MEDIOLOGY NIGERIA

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Building Mental & Physical Availability: A Strategic Framework for Brand Growth in Nigeria

Leveraging Category Entry Points, Distinctive Brand Assets and evidence-based marketing science.
An Ehrenberg-Bass framework applied to the Nigerian market.

72%	$16.41B	$23.42B	4.01%
OF RETAIL RUNS THROUGH OPEN MARKETS	CPG MARKET VALUE · 2024	PROJECTED VALUE · 2033	MARKET CAGR · 2024–2033

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Contents

01 Executive abstract 3

02 The science of brand growth 4

03 The availability framework 5

04 Category entry points 6

05 Distinctive brand assets 7

06 Empirical laws of brand growth 8

07 Common mistakes in brand development 9

08 Best practices for building availability 10

09 The Nigerian market 11

10 Strategic recommendations 14

11 Conclusion 15

R References 16

A About the author 17

01 · EXECUTIVE ABSTRACT

Growth comes from being easy to mind and easy to find

This journal presents a comprehensive framework for brand growth in Nigeria, built on the Ehrenberg-Bass Institute's evidence-based marketing science. It examines how brands grow through **mental availability** — being thought of — and **physical availability** — being easy to buy — exploring Category Entry Points as purchase triggers and Distinctive Brand Assets as memory cues.

$16.41B
Nigeria CPG market value, 2024

$23.42B
projected market value by 2033

4.01%
compound annual growth rate, 2024–2033

220M+
population — Africa's largest consumer market

The twin levers

- **Mental availability** — the probability the brand comes to mind in relevant buying situations
- **Physical availability** — the ease with which buyers can find and purchase the brand across channels, formats and moments

The operating tools

- **Category Entry Points (CEPs)** — the needs, occasions and situations that trigger category thought
- **Distinctive Brand Assets (DBAs)** — the colours, codes, characters and sounds that cue the brand instantly

Why Nigeria, why now

With Nigeria's Consumer Packaged Goods market valued at **USD 16.41 billion in 2024** and projected to reach **USD 23.42 billion by 2033**, these principles are essential for sustainable growth in a market defined by rapid urbanization, a rising middle class and uniquely complex distribution.

Keywords

Mental Availability · Physical Availability · Category Entry Points · Distinctive Brand Assets · Nigerian Market · Ehrenberg-Bass Institute

02 · THE SCIENCE OF BRAND GROWTH

Penetration, not loyalty, is the growth engine

Decades of empirical research from the Ehrenberg-Bass Institute for Marketing Science — led by Professor Byron Sharp and Professor Jenni Romaniuk — have fundamentally transformed the marketing landscape, challenging conventional wisdom with evidence-based principles for how brands actually grow.

The traditional doctrine

- Differentiation as the primary competitive weapon
- Narrow targeting of specific consumer segments
- Brand loyalty cultivation as the growth driver

The empirical reality

- Brands grow primarily by **increasing their customer base** — penetration
- Light buyers, not loyalists, hold the growth headroom
- Broad reach outperforms narrow persuasion

Purchasing data across numerous categories and markets reveals a consistent pattern: brands win by being **bought by more people, more easily** — not by cultivating extreme loyalty among a select few. This journal applies those evidence-based principles to Nigeria's dynamic market, characterized by rapid urbanization, a growing middle class and unique distribution challenges.

220M+
Nigerians — the largest consumer base in Africa

45M
projected middle-class consumers with rising disposable income

4.01%
consumer-market CAGR projected through 2033

The strategic consequence

Nigeria presents significant opportunities for brands that understand how to build mental and physical availability effectively. The winners will not be the most differentiated brands — they will be the most available: present in the mind at the moment of need, and present on the shelf, screen or stall where that need is answered.

03 · THE AVAILABILITY FRAMEWORK

Four numbers measure the mind; three dimensions build the shelf

The Mental and Physical Availability Framework provides a simple but powerful approach to brand growth. Mental availability is the probability a brand comes to mind in relevant buying situations; physical availability is the ease with which buyers can find and purchase it across channels, formats and moments.

MENTAL AVAILABILITY — THE FOUR EHRENBERG-BASS METRICS

Mental Penetration · MPen

Share of category buyers linking the brand to at least one CEP. Indicates the **breadth of the brand's mental footprint**.

Network Size · NS

Average number of CEPs associated with the brand. Measures **versatility across buying situations**.

Mental Market Share · MMS

The brand's presence across all CEPs relative to competitors. **Correlates strongly with actual market share**.

Share of Mind · SOM

CEP associations among brand knowers only. Reveals **strength among engaged consumers**.

PHYSICAL AVAILABILITY — THE THREE DIMENSIONS

Presence

Being where buying happens. In Nigeria: traditional open markets (**72%** of retail sales), convenience stores (**25%**), e-commerce (**6%**), modern trade (**3%**).

Prominence

Being easy to find within the sales environment — shelf placement, search visibility and point-of-sale presence.

Portfolio

Appropriate pack sizes, formats and price points. Nigeria's **"sachetization"** trend exemplifies portfolio adaptation to local conditions.

04 · CATEGORY ENTRY POINTS

Own the moment, not the attribute

Category Entry Points are the needs, occasions or situations that lead consumers to think about a product category. Developed by Sharp and Romaniuk, CEPs are the triggers that initiate the consumer journey — the **building blocks of mental availability**.

CEPs shift brand strategy from abstract attributes to tangible, real-world moments. In soft drinks, consumers think of products *"when feeling thirsty after exercising"* or *"while watching a game."* By linking to specific situations, brands increase the likelihood of recall when those moments arrive.

TABLE 1 · THE 7W FRAMEWORK FOR CEP IDENTIFICATION — NIGERIAN APPLICATIONS

DIMENSION	THE QUESTION	NIGERIAN APPLICATION
Why	What motivates consumers?	Family provision, status, convenience, value
When	What occasions trigger consideration?	Salary week, weekends, festive periods
Where	Where are consumers?	Open markets, traffic, church/mosque, workplace
While	What co-activities occur?	Watching TV, commuting, socializing
With whom	Who are consumers with?	Extended family, community gatherings
With what	What associated products?	Complementary purchases, substitutes
How feeling	What emotional states?	Pride, belonging, aspiration, security

Strategic application

Identify the most common CEPs through research, then build associations through marketing campaigns, packaging design and product development. **Focus on the most valuable CEPs rather than too many simultaneously** — depth of association beats breadth of ambition.

05 · DISTINCTIVE BRAND ASSETS

If buyers can't link it to you, it isn't an asset

Distinctive Brand Assets — also called brand codes — are learned associations that help consumers notice, recognize, remember and think of a brand. They encompass colours, logos, icons, characters, packaging, patterns, shapes and audio devices: non-verbal cues that make brands instantly recognizable **at speed, at distance, and across contexts**.

Fame

The percentage of category buyers who correctly link an asset to the brand when shown it in isolation. High fame means the cue **triggers the brand without the name**.

Uniqueness

How exclusively the asset is linked to the brand versus competitors. High uniqueness means the cue **cannot be claimed by a rival**.

The 3–5 rule

Concentrate on **three to five core assets**. Larger sets dilute exposure and slow memory building — consistency compounds.

TABLE 2 · DBA CATEGORIES AND NIGERIAN APPLICATIONS

CATEGORY	EXAMPLES	NIGERIAN APPLICATION
Visual	Colours, logos, shapes, patterns	Packaging colours visible in crowded markets
Verbal	Taglines, jingles, brand names	Memorable phrases in local languages
Character	Mascots, spokespeople	Culturally relevant characters
Sonic	Jingles, sound logos	Audio branding for radio advertising
Physical	Packaging shapes, product forms	Distinctive bottles, appropriate pack sizes

The core principle

If buyers can quickly and correctly link these cues to a brand — and not to competitors — mental availability increases. Every naira spent on an unowned cue is a naira spent building a rival's salience.

06 · EMPIRICAL LAWS OF BRAND GROWTH

Five laws that hold across every category studied

Byron Sharp's research identifies law-like patterns in buyer behaviour that hold across categories and markets. Strategy built against these laws is strategy built against the evidence.

TABLE 3 · KEY EMPIRICAL LAWS OF BRAND GROWTH

LAW	DESCRIPTION	STRATEGIC IMPLICATION
Double Jeopardy	Small brands have fewer buyers, who are also slightly less loyal	Growth comes from penetration, not loyalty programmes
Pareto (60/20)	Roughly 60% of sales come from the top 20% of customers	Light buyers collectively matter significantly
Buyer Moderation	Heavy buyers buy less over time; light buyers buy more	Focus on acquiring new buyers, not increasing frequency
Natural Monopoly	Big brands attract more light category buyers	Penetration drives scale advantages
Prototypicality	Category attributes score higher than unique ones	Differentiation is weaker than traditionally believed

Core principle

These laws demonstrate that brands grow by being easy to buy and easy to remember — not by being different. Marketing strategy should prioritize broad reach, consistent distinctive assets and ubiquitous distribution over niche targeting and differentiation campaigns.

07 · COMMON MISTAKES IN BRAND DEVELOPMENT

Six ways brands waste their budgets

Despite evidence-based guidance, brands consistently make predictable errors. Understanding these mistakes is essential to avoiding them.

1 · Over-reliance on differentiation

Heavy investment in communicating difference — yet consumers perceive brands as largely interchangeable. **Be memorable, not unique.**

2 · Narrow targeting

Targeting specific demographics limits reach and ignores that growth comes from light buyers across all segments. **Mass marketing outperforms.**

3 · Loyalty over penetration

The belief that retention beats acquisition misallocates resources. Growth comes from **increasing buyer numbers**.

4 · Inconsistent brand assets

Frequent changes to logos, colours or messaging prevent strong memory structures. **Consistent, long-term exposure builds recognition.**

5 · Cultural misalignment

In Nigeria, brands often prioritize visibility over cultural understanding. African consumers recognize when narratives are **imported rather than authentically engaged**.

6 · Neglecting physical availability

Even brands with strong mental availability fail if consumers cannot purchase them easily. Distribution coverage is **foundational in Nigeria's fragmented retail environment**.

The pattern behind the mistakes

Every one of these errors privileges persuasion over presence. The correction is systematic: audit each decision against the question — **does this make us easier to mind and easier to find?**

The availability checklist

Building availability is operational, not aspirational. Each lever has concrete actions and a matching measurement discipline.

Building mental availability

- **Identify and prioritize CEPs** — research common entry points; focus on the most valuable
- **Develop distinctive assets** — create 3–5 core assets; test fame and uniqueness regularly
- **Maintain broad-reach media** — prioritize channels reaching the widest category-buyer audience
- **Ensure creative consistency** — deploy assets identically across all touchpoints

Building physical availability

- **Maximize distribution coverage** — traditional markets, modern trade, convenience, e-commerce
- **Optimize prominence** — shelf placement and findability in every environment
- **Develop the right portfolio** — match packs, formats and price points to local patterns
- **Build distribution partnerships** — strong distributor relationships are essential

TABLE 4 · AVAILABILITY BUILDING CHECKLIST — ACTIONS AND MEASUREMENT

DIMENSION	KEY ACTIONS	MEASUREMENT
Mental availability	CEP research, DBA development, broad-reach media	**MPen, Network Size, MMS**
Physical availability	Distribution expansion, prominence optimization	**Numeric distribution, OSA**
Integration	Consistent assets across all touchpoints	**Brand recognition, attribution**
Adaptation	Local market customization	**Market share, penetration growth**

A young, urbanizing, $16 billion prize

Nigeria's Consumer Packaged Goods market was valued at **USD 16.41 billion in 2024** and is projected to reach **USD 23.42 billion by 2033**. Three structural drivers underpin the trajectory.

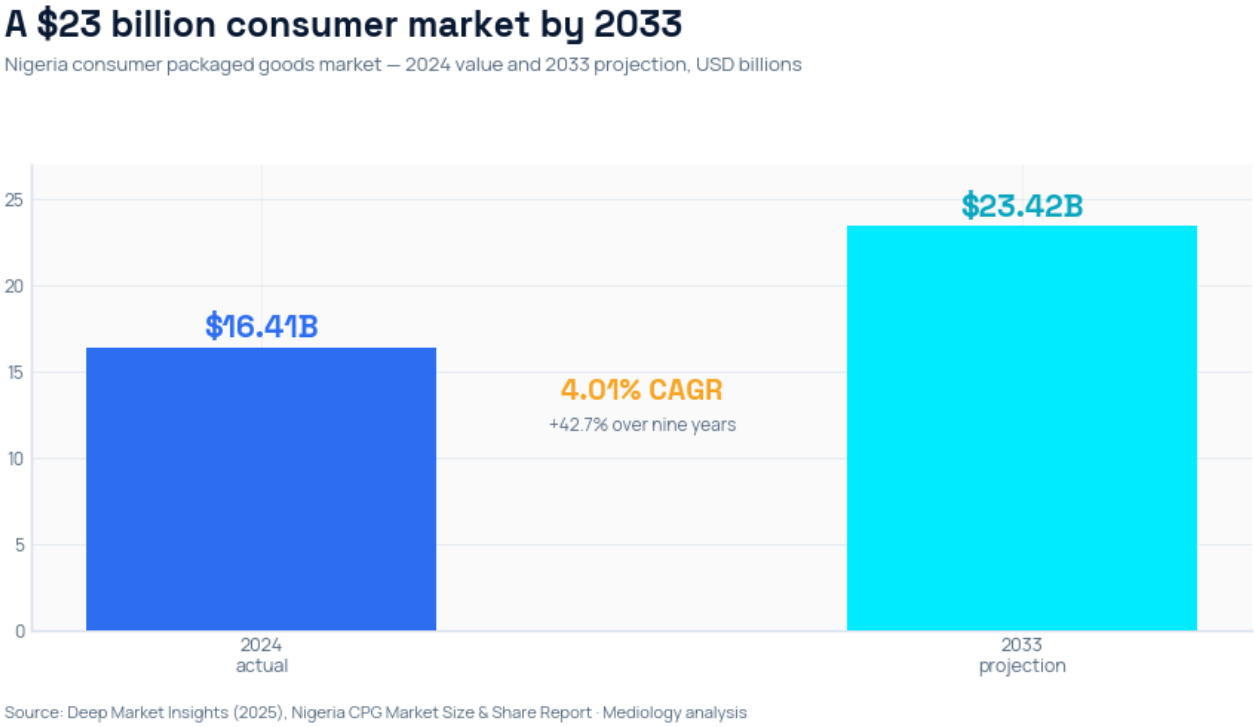


Figure 1 · Nigeria CPG market — 2024 value and 2033 projection, USD billions.

Urbanization

Urban population projected to reach **220 million**, driving demand for modern retail formats and branded convenience.

Rising middle class

Expected to grow to **45 million**, with higher disposable incomes and appetite for premium propositions.

Digital transformation

E-commerce growing rapidly, particularly among urban youth — a new physical-availability frontier.

Six regions, six playbooks

Nigeria is not one market. Distribution strategy, portfolio design and media weight must flex to sharply different regional structures.

TABLE 5 · REGIONAL MARKET CHARACTERISTICS AND CHANNEL STRATEGY

REGION	KEY STATES	CHARACTERISTICS	STRATEGY
South-West	Lagos, Oyo, Ogun	Modern trade; urban; premium demand	Supermarkets, e-commerce focus
South-East	Anambra, Enugu, Imo	Trading culture; Onitsha hub	Wholesale, value positioning
South-South	Rivers, Delta	Oil industry; higher purchasing power	Modern trade, premium segments
North-West	Kano, Kaduna	Largest population; traditional retail	Traditional markets, sachet formats
North-East	Borno, Adamawa	Emerging recovery; price-sensitive	Gradual expansion, affordability
North-Central	Abuja FCT, Plateau	Administrative centre; mixed urban-rural	Modern + traditional trade

Market opportunity — the local champions are rising

Multinational exits have created space for local businesses. **Bokku Mart now operates 60+ Lagos stores, surpassing ShopRite**, while **OmniRetail has launched 50+ franchises** serving underserved communities. Availability built on local infrastructure is beating imported scale.

Distribution is the strategy

Physical availability in Nigeria means mastering a fragmented, overwhelmingly traditional retail landscape — while building early positions in the formats growing fastest.

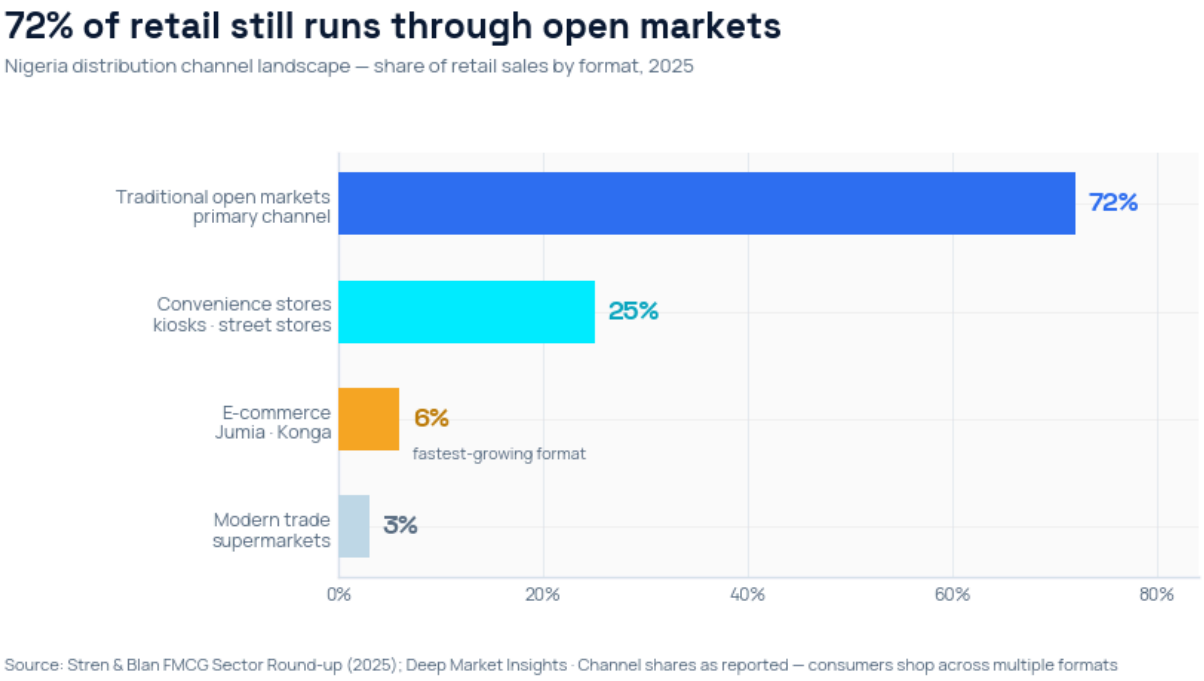


Figure 2 · Distribution channel landscape — share of retail sales by format.

Traditional open markets · 72%

The primary channel. Retailers purchase **80%+ from wholesalers** — wholesale relationships are the real distribution asset.

Convenience stores · 25%

Street stores and kiosks offering low prices and convenient access — the everyday top-up mission.

Modern trade · 3%

Supermarkets concentrated in **Lagos, Abuja and Port Harcourt** — small share, high visibility and premium signalling.

E-commerce · 6%

Growing via **Jumia and Konga**, particularly among younger consumers — the fastest-compounding format.

10 · STRATEGIC RECOMMENDATIONS

Three playbooks, one direction

The framework translates into distinct priorities by market position — and a shared discipline for every brand.

For new market entrants

- **Physical availability first** — robust distribution before heavy advertising investment
- **Culturally relevant DBAs** — local languages and cultural symbols
- **Start with core CEPs** — the 3–5 most common entry points
- **Distribution partnerships** — local expertise is invaluable in Nigeria's complex landscape

For established brands

- **Expand Network Size** — increase CEP associations where penetration is established
- **Optimize portfolio** — continuously adapt packs, formats and prices
- **Strengthen distinctive assets** — audit fame and uniqueness; reinforce high performers
- **Expand geographically** — North-West and North-East are untapped potential

For all brands

- **Measure what matters** — MPen, Network Size, MMS — not traditional awareness
- **Maintain broad-reach media** — TV, radio, outdoor, complemented by digital
- **Build for the long term** — memory structures require sustained investment
- **Embrace omnichannel** — extend physical availability to digital platforms

IMPLEMENTATION FRAMEWORK

Phase 1 · Foundation

Distribution build-out, CEP research and distinctive-asset development — the infrastructure of availability.

Phase 2 · Building

Broad-reach media weight and consistent asset execution across every touchpoint.

Phase 3 · Expansion

Network-size growth and geographic expansion into under-served regions.

11 · CONCLUSION

Context, continuity, credibility

The evidence-based marketing science developed by the Ehrenberg-Bass Institute provides a robust framework for brand growth applicable across markets and categories. Mental and physical availability — supported by Category Entry Points and Distinctive Brand Assets — offer a clear pathway for sustainable growth in Nigeria's dynamic market.

The opportunity is substantial: over 220 million people, rapid urbanization and a growing middle class. Yet the complexity of the distribution landscape, regional diversity and economic volatility demand thoughtful adaptation of global principles to local reality.

KEY SUCCESS FACTORS

Be there

- **Physical availability** through comprehensive distribution coverage
- **Portfolio adaptation** to local purchasing patterns and price points
- **Cultural relevance** in every asset and activation

Be remembered

- **Mental availability** via CEP-linked, consistent distinctive assets
- **Broad-reach marketing** sustained over the long term
- **Measurement discipline** — progress tracked with availability metrics

The final word

Brands embracing these principles while respecting Nigeria's unique characteristics will be positioned for sustainable growth. The authority of authenticity is earned through context, continuity and credibility. "Brands grow by being easy to buy and easy to remember. Everything else is commentary."

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PROFILE

Results-driven marketing communications strategist with over 15 years of experience in brand building, brand development and management. A trusted consultant to global and local brands including Samsung, Reliance HMO, Polo Swarovski, FBN Holdings, M-KOPA, Honda Nigeria, Daraju Industries and De Trans — delivering 360° marketing, communication strategies, media planning and buying, digital marketing, SEO, content strategy and marketing analytics.

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- B.Sc. Economics — University of Lagos
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- Managing Consultant — Mediology Nigeria Ltd (2025–present)
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- Senior Manager, Research / Planning & Innovation — All Seasons Zenith (Publicis), 2013–2014
- Manager, Data Analytics & Innovation — MediaCom (WPP), 2011–2013

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