A Nendo Publication

THE STATE OF MOBILE DATA

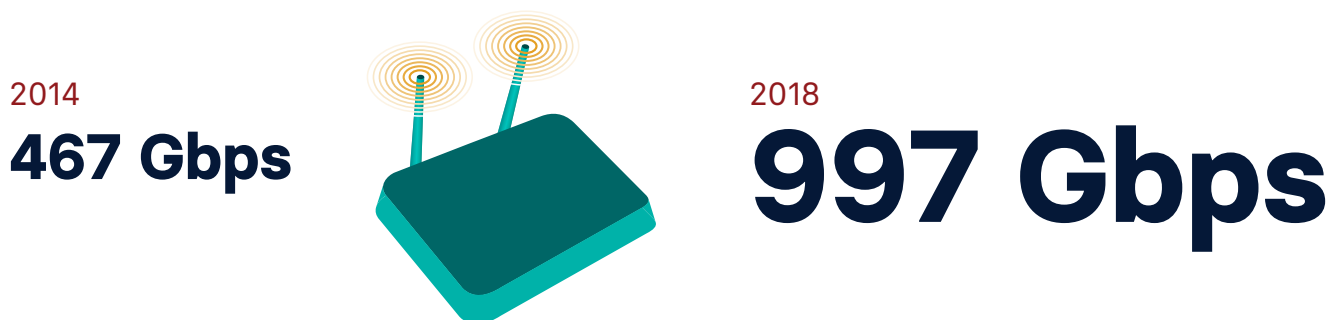# 2019

INSIGHTS & HIGHLIGHTS

NENDO

Context

KENYA'S INTERNATIONAL INTERNET BANDWIDTH GROWTH

Referring to the capacity of international connections between countries for transmitting internet traffic, Kenya has seen year-on-year growth from 2014-2018. From 467 Gbps (billions of bits per second) in 2014 to 977.04 Gbps in 2018[1].

2014
467 Gbps

2018
997 Gbps

KENYA'S ANNUAL INTERNET TRAFFIC CONSUMPTION

By 2022, Kenya is expected to hit the 1 billion gigabytes mark. Estimates were that in 2018, Kenyans would consume 269 million gigabytes[2]. Mobile subscriptions account for the majority of internet connections in Kenya.

1,000,000,000
Gigabytes
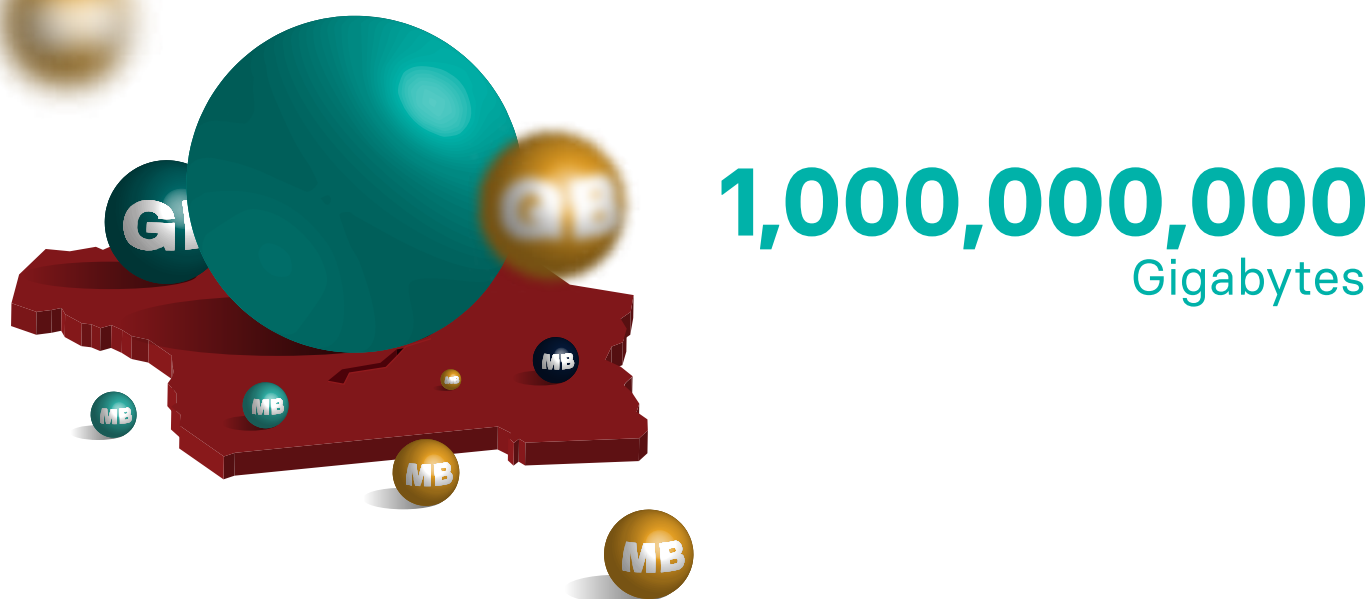
[1]-Communications Authority of Kenya, Quarterly Sector Statistics, Q1-2018-2019.
[2]-PwC Entertainment and Media Outlook, 2018-2022: An African Perspective.

Context

HOW MANY KENYANS ARE ON THE INTERNET?

The methodologies used to define and derive the number of internet users in Kenya has raised questions. Who is an internet user? How do we separate unique mobile subscribers from internet users? How do we calculate the effects of cyber cafes in the equation?

The regulator, the Communications Authority of Kenya, estimates over 40 million internet users. 2016, 2017 and 2018 studies elsewhere offer different perspectives ranging from over 20 million to between 8 and 13 million Kenyans.

Double-counting and methodologies that sample from the population still leave questions to the exact number of internet users countrywide. 4G mobile connectivity is available in every county in the country, thanks to Safaricom, but the question of affordability and accessibility still lingers.

42.2m

21.2m

13m

12.1m

CENTRAL INTELLIGENCE AGENCY

Google

internet live stats

COMMUNICATIONS AUTHORITY OF KENYA
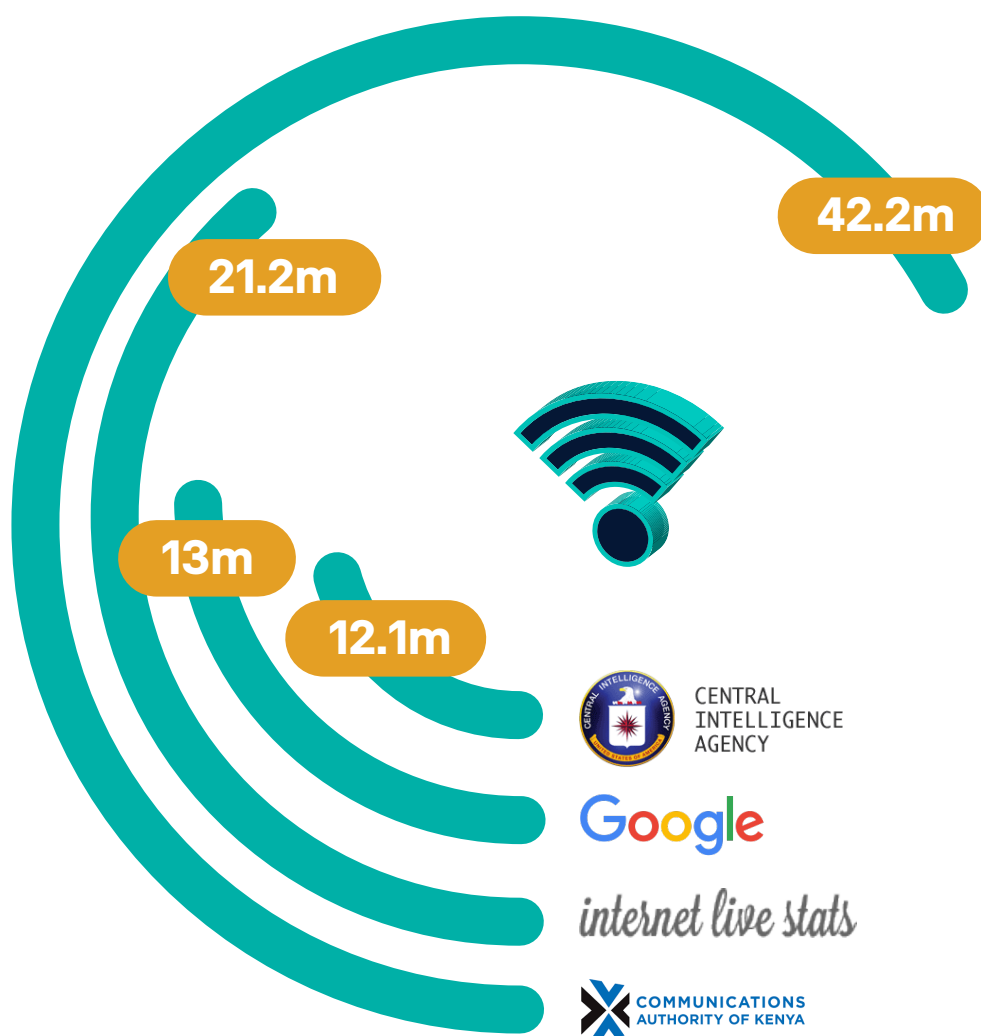
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Consumption

THE 5S's OF THE KENYAN INTERNET

What do Kenyans use their connectivity for? According to Nendo, Kenyans use their internet connectivity and mobile data bundles to access news, information, entertainment and various services including:

- **Search** - Google is Kenya's most-visited website and most-frequently used search engine.
- **Sport** - Sports betting company SportPesa has been the most "Googled" word by Kenyans every year from 2016 to 2018.
- **Social** - Facebook is the second-most-visited website in Kenya and the largest social media site with over 8.5 million users.
- **Sex** - Kenya has two adult websites in its top 10 most-visited sites. This is greater than any other East and Central African country.
- **Stories** - The country has a growing appetite for content spanning news, entertainment and video. The vertical photo/video format "Stories" is also increasing in popularity.
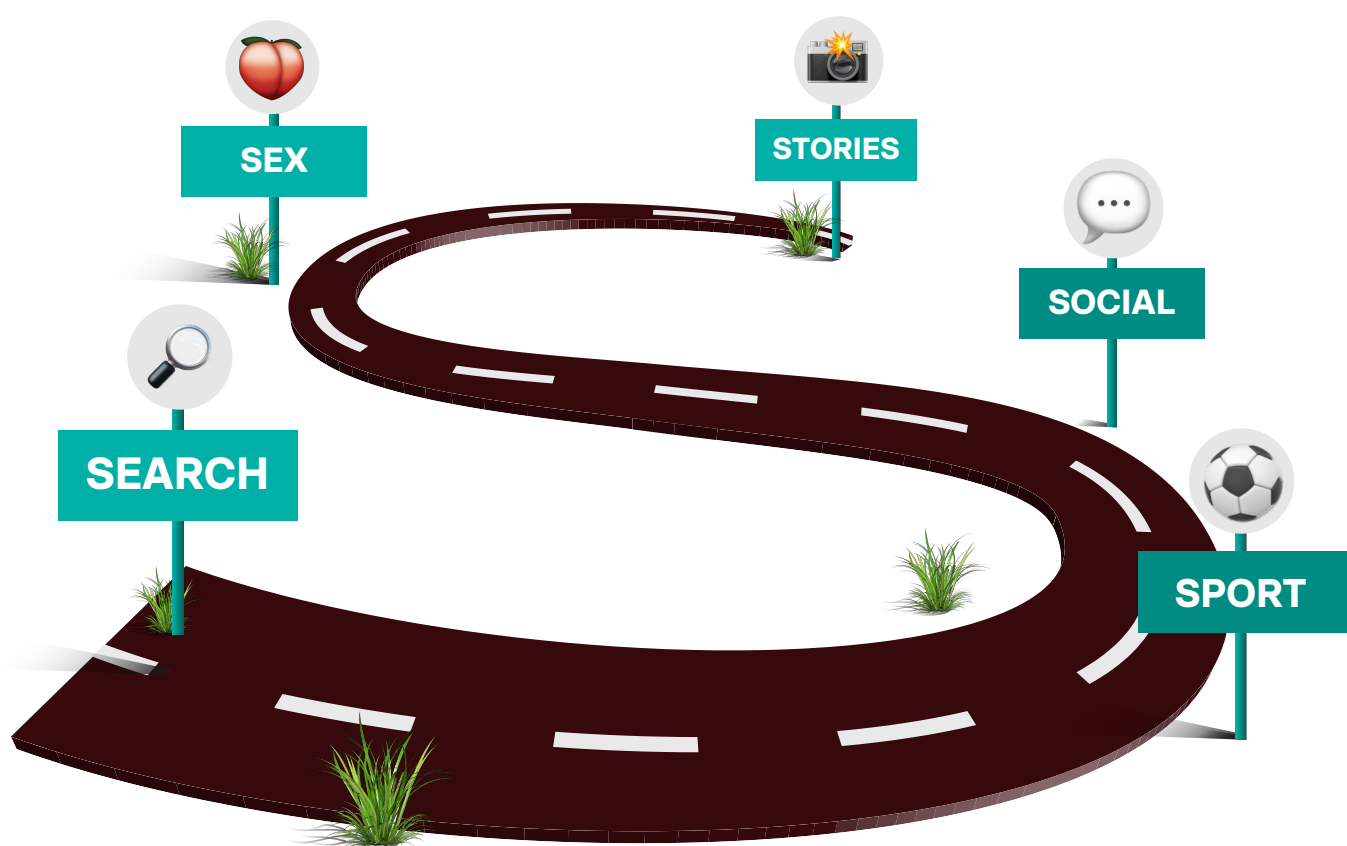
Consumption

Top 10 Websites in Kenya

As per Similarweb.com rankings for Kenya on 01 January 2019.

GOOGLE.com

FACEBOOK.com

YOUTUBE.com

BETIN.co.ke

XVIDEOS.com

BETPAWA.co.ke

SPORTPESA.co.ke

XNXX.com

GOOGLEWEBLIGHT.com

TWITTER.com

Consumption

Top 10 Apps of 2018, by Downloads

An analysis of Kenya's top 10 most downloaded apps in 2018.

WHATSAPP MESSENGER
MESSAGING

FACEBOOK
SOCIAL MEDIA

FACEBOOK MESSENGER
MESSAGING

TALA
LENDING AND FINANCE

OPERA NEWS
NEWS & ENTERTAINMENT

BRANCH
LENDING AND FINANCE

OPERA MINI
INTERNET BROWSING

OKASH
LENDING AND FINANCE

TRUECALLER
CALL IDENTITY & MESSAGING

VIUSASA
VIDEO STREAMING

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Consumption

Advertising technology (AdTech) refers to analytics scripts, tools and trackers that are embedded into websites and web pages. Kenyans visit news and digital publishing websites frequently to stay up-to-date with current affairs. In the *State of Mobile Data 2019: Context, Consumption & Control*, Nendo evaluated Kenyan publishing websites to determine the percentage of AdTech they used on their websites:
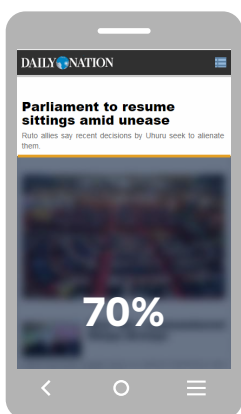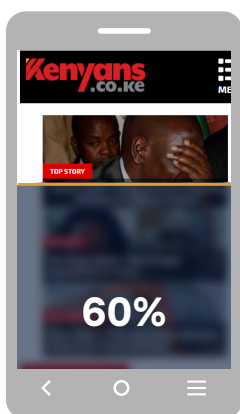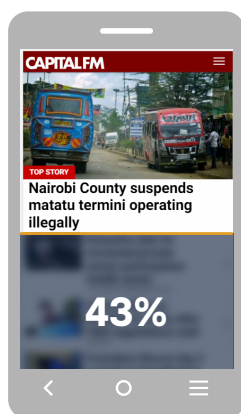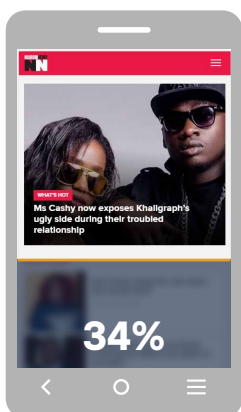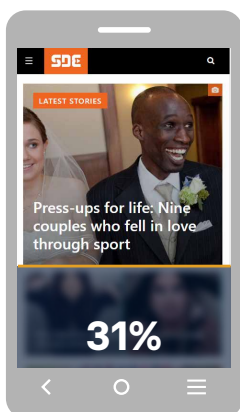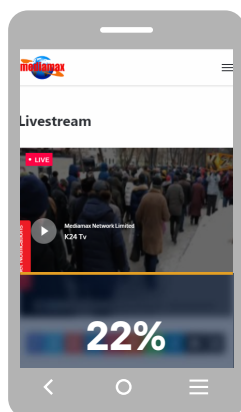
70%

DAILY NATION

60%

KENYANS.CO.KE

43%

CAPITAL FM

35%

CITIZEN DIGITAL

34%

NAIROBI NEWS

31%

SDE

22%

K24/MEDIAMAX

17%

BUSINESS DAILY

17%

STANDARD DIGITAL

7%
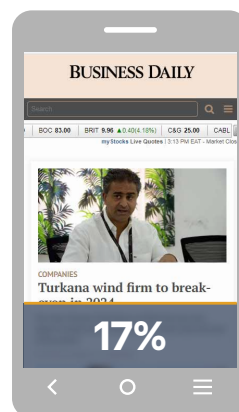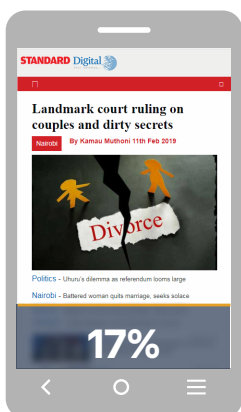
THE STAR

Details

The experiment determined an average amount of AdTech based on loading 5-8 separate web pages of each media house's website. The pages were loaded with an ad-blocking tool (Ghostery) turned on and off for comparison. See the Full Report for details.

Disclaimer: *While every effort has been taken to verify the accuracy of this information, Nendo Limited cannot accept any responsibility or liability for reliance by any person on this report or any of the information, opinions or conclusions set out in this report.*

Control

LITE APPS: SAVING MEGABYTES & STORAGE SPACE

Android has popularised the rise of "lite" apps. These are mobile apps built to save storage space on the mobile phone by being a smaller size of megabytes. Lite apps pledge to use fewer megabytes while providing the same services to the end-user. There are no lite apps on Apple's iOS operating system and the app sizes are shared here for comparison with their Android equivalent apps.

	iOS (MBs)	ANDROID (MBs)	LITE (MBs)
Facebook	456.9	64.5	1.4
Messenger	240.8	44.1	6.6
Twitter	186.6	29.5	1.3
LinkedIn	159.4	33	0.9
Uber	335.8	61.7	5.4
Google	325.6	39.9	5.1
YouTube	245.8	32.5	8.7
Google Maps	197.9	31	0.2

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Control

APP RECOMMENDATIONS: SURF SAFE. MANAGE MEGABYTES.

01 Datally by Google
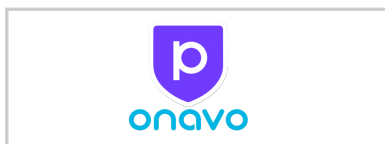
02 Onavo Project

03 Firefox Focus
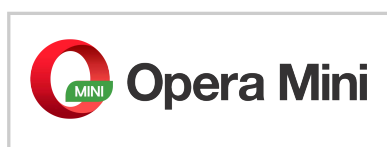
04 Opera Mini

05 Brave

06 ProtonVPN

VIDEO IN VIEW: MORE TIME, CLEARER PICTURE, MORE MEGABYTES

A video, played using a high-speed mobile data connection, may automatically select a higher resolution. Choose and set a default resolution to manage your megabytes and consumption.

0.3 Gb/hr	0.3 Gb/hr	0.7 Gb/hr	0.9 Gb/hr	1.5 Gb/hr	3Gb/hr	7.2 Gb/hr

240p

360p

480p

720p

1080p

1440p 2k

2160p 4k
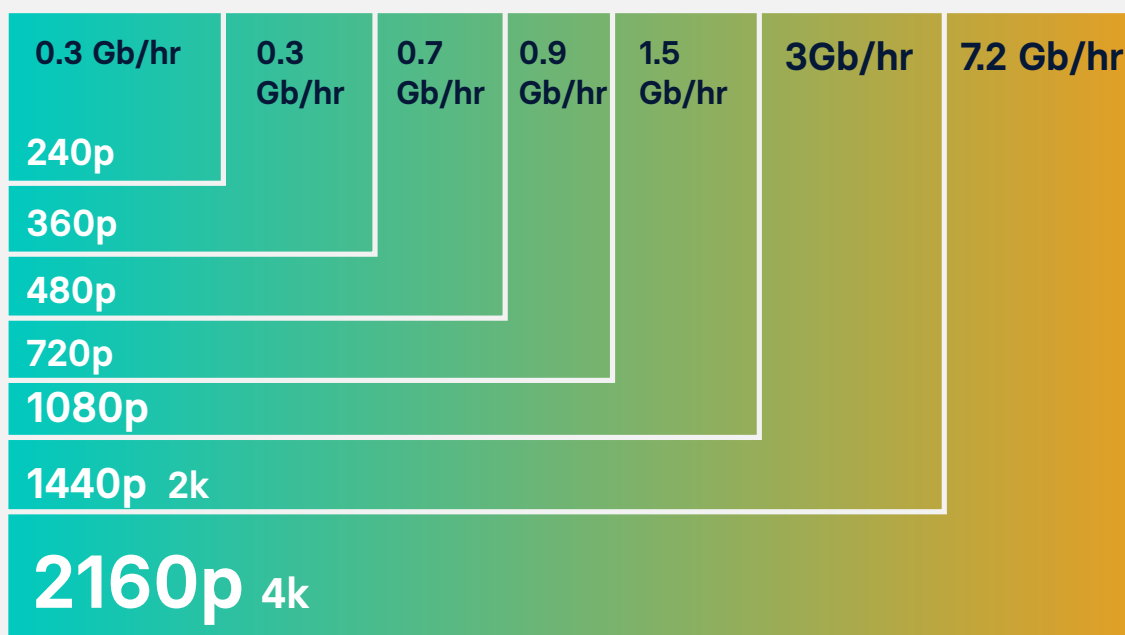
Gb/hr - Gigabytes per hour

Source: Android Central

About Nendo

Nendo delivers results for leaders and teams through its Advisory, Agency and Academy services. Nendo is a respected consultancy focused on customer insight, competitive intelligence and data analysis. Nendo delivers strategies and projects to challenges the thinking of our clients, enabling them to lead change in their organisations.
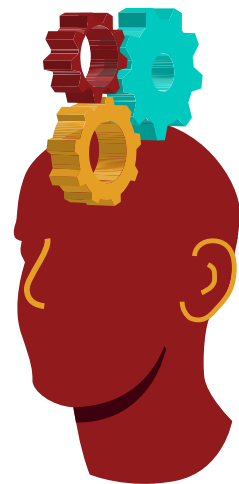
@Nendo254 on Facebook, Twitter and Instagram.

About the Author

Mark Kaigwa is the Founder of Nendo. He is the author of the State of Mobile Data in Kenya: Context, Consumption and Control. As a speaker, he has travelled to over 37 countries around the world to deliver talks and insights about African consumers. Kaigwa is passionate about technology, social media and connectivity in Africa.

@MKaigwa on Twitter and Linkedin

Download the Full Report

The State of Mobile Data 2019 by Nendo is freely available at Nendo's website. Provide your email address and contact details to receive the 32-page report that features:

- Background into the mobile connectivity landscape.
- Perspectives on the consumption and uses of mobile data bundles in the country.
- Insights into the future of Kenya's internet and mobile connectivity habits - what can we expect from search, social, sport, sex and stories in 2019 and beyond?

This Insights and Highlights is a snapshot of the rest of the material. Share this with colleagues, peers and friends.

Book a speaker from Nendo to deliver an insights talk to your leadership, department or team. Email hello@nendo.co.ke to determine details on pricing and availability.