



## Game of Phones Mobile Consumer Survey

18 October 2016

# Welcome!

## Today's program

Hour	Item
08.00 - 08.10	Introductory remarks by on behalf of the Aga Khan University, Graduate School of Media and Communications
08.10 - 08.30	Presentation about Deloitte's 2016 Mobile Consumer survey
08.30 - 10.00	Interactive session
	Vote of thanks

# Introductory Remarks



**THE AGA KHAN UNIVERSITY**  

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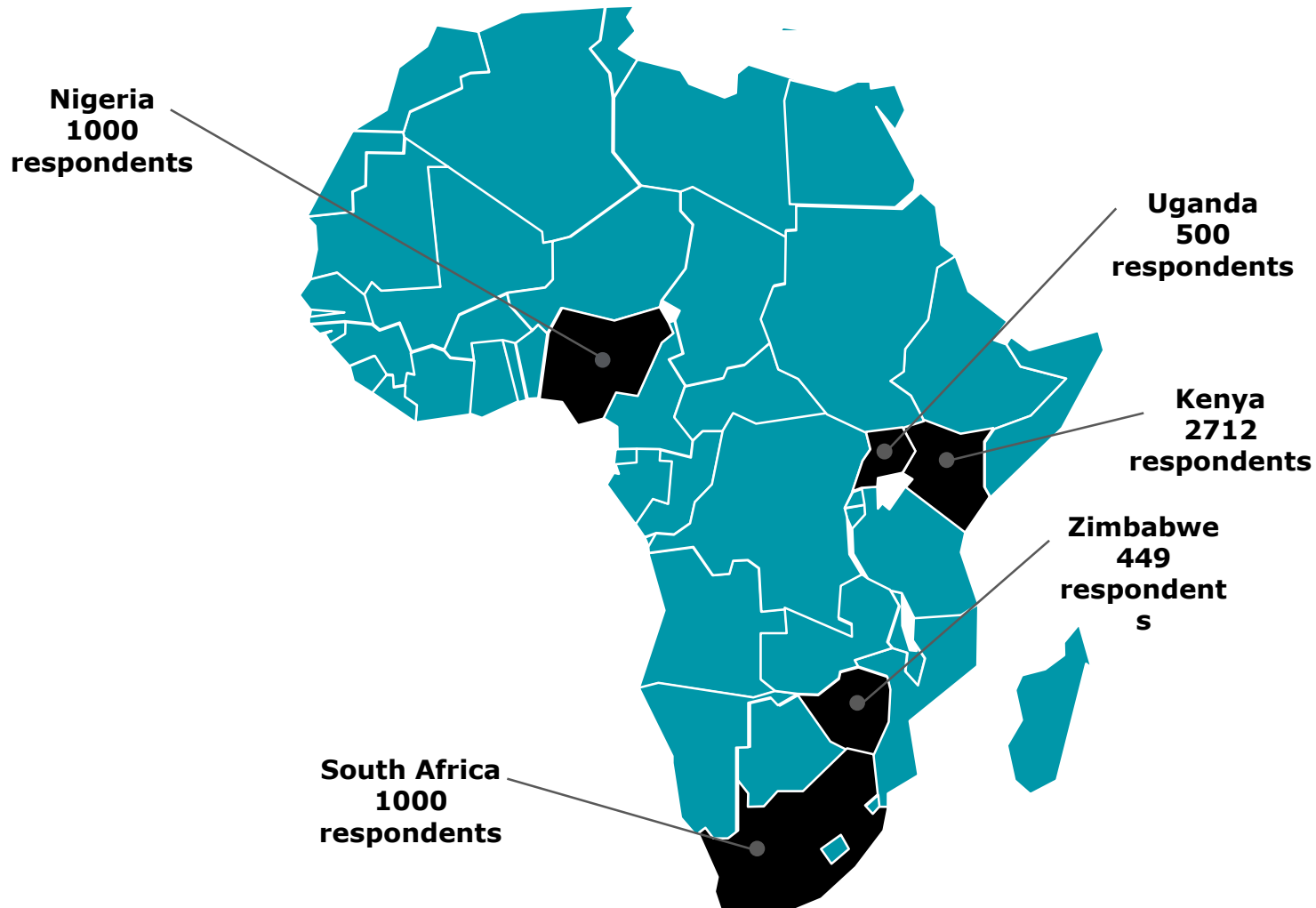
GRADUATE SCHOOL OF MEDIA  
AND COMMUNICATIONS

# Game of Phones

## Mobile Consumer Survey

# African Mobile Consumer Survey 2015/16

Over 5,000 people – young and old, urban and rural, male and female



# Game of Phones

## What we looked at

### Mobile Internet

Explosive growth in data consumption is the next and possibly the last of the organic growth waves in the telecommunications sector.

Africa's population by 2025 will be nearly 1.5 billion and within that a meaningful portion will be shifting into the emerging middle class.

### Device ownership habits in Africa

In most of the markets surveyed, the new phone market is significantly stronger than the used phone market.

The transfer of used phones to relatives is also the most prevalent scenario during phone upgrades, with the exception of South Africa,

### Reliability and Speed in a brand-neutral continent

Mobile network subscribers view the reliability, coverage and speed of the voice and data network as the most important criteria for choosing an operator.

Consumers are relatively brand neutral in their choice of devices in all the markets except South Africa. More than half of the consumers own non-premium brands in each market

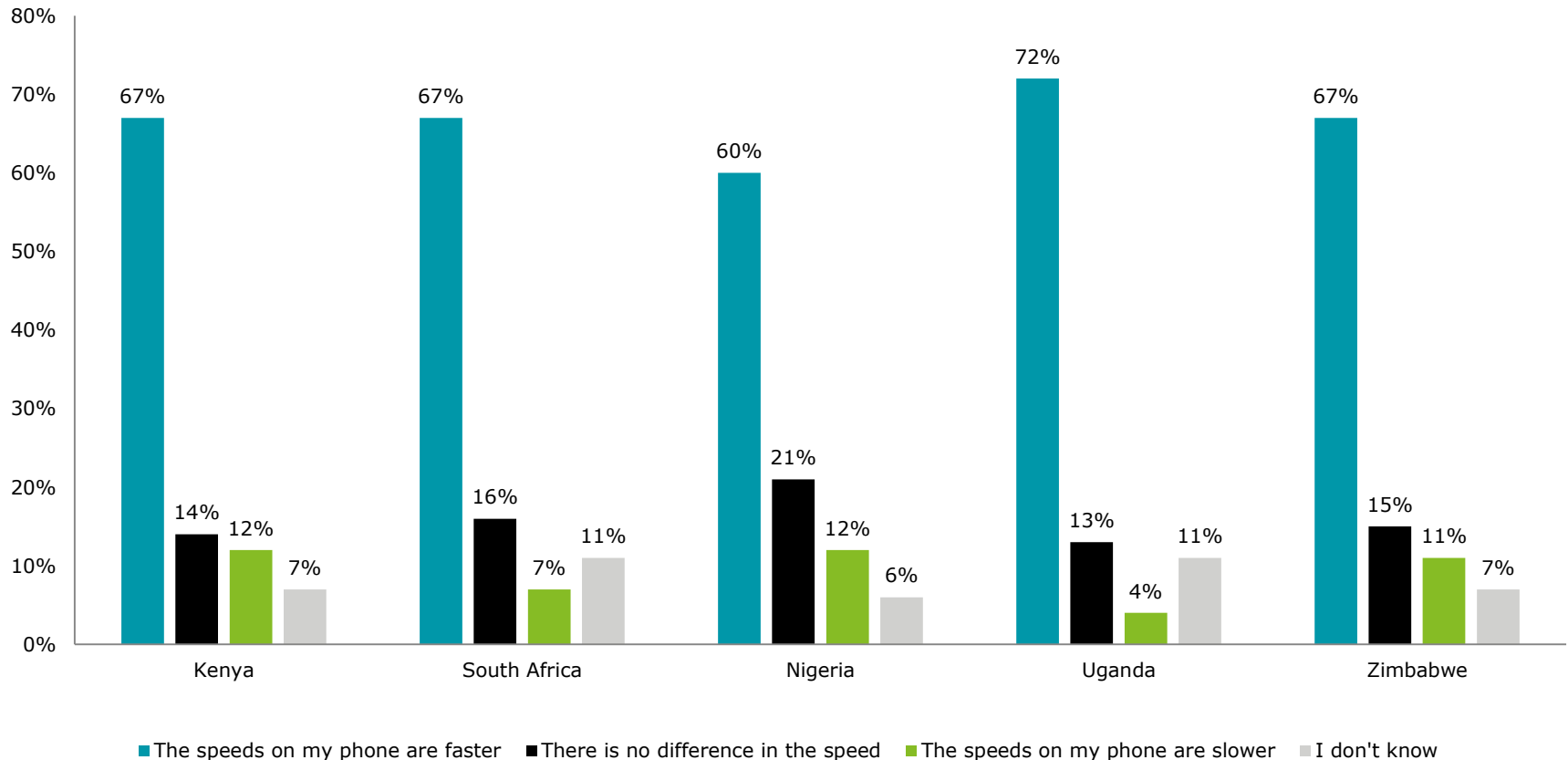
### Smartphone usage

The use of mobile phones has become an integral part of our daily lives.

Mobile data provides a constant connection into our work, social and personal contacts as well as a wealth of real-time information.

# The explosion of rich media local content requiring high speed connections drives 4G adoption

Q. How would you rate the 4G service you subscribe to compared to the speeds you were previously getting when using your mobile network?



Source: Deloitte Global Mobile Consumer Survey, Kenya, South Africa, Nigeria, Uganda and Zimbabwe  
Base: All who connect with 4G/LTE: 491

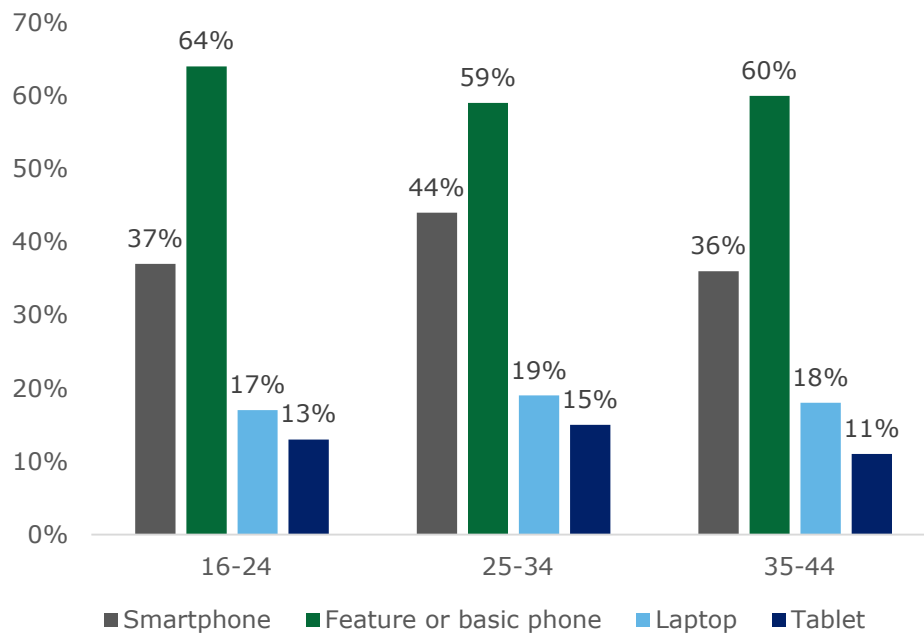
# Game of Phones

## A few insights



# Closing the magic 50% Smart Phone Penetration?

Driven by 3G/4G Network expansion, growing middle class, decrease of data prices and low cost devices.



## Meet the \$4 smartphone which starts shipping next week

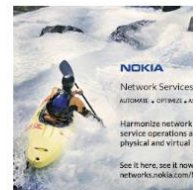
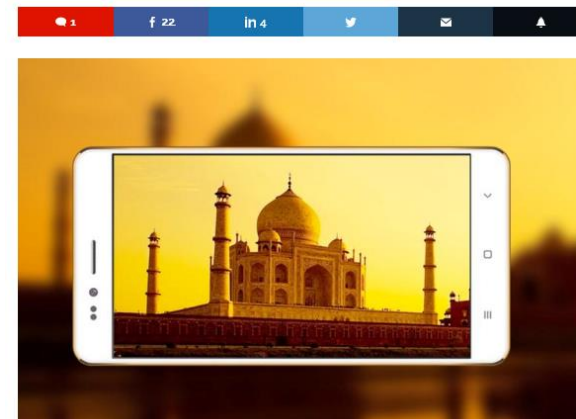
The first batch of the Ringing Bells Freedom 251 smartphone is ready to go.



By Charlie Osborne for *Between the Lines* | July 1, 2016 -- 09:48 GMT (02:48 PDT) | Topic: *Mobility*

Cubot, Infinix, Huawei, Xiaomi

Cubot Max, Infinix Hot 4, Xiaomi Note 4, Tecno Phantom 6 on sale. 24hr Delivery Go to [avechi.com](http://avechi.com)



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# The device eats everything

Call and data subscriptions probably included, driven by:

- Free Wifi-pick up and FON-solutions
- Simless phones



Services?





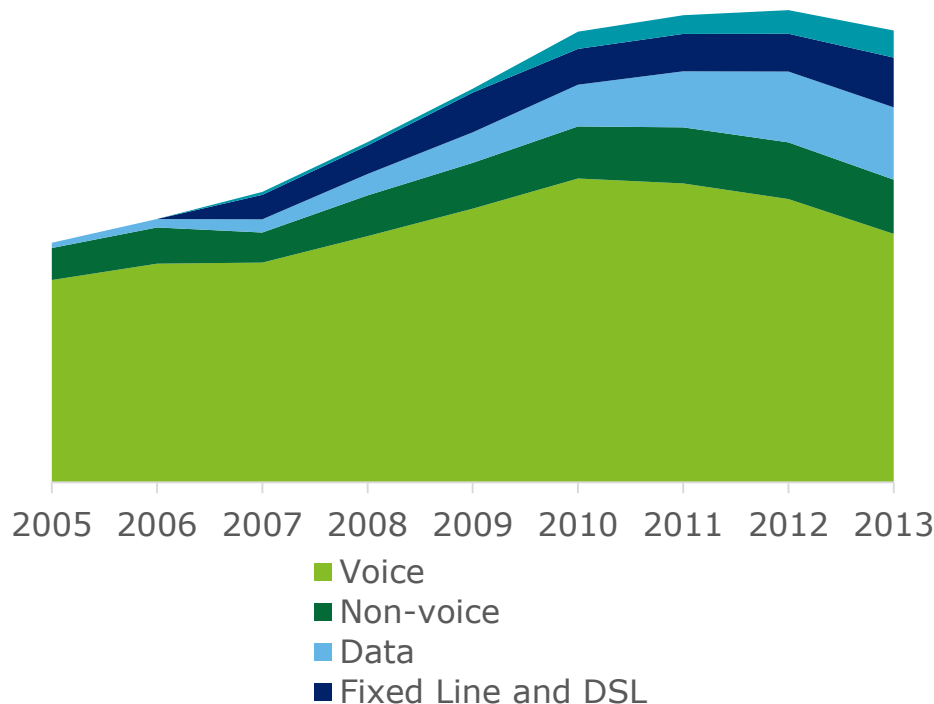
# **RESPECT: Nambian Boy Invents SIM-less Cell Phone That Requires No Airtime!**

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Mobile Network Operators need to refocus on the mid term  
Prices will erode, disruptive propositions will come and access  
will be democratized or demonetized.

Example Revenue Trend for a leading EU provider



THE  
MONITOR

15 SEPTEMBER 2016

## Uganda: Govt to Offer Free Internet to Kampala, Entebbe

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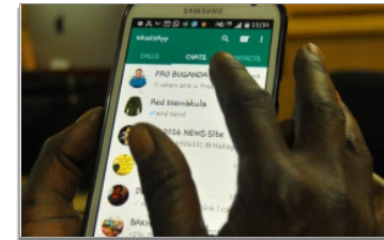


Photo: Joseph Kiggundu/Daily Monitor

Internet users will benefit from the service in the evening hours.

By Dorothy Nakaweesi

Kampala — Internet users around Kampala and Entebbe will save money on buying data as government introduces free Internet, effective October 1.

### MORE ON THIS

#### Uganda Launches Free Internet Service in Kampala



- Govt Launches Free Internet Service in Kampala
- Entrepreneurs Urged to Embrace Online Marketing




# Alternative Income Streams

## Insurance


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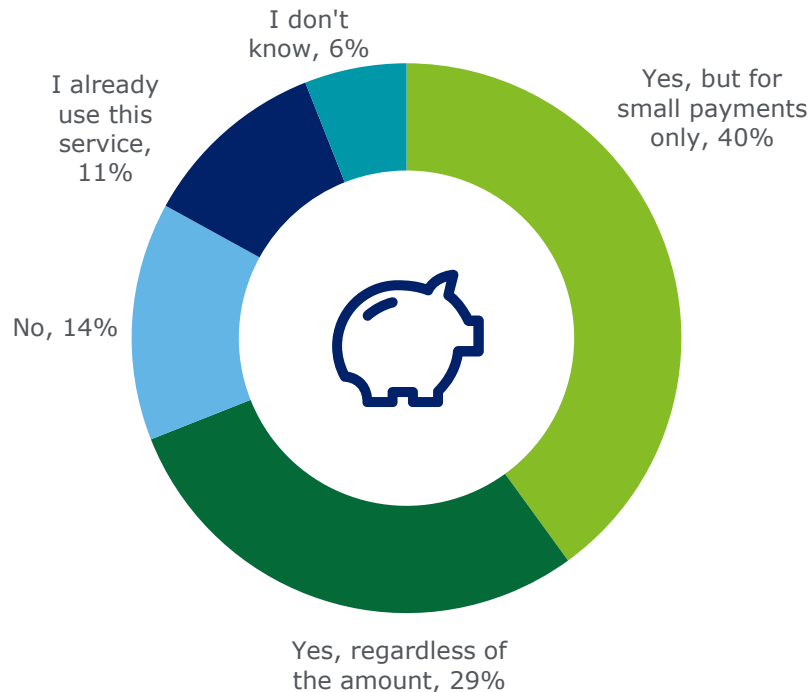
# Game of Phones

## Interactive session

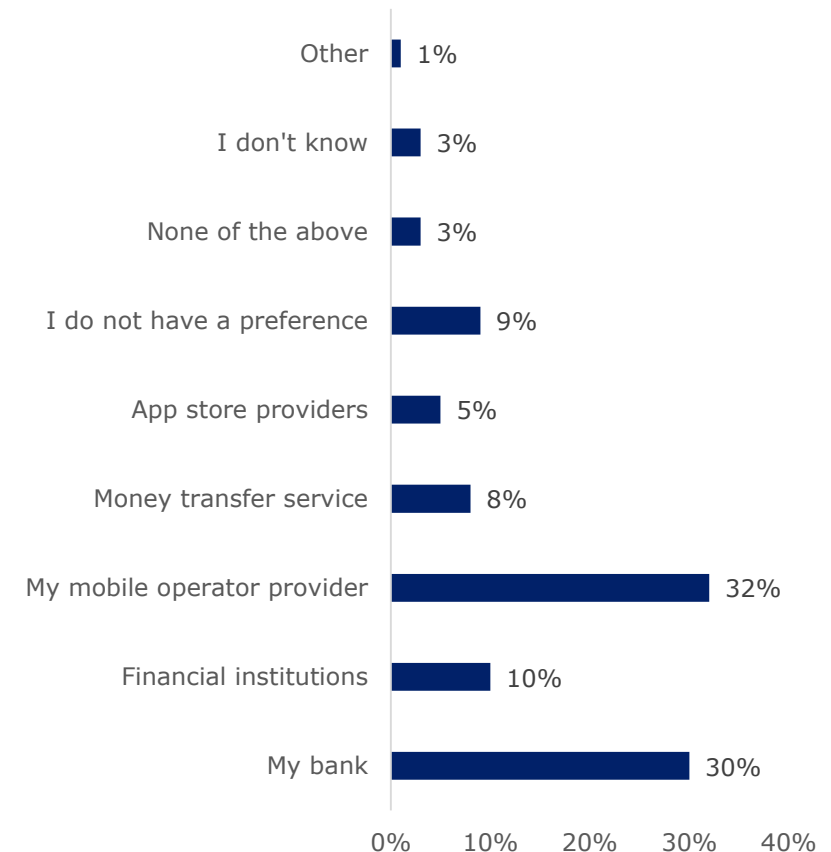
# The potential for digital and mobile is growing

Most respondents are comfortable adopting a different form of mobile payments. More people trust their mobile operators over their banks to process their transactions

If a solution whereby you would be able to pay in shops by using your mobile phone, similar to how you use cash or a debit or credit card, would become available, would you use it?



Who would you prefer to process your transaction?



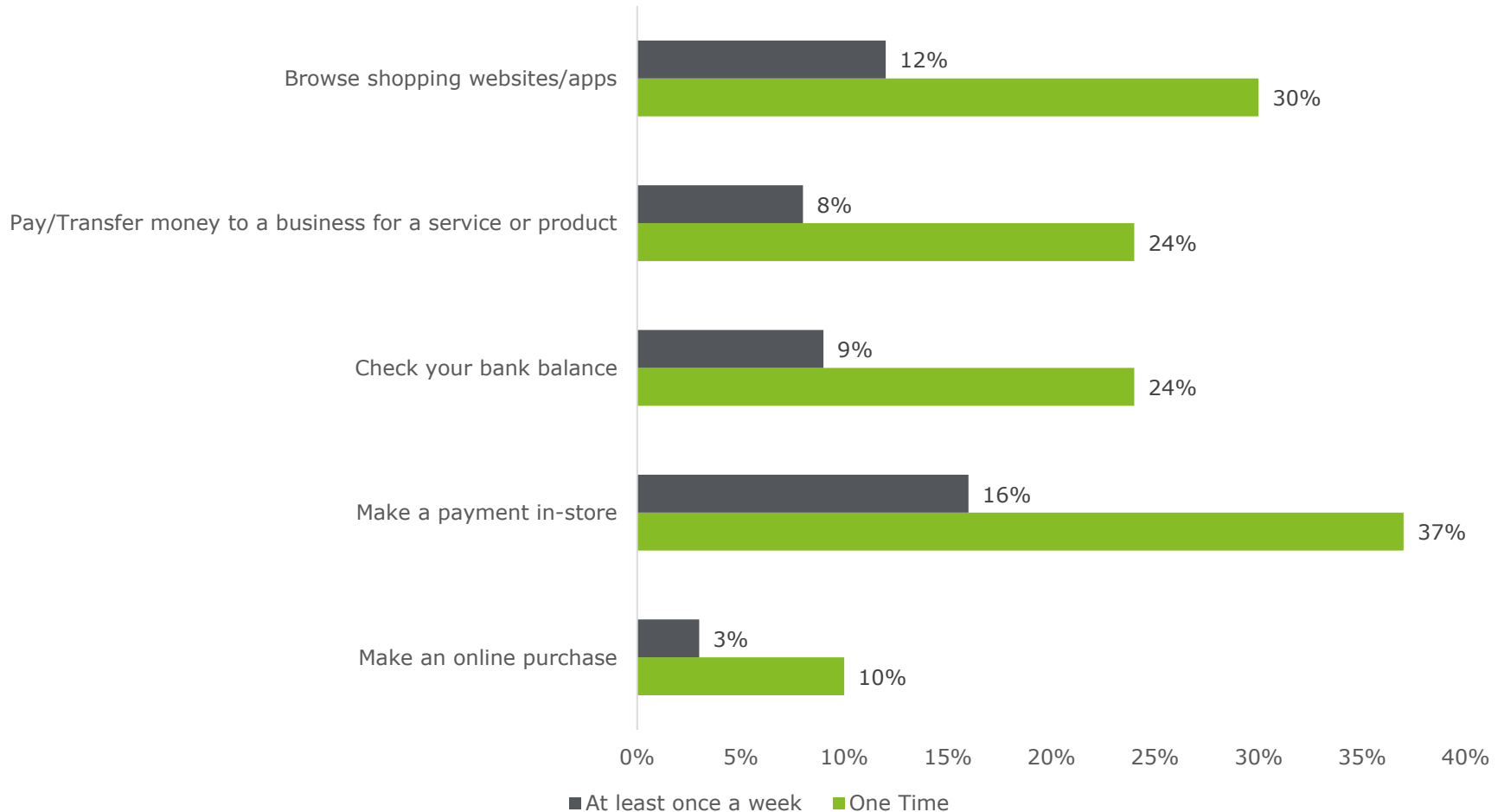
Ken Okwero - Head of Strategy, Safaricom:

*How do you expect the current mobile financial services to evolve, in order to enable growth of mobile and digital in business?*



# Phone usage for retail related activities Kenya

Mobile users have dabbled with mobile commerce as shown by percentage of once-off mobile commerce transactions.

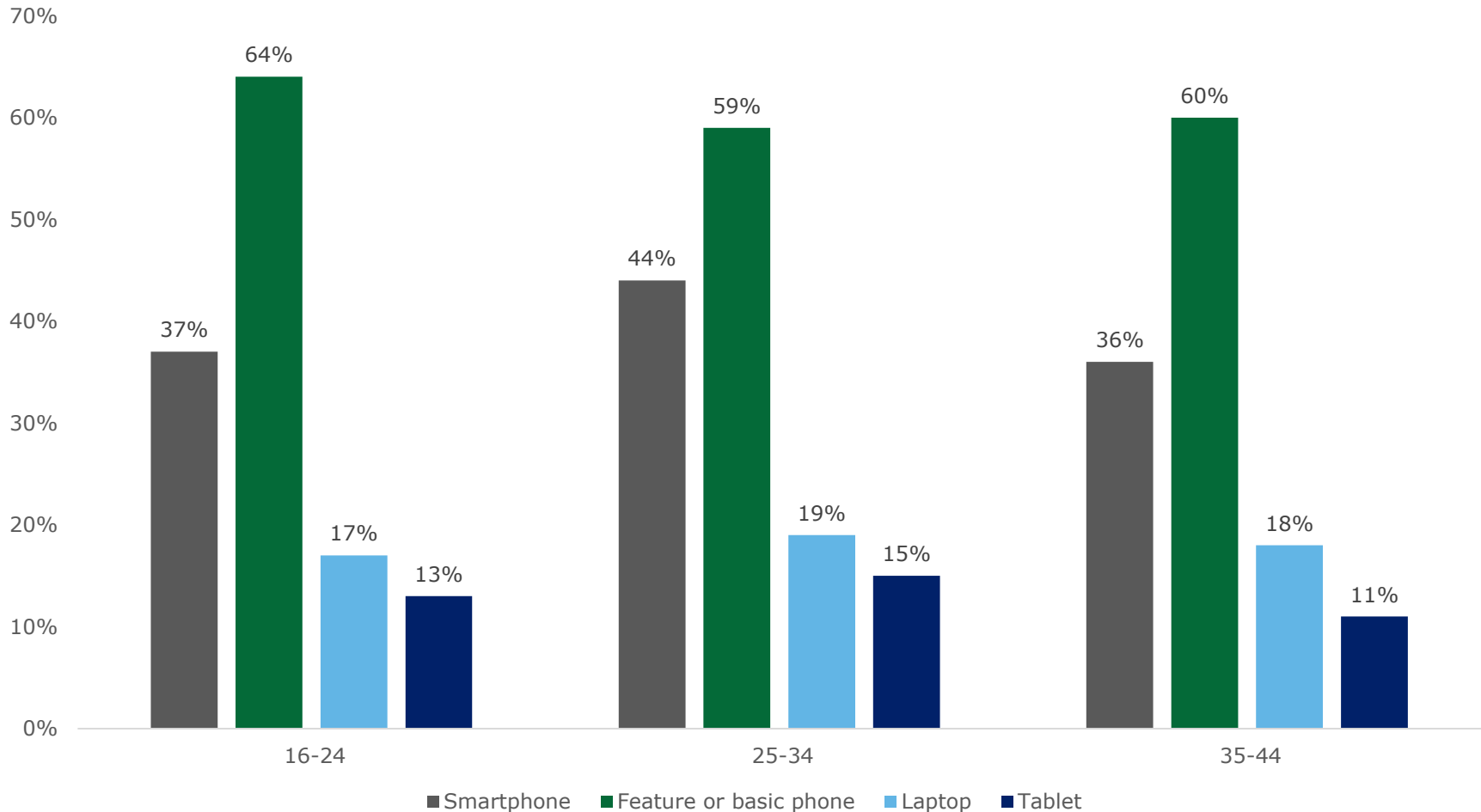


Wambui Mbarire - CEO, Retail Trade  
Association of Kenya:

*What do you see as the future of  
retail, and how does mobile enable  
customer engagement?*

# Mobile device ownership across different age groups

Which of the following devices do you own or have ready access to (at work or home)?



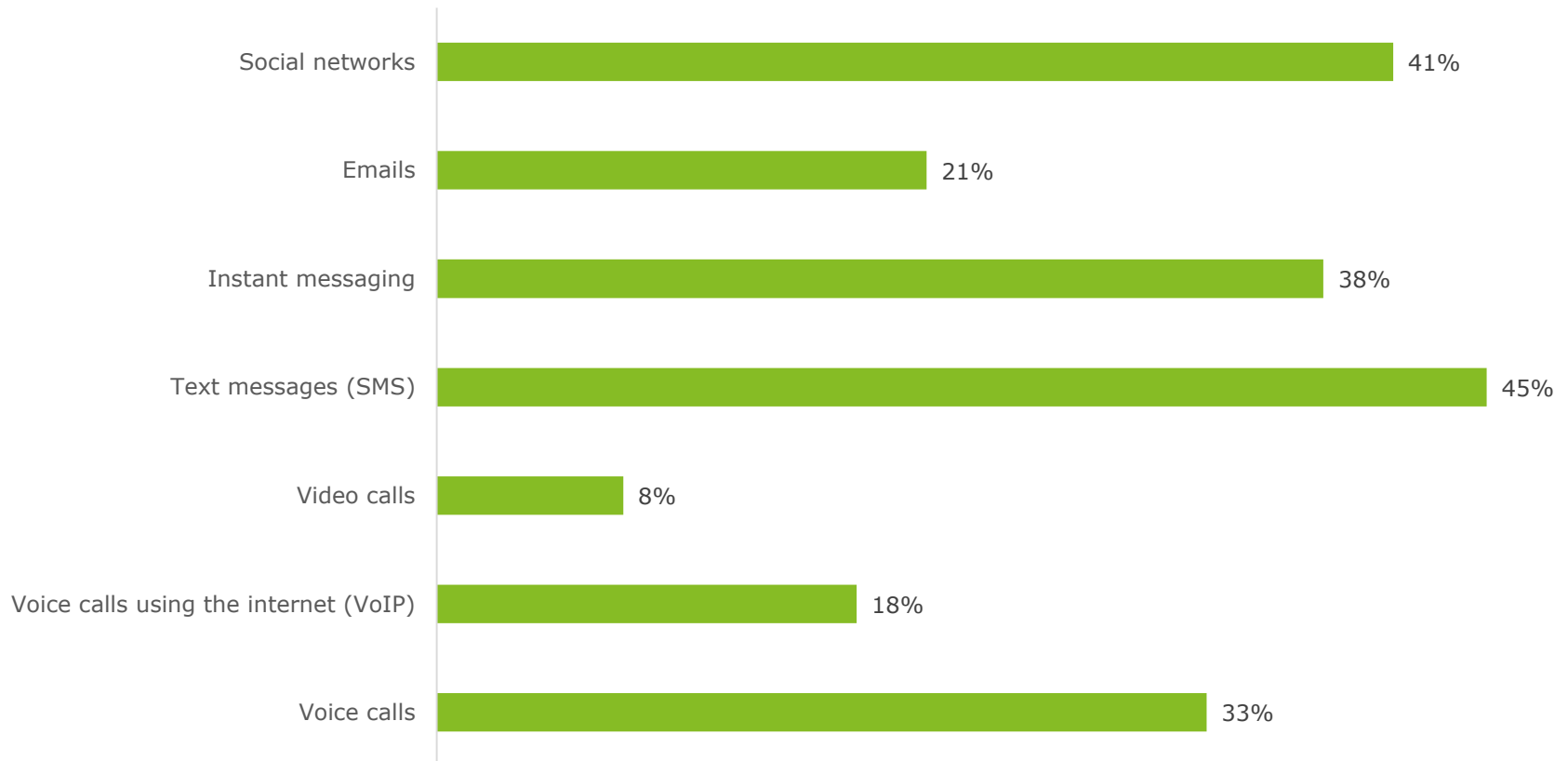
Mark Kaigwa - Founder, Nendo :

*How should companies engage with this  
demography?*

# Mobile device use is still on the rise

The extent to which people are using their mobile devices is increasing in Kenya. SMS and the use of social networks growth across a wider audience is likely driven by bundled services from MNO's.

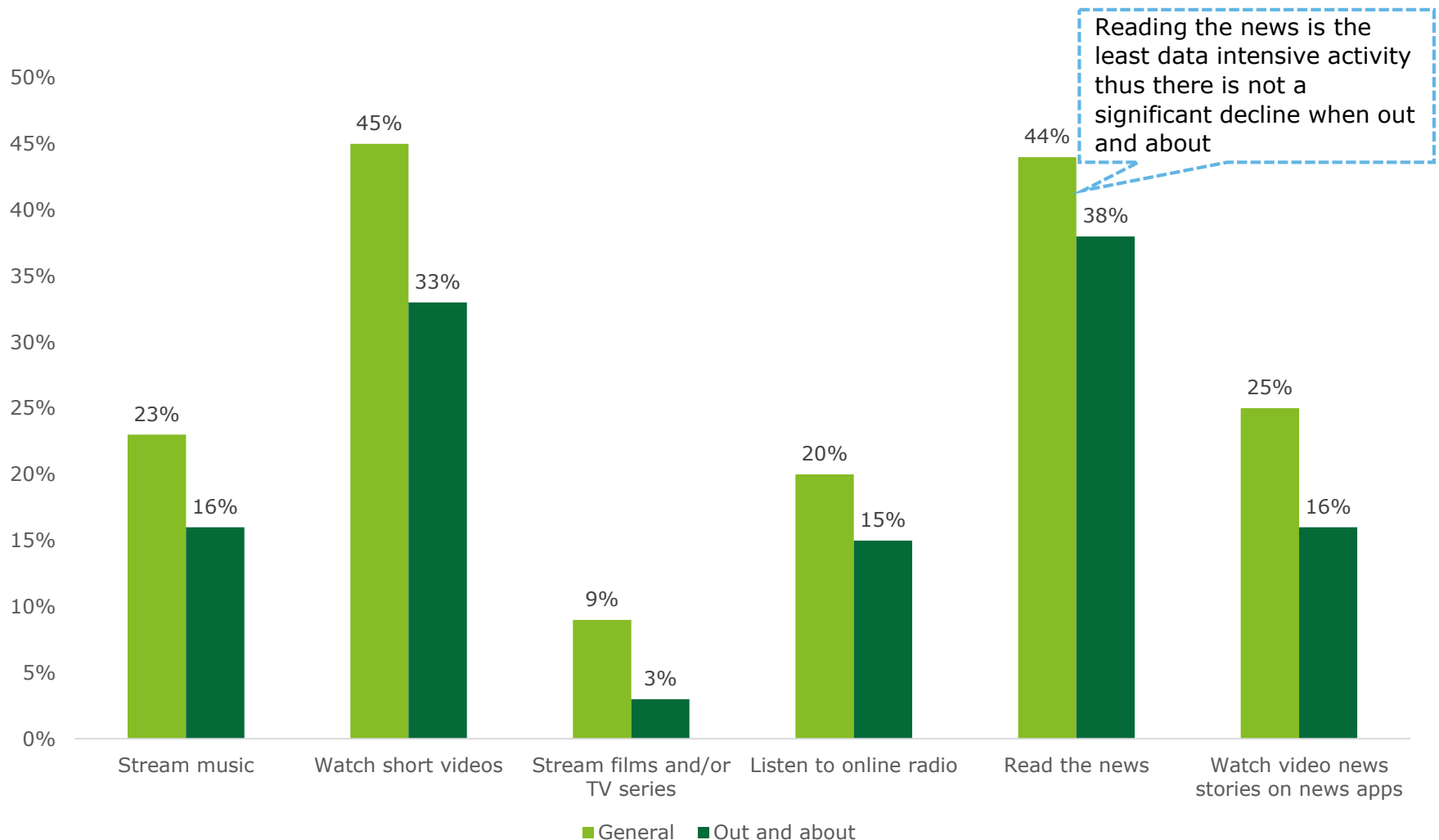
Which of the following do you do more frequently this year compared to 12 months ago?



Rhonda Breit – Associate Dean, Graduate School of Media and Communications The Aga Khan University.

Given tomorrow's 'digital' business operations, would you say that our education system is fit for purpose?

# The consumption of short-format (SF) video and news is a trend to watch for content producers, advertisers and MNOs



Churchill Otieno Managing Editor -  
Convergence/Digital, Nation Media Group:

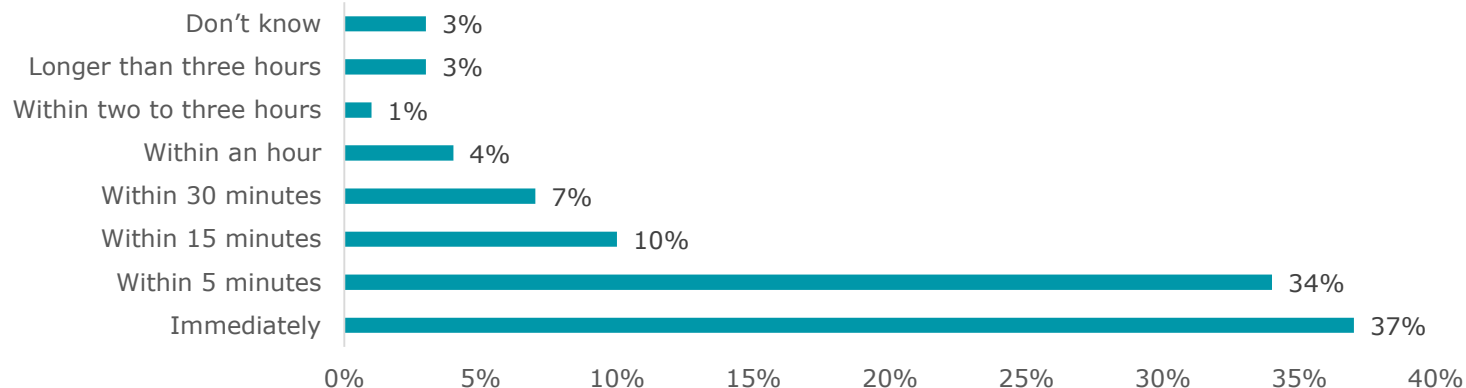
*What role will mobile play as a media  
channel of the future?*



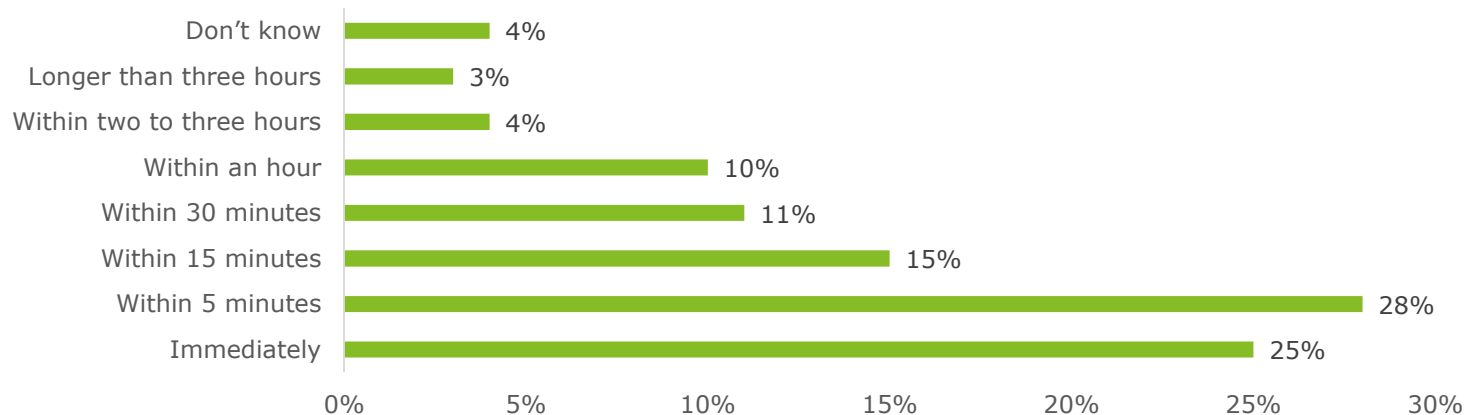
# Smartphones are not just a part of our lives, they are our lives

It's at least an 17 hour day for >50% of all smartphones in Kenya

**Q. Typically how long is the interval between you waking up and looking at your phone for the first time?**

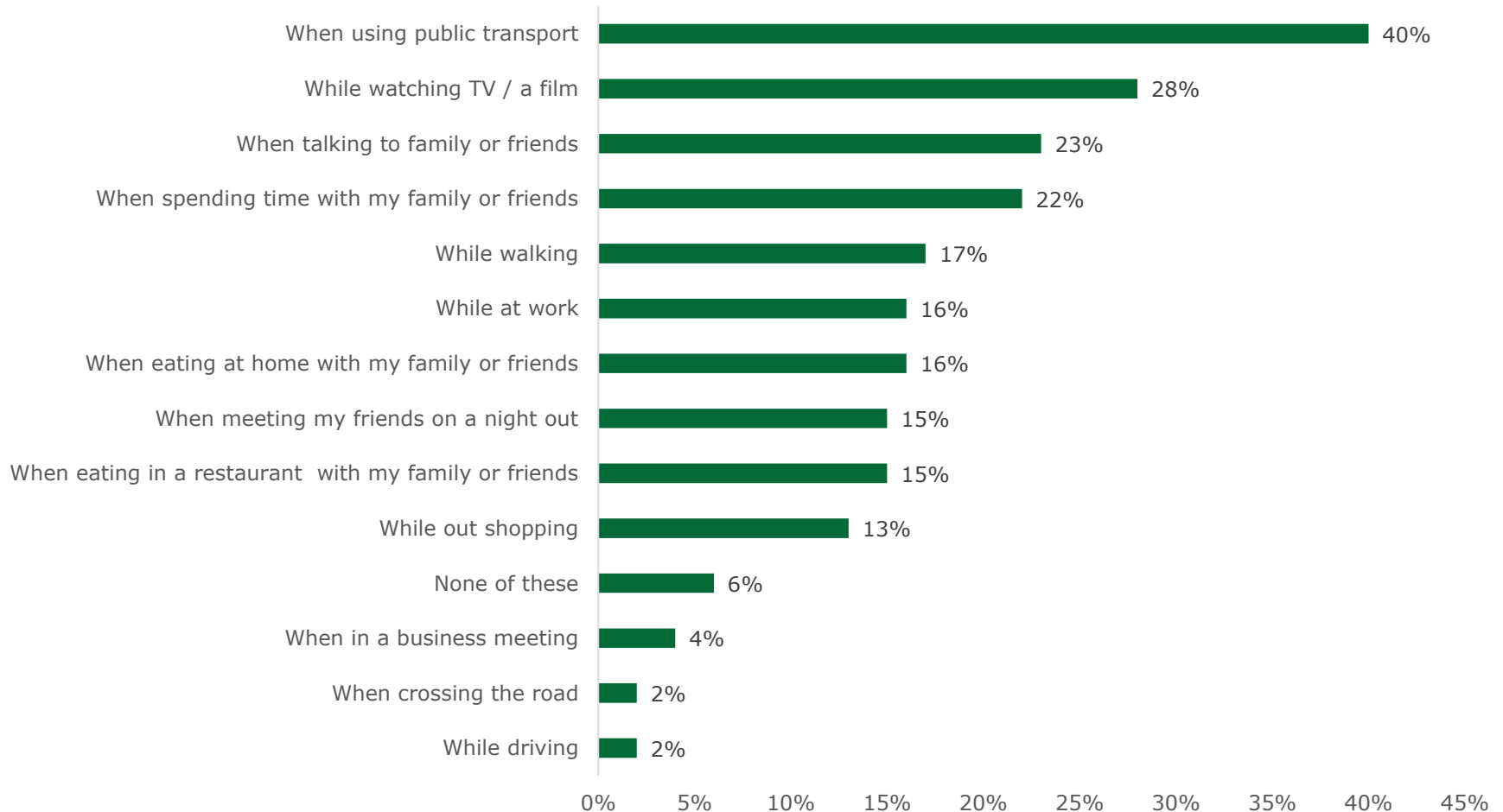


**Q. At the end of the day, typically how long is the interval between you looking at your phone for the last time and preparing to sleep?**



# Socio-economic impact of mobile devices

The distraction carries on all through the day. Including at this meeting.



Maggie Ireri - CEO, Tifa Research

*What then is the likely impact on consumer and social behaviour?*