GENERAL OVERVIEW

- Mobile Usage in Nigeria
- Nigeria’s Population, Unique Mobile Users, Mobile Penetration and Smartphone Penetration Rate.
- Share of Desktop versus Mobile Traffic.
- 10 Most Mobilized Countries in the world.
- Share of Mobile Internet Usage by Device and Operating system.

MOBILE TRENDS

- Operator (MNO)
- Cost of Data Trend in Nigeria (2011 versus 2016)
- Market share of mobile by browser, OS, Social Media Sites and Device.

MOBILE LIFESTYLE

- Mobile Video
- Mobile Money
- M-commerce
OVERVIEW OF NIGERIA’S MOBILE MARKET
From 2011 – 2016, number of smartphone users increased from 4M to 15.5M.
Time Nigerians spend daily across media

- 131 mins (TV)
- 193 mins (Smartphone)
- 80 mins (Laptop)
- 39 mins (Tablet)

Source: Millwardbrown
Nigeria is the most mobilized country in the world ahead of India and South Africa.

76% of the internet traffic comes through MOBILE.

<table>
<thead>
<tr>
<th>Country</th>
<th>Internet Traffic (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nigeria</td>
<td>76%</td>
</tr>
<tr>
<td>India</td>
<td>65%</td>
</tr>
<tr>
<td>South Africa</td>
<td>57%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>57%</td>
</tr>
<tr>
<td>Poland</td>
<td>52%</td>
</tr>
<tr>
<td>Turkey</td>
<td>39%</td>
</tr>
<tr>
<td>Iran (I.R.)</td>
<td>38%</td>
</tr>
<tr>
<td>Mexico</td>
<td>33%</td>
</tr>
<tr>
<td>China</td>
<td>30%</td>
</tr>
<tr>
<td>Japan</td>
<td>30%</td>
</tr>
<tr>
<td>Colombia</td>
<td>28%</td>
</tr>
<tr>
<td>Spain</td>
<td>27%</td>
</tr>
<tr>
<td>Philippines</td>
<td>26%</td>
</tr>
<tr>
<td>Argentine</td>
<td>25%</td>
</tr>
<tr>
<td>Korea (Rep.)</td>
<td>25%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>24%</td>
</tr>
<tr>
<td>UK</td>
<td>23%</td>
</tr>
<tr>
<td>Italy</td>
<td>22%</td>
</tr>
<tr>
<td>USA</td>
<td>22%</td>
</tr>
<tr>
<td>Brazil</td>
<td>22%</td>
</tr>
<tr>
<td>Egypt</td>
<td>19%</td>
</tr>
<tr>
<td>Germany</td>
<td>17%</td>
</tr>
<tr>
<td>Canada</td>
<td>15%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
</tr>
<tr>
<td>Russia</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: Statcounter
Share of desktop traffic decreased from 57% in 2011 to 18% in 2015 and mobile share of traffic increased from 42% in 2011 to 79% in 2015.

Web usage by OS Name
Country: Nigeria

- **Android**
- **iOS**
- **RIM**
- **Windows Phone**
- **Nokia OS**
- **Unknown**
- **Other**
- **Symbian**
- **LG proprietary**
- **Samsung proprietary**

### Web usage by Device Vendor
Country: Nigeria

- **Samsung**
- **Apple**
- **Blackberry**
- **Infinix**
- **Nokia**
- **Tecno**
- **Unknown**
- **HTC**
- **Microsoft**
- **Sony**
NIGERIA’S MOBILE MARKET TRENDS
Growth of Active Mobile Subscribers by Operator from 2012 – 2016

<table>
<thead>
<tr>
<th>Year</th>
<th>Globacom</th>
<th>Airtel</th>
<th>MTN</th>
<th>Etisalat</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>8,602,731</td>
<td>5,948,190</td>
<td>19,732,901</td>
<td>4,455,290</td>
</tr>
<tr>
<td>2013</td>
<td>24,322,944</td>
<td>23,203,689</td>
<td>55,341,730</td>
<td>15,974,836</td>
</tr>
<tr>
<td>2014</td>
<td>28,486,530</td>
<td>27,989,580</td>
<td>60,493,053</td>
<td>21,559,667</td>
</tr>
<tr>
<td>2015</td>
<td>32,999,384</td>
<td>32,268,301</td>
<td>61,252,387</td>
<td>22,161,290</td>
</tr>
<tr>
<td>2016</td>
<td>34,608,793</td>
<td>33,866,798</td>
<td>57,045,721</td>
<td>21,877,542</td>
</tr>
</tbody>
</table>

1000 Naira can buy 15x more data in 2016 than it could in 2011.

Source: Twinpine Consumer Survey 2016
Market share of **Mobile Browsers** from 2012 to 2016

Market share of **Operating System** from 2012 to 2016

Source: http://gs.statcounter.com/
Market share of **Device Vendors** from 2012 to 2016

*Unknown: Primarily dominated by Infinix, Tecno, Innjoo, Xiaomi, Gionee, Huawei*

Market share of **Social Media Sites** from 2012 to 2016

Source: http://gs.statcounter.com/
Quick facts on Nigerian Video Consumption

- **110m** views per month
- **6.7m** hrs watch time per month

**6 out of 10 consumers are watching online video on their smartphones**

In 2015, video accounted for around **50%** of mobile data traffic. Almost **70%** of all mobile data traffic will be from video by 2021. It will grow by **55%** annually during this period.
MOBILE MONEY

How Nigerians are sending money on mobile

- Shortcode: 34.10%
- Bank app: 34.60%
- Mobile money solution: 35.10%
- Have not transferred money before: 6.20%

What Nigerians do with mobile money

- Transfer money to family, friends and other people: 68%
- Pay bills: 22%
- Pay tithe and offering in church: 4%
- Make donations: 6%

Source: Twinpine Consumer Survey 2016
MOBILE COMMERCE

- 32% e-commerce in Africa happens on mobile. Source (Criteo commerce report Q4 2015 and Q1 2016)
- 13% of shoppers rate their experience on smartphone very good. Source (Retail week cross device retailing report 2015)
- 57.4% of Nigerians have bought things online with their phones before (Twinpine consumer survey, 2016).

Nigerians are shopping via mobile as much as on desktop on weekends

- Percentage of Nigerians online that research an item before purchasing
  - Yes: 17%
  - No: 83%

- Where online shoppers research items before purchase
  - Google: 46%
  - Social media: 14%
  - Review sites: 15%
  - Website of the seller: 25%

- Means by which Nigerians transfer money online
  - Shortcode: 34.10%
  - Bank app: 34.60%
  - Mobile money e.g Paga, etranzact: 6.20%
  - Have not transferred money before: 35.10%

M-commerce Stats

Source: Twinpine Consumer Survey 2016

Source: Criteo internal data Q1 2016
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