



Understanding the Middle Class Through Mobile





26%

of Africans have
access to the
internet.

*Primarily
Nigerians,
South Africans
& Egyptians.*

That means

74%

DO NOT

have access
to the internet



70%

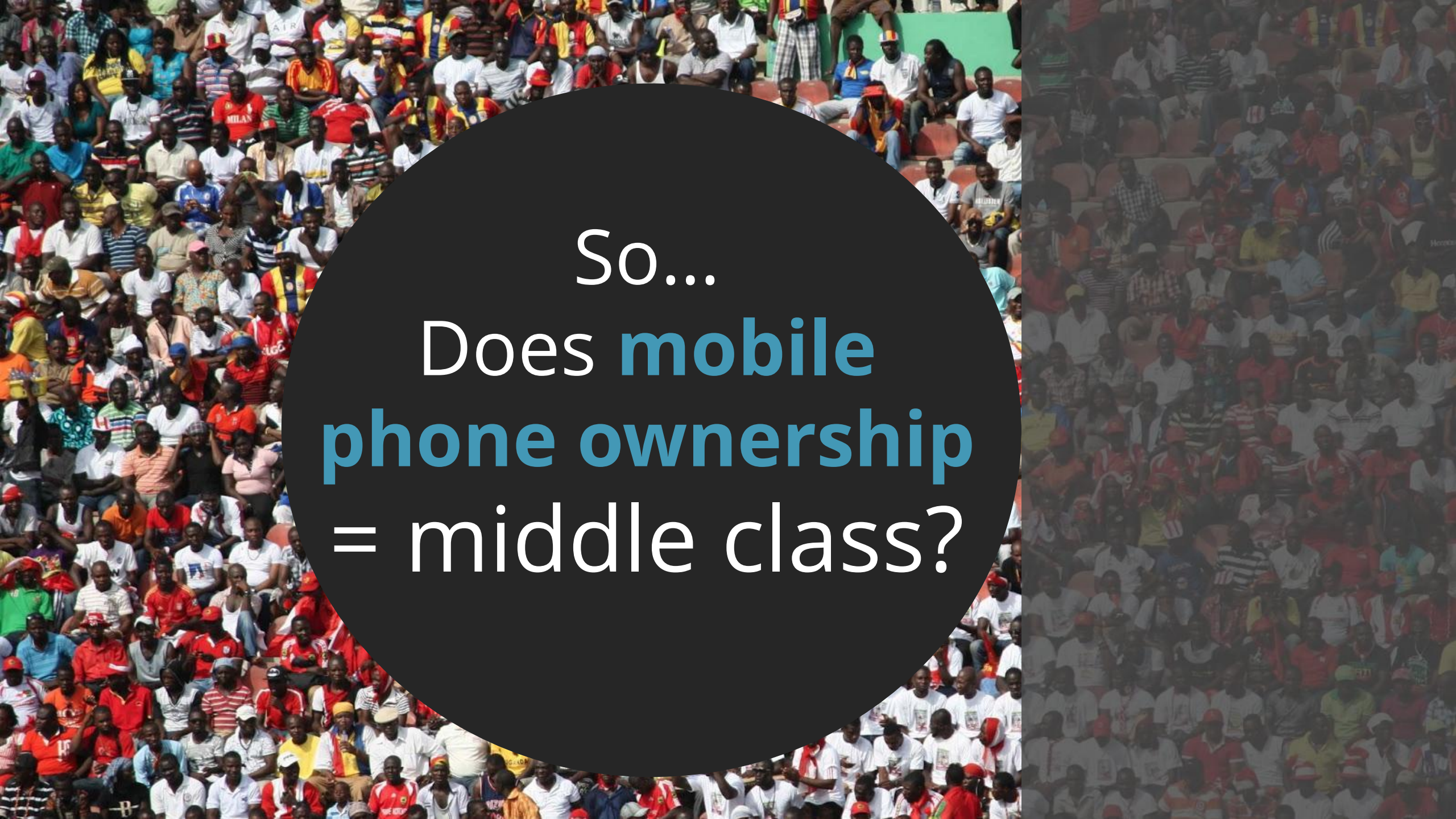
of Africans have a
mobile phone with
SMS, voice services.

That means an
additional

44%

Are connected
via mobile vs internet

17 African
countries
have sms
penetration
rates of
90%+.

A large crowd of people, mostly men, are seated in tiered stadium-style seating. They are wearing various casual clothing, including t-shirts, some with logos like 'MILAN' or 'AIR'. The background is a bright green wall. A large, dark grey circular overlay is positioned in the center of the image, containing white and blue text.

So...
Does **mobile
phone ownership**
= middle class?

Key Africa Mobile Statistics:



POPULATION
1.2 billion

POPULATION UNDER 15YRS
492 million



MOBILE PHONE PENETRATION
74%

SMARTPHONE PENETRATION
15%



INTERNET PENETRATION
26%

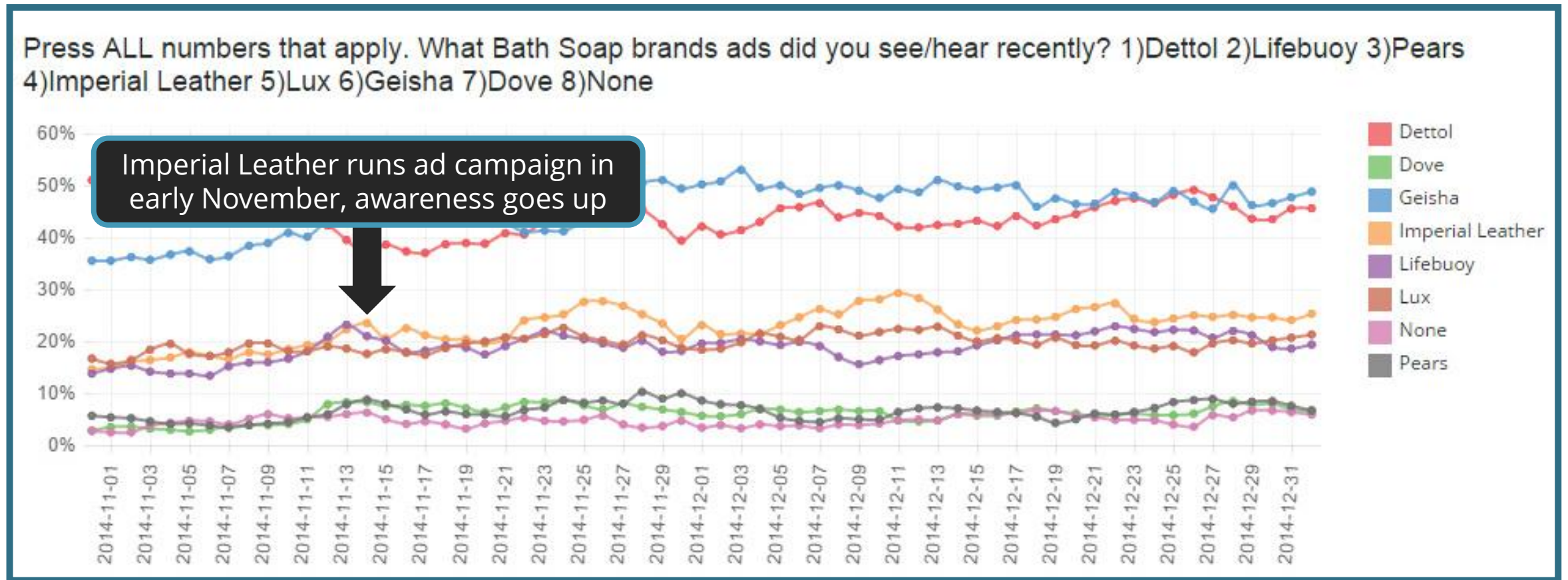
SOCIAL MEDIA PENETRATION
10%



What are the
spending habits
of the middle class
owners of mobile
phones?

Retail preferences

GeoPoll tracks preferences of fast moving consumer goods among its sample



*Shows 7 day rolling average, each data point n>170

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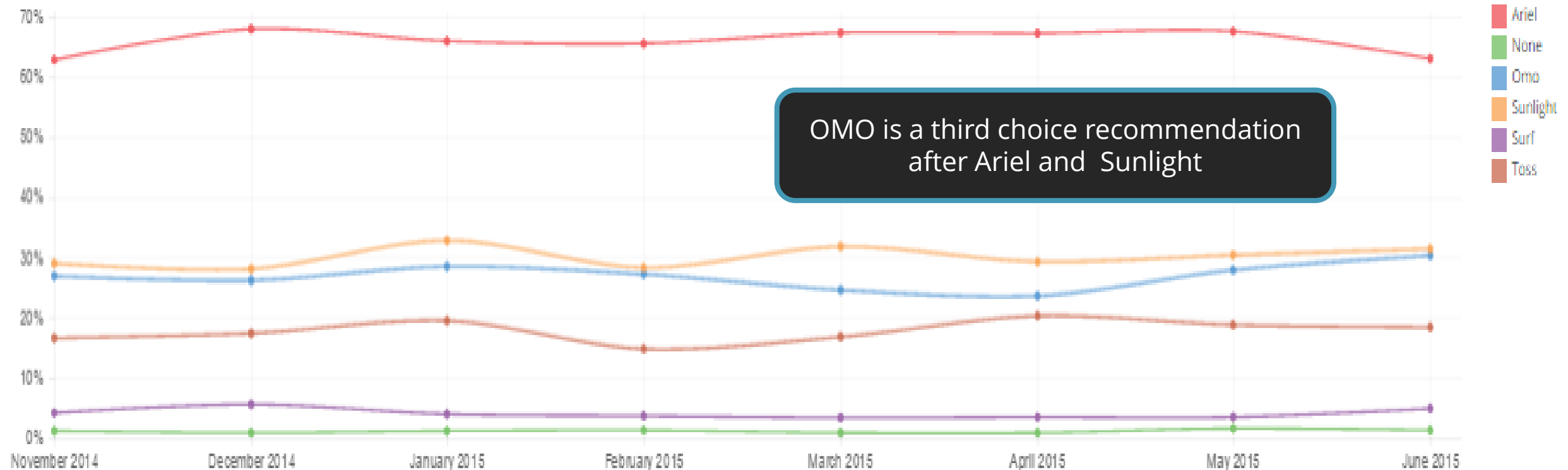
*Shows 7 day rolling average, each data point n>170



Do consumer
spending habits
differ by those
who spend
more/less on their
mobile phone bill?

Products recommended: all mobile spend

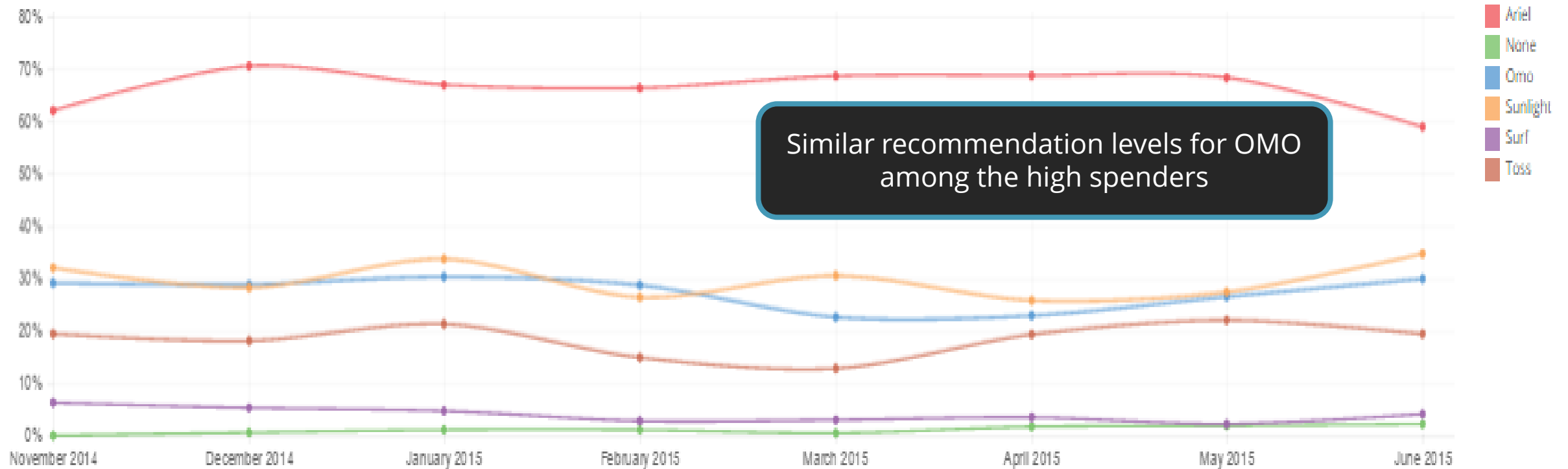
Press ALL numbers that apply. What Washing powder brands would you recommend to your friends and family? 1)Omo 2)Sunlight 3)Toss 4)Surf 5)Ariel 6)None



*Shows monthly average, each data point n>641

Products recommended: high mobile spend

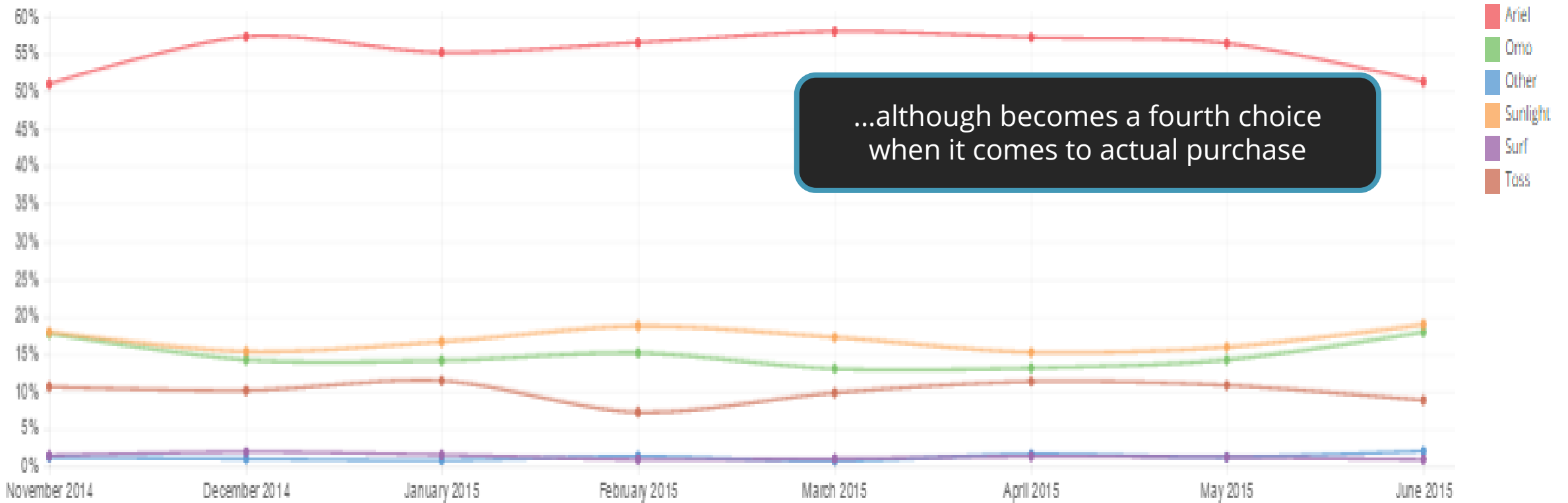
Press ALL numbers that apply. What Washing powder brands would you recommend to your friends and family? 1)Omo 2)Sunlight 3)Toss 4)Surf 5)Ariel 6)None



*Shows monthly average for those spending over 3000KSH on mobile, each data point n>237

Products bought: all mobile spend

Which ONE of these brands of Washing powder do you buy most often? 1)Sunlight 2)Surf 3)Omo 4)Toss 5)Ariel 6)Other



*Shows monthly average, each data point n>641

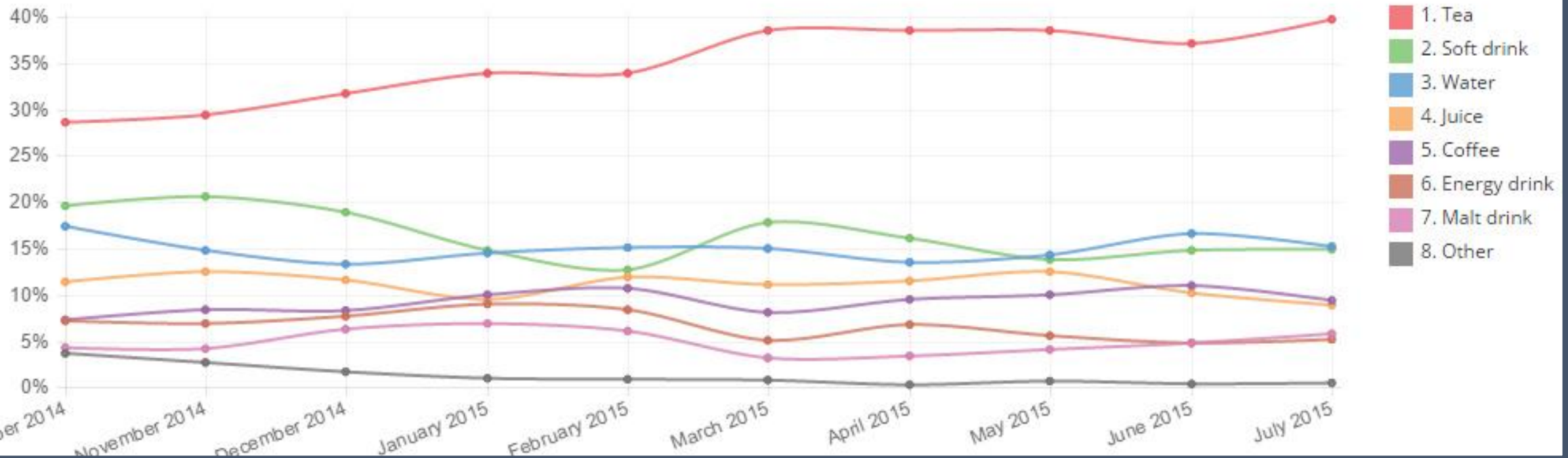


Do consumer
spending habits
differ by those
who have
higher/lower
LSMs?

Soft drinks purchased: LSM 4

Those with lower LSM report purchasing **tea** the most often

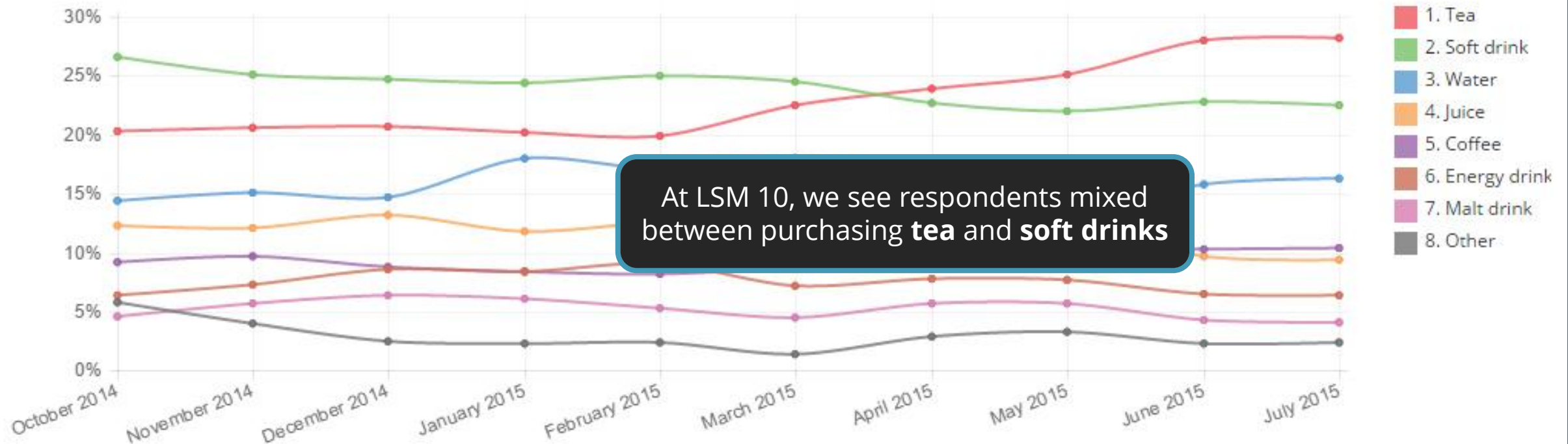
Yesterday, what type of drink did you purchase? [Reply with a number]



*Shows monthly average for LSM 4, each data point n>1316

Soft drinks purchased: LSM 10

Yesterday, what type of drink did you purchase? (Reply with a number) 1)Soft drink, 2)Water, 3)Energy drink, 4)Malt drink, 5)Juice, 6)Coffee, 7)Tea, 8)Other, 9)None



*Shows monthly average for LSM 10, each data point n>3692

Conclusions

Our studies show that mobile phone owners are **more likely** to be part of the African middle class

However

Can still reach those with lower mobile spend and lower LSM through mobile, and **spending habits are different**

Conclusions

The African “Middle Class” should **not be treated as one group** – there are differences within the middle class based on income, etc which need to be studied further.

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