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KENYA

Mobile Report 2019

#JumiaMobileWeek2019

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Kenyan Facts

Kenya is Africa's Silicon Savannah

Kenya has experienced rapid growth over the last decade, with the ICT sector expanding from 10% to 22% in 2017, contributing to 1.6% of total GDP. As at 2018, Kenya's GDP growth stood at 5.7% versus Africa's GDP growth of 3.5%. Kenya's growth unleashed almost a decade ago, is supported by strong government, private sector and foreign investment. Other engines identified as driving development include; **mobile adoption** with **91% (46.94M)** penetration of mobile subscriptions, compared to 80% mobile penetration in Africa **and internet connectivity, at a penetration rate of 84%** with **43.3M of the total population** having access to the Internet in Kenya. Curiously Google only identifies 13M active internet users in the country.

With a population of about **51.58M** (of which **26.6%** are in urban areas or cities), Kenya has a young population with an average age of 18 years with almost **three quarters of the population under the age of 30**. This youthful population has an increasing disposable income & resulting higher purchasing power.

Higher mobile and internet penetration has led to the growth of social media users, currently at **8.20M**. Kenyan users on social media will spend close to **3 hours a day on social media**, with the most used social media platforms identified as Whatsapp (74%), Facebook (70%) & Twitter (50%), based on users own claimed activity.

Other factors that have driven growth in mobile subscriptions include **more affordable smartphones & declining mobile data plans**

Internet Connectivity

Driving growth & innovation

Kenya's National Broadband strategy released in 2013, identified that access to the internet would be critical in the development of the country and a key driver for innovation. With this in mind, Kenya's broadband penetration has been driven by **improved infrastructure**, with an **infrastructure score of 54.8 as defined by the World Economic Forum** and **mobile operators covering almost 90% of the population**. However, some sections of the country continue to be disconnected from the Internet. This has provided opportunities for innovation such as the initiative by Loon, a sister company of Google to **deliver connectivity to rural areas** of the country using balloons.

3G network coverage across the country has also increased from 67% in 2014 to **85% in 2017**, with a bigger proliferation of **4G, now reaching more than a third of the population**. Growth in network coverage has also been driven by **accessibility**, through mobile providers and new internet service providers such as **Express Wifi by Facebook**, providing **more affordable internet solutions** than is currently offered by Kenyan telco's.

The overall affordability of mobile data baskets has also improved, with 500MB allowance in 2017 **costing 1.3% of monthly GDP per capita, as compared to 3.7% in 2014**.

Better internet coverage across the country has also led to the growth of mobile content in Swahili, with the number of mobile apps in the language increasing from **5,000 in 2014 to almost 30,000 in 2017**.

Mobile Market Trends

Battle of the Brands

Although **affordability of the smartphone** has historically been quoted as a major challenge, Jumia, Kenya's leading ecommerce platform, has reported a **continuous decrease** in average price of smartphone over the last three years. The average amount spent to purchase a smartphone on the platform in **2014 stood at 186 USD, which reduced to 97 USD in 2016 and 86 USD in 2018** respectively. The rise of **affordable** entry-level devices from brands continues to remain a key driver of smartphone adoption.

The smartphone industry has remained a truly competitive landscape throughout the years, with Chinese brands dominating both Kenyan and African markets. Among the top mobile brands on Jumia 2018, **Infinix dominated** the sales (for the past three years). Xiaomi and Huawei were seen as strong new entrants, **gaining 5% and 9% market share** on Jumia respectively, within 2018

Despite the price of smartphones falling, **smartphone users** continue to focus on **specifications** along with brand perception and quality. This has resulted in brands offering **higher specifications at lower pricing** by investing in higher storage, larger screen size, better camera resolution and 4G network connectivity on their devices. Thus, **creating value** for Kenyan consumers.

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Mobile Money

Driving Financial Inclusion

In 2018, **70% of all transactions made on Jumia were done through mobile money** and rest 30% through other payment methods including cash on delivery and card payments.

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