

# BBG Research Series

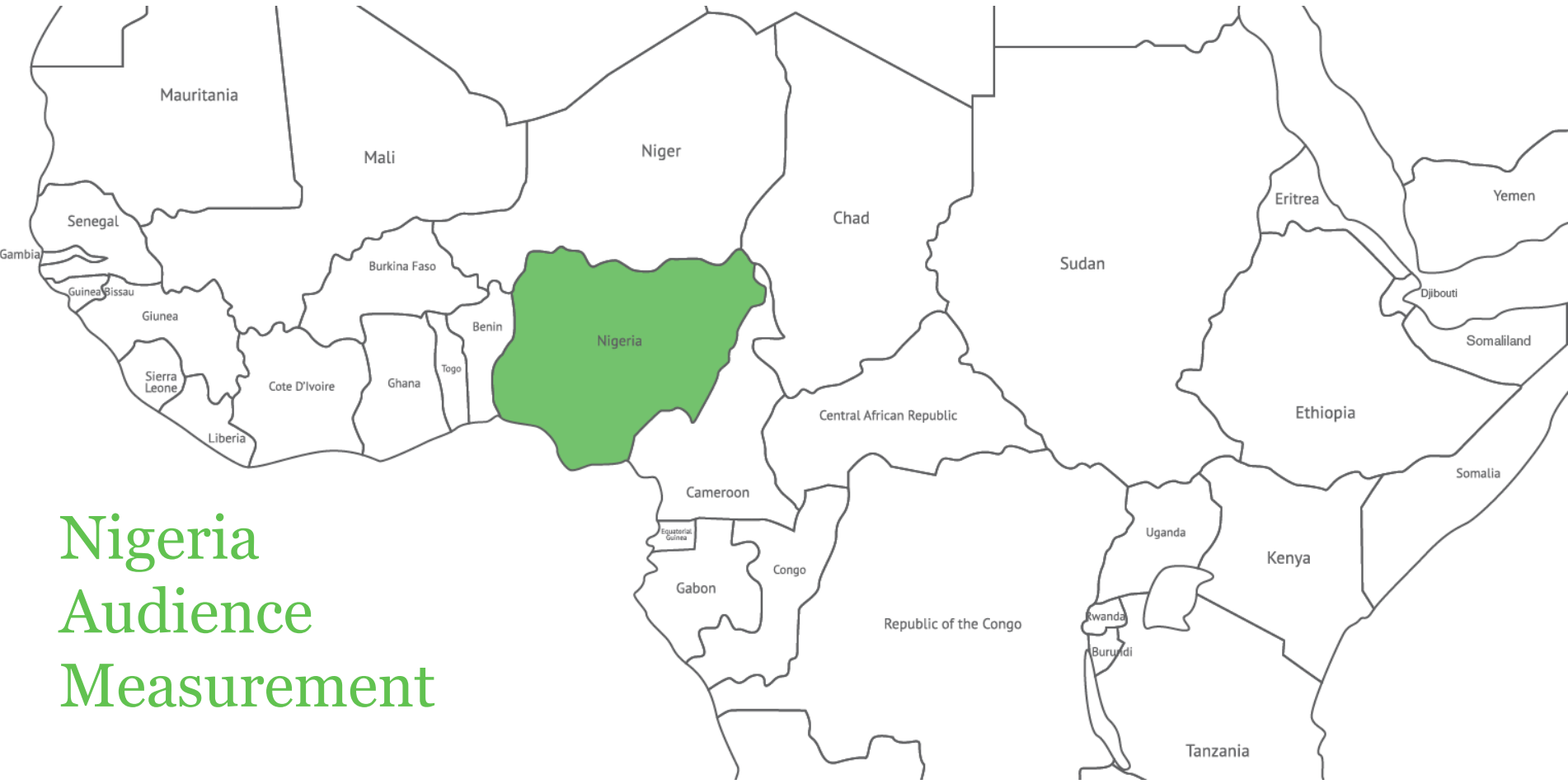


GALLUP®



## Nigeria Media Use 2012

Digital Media Gap Shrinking, Popularity of Radio Undiminished



# Nigeria Audience Measurement

# Nigeria Audience Measurement Survey – Radio & TV

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- Overview
  - Survey Design
  - Broadcast Media
  - What kinds of programs do Nigerians want to listen to or watch on TV
    - Are there demographic differences
  - When do Nigerians listen and watch
    - Are there demographic differences in share
  - Mobile Phone and Internet Access in Africa (2012)

# Nigeria Survey

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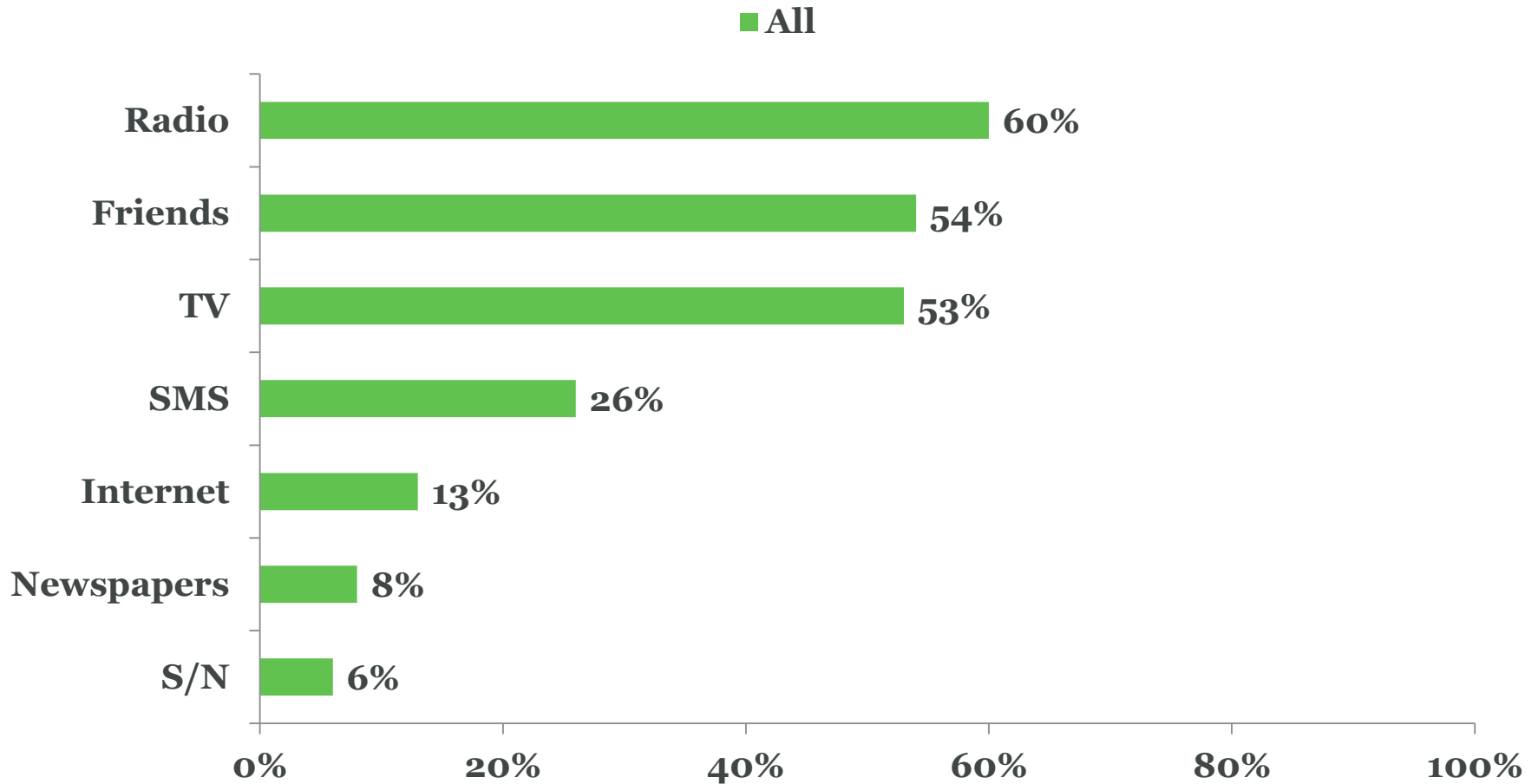
- Nationally representative sample\* of 3,000 Nigerians aged 15 and older.
- Conducted between 02 March and 07 April 2012
- Questionnaire translated and interviews conducted in English, Pidgin, Hausa, Igbo, & Yoruba
- Random selection of households using random route procedure
- Random selection of respondent (15 +) using Kish Grid
- 100 interviewers from all across Nigeria
- Supervisors accompanied interviewer on 646 interviews and re-contacted 762 respondents
- The overall response rate was 82%.

*\* A small part of Kano was not included in the survey because of security concerns, represents < 0.025% of population*



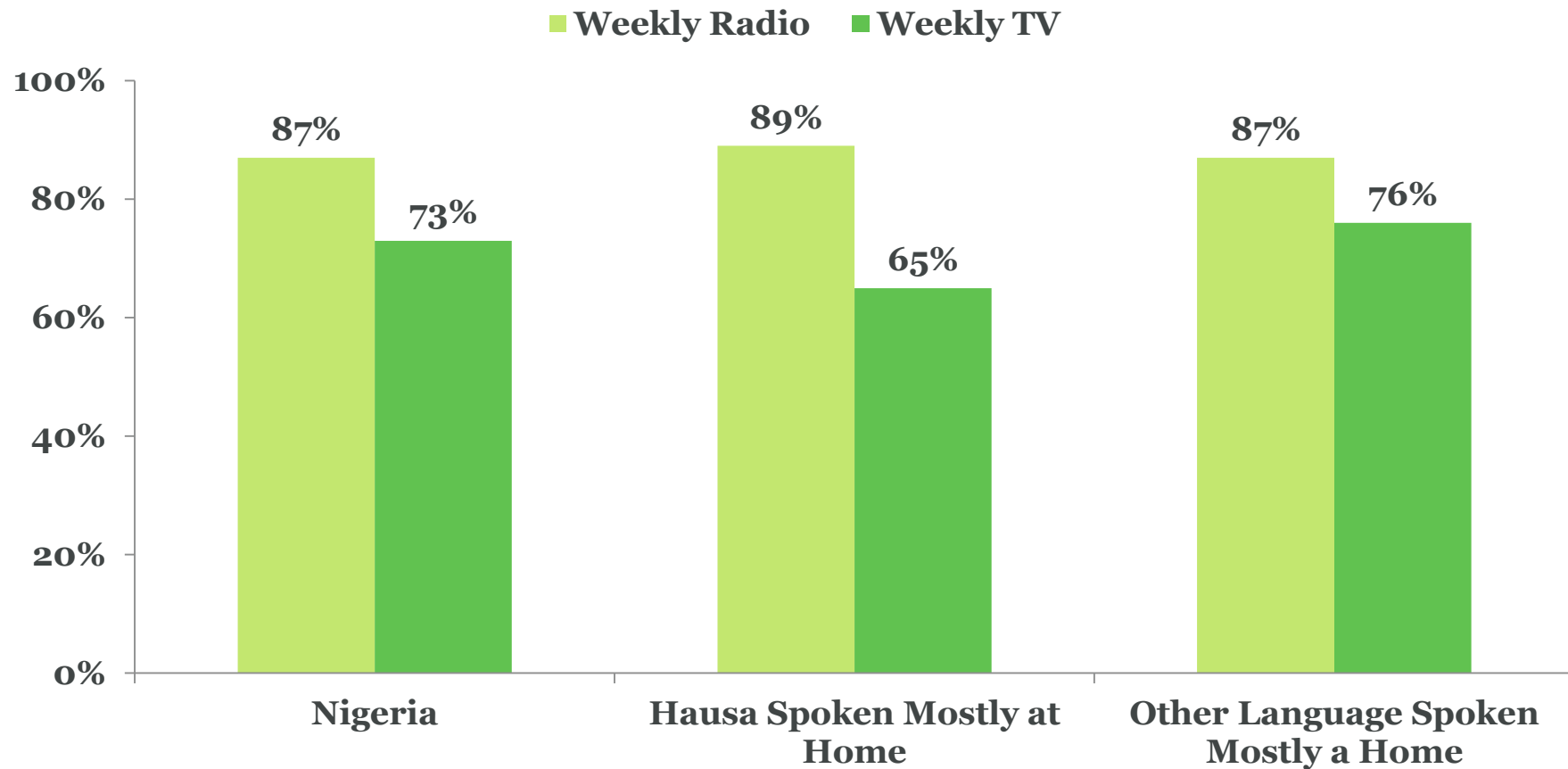
# Broadcast Media Remain the Paramount News Source

# Where Do Nigerians Get Their News?



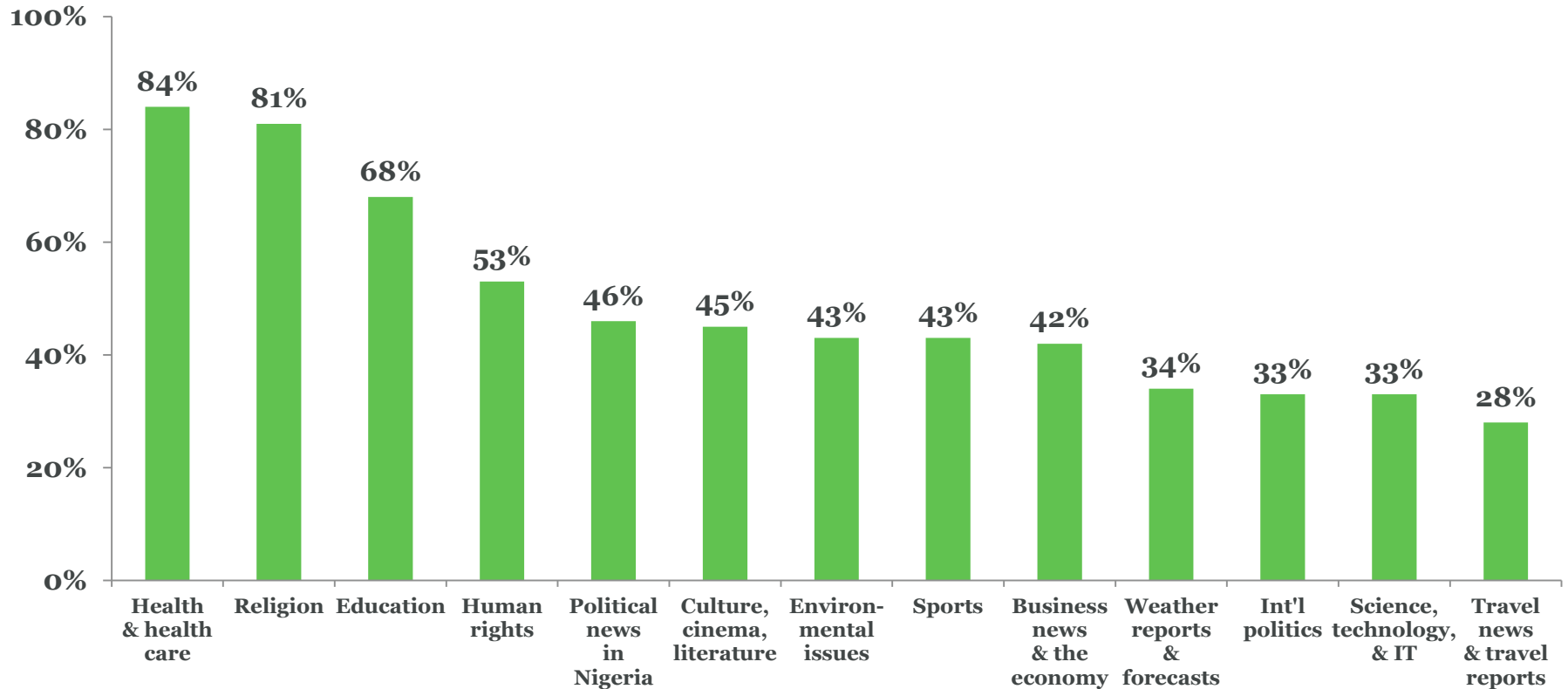
Base: All respondents (n=3,000). Percentage using each platform to follow news daily or almost daily.

# Radio and TV Reach – Last 7 Days



# What Do Nigerians Want to Listen to or Watch?

Topics of Interest: % "Very Interested"

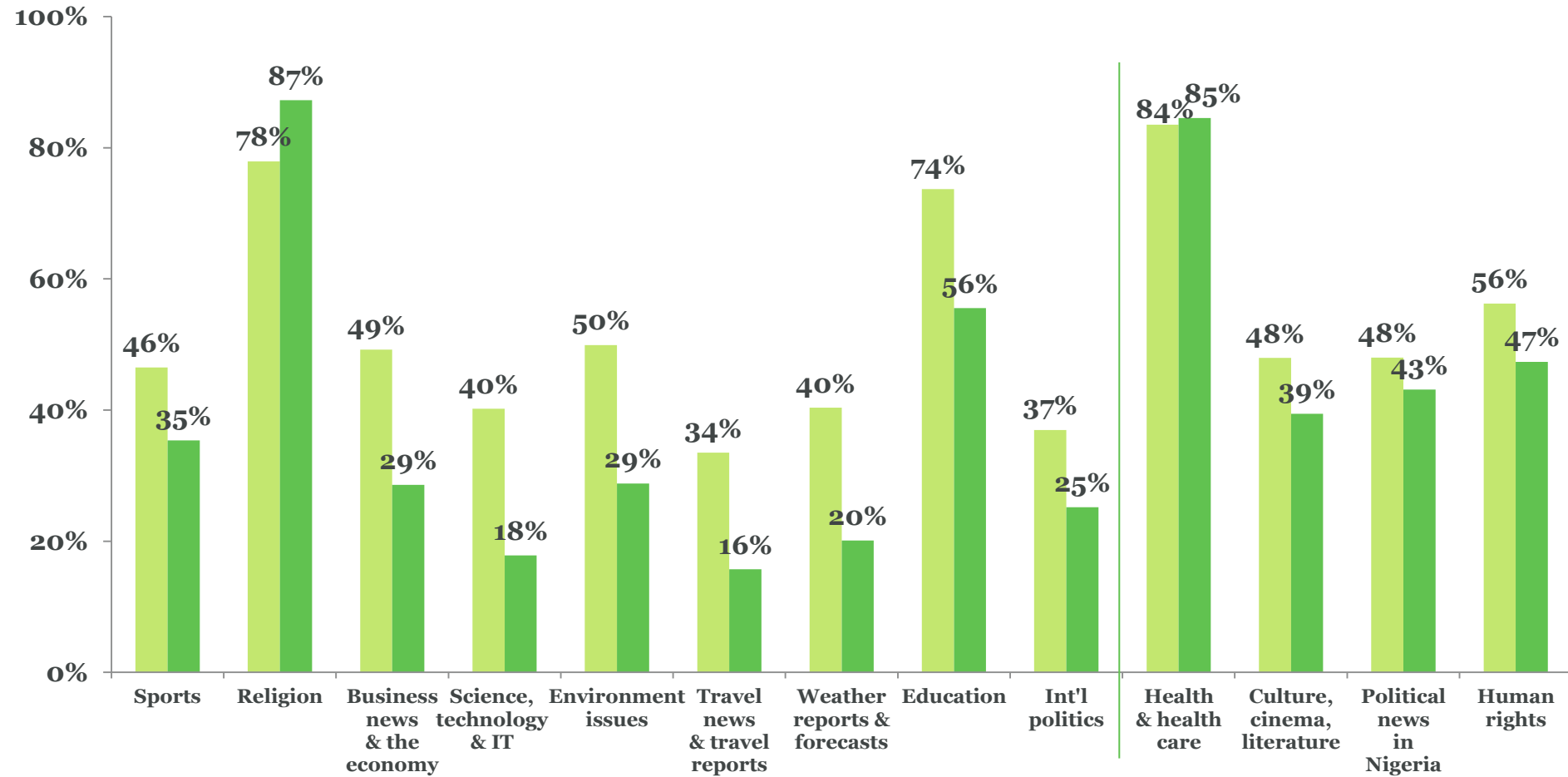




# What Do Nigerians Want to Listen to or Watch?

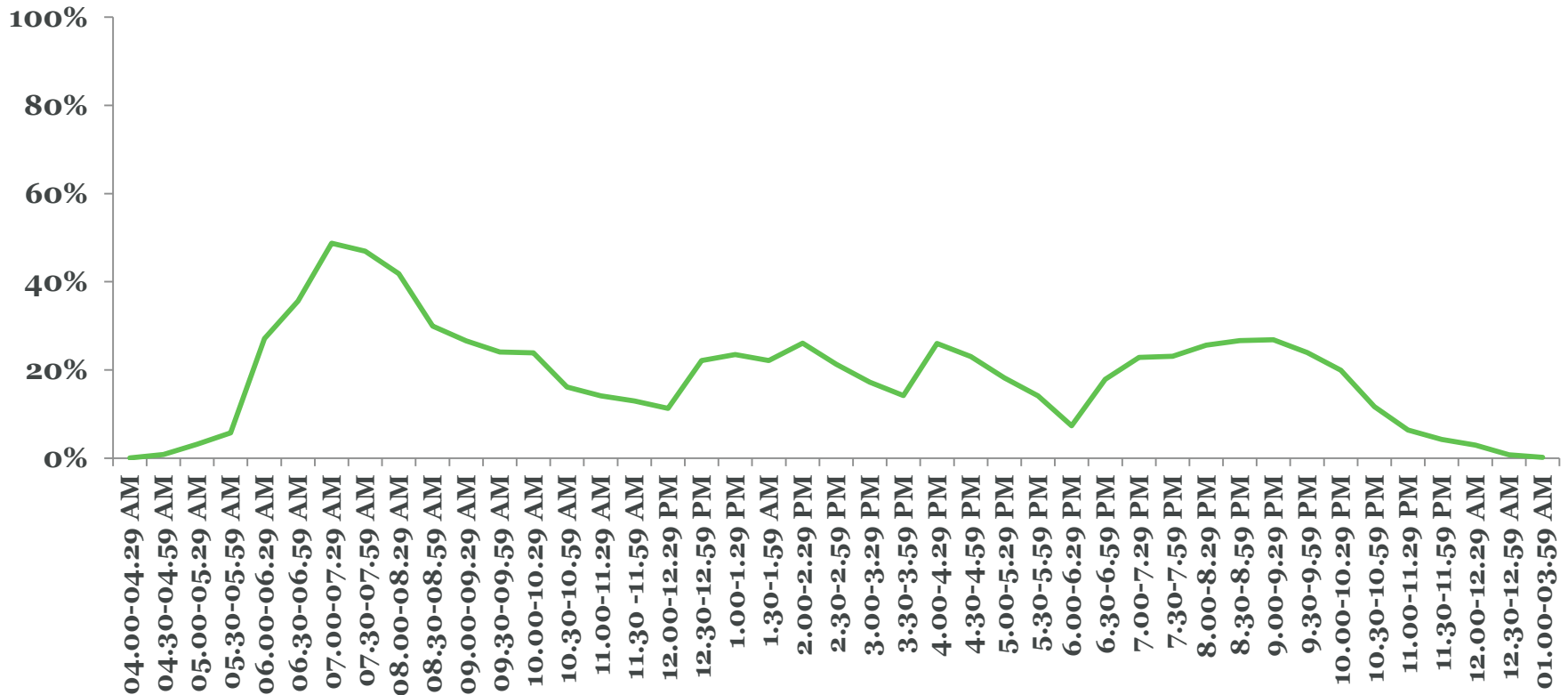
■ Non-Hausa Mostly Spoken at Home

■ Hausa Mostly Spoken at Home

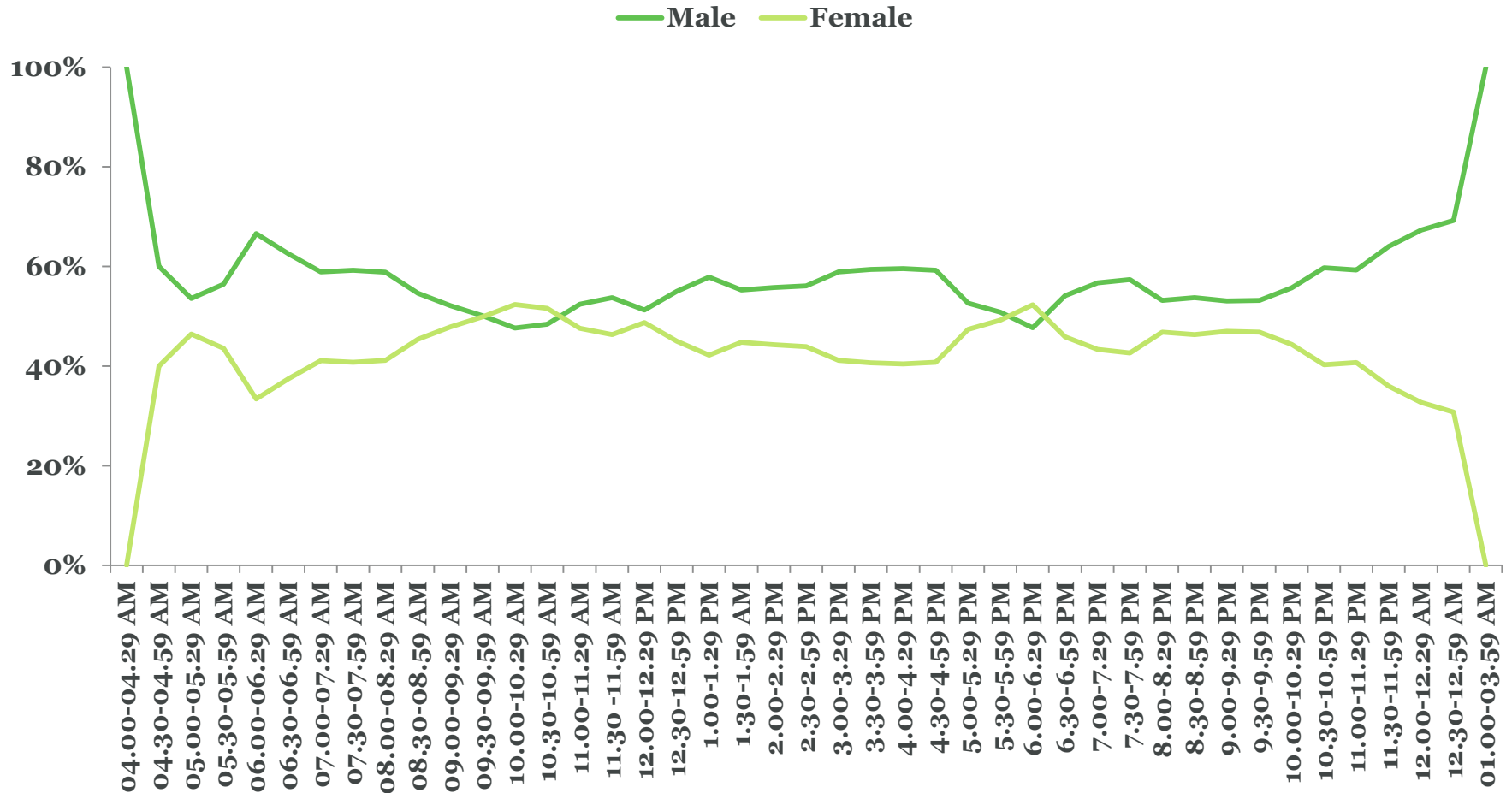


# Listened to Radio Yesterday

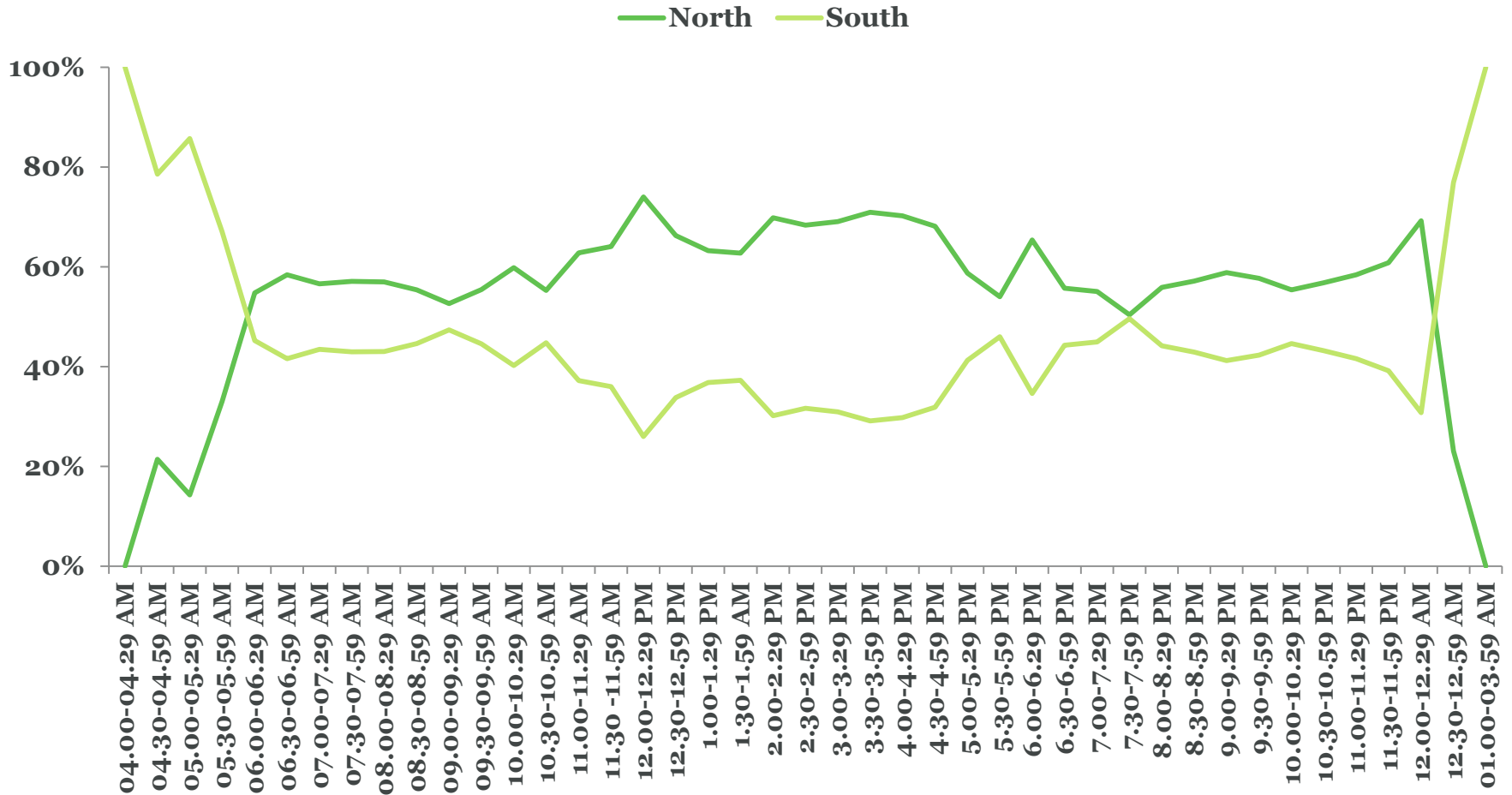
**Q: “At which times did you listen to the radio yesterday?”**  
Asked of respondents who say they listened to the radio the previous day



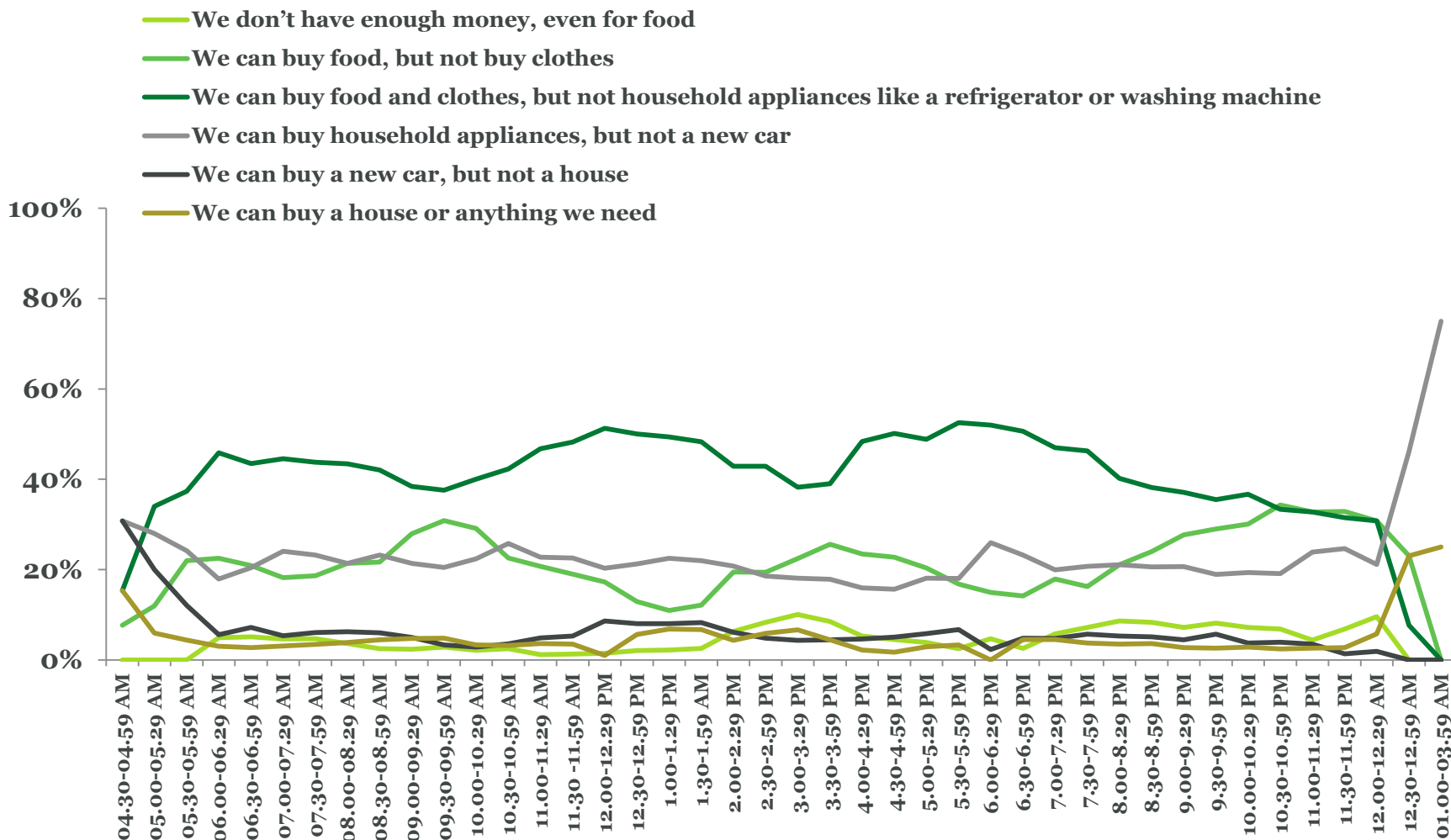
# Listened to Radio Yesterday: by Gender



# Listened to Radio Yesterday: North - South

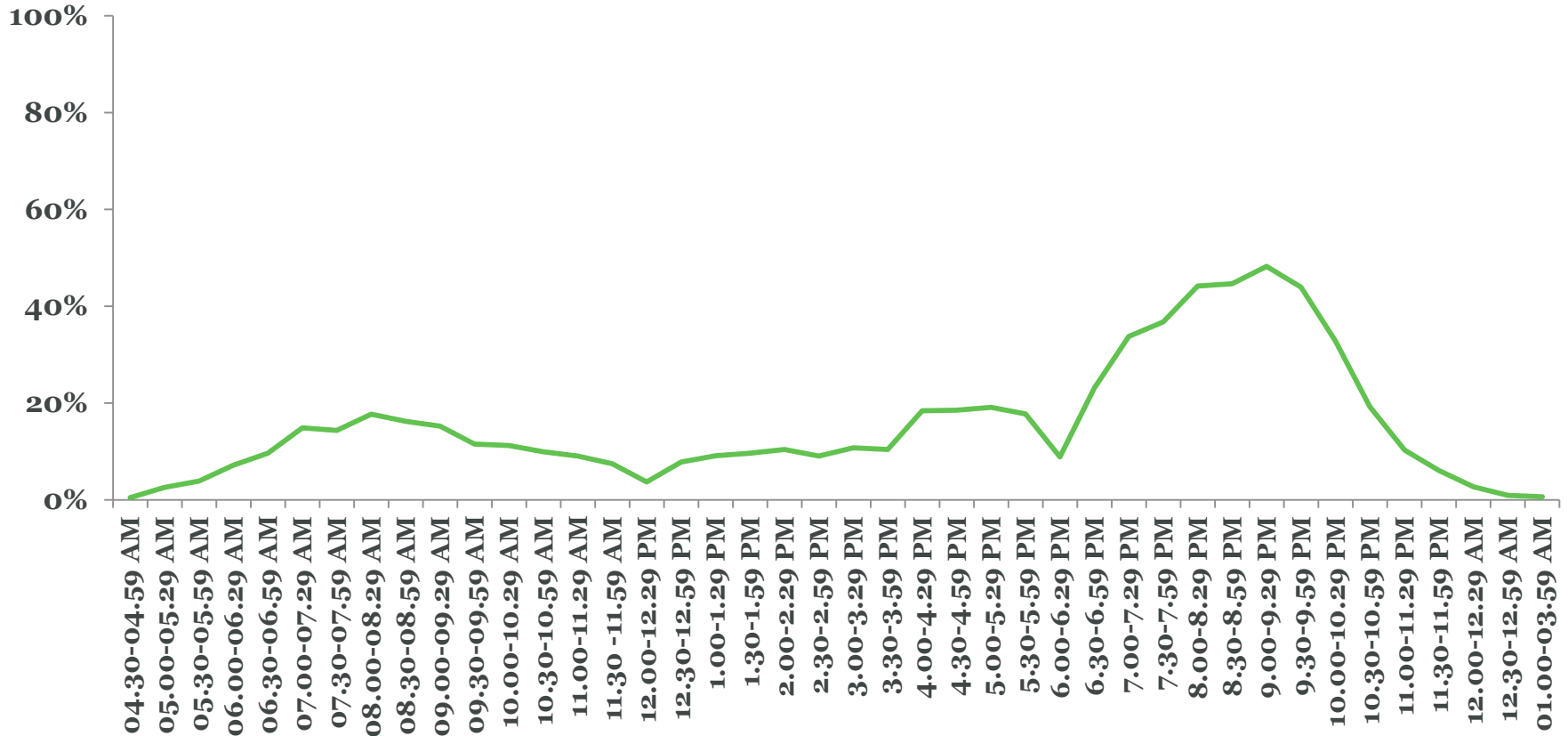


# Listen to Radio Yesterday: by Subjective Household Income

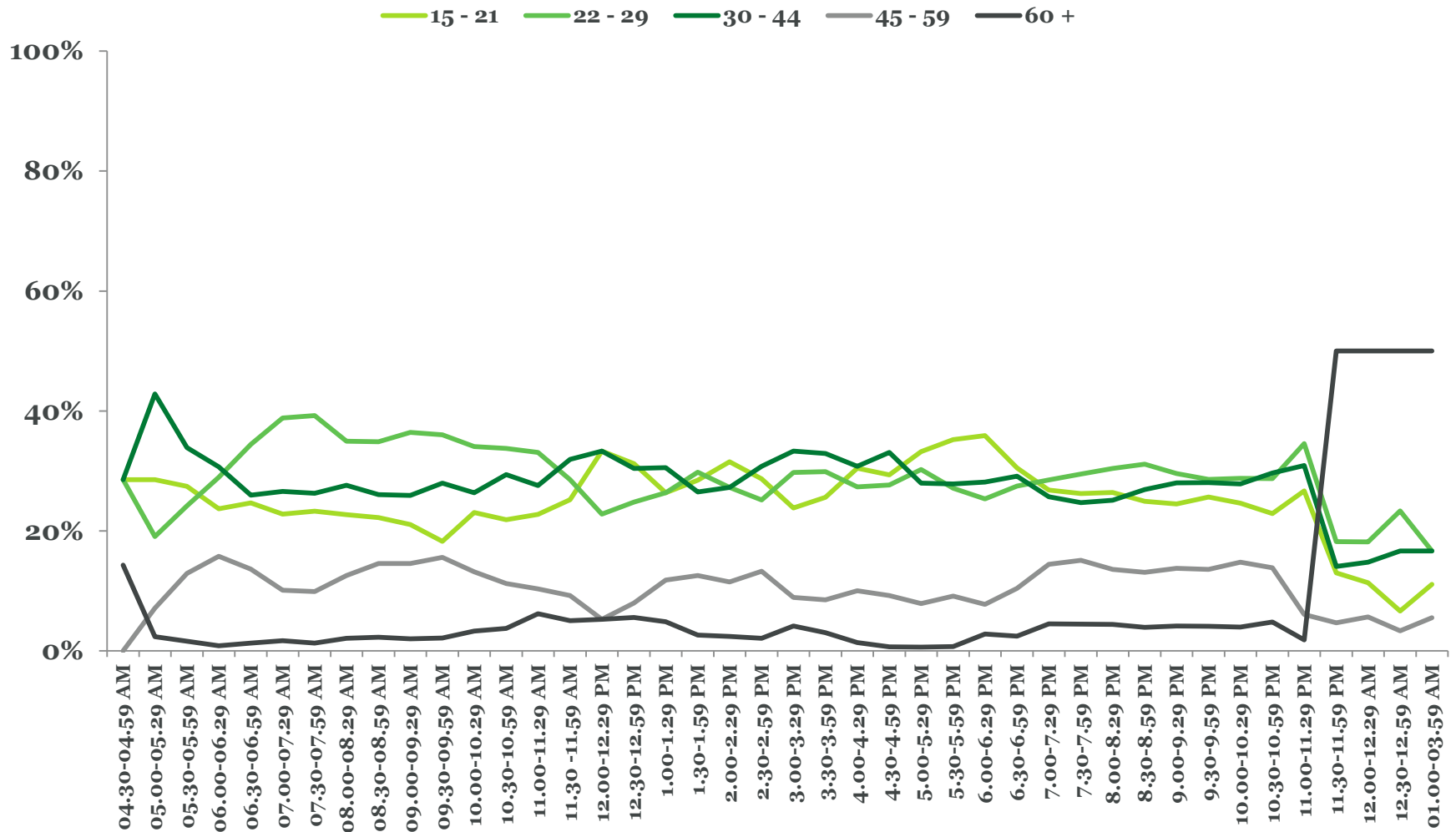


# Watched TV Yesterday

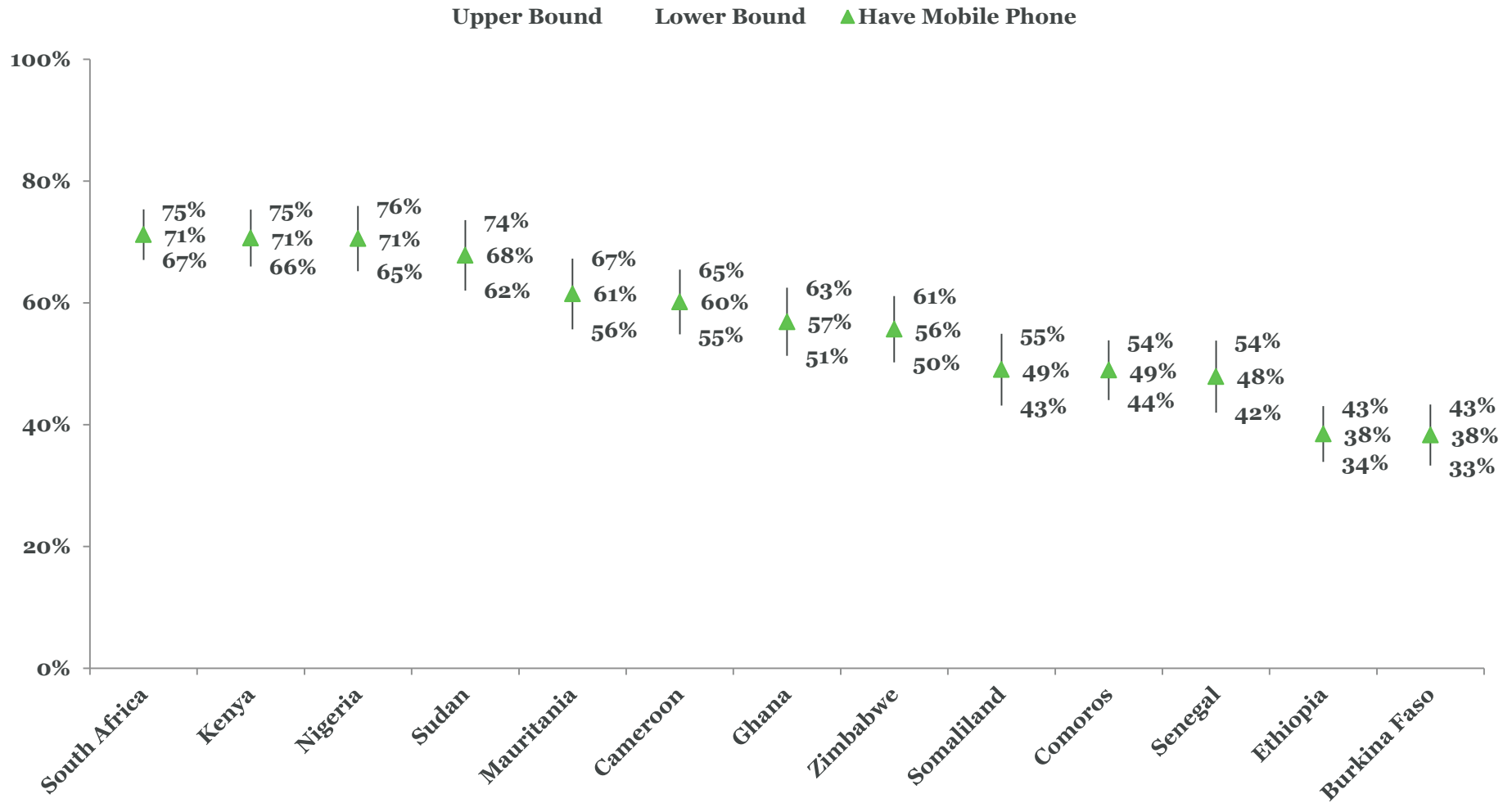
**Q: “At which times did you watch television yesterday?”**  
Asked of respondents who say they watched television the previous day



# Watched TV Yesterday: by Age Group

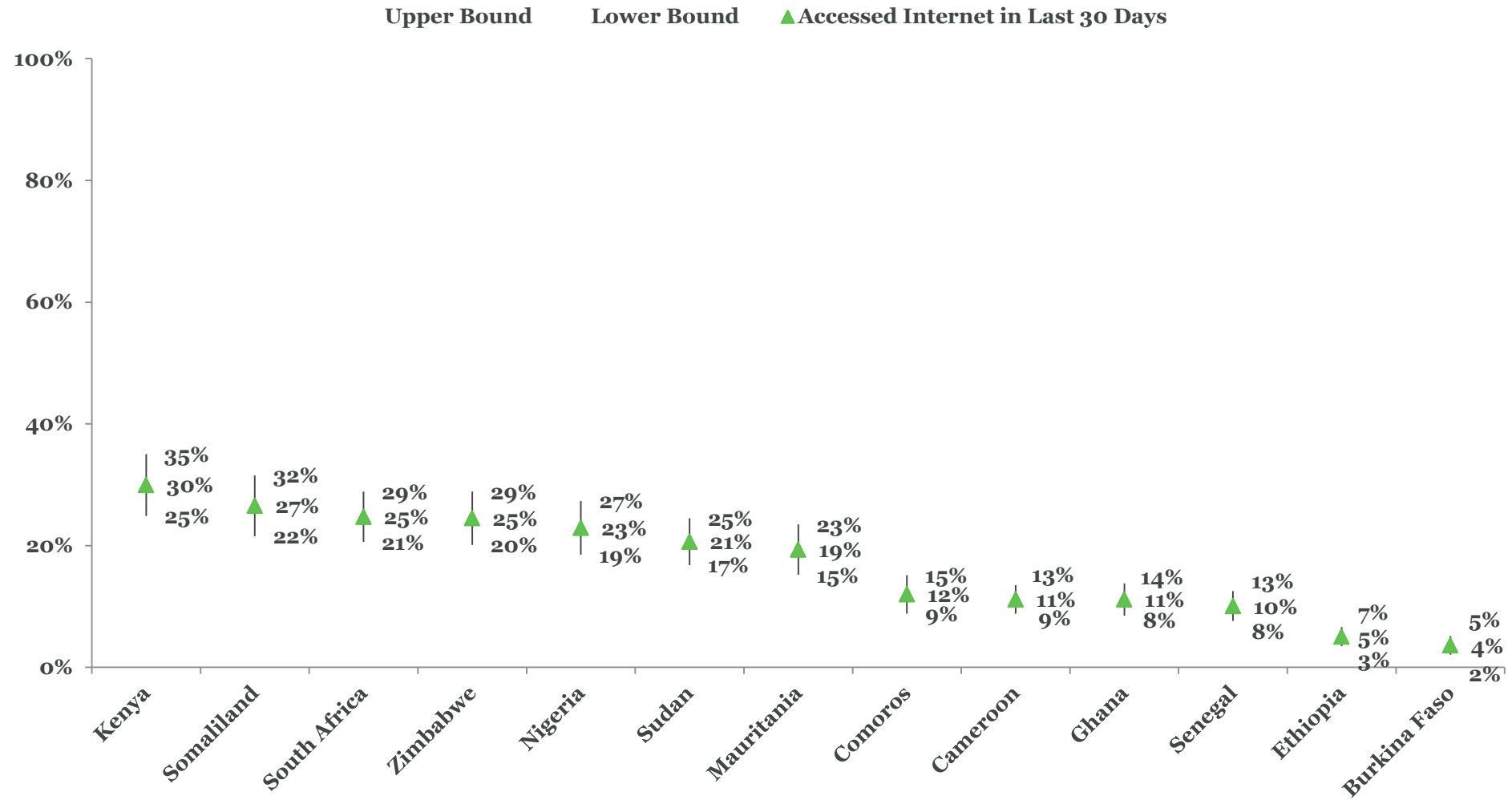


# Mobile Phones in Sub-Saharan Africa – 2012 Gallup World Poll (to date)



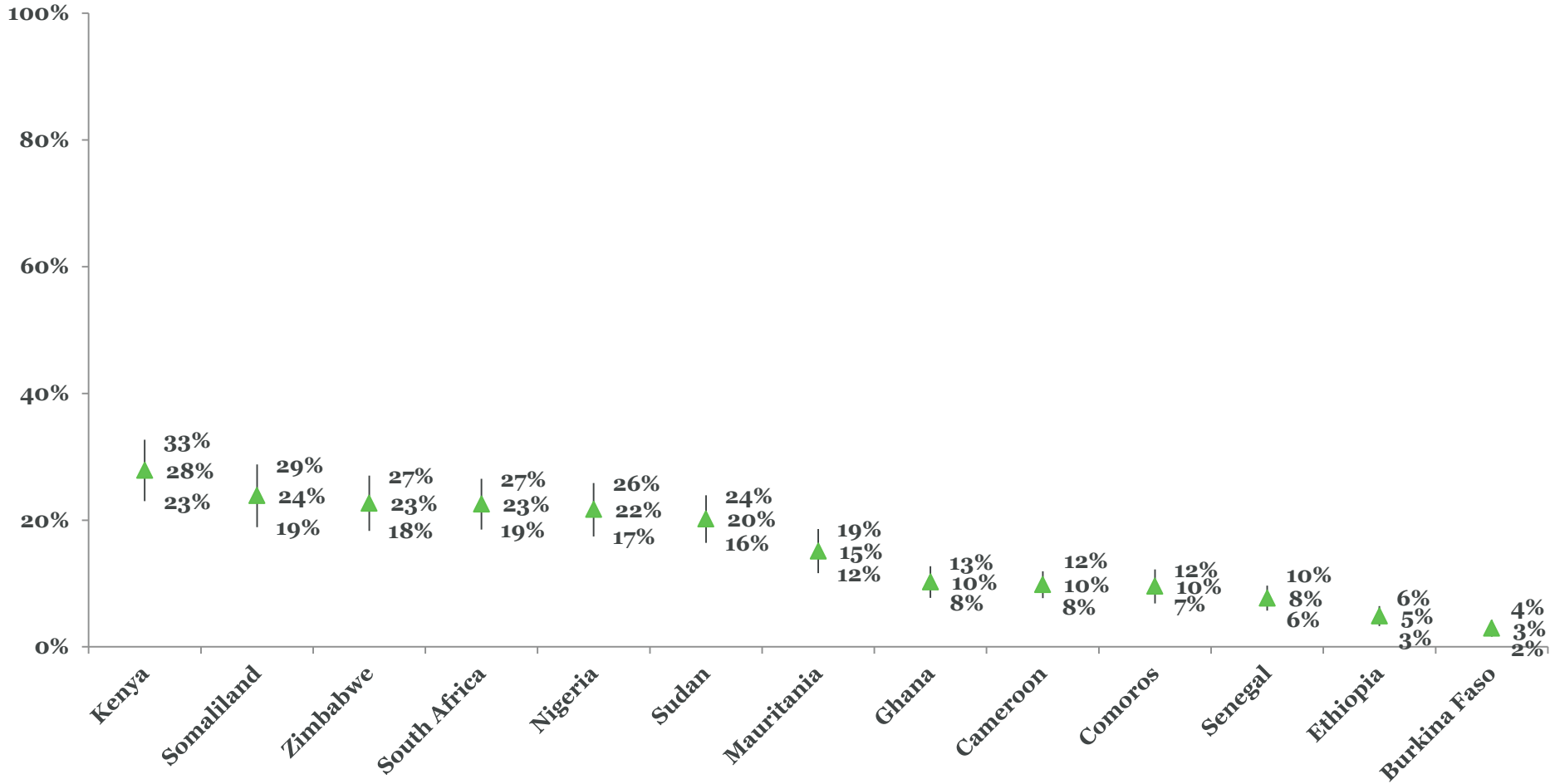


# Accessed Internet Last 30 Days in Sub-Saharan Africa – 2012 Gallup World Poll (to date)



# Have Mobile Phone and Accessed Internet in Sub-Saharan Africa – 2012 Gallup World Poll (to date)

Upper Bound    Lower Bound    ▲ Have Mobile & Accessed Internet



# “Digital Nigeria” Comes of Age

Findings from the 2012 BBG/Gallup National Survey of Nigeria

# Main Findings

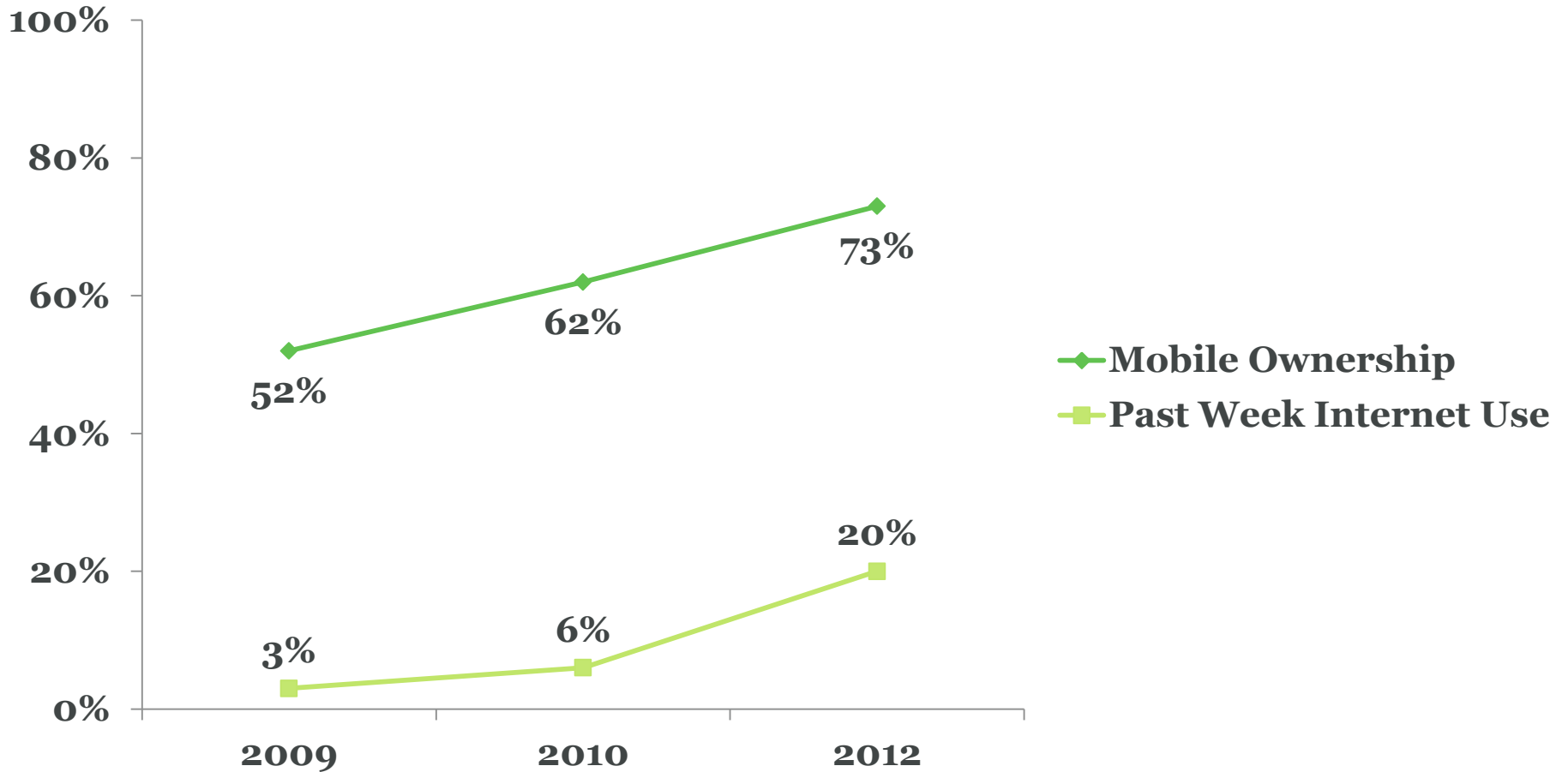
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- Massive growth in “connectedness” in past few years
- Former media gap between Hausa and others has narrowed; increase in Hausa phone ownership accounts for growth in mobile
- Internet use strong across the board at 20% weekly; but varies sharply by demographic
- Growth of Internet largely due to take-up of mobile Web; a shift from café-centered Internet culture
- More than 50% in all demographic groups own mobile, except least educated (even among them, 30% have mobiles)
- Mobiles widely used for non-voice activities, esp. SMS, web, social networking
- News sharing by SMS, social networking, email very important
- But broadcast media still dominate for news

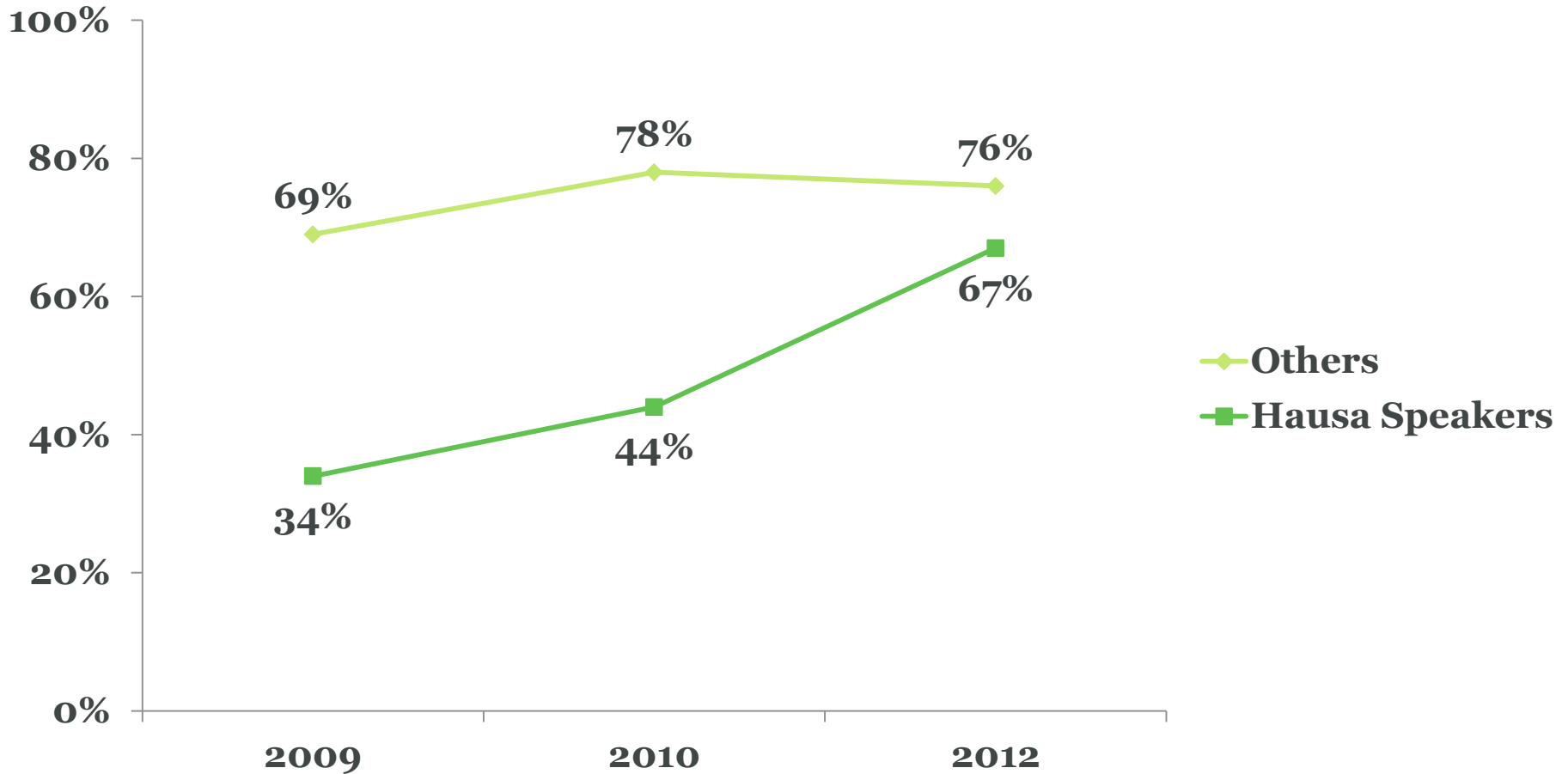
# Internet and Mobile Growth



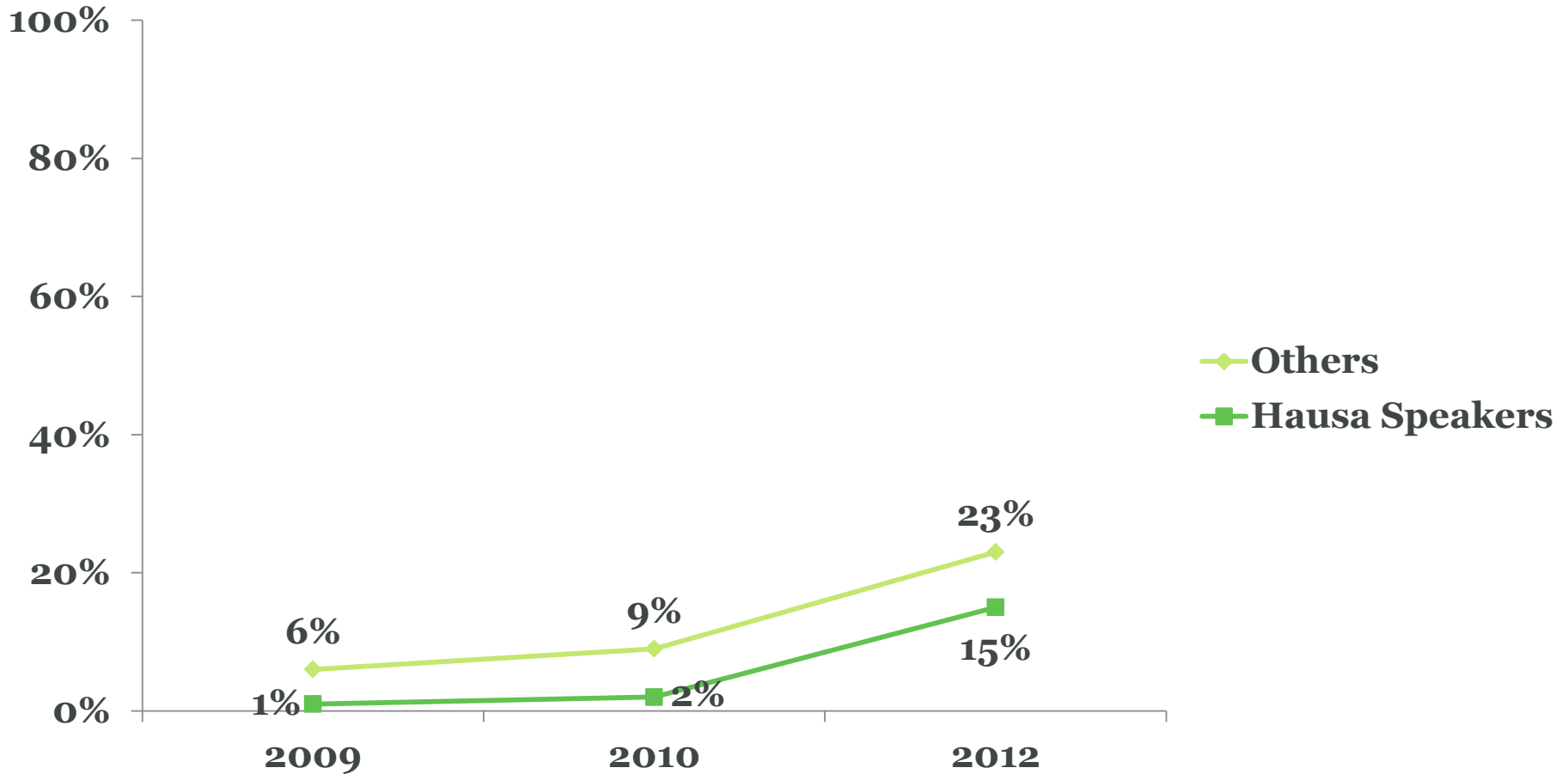
# Mobile and Internet Growth in Nigeria



# Mobile Growth: Hausa vs. Others



# Internet Growth: Hausa vs. Others



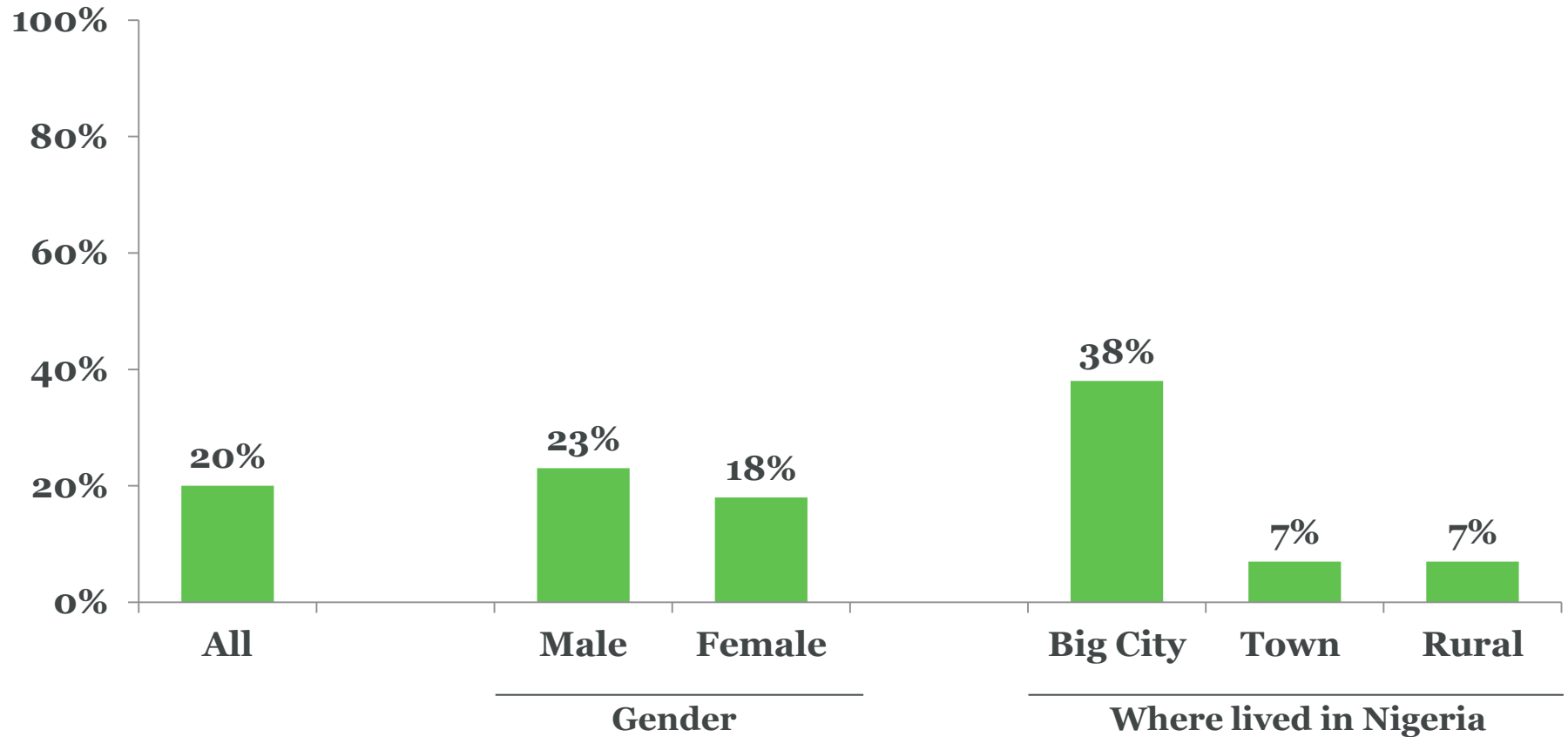
Percentages using Internet at least weekly, by year. 2009 n=3,011; 2010 n=3,000; 2012 n=3,000



# Aspects of Internet Use

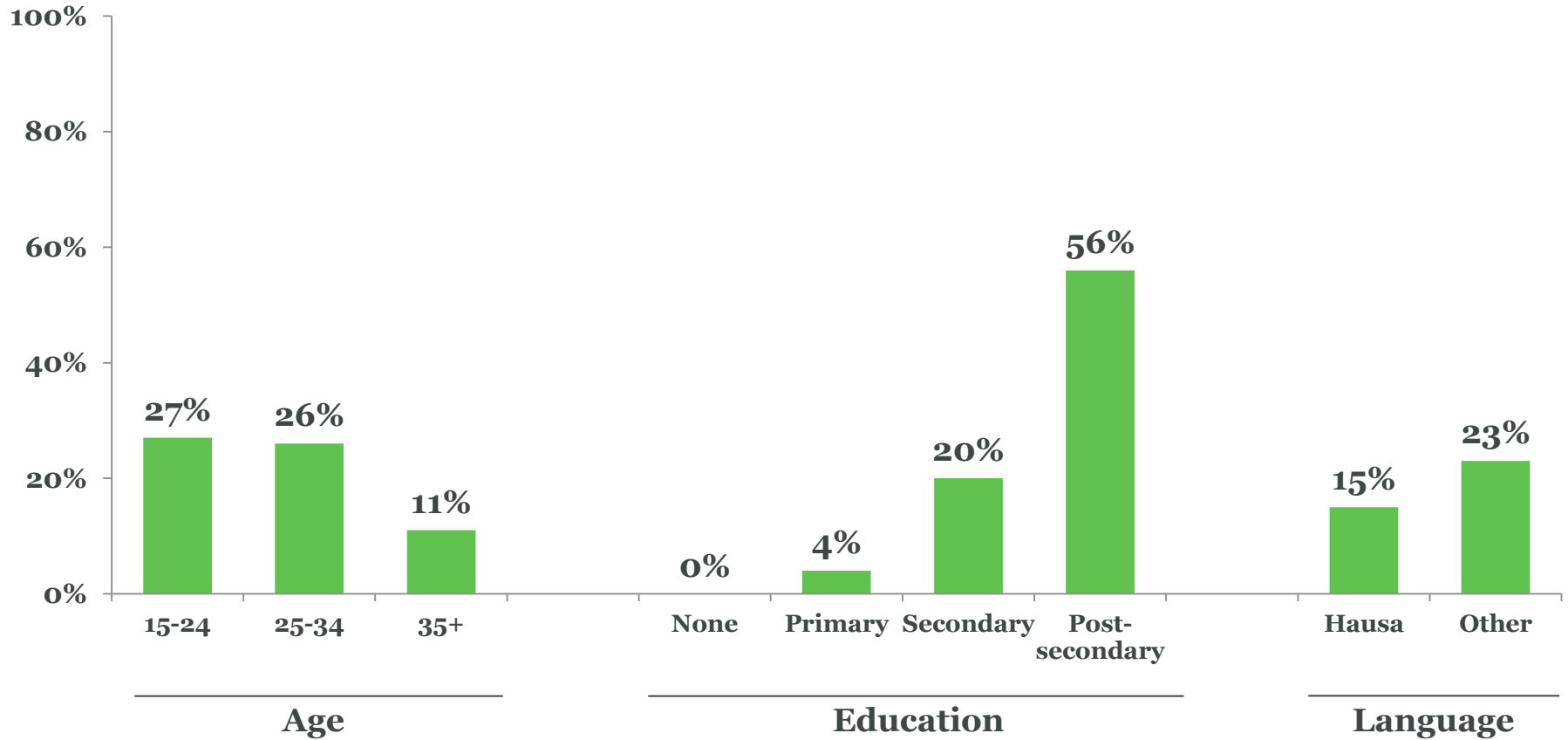


# Past Week Internet Use, by Demo



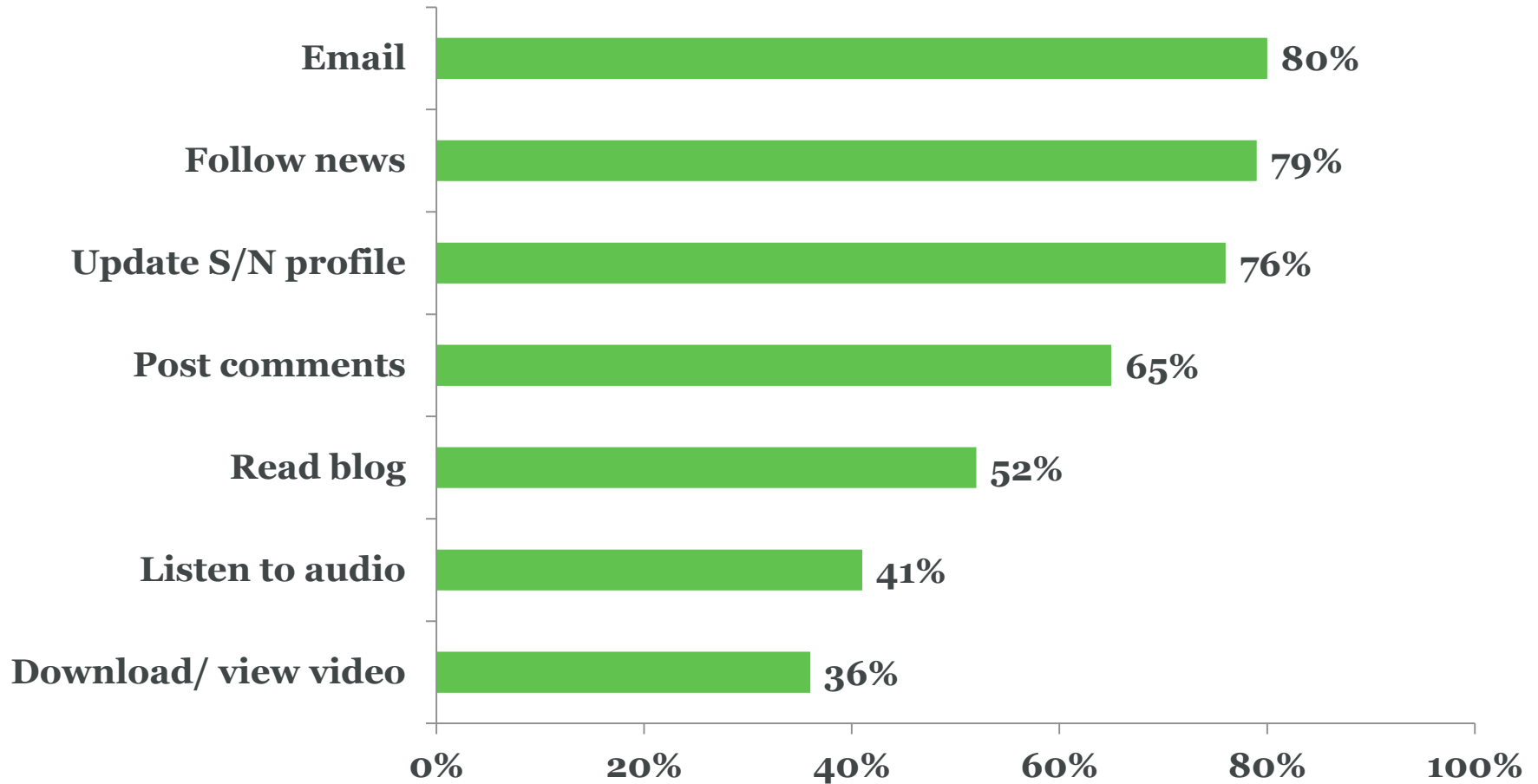
Percentages using Internet at least weekly in each group

# Past Week Internet Use (*continued*)



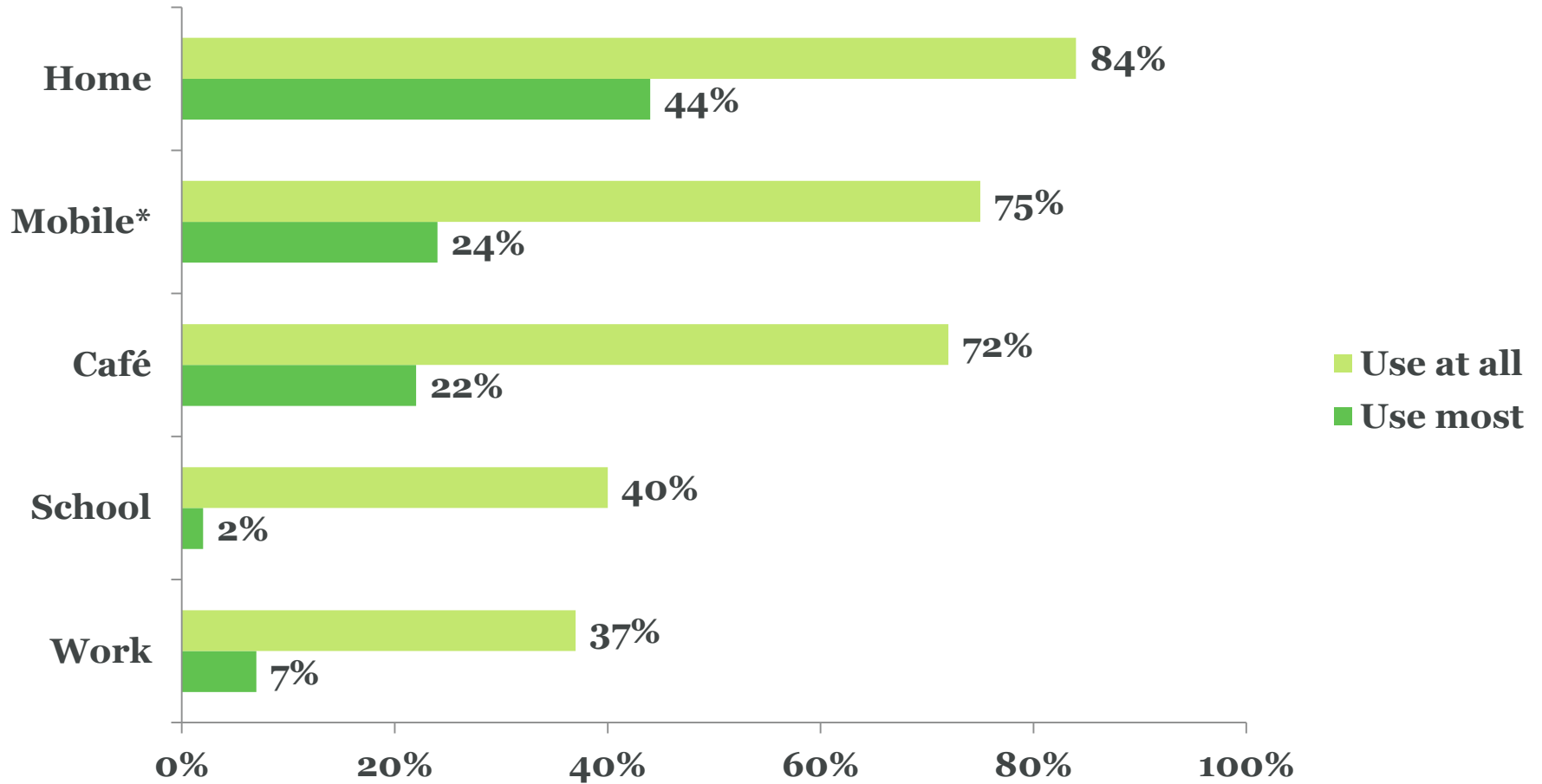
Percentages using Internet at least weekly in each group

# Internet-Based Activities



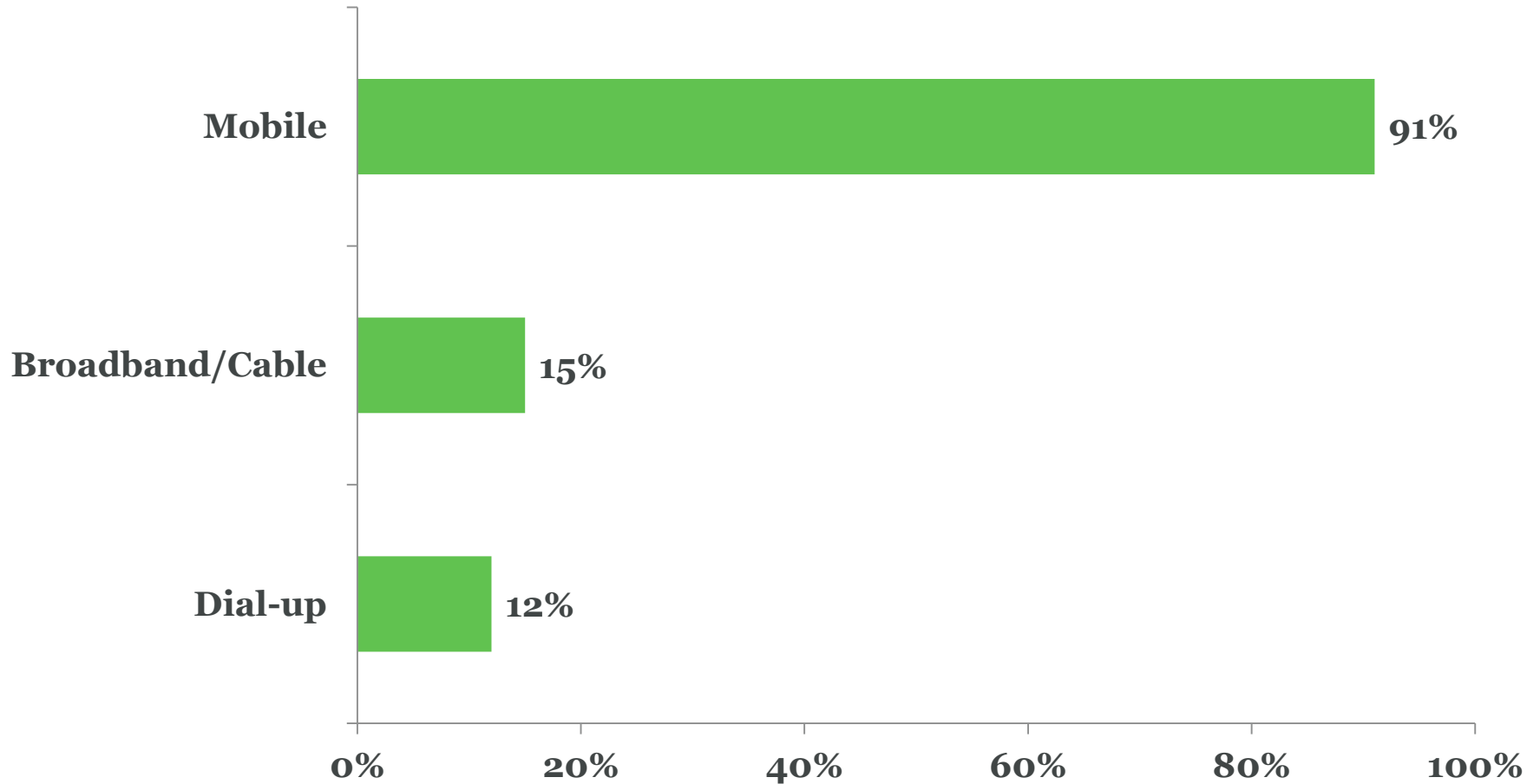
Base: Past week Internet users (n=613); figures show percentage of Internet users performing each activity in past week

# Where Is the Internet Used?



Base: Past week Internet users (n=613). \*Mobile defined as using Internet via mobile device at various locations

# How Is Internet Accessed at Home?

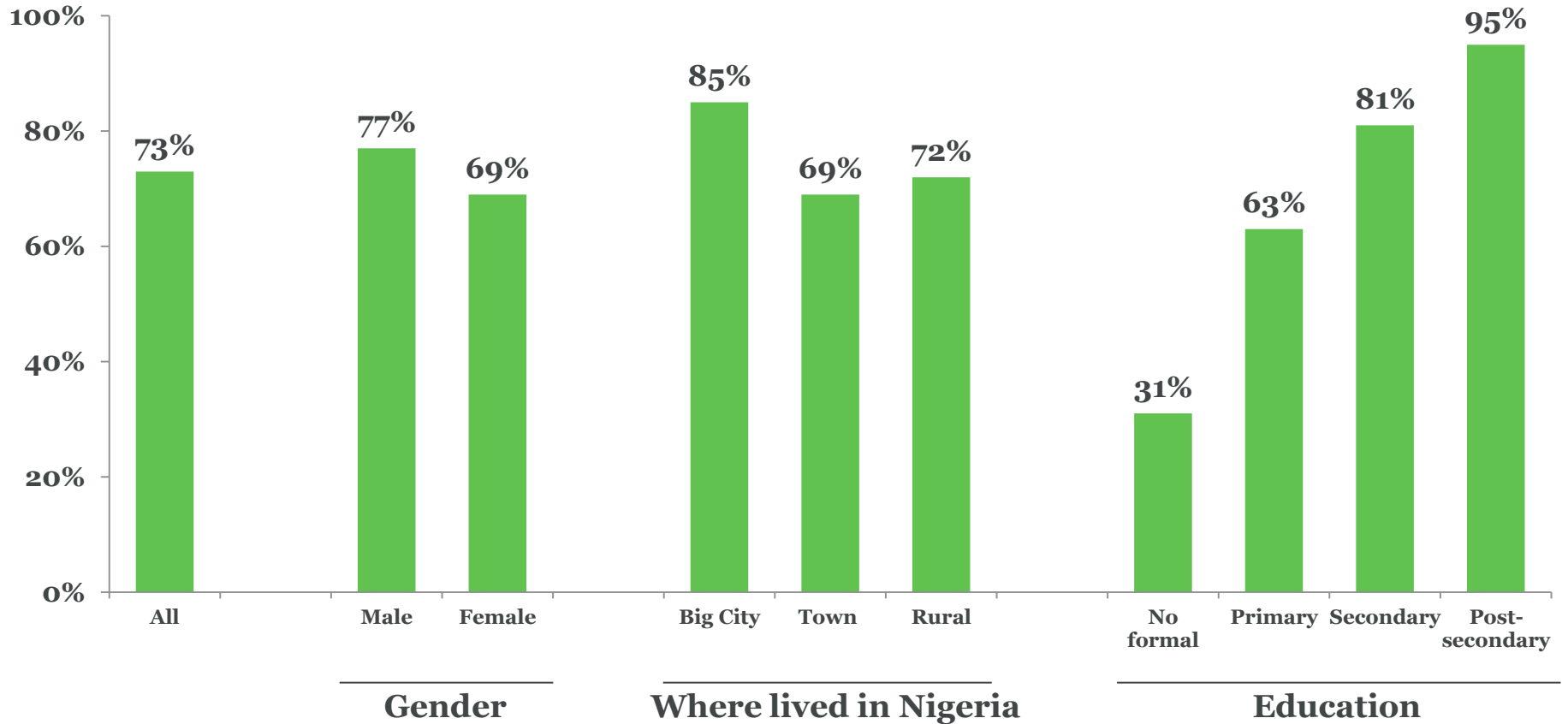


Base: Past week Internet users who use Internet at home (n=516)

# Mobile Nigeria



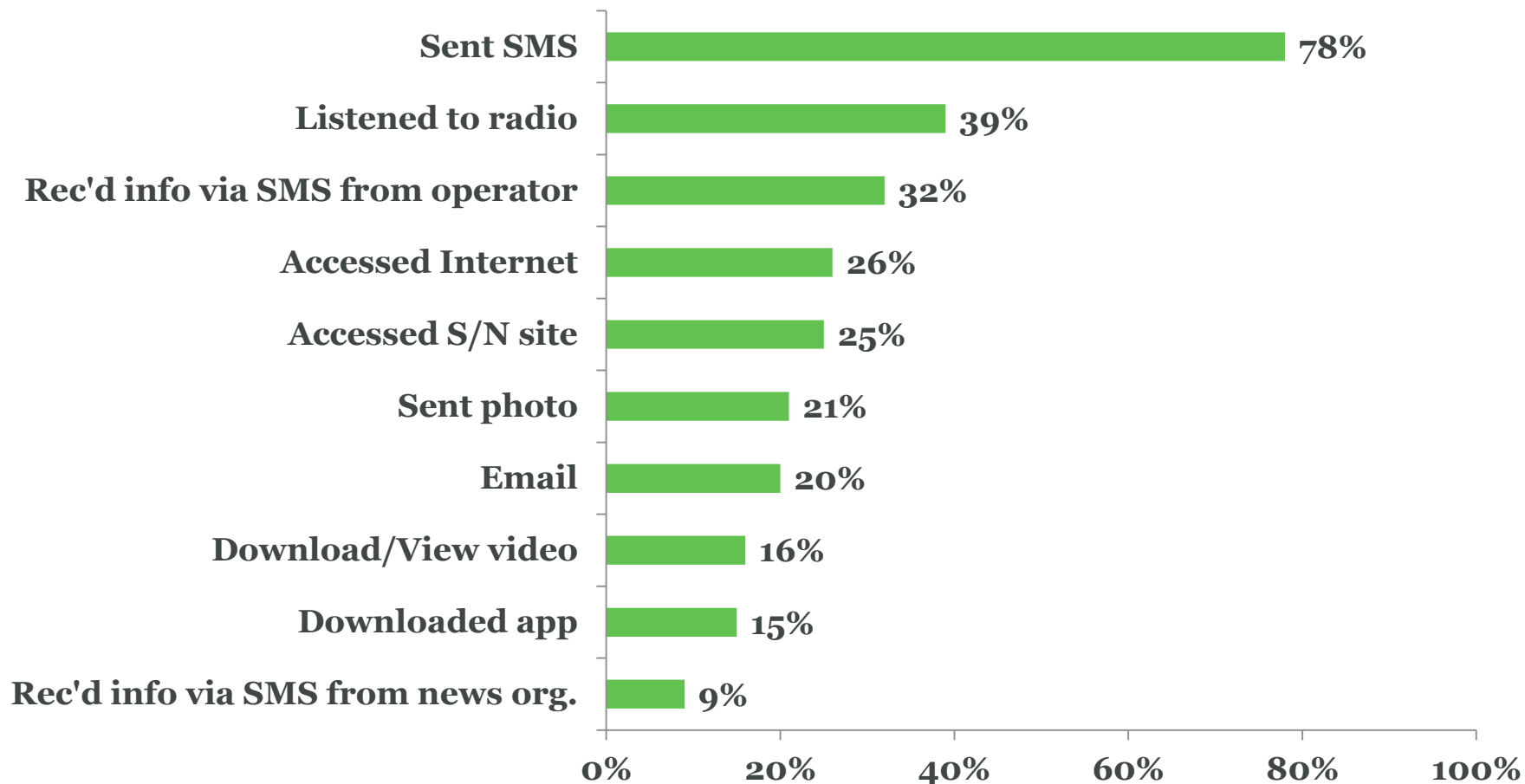
# Mobile Phone Ownership, by Demos



Percentage in each group personally owning a mobile phone



# Activities Performed on Mobiles in Past Week



Base: Mobile phone owners (n=2,193)

# Mobile News: Accessible, Convenient, Fast

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- *“It’s easy because there are some villages that do not have electricity and they are far from where you can get a newspaper — you can just use the phone.” (Zaria, female)*
- *“Initially, I hated reading news or even listening to it, especially reading newspapers, but now with my phone, I find it very easy and most convenient.” (Kano, female)*
- *“Like the issue of the plane crash, my friend told me on Facebook...It could have taken me two to three hours before the network news will carry it.” (Kano, male)*

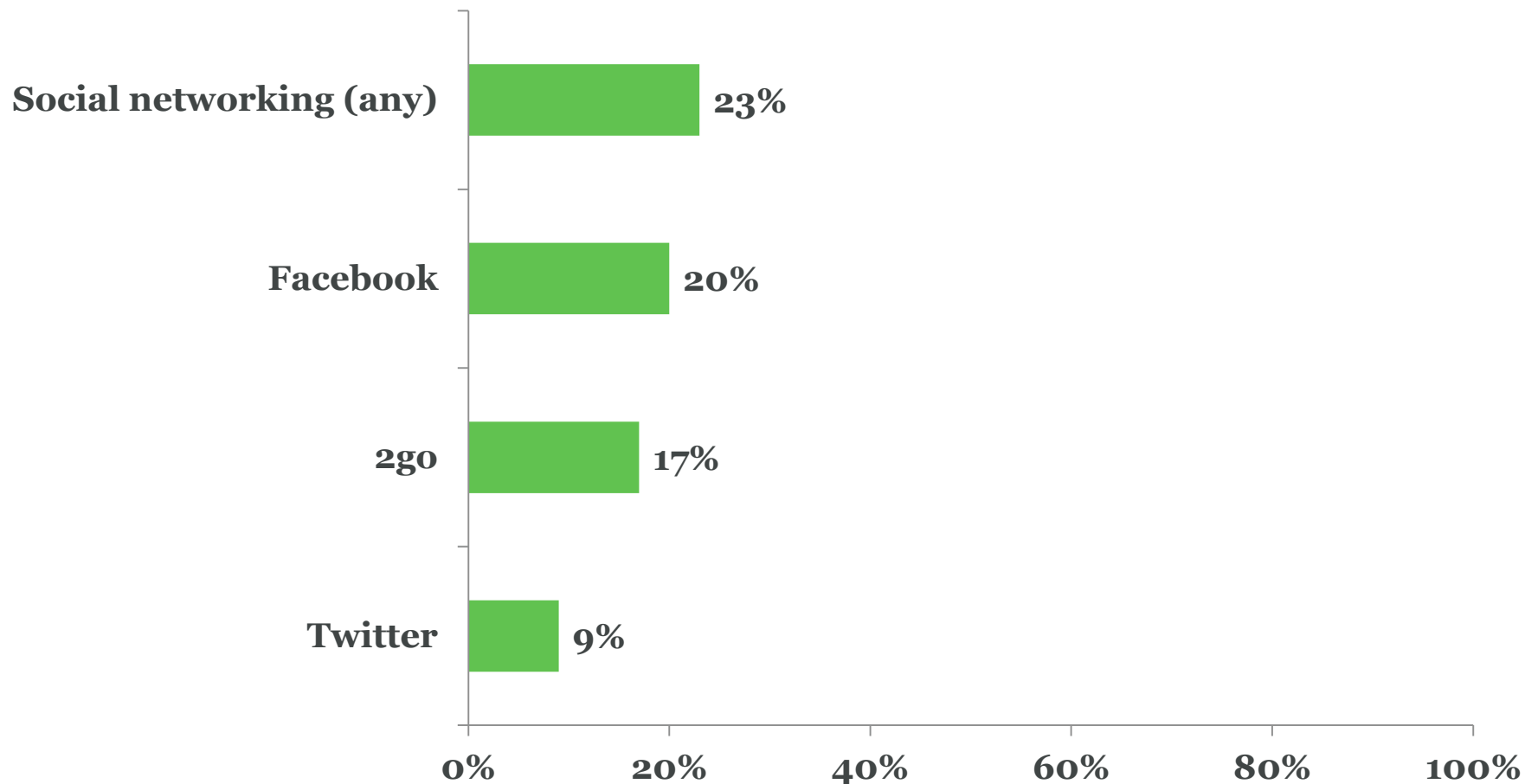
Source: 2012 focus groups with Hausa speaking mobile Web users (BBG/Gallup)



# Social Networking and News Sharing

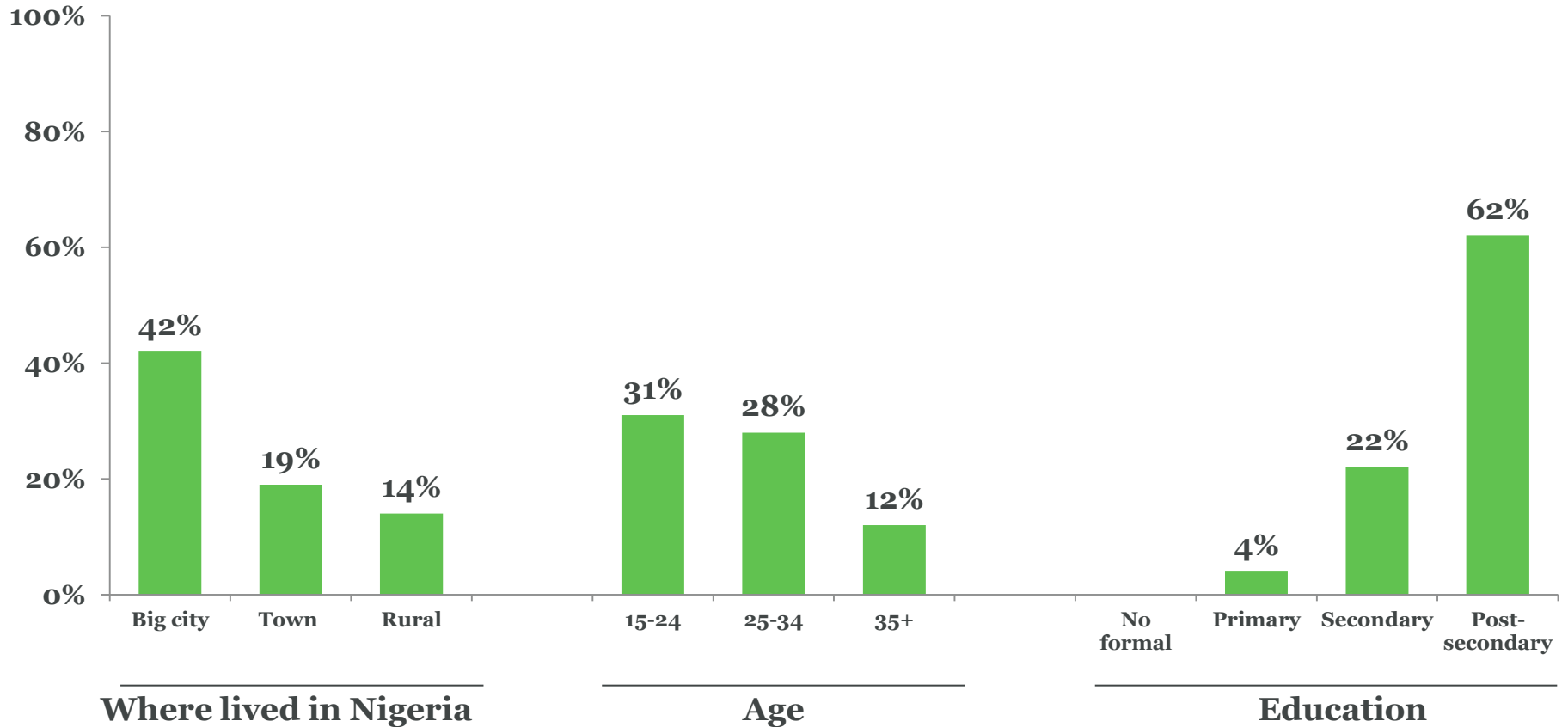
© 2011 [www.fotolighthouse.com](http://www.fotolighthouse.com)

# Social Networking in Past Week



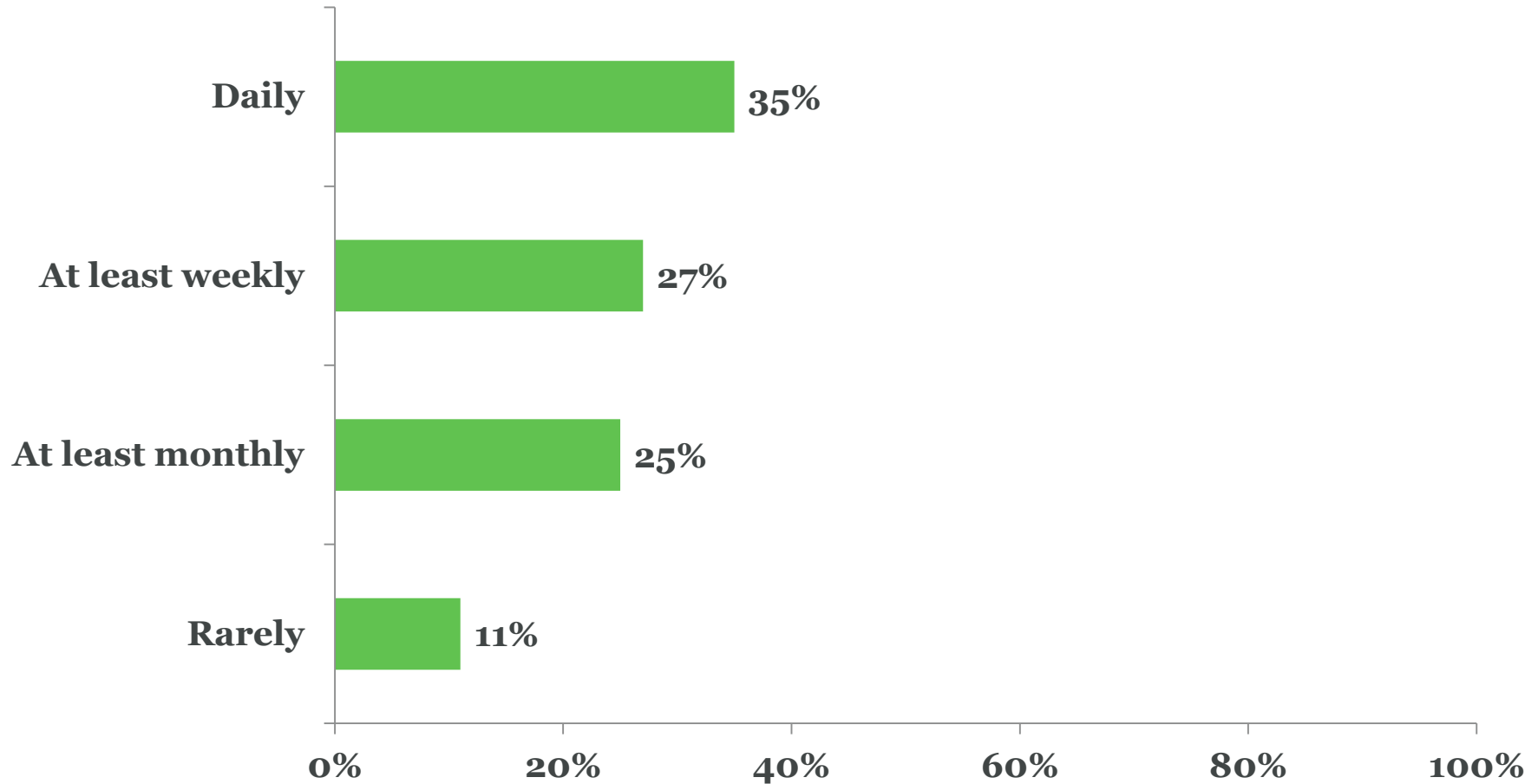
Base: All respondents (n=3,000)

# Social Networking, by Demos



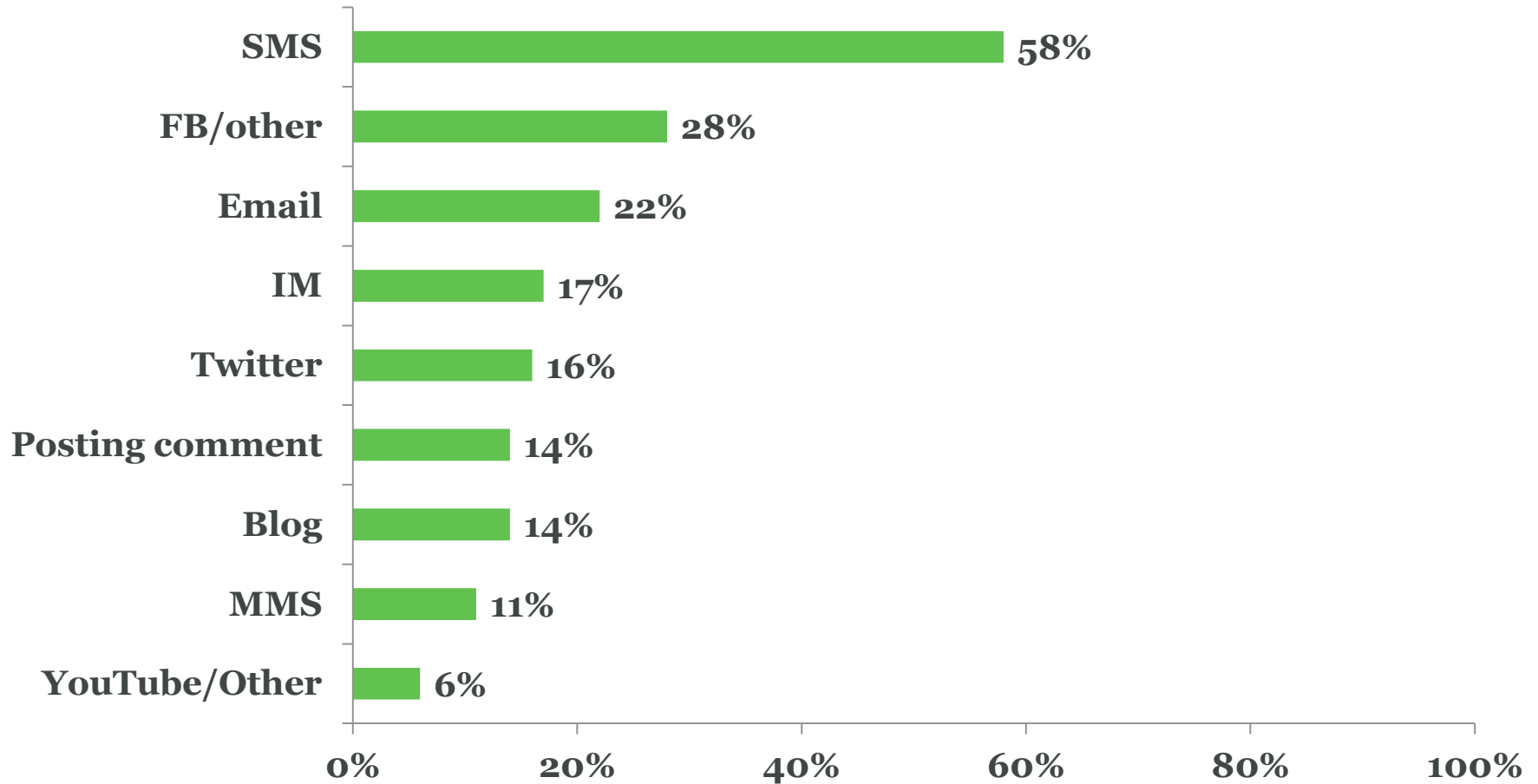
Percentage in each group using social networking sites in past week

# Q. “How often do you discuss or share news with other people in your community?”



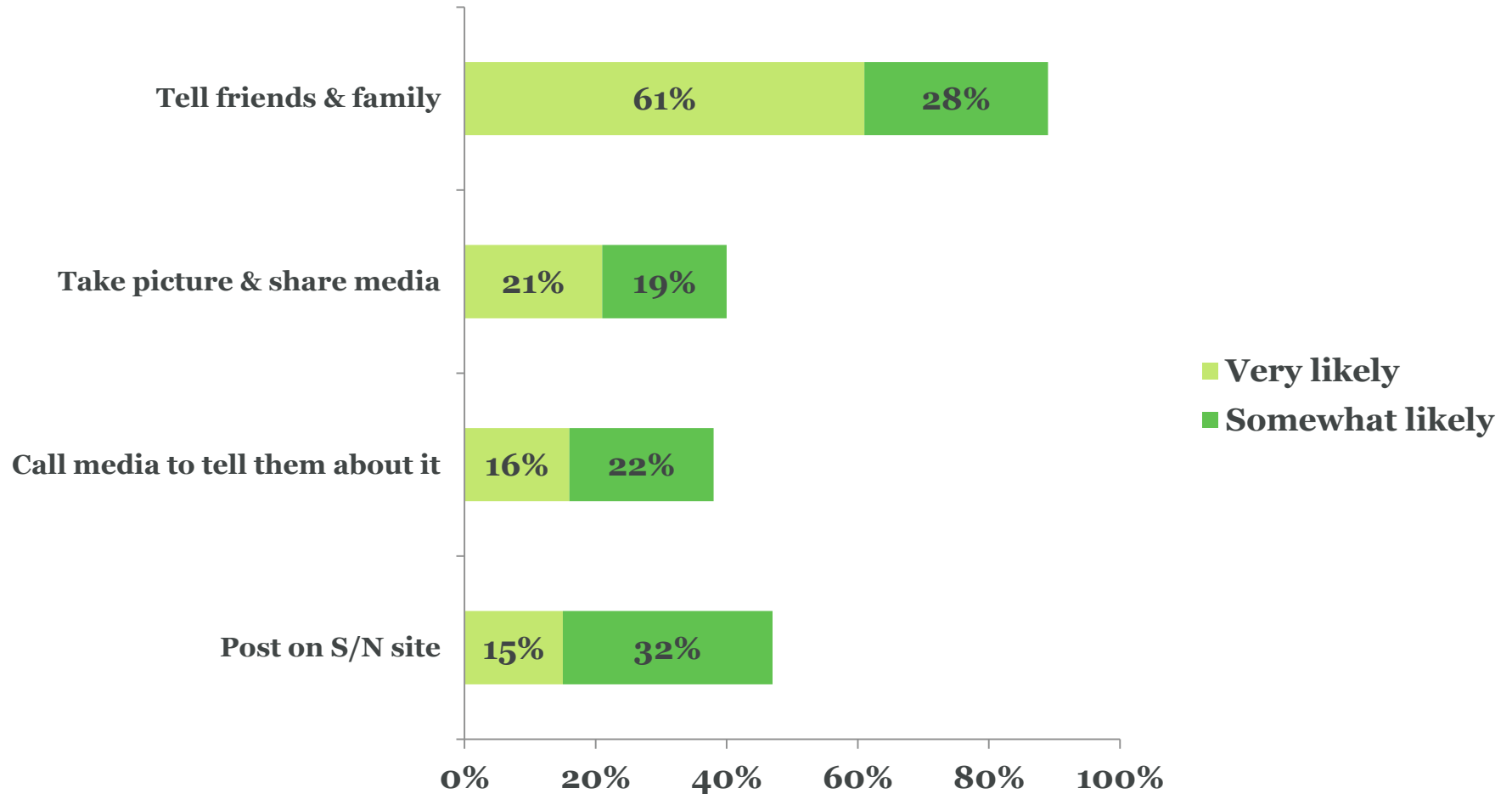
Base: All respondents (n=3,000)

# How do you share news?



Base: All who share news daily (n=1,039)

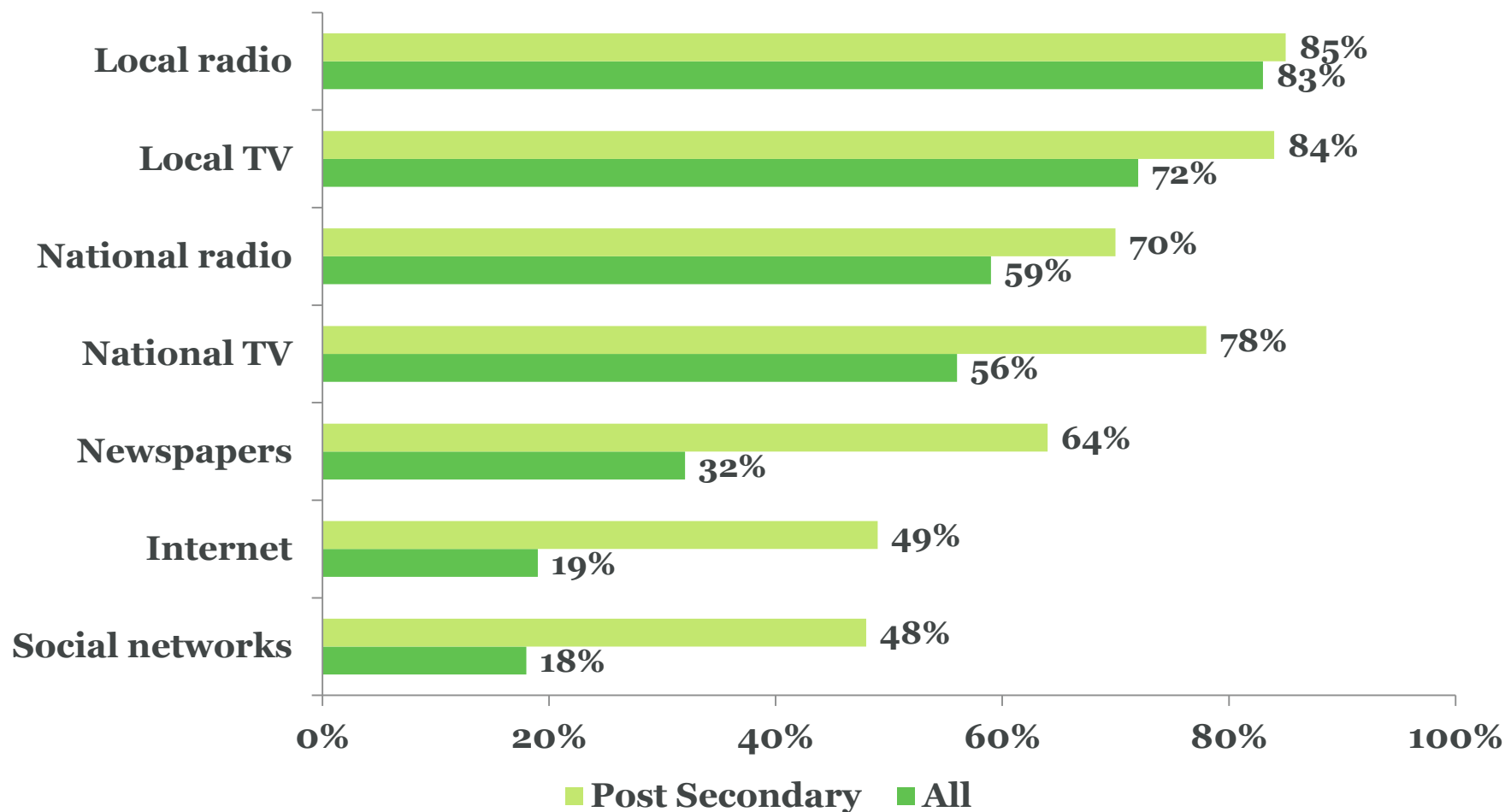
Q. “If you saw an interesting event occur that you thought would be interesting for other people to learn about, how likely would you be to do each of the following...”



Base: All respondents (n=3,000)



# Q. “Which of these different sources did you use to follow the news about the government’s decision to remove fuel subsidies?”



Base: All who followed the news on this topic (n=2,496)

# Conclusions

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- Digital media should be a part of any communications strategy for Nigeria
- Previously “underserved” groups entering the digital mainstream fast
- Internet outreach should be mobile-centric
- Take advantage of penchant for information-sharing
- ...but don't forget the continued primacy of broadcast media!



## Upcoming BBG Research Series events:

- Thursday, September 20: Burma
- Tuesday, October 16: Indonesia

Learn more about our work and events online at: <http://www.bbg.gov/> & <http://www.gallup.com>

Have a question? Contact us at 202-203-4400 or [pubaff@bbg.gov](mailto:pubaff@bbg.gov)