



The Maturing Kenyan Consumer
Consumer Trends Expected Effects on Data
Collection Rewards

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Service Based and Passive Data Collection



Direct Benefit and Active Data Collection

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Direct Benefit and Active Data Collection



Driving Question

As Kenyan consumer demographics further trend towards N.A. levels of access would they prioritize service based data collection over direct?

Hypothesis

Yes

- Increased social movement to service platforms
- As consumer buying power rises so does the cost of their “time”

Trend Assumptions

The Kenyan Consumer has become and will continue to become:

1. Smartphone connected
2. Internet Connected and Prioritized
3. Internet Savvy – formal education on any level
4. Connected on Social Medias
5. More Informed of Data Privacy and Value

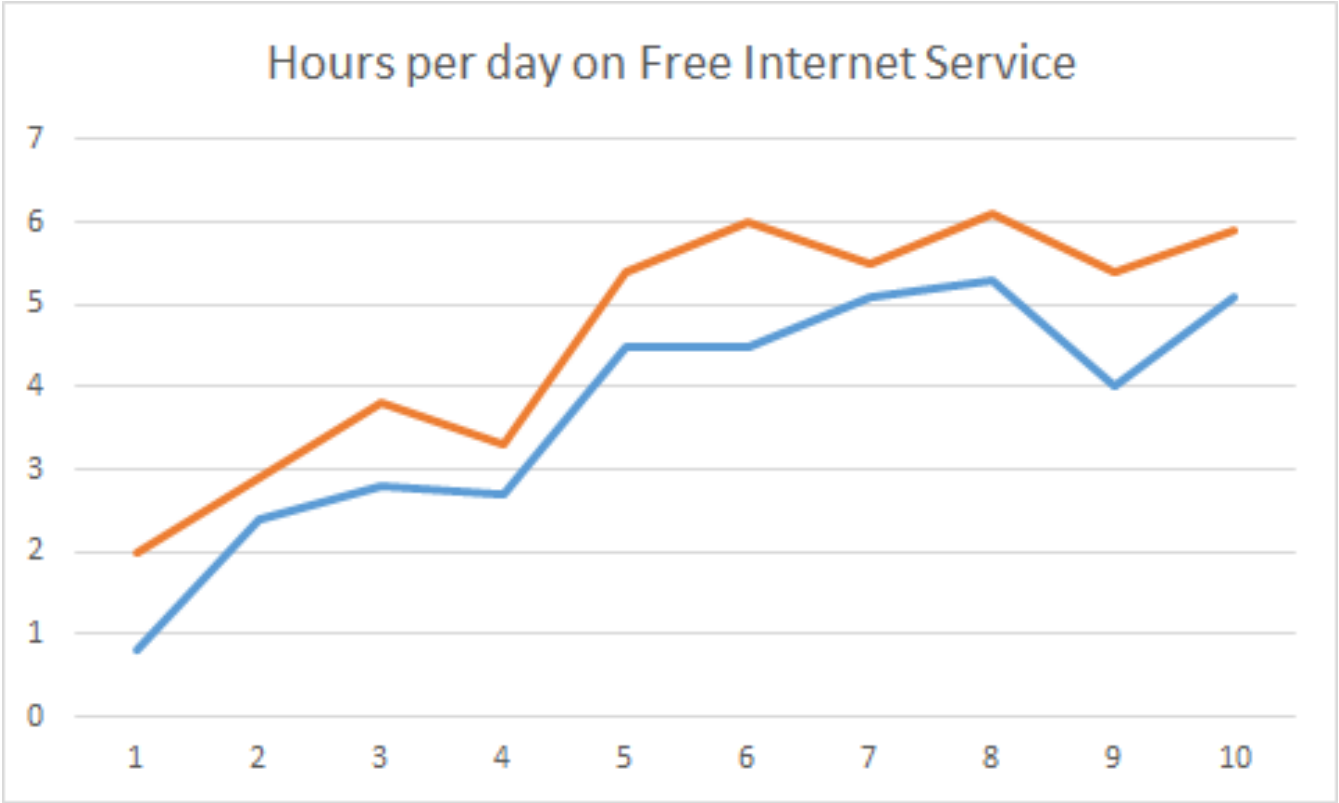
SMS SURVEY: N = 2,000
NATIONAL REP OF KENYA:
AGE/GENDER/LOCATION/LSM
SMART/FEATURE PHONE
No Incentive



CATI SURVEY: N = 300
DRILL DOWN INTERVIEWS
RISING MIDDLE CLASS
KSH100 Incentive



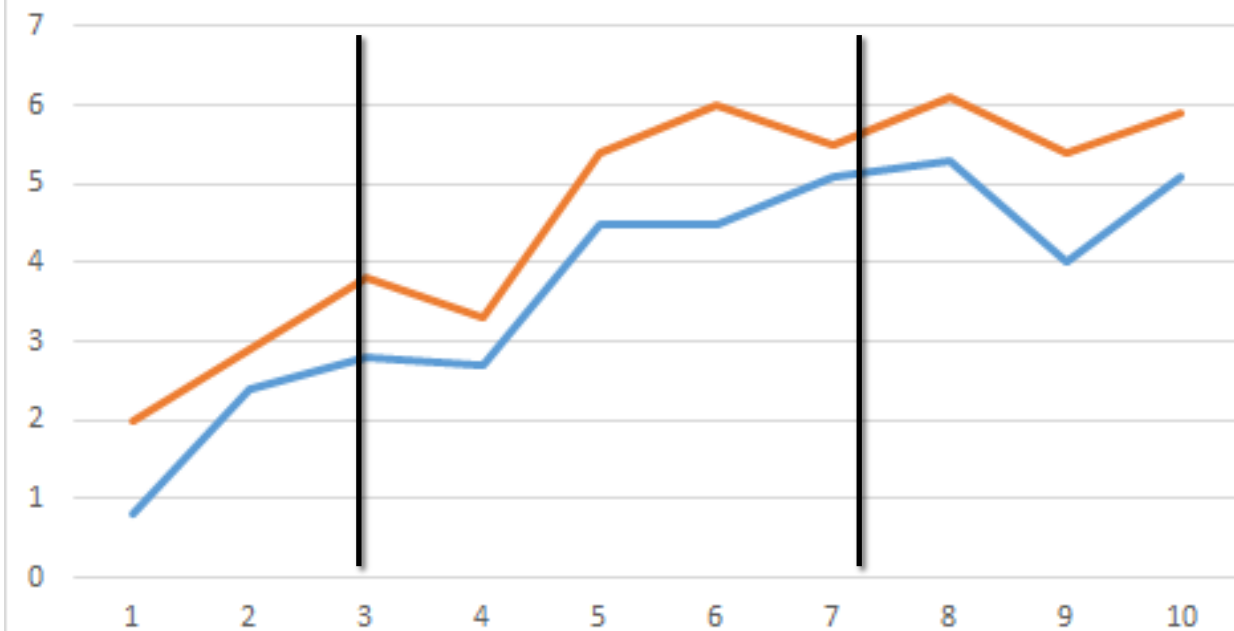
Avg Time spent on Services: 3.72hrs
Avg Time Expected on Services in 18 months: 4.63hrs



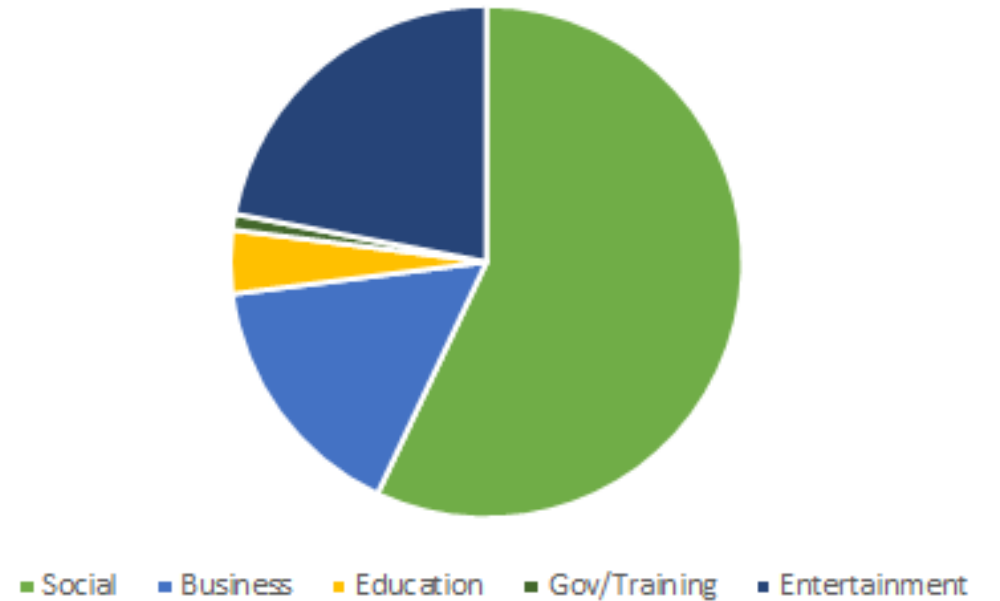
Avg Time spent on Services: 3.92hrs
Avg Time Expected on Services in 18 months: 4.80hrs

Prefer Service over Incentive: 28%
Income 1.5x: 47% (+19%)
98% expect service based usage to increase annually

Hours per day on Free Internet Service



Internet Service Usage



Social Networks/Keeping up with Network

71%

Easiest connections to TV/Radio/Entertainment

31%

Professional Requirement or Advantage

64%

Trust Major Service Brands such as Opera & Google

63%

Facebook offers better value than direct incentives

76%

Use earned mobile money/airtime to for internet

56%

Conclusions

1. Free Internet Services have begun to penetrate and saturate professional networks. Will only increase
2. The average Kenyan consumer understands the internet and is using it for recreation at minimum

CATI - Prioritize Service Based Data Collection: 54%

Did not collect valid data on monetary value of time

Impact

Exploration of Service Partnerships

Investing in Identifying the “Tipping Point”

Passive Data Collection Investments

Implications on Data Collected – Preparing for behavioral data collection



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