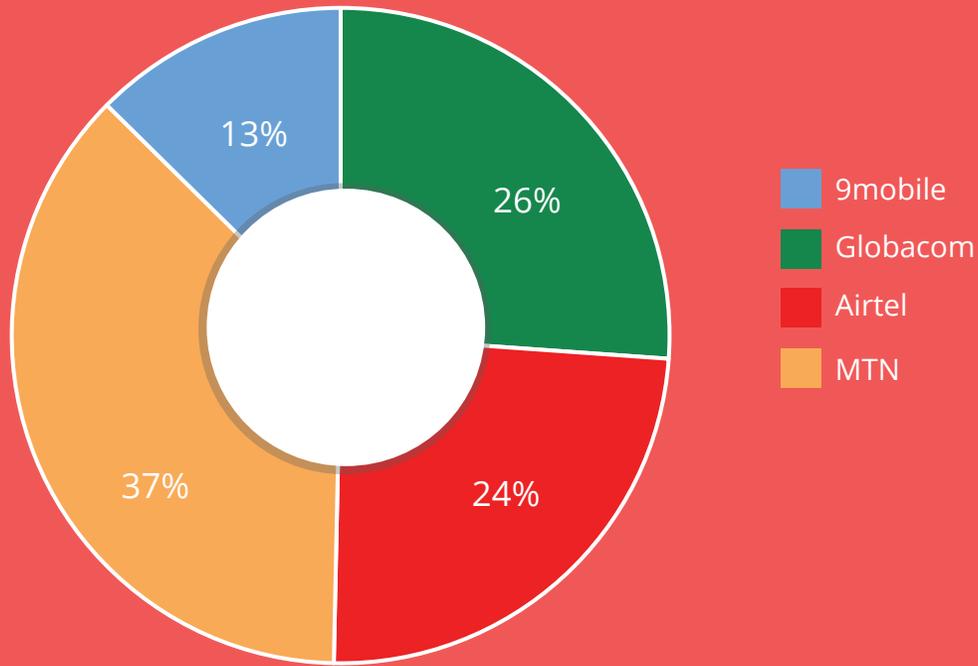


Android is clearly still the preferred mobile operating system used in Nigeria



NIGERIAN

MOBILE TRENDS



Market Share by Mobile Operator

Market Share, June 2017

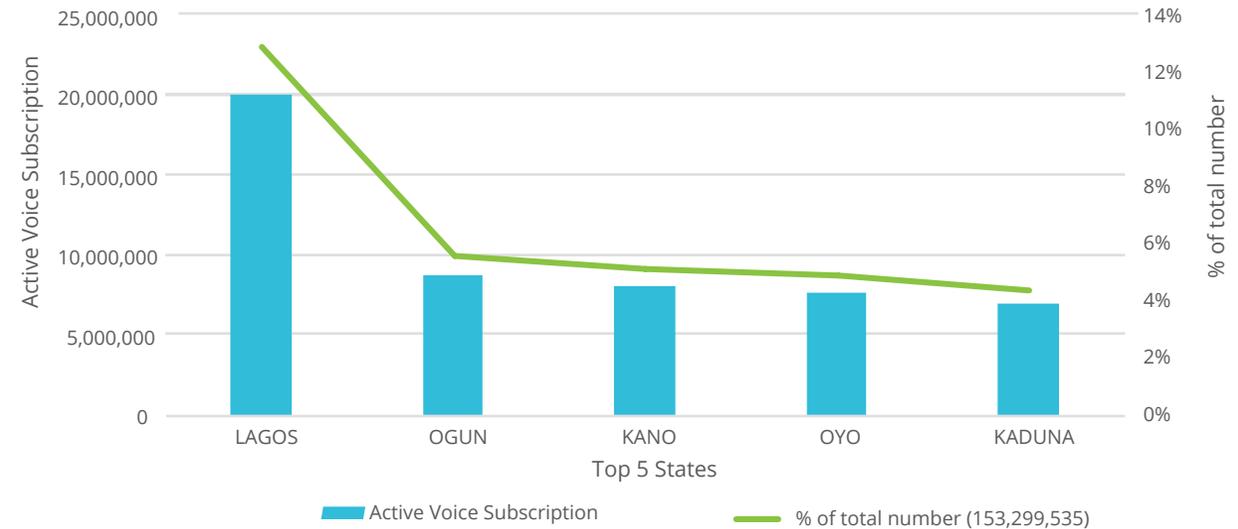


Growth of **Active Mobile Subscribers** by Operator from **2014 – 2017**

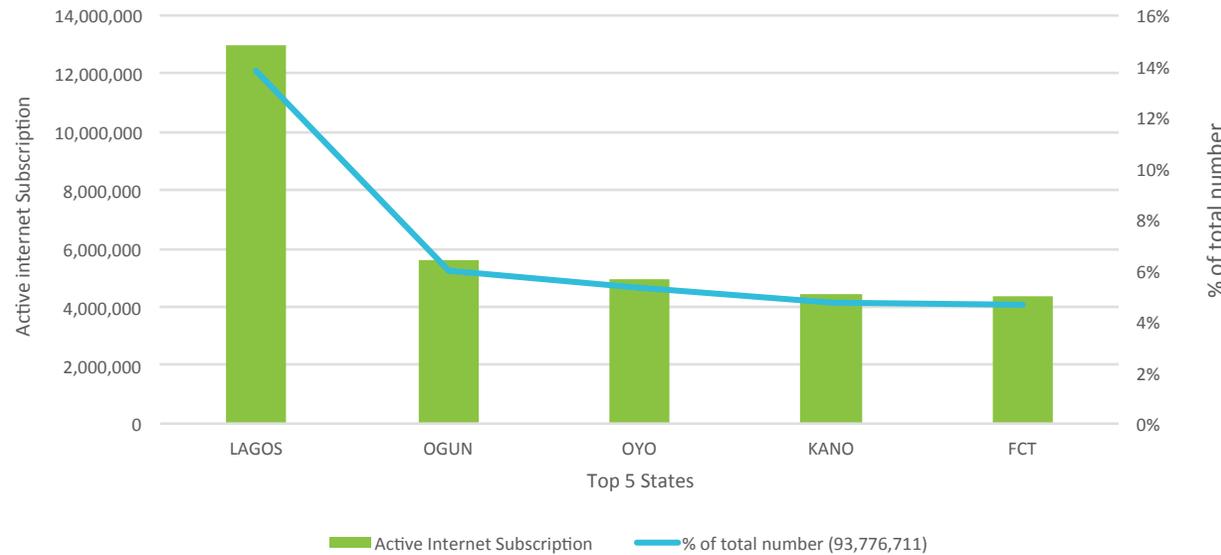
Year	Globacom	Airtel	MTN	9mobile
2014	28,486,530	27,989,580	60,493,053	21,559,667
2015	32,999,384	32,268,301	61,252,387	22,161,290
2016	34,608,793	33,866,798	57,045,721	21,877,542
2017	37,411,407	34,656,605	53,093,756	18,022,674

Top 5 states with Active voice subscription

Lagos state leads with the highest voice subscription in Nigeria



Source: National Bureau of Statistics



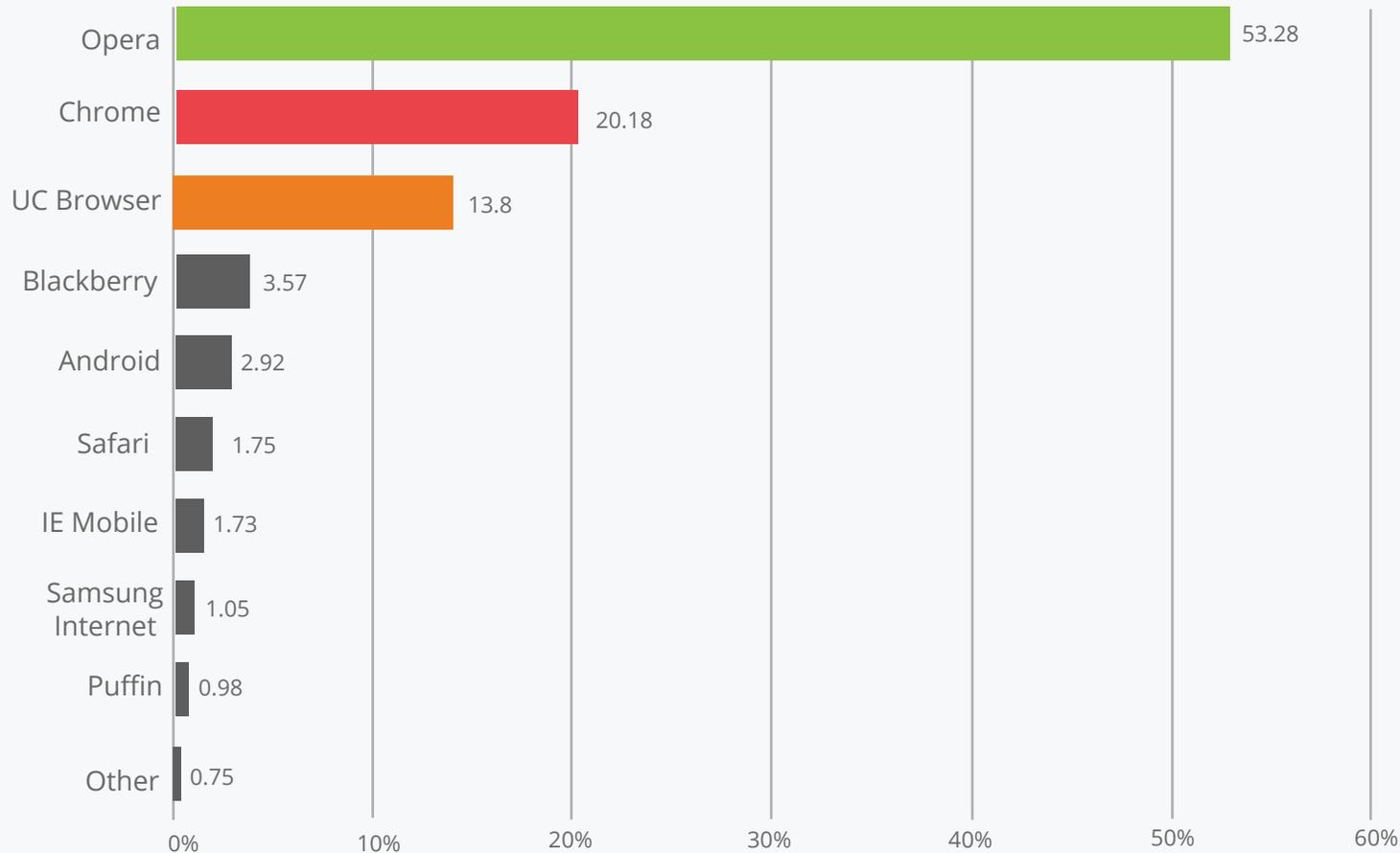
Source: National Bureau of Statistics

Top 5 states with Active internet subscription

...but Abuja enters the top 5 in terms of states internet subscription in Nigeria

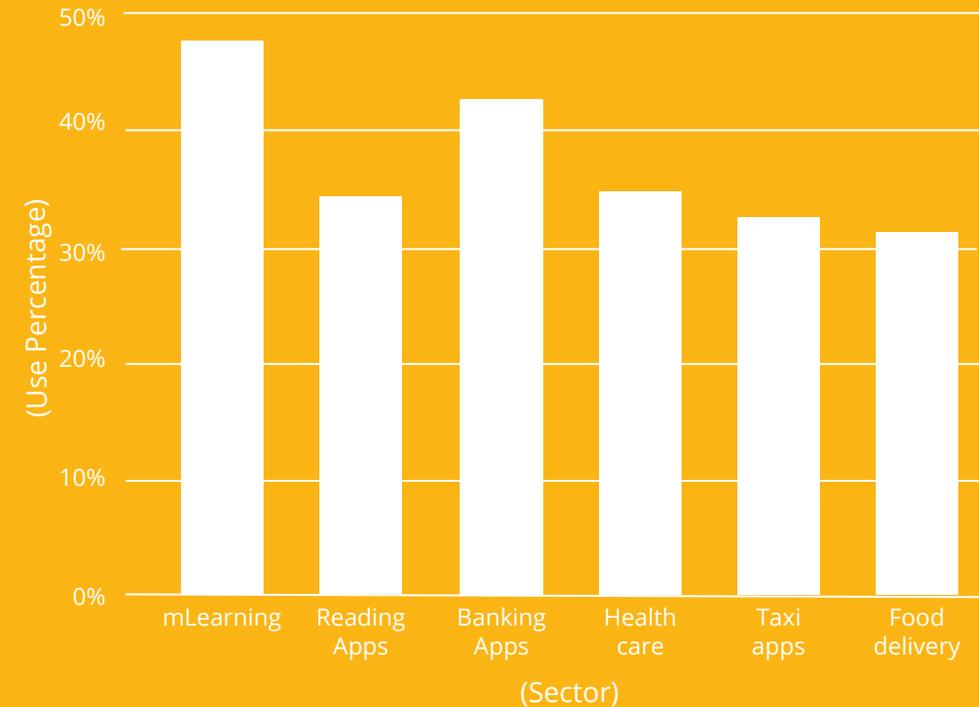
Market Share of mobile browser

Opera is still the preferred mobile browser

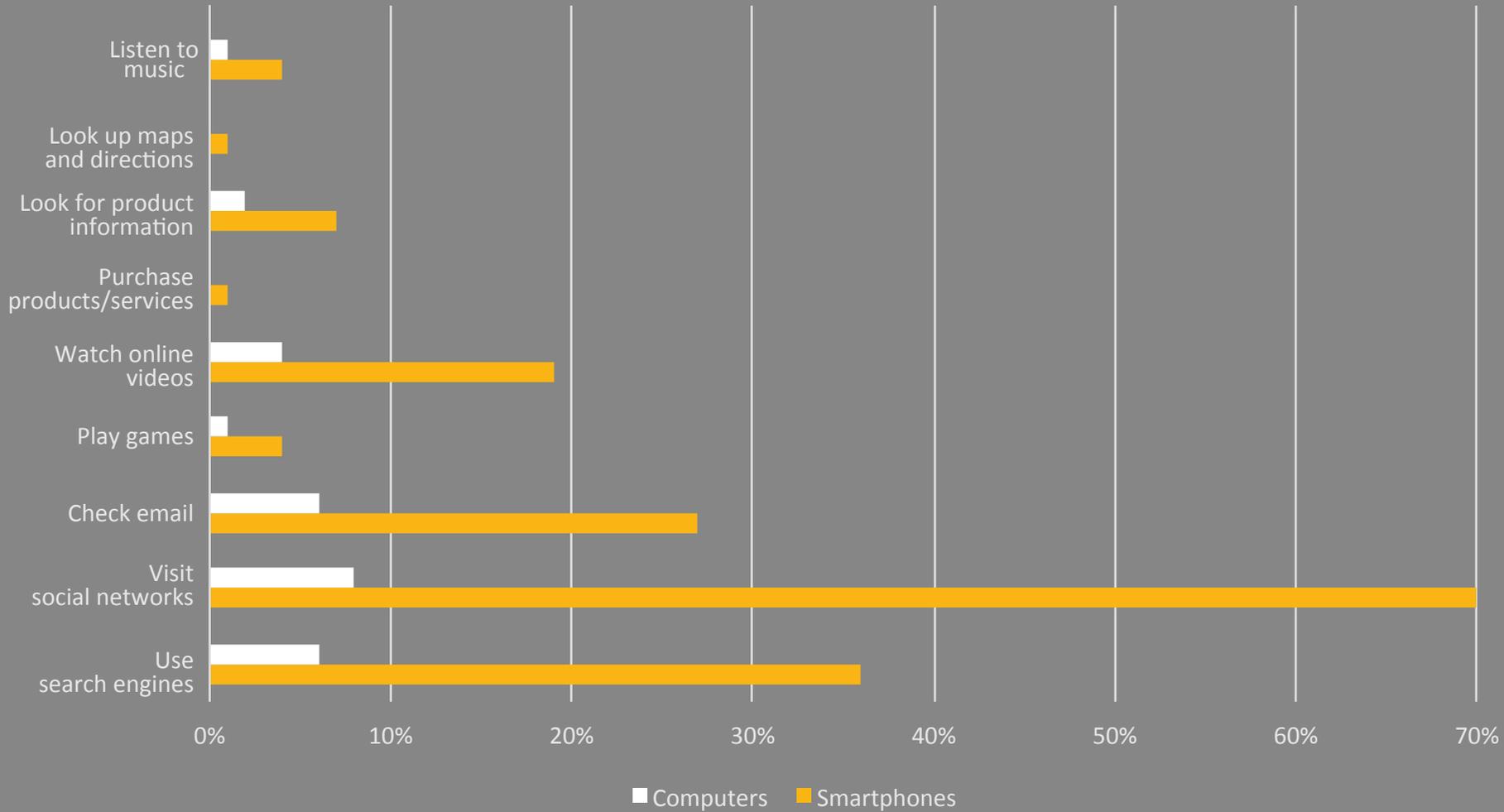


Source: Statcounter, 2017

Nigerian behavioural studies shows the future opportunities of other sectors outside apps and entertainment in Nigeria; 48% of the people surveyed indicated that they use mLearning apps.

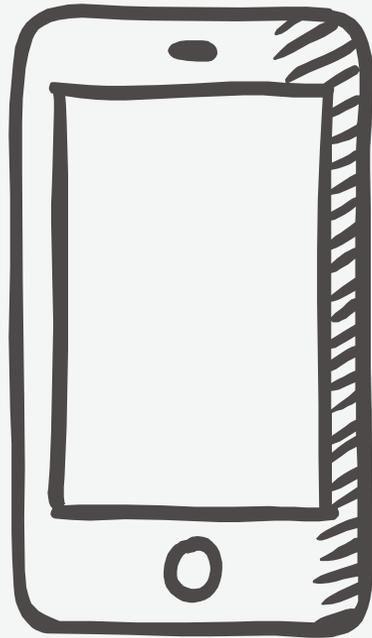


Source: Mobile Ecosystem 2016



What online activities do **Nigerians** do on their **smartphones & computer** at least weekly?

Social Media is the most popular activity performed by Nigerians weekly on their mobile phones.

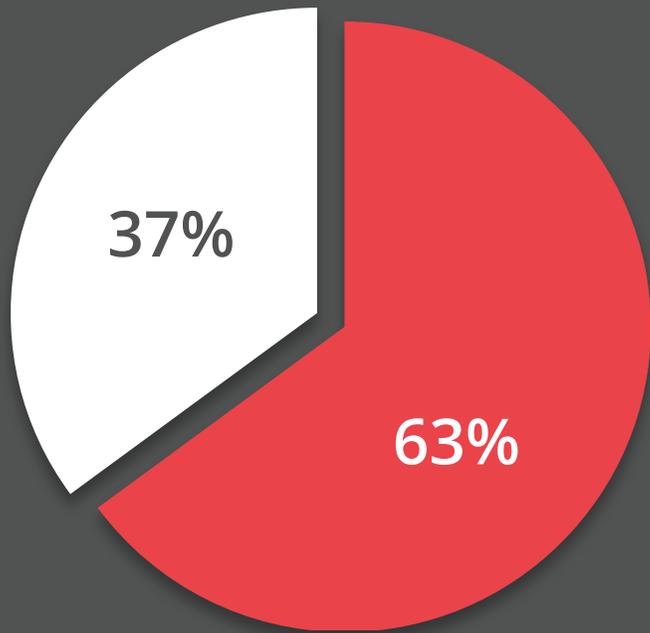


NIGERIAN

MOBILE LIFESTYLE

MOBILE COMMERCE

63% of all M-Commerce orders in Nigeria come from Mobile



Nigerian customers who use mobile phones to shop online buy a wide range of products, the top 3 being:



Mobile phone



Beauty and perfumes



Women's Clothings

Average price of smartphones have dropped significantly between 2014 and 2016, and sale of smartphones have gone up.

Average price of smartphones

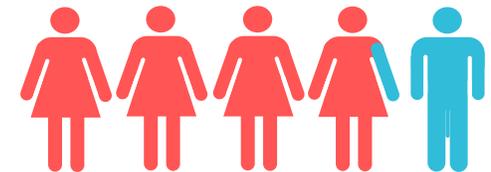


Booming smartphone sales (2014-2016)

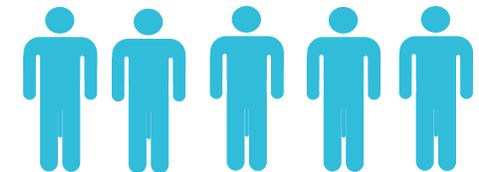


More men shop online than women in Nigeria.

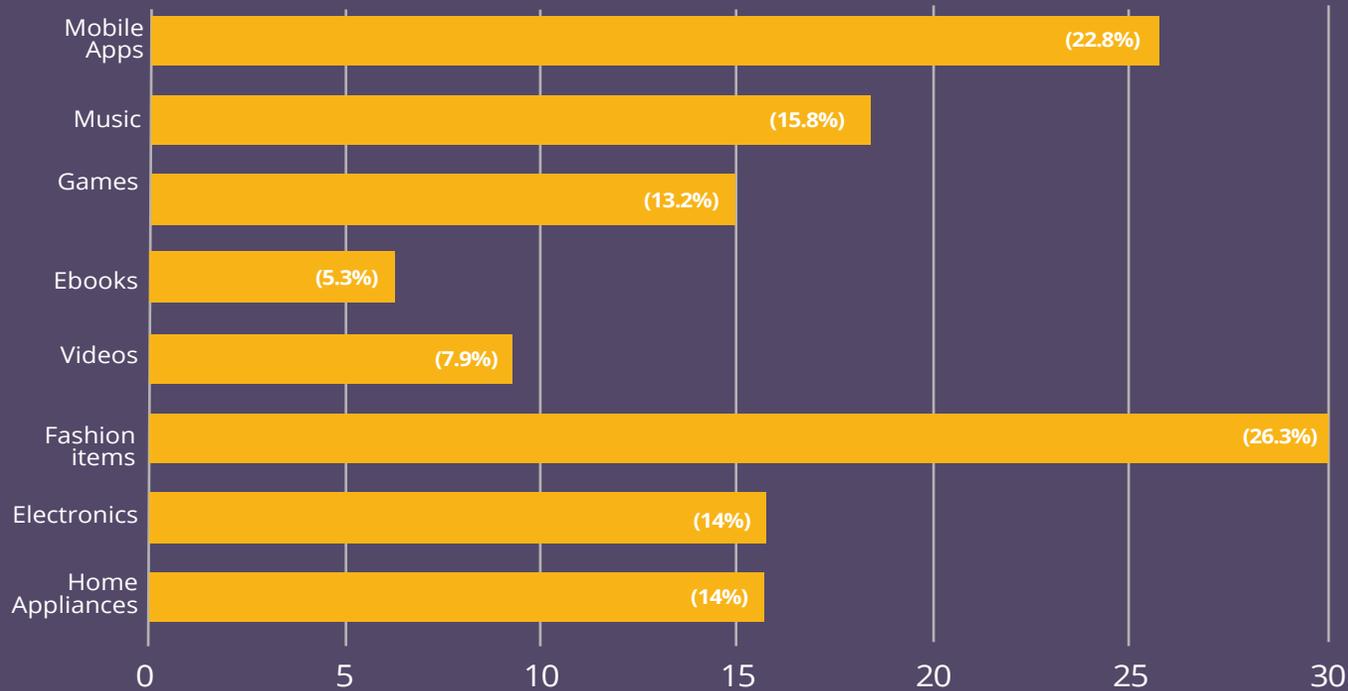
39%
WOMEN



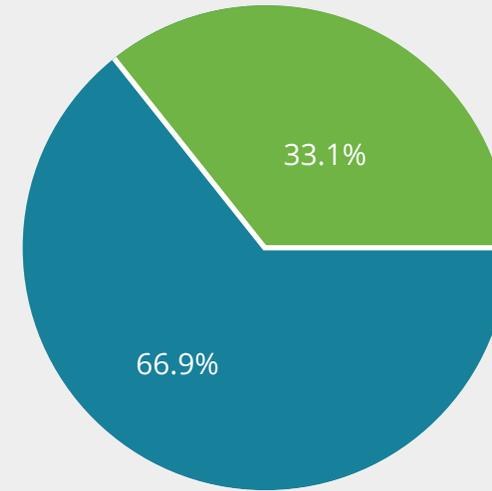
61%
MEN



Mobile purchase interest of Nigerians

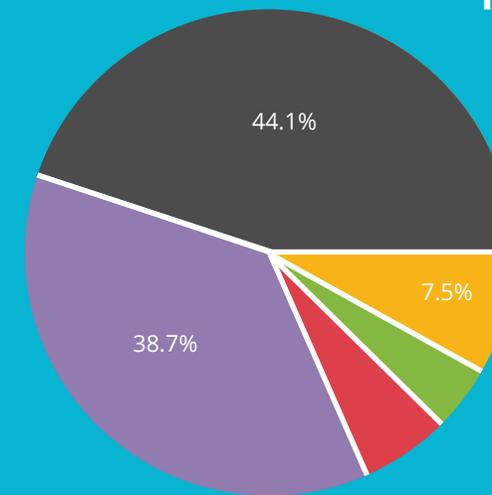


Fashion items and mobile apps top the list of things people buy with their mobile phones



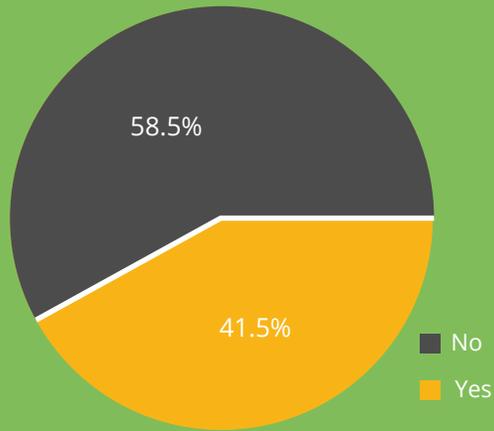
66.9% of Nigerians have bought an item with their mobile phone

- No
- Yes

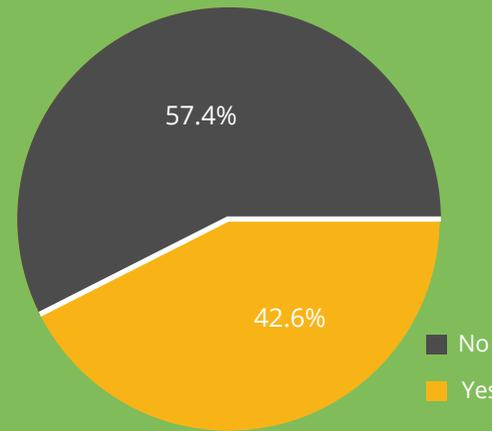


Reasons why Nigerians don't shop with their phones; a major reason being fear of buying fake items

- Slow internet
- Delivery delays
- Delivery changes
- I am afraid of buying fake items
- I haven't bought anything with my phone

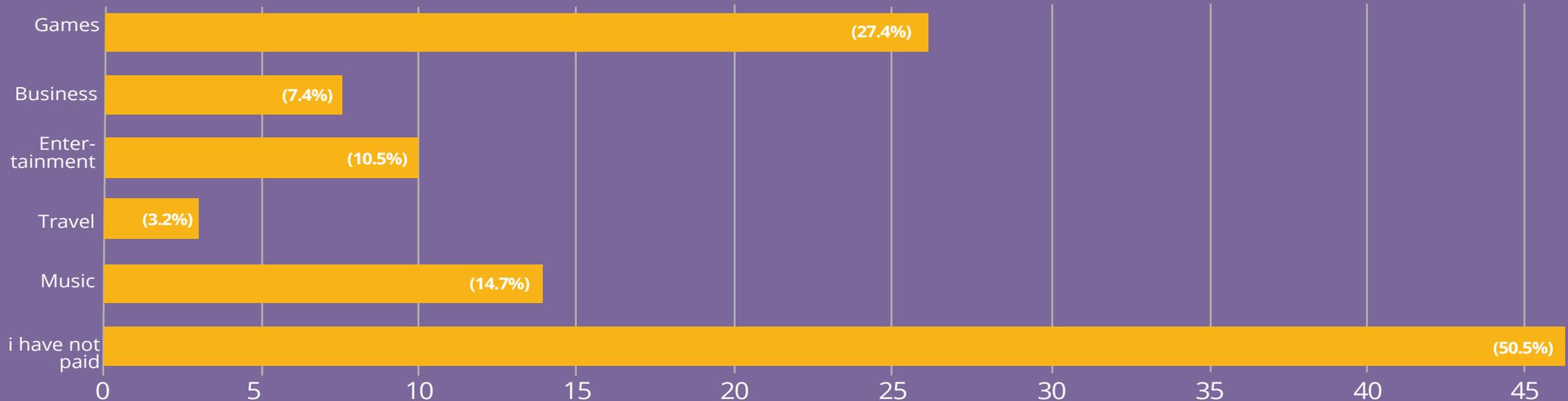


58.5% of Nigerians have paid for a mobile app before.

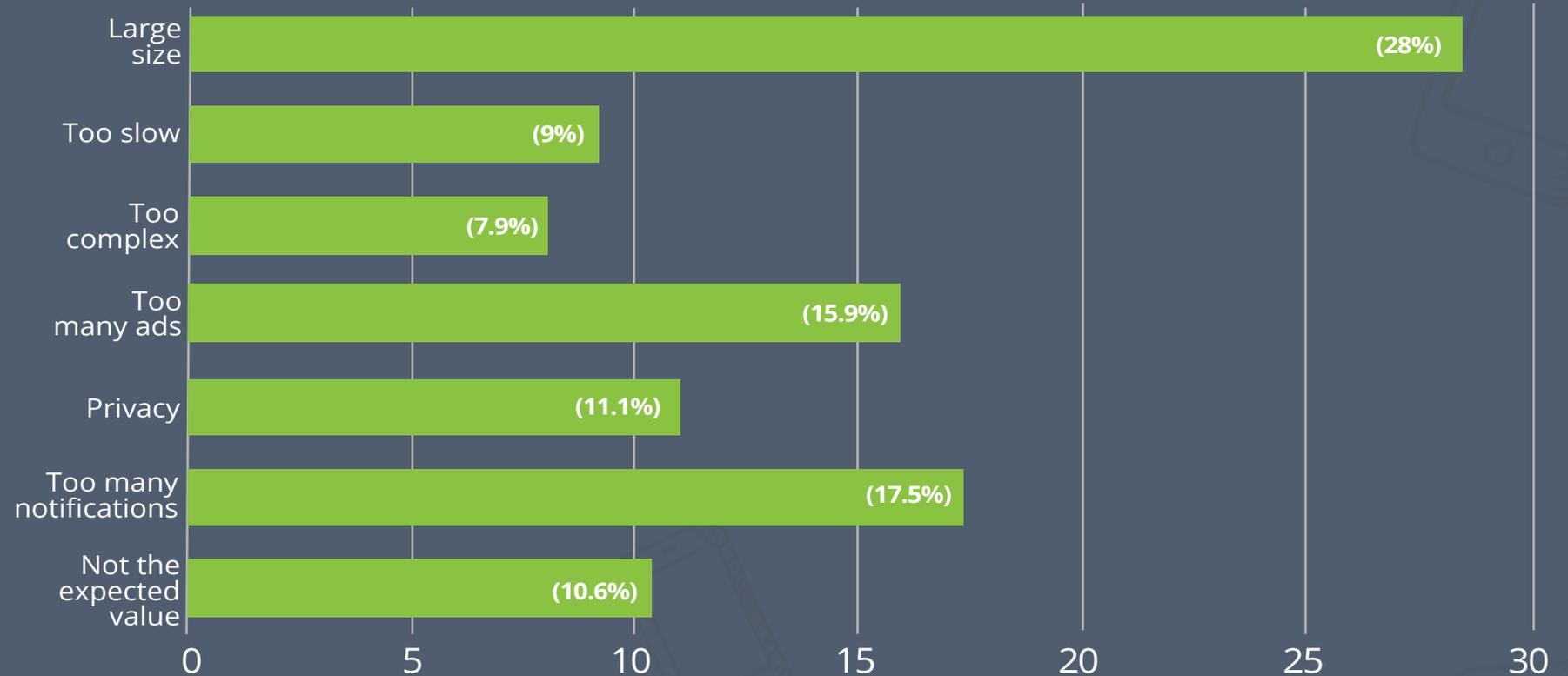


Nigerians are not too keen on in-app purchases, only 42.6% have made an in-app purchase.

Games top the list in type of app paid for



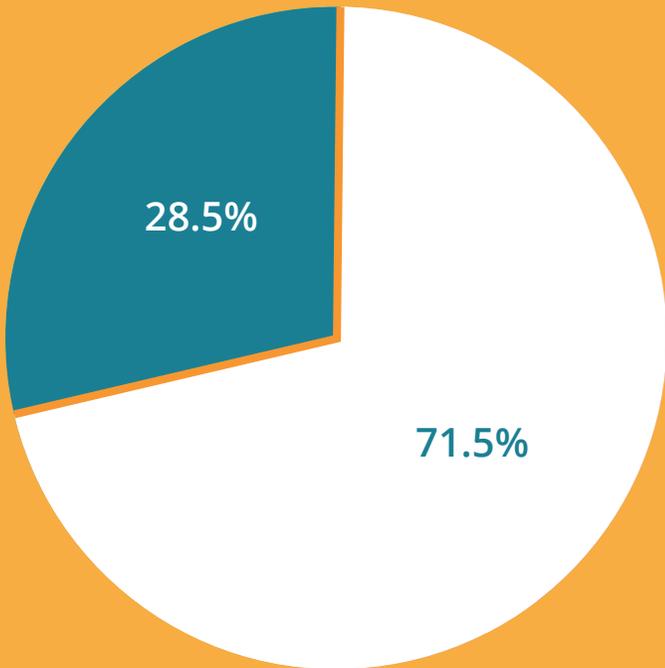
Main reasons why Nigerians uninstall apps



Large size and too many notifications top the chart

MOBILE MONEY

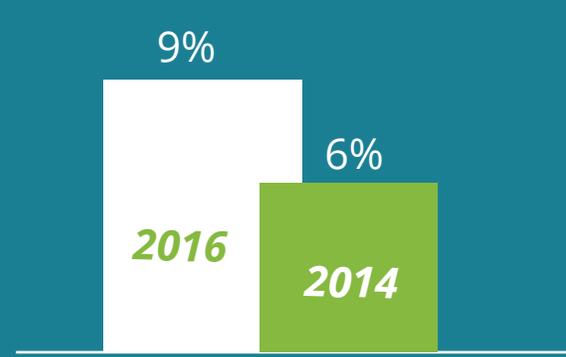
71.5% of Nigerians use a mobile banking app



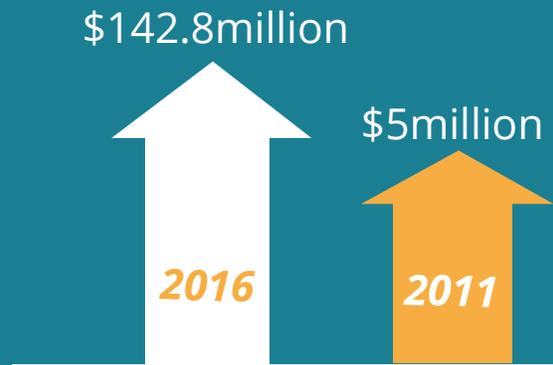
YES
 NO

Benefits of mobile banking

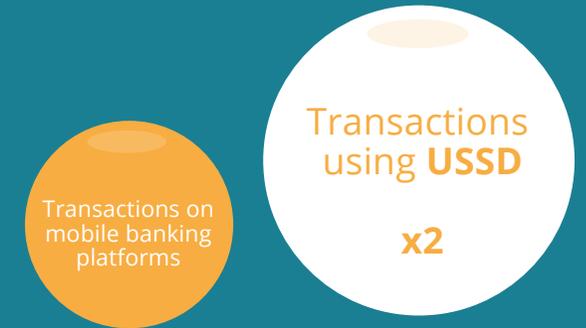




9% of Nigerians have made an in-store mobile payment; increasing from its previous value of 6% in 2014 (Mobile Money Report, MEF 2017)

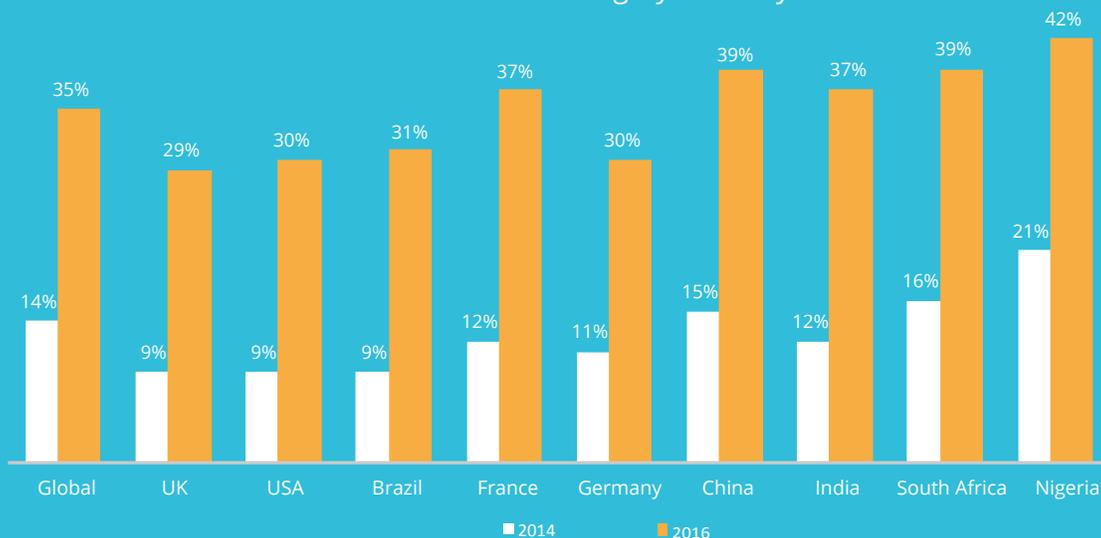


Average monthly transactions in mobile grew from a transaction value of 5millionUSD in 2011 to 142.8millionUSD in 2016 (KPMG Fintech in Nigeria Report, 2016)



Number of transactions performed using the USSD service has more than doubled the number of transactions on mobile banking platforms for banks offering USSD. (Mobile Money Report, MEF 2017)

Direct Carrier Billing by Country

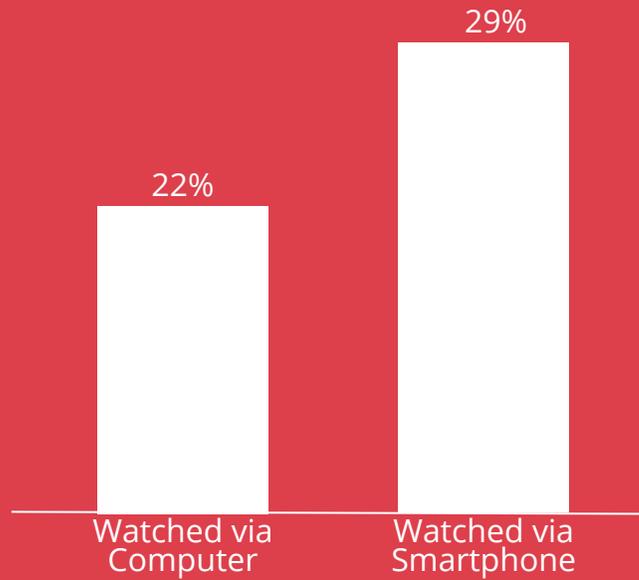


Payments made directly to mobile phone bill

Nigeria tops the chart with carrier billing (paying for items directly from the phone bill) at 42%.

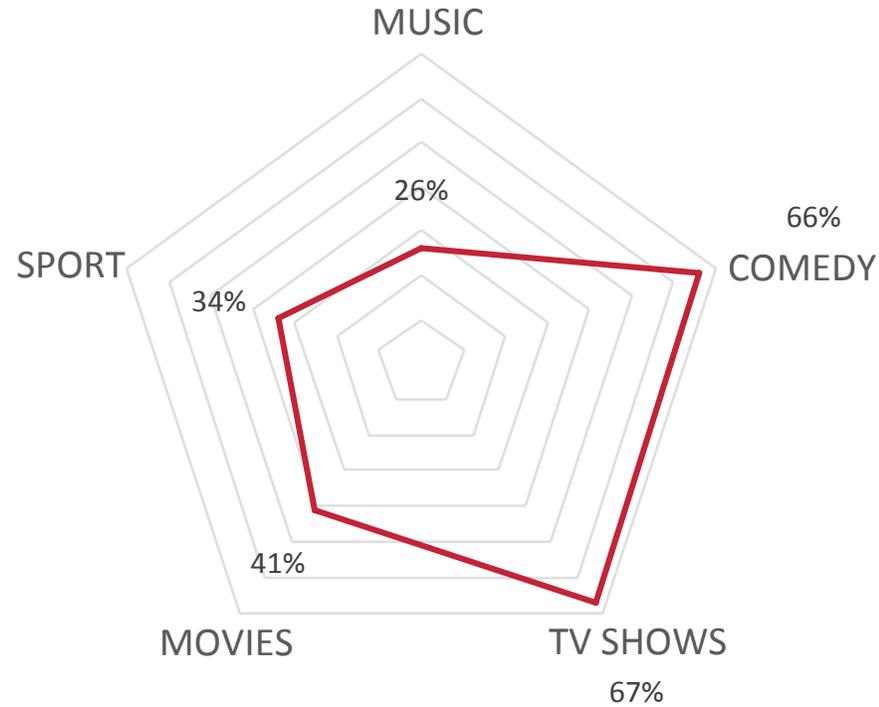
MOBILE VIDEO

29% of Nigerians prefer to watch short online videos via their smartphone



Many Nigerians prefer to watch short online videos, especially when via smartphones.

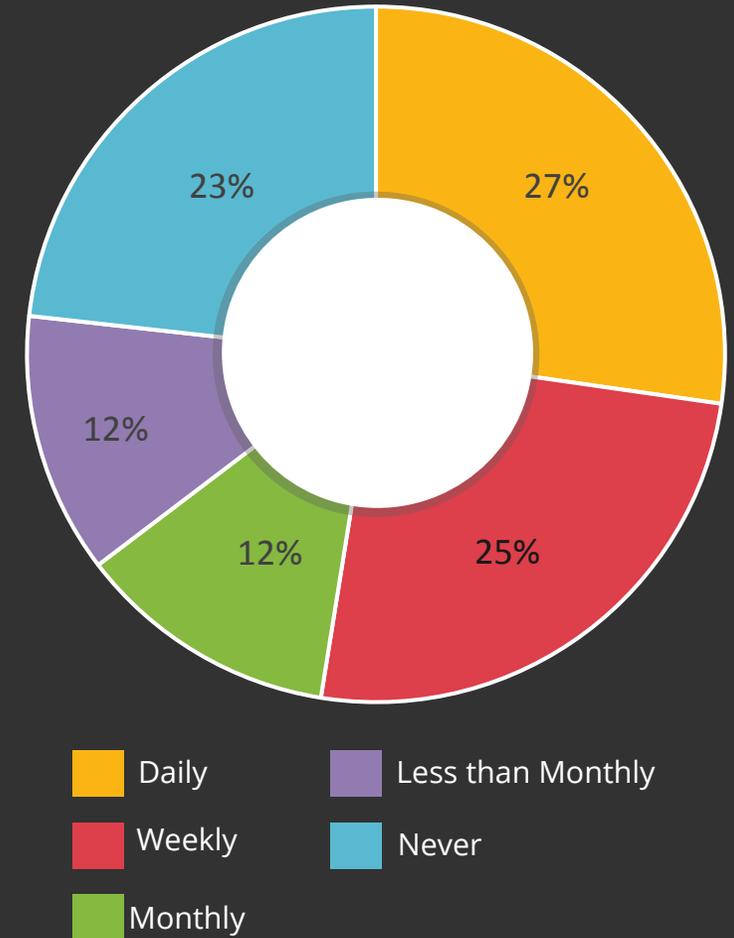
Source: Google Consumer Barometer Survey



Nigerians watch a range of online videos via their smartphones.

Source: Google Consumer Barometer Survey

Frequency at which online videos are watched



Many Nigerians watch online videos via their smartphones at least weekly.

Source: The Connected Consumer, Google

DISCLAIMER

This document, and any attachments thereto, regardless of form or medium, is intended only for use by the addressee and may contain legally privileged and/or confidential, copyrighted, and/or otherwise restricted information viewable by the intended recipient only. If you are not the intended recipient of this document (or the person responsible for delivering this document to the intended recipient), you are hereby notified that any dissemination, distribution, printing or copying of this document, and any attachment thereto, is strictly prohibited and violation of this condition may infringe upon copyright, and/ or other laws protecting proprietary and/ or, intellectual property.

In no event shall this document or the concept and ideas be delivered to anyone other than the intended recipient or original sender and violation may be considered a breach of law and shall be fully prosecuted. Intended recipients of this document are bound to use same for its stated purpose and not for any illegal or unauthorized purpose.

Note that without a Contractual Obligation, this document remains the Intellectual Property of Twinpine Network and should not be circulated or used without the authority of the copyright owners.



twinpine

A Terragon
Company



www.twinpinenetwork.com



+234 1400 00029



info@twinpinenetwork.com