

Africa

CUP OF NATIONS 2019

INSIGHTS

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Introduction

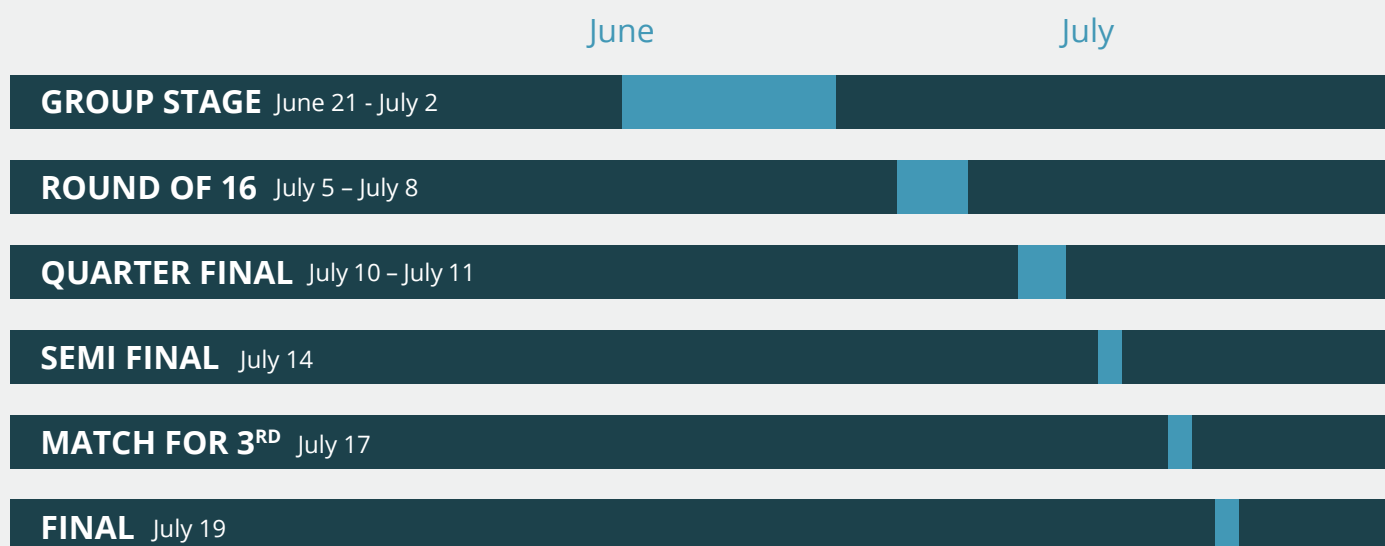
Africa Cup of Nations 2019

The Africa Cup of Nations (AFCON) is a biennial football tournament where national teams throughout the continent have an opportunity to compete for the cup title. **Established in 1937**, AFCON gives African football teams the chance to compete in a well-recognized tournament that is broadcast across the continent and globally, providing an opportunity for those nations who do not regularly qualify for the World Cup to show their skills. While Africa has a strong history and interest in football, only the top African national teams usually qualify for the World Cup as the Confederation of African Football is allocated 5 slots: In 2018, Egypt, Nigeria, Morocco, Senegal, Tunisia played in the World Cup and **no African teams have ever made it** to the finals of the World Cup, despite the fact that South Africa hosted The World Cup in 2010. AFCON, which since **2013 has been played in odd years** in order to avoid conflict with the World Cup, gives African national teams and their respective fan-bases a chance to come together every other year for the 4-week duration of the tournament.

The 2019 Africa Cup of Nations will be hosted by Egypt, which will be **the fifth AFCON to take place in the country**. Egypt has also won the most AFCON tournaments of any nation, with seven wins under their belt, and in 2017 Egypt lost in the final match to Cameroon. 2019 represents the **first year that 24 teams will compete**, instead of 16, giving more teams the chance to qualify. Matches will take place in **six stadiums across Egypt**, including Cairo International Stadium, Port Said Stadium, Air Force Stadium, and the Suez Sport Stadium. The final will be played at Cairo International Stadium, which can host an audience of up to 75,000.

The Group Stage of the tournament, which is a knockout round, kicks off on Friday, the 21st of June, with a match between Egypt and Zimbabwe, and concludes on Tuesday, the 2nd of July with a match between Mauritania and Tunisia. The matches will continue on through July with the Final being played on the 19th of July.

AFCON STAGE SCHEDULE



The following twenty-four countries have qualified to compete for the cup this year.

Algeria

Angola

Burundi

Benin

Cameroon

*Democratic
Republic of Congo*

Egypt

Ghana

Guinea

Guinea-Bissau

Ivory Coast

Kenya

Madagascar

Mali

Mauritania

Morocco

Namibia

Nigeria

Senegal

South Africa

Tanzania

Tunisia

Uganda

Zimbabwe



GeoPoll's Study on AFCON

AFCON is an important event throughout the continent for the teams participating and their fan bases, but also the TV stations who will be airing the matches, advertising agencies, and brands who have invested significant time and money to reach a large, engaged audience of consumers. While excitement for the tournament is building, there is little data around expected viewership of the matches and participation in related activities such as purchasing merchandise and placing bets on matches.

As a leading full-service research provider in Africa who regularly provides insights for top brands, media outlets, and agencies, in June 2019 GeoPoll embarked on a study to gather information on planned viewing habits, betting activities, and brand awareness surrounding the tournament. To gather this data, GeoPoll ran a one-time survey on AFCON to over 2,000 respondents in Kenya, Uganda, Nigeria, Egypt, Ivory Coast, and the DRC.

We sought to understand the following:

- Awareness of the AFCON 2019 tournament prior to its start
- Levels of interest in football and AFCON
- Popular teams and expected winners
- How people plan to watch and engage with AFCON
- Involvement in sports betting and AFCON-specific betting

In the following sections we will examine the above topics and provide insights by country, age, and gender in order to provide interested parties with valuable information on AFCON as the tournament begins.

Study Methodology

GeoPoll's AFCON survey was conducted in June 2019 through a combination of SMS, mobile web, and mobile application survey modes, with respondents drawn from GeoPoll's active user bases in each country. Data was collected in 6 countries: Kenya, Uganda, Nigeria, Egypt, Ivory Coast, and the DRC. Countries were selected in order to include those which are hubs of Eastern, Western, Central, and Northern Africa, and due to the high levels of interest in football in the mentioned countries. As the host nation, we felt it was important to gather data from Egypt. The sample for questions in the first section "Interest and Awareness" is a natural fallout sample size of over 3,300, with slight differences per question. Following these introductory questions, only those respondents who answered that they planned to watch AFCON continued in the study, and the sample for the rest of the study was 400/country, 2,400 total.

Sample for the second half of the study is approximately nationally representative by age, gender, and location in Nigeria, Kenya, and Uganda, and skews slightly male and younger in the DRC, Egypt, and Ivory Coast. The overall breakdown is 45% female to 55% male, and 38%

15-24, 39% 25-34, and 23% ages 35+. The sample was not controlled for Living Standard Measures, and due to surveys being conducted via mobile, we can expect this group of respondents to skew slightly towards wealthier populations. However, by using SMS as one of our modes, we ensured that we could reach audiences who have only basic phones without internet connections.

The survey questionnaire consisted of 38 total questions, of which we have presented a selection below. The first set of questions, on general interest in and awareness of AFCON, were administered to all respondents, while questions specifically on AFCON 2019 and activities surrounding AFCON 2019 were only administered to those who indicated that they planned to follow AFCON 2019.

As a full-service research firm, GeoPoll takes data quality seriously and has taken steps to ensure this survey has the highest quality of data possible for a multi-country survey administered through mobile-based modes. To learn more about our survey methodology or request detailed sample breakdowns per country, please contact us at info@GeoPoll.com

Interest and Awareness

The 2014 Global Interest in Football report by Nielsen notes that, “nearly half of the people in the world are interested in football and one fifth of them actually participate in the sport.” The report further states that “the countries with the highest levels of interest and participation in football are in Africa, Asia, and the Middle East,” and in Africa, football is undoubtedly the most popular sport.

GeoPoll’s 2018 study on the World Cup, conducted two months prior to opening match, indicated that the majority of Africans surveyed were aware of when the World Cup would start. AFCON, an Africa-only tournament largely resembling the World Cup, is likely to also garner significant attention from Africans. With viewership in powerful numbers, comes powerful opportunity to advertise. This section of this report will inform on the reported interest, awareness, and projected viewership surrounding 2019’s AFCON event, based on GeoPoll’s recently conducted study on the topic in the field in Kenya, Uganda, Nigeria, Egypt, Ivory Coast, and the DRC. For this section, GeoPoll gathered responses from over 3,300 respondents, with at least 500 per country. The sample was a natural fallout that was not weighted for age, gender, or location. The following sections include only those who answered that they planned to follow AFCON and sample for those questions is approximately nationally representative.

Interest in Football

Overall, AFCON was the second most followed football tournament by the respondents at 38%, only behind the World Cup which is followed by 43% of respondents. Nigerians, Kenyans, and Egyptians followed a larger quantity of other football tournaments in addition to AFCON and the World Cup, indicating that, culturally, football viewership in those countries is a more popular hobby than it may be in the other countries surveyed. Additionally, when respondents were asked to rate their interest in football on a scale of 1 to 10, with 1 being

no interest and 10 being very high interest, Egypt had the highest percentage of respondents who indicated very high interest, while, DRC had the highest amount of respondents indicate low interest. These data points suggest that football viewership is quite popular in Egypt, which is not surprising when looking back at Egypt’s record of hosting AFCON and qualifications for the World Cup.

LEVEL OF FOOTBALL INTEREST IN EGYPT

LOW

10%



MEDIUM

25%



HIGH

65%



When looking at the data for football interest for Nigeria specifically, 63% of respondents indicated their interest level as medium to high with answers of 4-10 on the scale, and 37% indicated low interest with answers of 1-3. The 63% of respondents interested in football are still a powerful audience to engage through advertising, and as we see below, even those not interested in football in Nigeria and other countries still plan to follow the matches.

By examining interest levels by gender over all countries, we find that males report higher levels of interest in football, with 40% of males reporting interest levels of 8 or above, compared to 32% of females reporting the same.

Awareness of AFCON

61% of respondents, across the countries surveyed, watched the last AFCON Tournament. Nigeria had the highest number of reported watchers with 81% indicating they watched the last AFCON tournament. Uganda had the lowest reported viewership at 37%. Also, more people in Uganda said they “did not watch” or they “did not know” if they had watched the last AFCON tournament than people who said they watched the last AFCON tournament, which suggests that Uganda’s awareness of the tournament is low.

Beyond inquiring about viewership of the last AFCON, our study asked a series of questions to further investigate awareness of the upcoming tournament. The questionnaire asked about the upcoming AFCON’s host country, month the matches will be played, and the year the tournament

rates for both June and July. Across the countries studied, 58% of respondents chose June, 8% chose July, 21% of respondents did not know when the tournament would be held, and the remaining guessed months August through May. Considering both June and July are acceptable answers to indicate awareness, 66% of respondents across the countries studied knew when the tournaments were to occur, which is higher than the awareness of the 2019 AFCON host country and a sizeable amount of awareness for a niche event.

In terms of awareness surrounding when the upcoming AFCON tournament, 48% out of all of the respondents chose 2019. Averaging the 54% that correctly indicated the host country, the 66% that knew the months when the matches were scheduled to be held, and the 48% that indicated

61% of respondents, across the countries surveyed, watched the last AFCON Tournament.

will be held. The answers to these questions gave us data points that can suggest awareness.

Overall, 54% of respondents knew that AFCON 2019 was to be hosted by Egypt, which is a majority of respondents across countries, meaning relatively strong awareness levels. DRC, Egypt, and Ivory Coast all exceeded the multi-country average, with over 60% of respondents in each country indicating correctly that Egypt was hosting the next AFCON. This is an especially notable piece of data because both DRC and Ivory Coast were in the top three countries that indicated low interest in football. Although respondents may be less interested in football, they still seem to know what country is hosting AFCON. This could be due to heightened exposure for the tournament in the two countries. For the question regarding month of the AFCON tournament, there are two acceptable answers that would indicate awareness of the event. The matches will run from late June for group round and end in early July with the finals so we looked at response

the correct year for the upcoming AFCON, we get 56%. This 56% is a sound indicator of awareness of

the AFCON tournaments across Kenya, Uganda, Nigeria, Egypt, DRC, and Ivory Coast. Our study suggests that the majority of people in the countries aforementioned are aware of the upcoming football event, which is great news for those anticipating high viewership of the matches to come in June and July.

Comparing by gender, we find that males are more aware of the upcoming tournament: 78% of males correctly said the tournament is in June or July, and 55% know AFCON is in 2019, compared to 54% of females who are aware of the month and 40% who are aware of the year.

The majority of people surveyed are aware of the upcoming football event, which is great news for those anticipating high viewership of the matches.

Planned Viewership

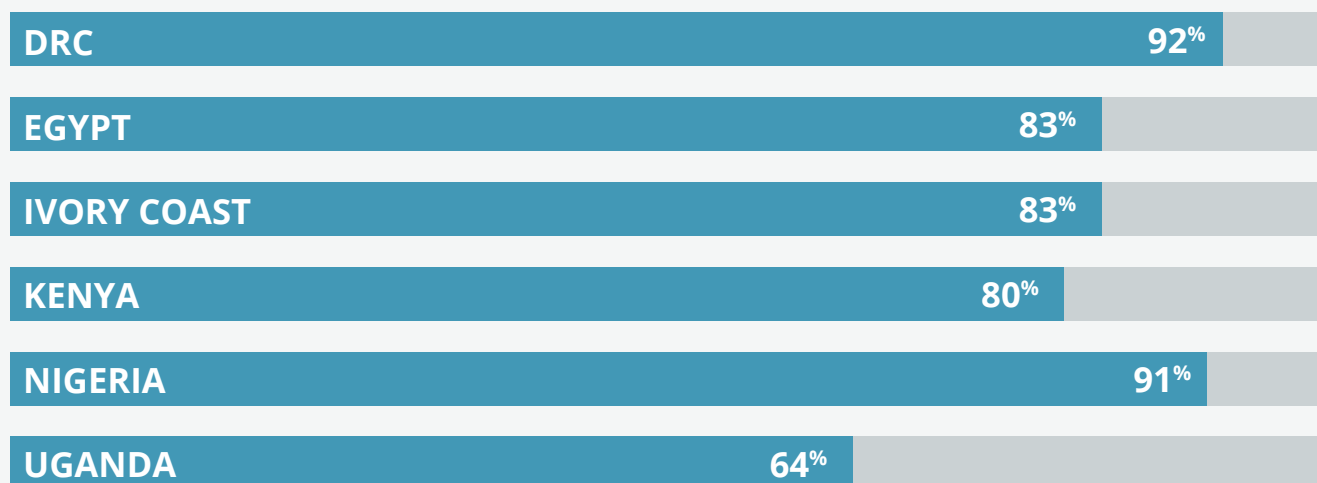
The majority of respondents suggested through their answer choices that they are aware of the upcoming AFCON tournament, which speaks well to potential viewership, yet we probed further to get a even stronger idea of respondents who actually planned viewership of the tournament. Respondents were asked to rate their interest in the 2019 AFCON tournament on a scale of 1 to 10 with 1 being very low and 10 being very high. Across all countries surveyed, 39% responded with answers from 8 through 10 indicating very interested, 30% had medium levels of interest with answers from 4 to 7, and 31% answered with numbers 1 through 3. More respondents overall were interested than not interested, but looking at each country individually shows a different narrative. The countries with the highest levels of reported interest were Egypt, DRC, and Ivory Coast with 57%, 43%, and 46% answers 8-10 respectively. Egypt had the least disinterested respondents of the three at 14% providing answers of 1-3, while DRC had 32% and Ivory Coast had 22% with low levels of interest. This shows Egypt is by far the most interested country of those surveyed. In Kenya, 72% indicated some levels of interest, from 4-10. The least interested countries we surveyed were Uganda and Nigeria. In Uganda, 42% of respondents had low levels of interest, and only 30% of respondents had high levels of interest. In Nigeria, respondents were quite split: 39%

had low levels of interest with responses of 1-3 and 26% had high interest in the upcoming AFCON with answers of 8-10, with the remainder of respondents having medium interest, though as shown below, a large majority (91%) of those in Nigeria still plan to follow the tournament, perhaps due to the prevalence of football in the country. Despite the 31% of respondents across countries that were less interested in AFCON, the 69% of interested and neutral respondents still provide a promising potential audience.

Our questionnaire then asked respondents if they intend to follow this year's AFCON. Across all 6 countries surveyed, 83% of respondents indicated that they intend to follow the AFCON tournament this year. DRC had the highest rate of intended followers reported with 92% and Uganda had the lowest with 64%. The figure below exhibits the outcome from each surveyed country individually.

Across all 6 countries surveyed, 83% of respondents indicated that they intend to follow the AFCON tournament this year.

INTENDED FOLLOWING OF AFCON 2019



Teams People Are Rooting For and Winning Team Guesses

GeoPoll got into the competitive spirit of the games when we asked respondents to tell us what team they were rooting for to win and what team they thought was going to win. Responses were scattered across the board for both questions but there were some teams that clearly stood out as favorites and projected winners. For the team respondents were rooting for to win, Egypt was the team with the largest share of responses with 21% of responses, followed by Nigeria with 16%, and Ivory Coast with 12% of responses. Egypt was also the team

that stood out with the largest share of responses (25%) for the question that asked who respondents thought were going to win AFCON. Following Egypt with the largest shares of responses were Nigeria (15%), "Don't Know" (8%), Ivory Coast (8%), and DRC (7%). Overall, the respondents have spoken and Egypt, Nigeria, and Ivory Coast all seem like an obvious front runners for the upcoming AFCON tournament.



How People Are Watching

How People are Watching AFCON

AFCON is one of the biggest televised events in Africa: The multi-country nature of the games and the fact that the host nation is within Africa ensures that large numbers tune into the matches. Given that viewership of the World Cup in Africa is high, with GeoPoll finding that 36% of TV viewers across 6 African countries were tuned into the final 2018 World Cup match, it is expected that AFCON matches will pull in large audiences and command high advertising rates.

Due to the high levels of interest in the tournament, the question of which free-to-air and paid TV stations would get broadcasting rights has been much discussed, especially as even in April the Confederation of Africa Football, AFCON's hosts, had **not yet resolved who would be airing the games**. As the games start, it has been confirmed that multiple stations will be airing them live, including and various free-to-air and pay TV stations in each nation.

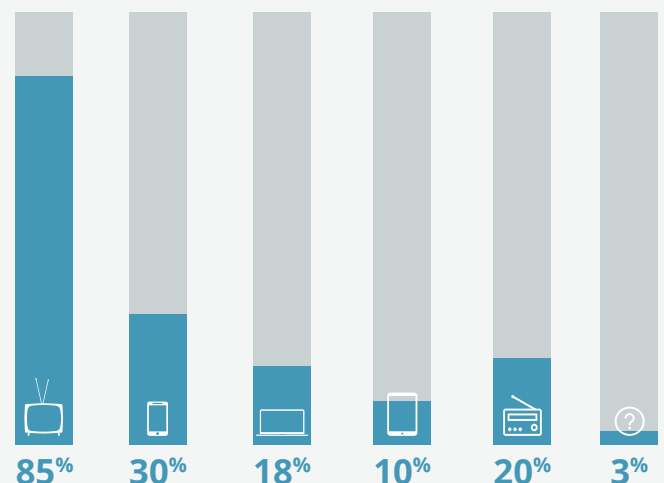
In addition to traditional television broadcasts, there is increased interest in streaming audiences and those who follow games via social media or other news sites. While Subscription Video On Demand (SVOD) services such as Netflix have had a slow start in Sub Saharan Africa, they are now growing, and by **2023 analysts expect there to be almost 10 million SVOD subscribers**, dominated by those in South Africa and Nigeria. Services that stream sports matches specifically, including Kwese iflix and SuperSport's streaming service, have also been picking up steam recently. Following the World Cup 2018, Kwese iflix CEO Mayur Patel told GeoPoll that the World Cup matches had been the **biggest streaming event on their platform** so far, explaining that they had worked with mobile network operators to address some of the specific challenges facing streaming in Africa, such as cost of data and low phone storage capacity. SuperSport's streaming option also provides subscribers the option to watch content from their phones or computers, and their mobile app provides live scores and other match information.

In order to assess how people in the six African nations studied plan to watch matches and examine any differences in viewing habits between ages, genders, and countries, GeoPoll asked a series of questions on viewing plans for AFCON.

How People Follow AFCON

Despite the increase in streaming services, TV remains the most popular way to follow sports matches in Africa, and GeoPoll found that 85% of respondents plan to use TV as at least one of the mediums through which they will follow AFCON. Mobile phones were the second most popular source through which respondents will follow AFCON, with 30% saying they will use mobile phones. Radio, which is traditionally one of the biggest sources of information in Africa, has dropped in popularity, with only 20% including it among the sources they will use.

HOW DO YOU INTEND TO WATCH THE NEXT AFCON MATCHES?



We also asked specifically about sources of information around AFCON, and found slightly differing results from the question focused on watching AFCON. When asked “What are your major sources of information on the next AFCON matches?” TV is still listed as the top source, but at a lower percentage, 62%, than the 85% who plan to watch AFCON matches through the TV. This is likely due to the inclusion of sources through which people can get information on AFCON, even though they do not show the matches themselves, such as word of mouth, websites, newspapers, and SMS. We found that in terms of gathering information on AFCON, social media, which 53% said they would use, and websites, which 36% of respondents said they would use, are the second and third most popular sources behind TV.

Taking a deeper dive into social media usage around AFCON, GeoPoll looked at the social media channels that respondents think they will use most to follow the tournament. Of those who included social media as an information source, we found that Facebook is most likely to be labelled as the biggest social media source of information at 65%, followed by WhatsApp at 13% and Twitter at 12%. We found that females were more likely to cite Instagram as their biggest source of information of the social media channels, and the 35+ age group was most likely to say Twitter was their biggest source of information.

SOCIAL MEDIA SOURCES OF INFORMATION

Which of these social media channels has been your biggest source of information on AFCON?



TV Viewing Plans and Pay TV Subscriptions

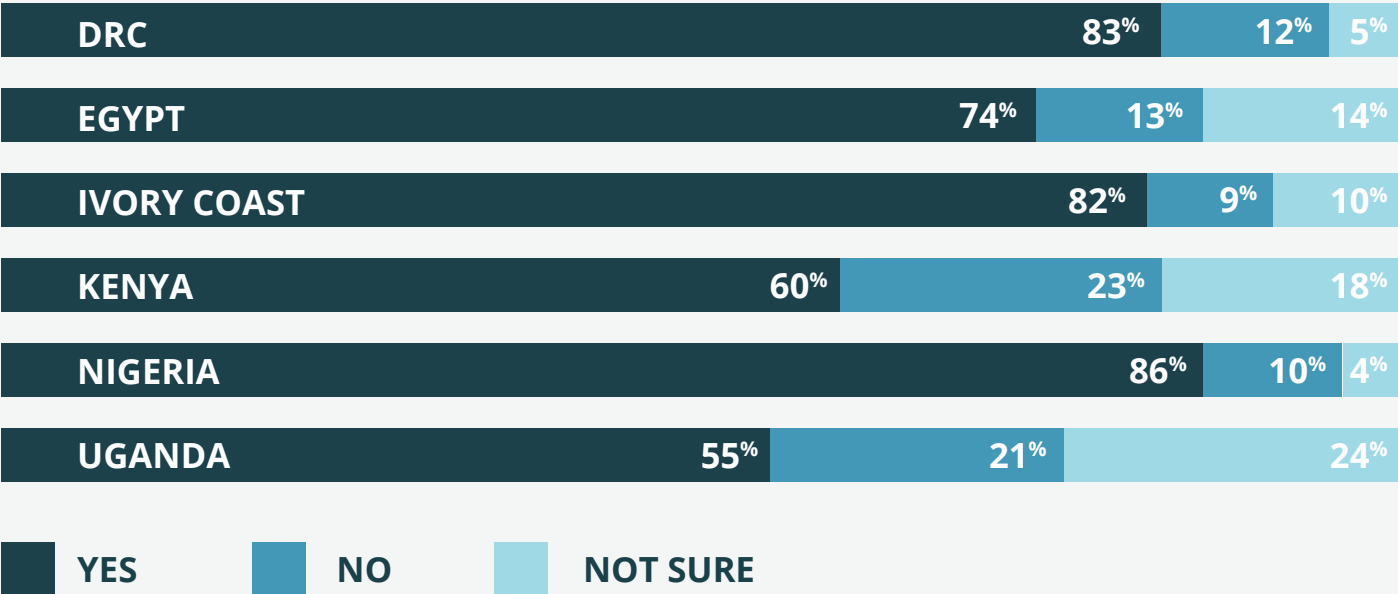
As mentioned above, the rights for broadcasting AFCON were not finalized until recently, and in some countries there may be more awareness of which stations broadcast matches based on their own publicity and other factors, so GeoPoll examined knowledge of what TV stations are airing matches. Overall, we found that 73% of respondents who plan to follow AFCON know which TV stations are airing the matches, with the highest awareness levels being in Nigeria, where 86% say they know which stations are airing matches, and the DRC, at 83%. The lowest levels of awareness were in Kenya, at 60%, and Uganda, at 55%.

Next, we looked at pay TV subscription rates and willingness to subscribe to pay TV specifically for AFCON matches. We found a quite high rate of pay TV subscriptions, at 64% across all countries, with Kenya and Nigeria having the highest number of pay TV subscriptions, at 74% and 89% respectively. As this sample was not controlled for LSM and surveys were conducted via mobile phones, it is likely these numbers are inflated, however they still show an interesting trend among this population. Egypt had the lowest percentage of those who already subscribe to pay TV, at 34%.

Of those who do not currently subscribe to pay TV, we inquired if they would consider subscribing to pay TV in order to watch AFCON matches, finding responses quite split between ‘depends on price,’ ‘no,’ and ‘yes’: 35% said it depended on the price, 34% said they would consider subscribing, and only 31% said they would not consider it. Kenya and Uganda had the highest numbers who would consider subscribing to pay TV. Additionally, males aged 18-24 were most likely to say they would consider subscribing, while 37% of young males saying they would consider paying to watch AFCON matches. Females were more likely to say they would subscribe to pay TV depending on price.

Streaming is another way that viewers can tune into AFCON, and GeoPoll’s study found that 73% would consider watching AFCON matches via streaming platform. The willingness to watch via streaming platform was highest in Kenya (94%), Nigeria, (91%), and Egypt (86%), which may correlate with higher rates of internet penetration in these countries when compared to Ivory Coast, where 45% would consider streaming, Uganda, where 60% say they would stream matches, and the DRC, where 61% would stream matches. We did not find significant differences in willingness to stream based on age or gender, though a more in-depth look into location, income level, and streaming availability may yield different results.

KNOWLEDGE OF STATIONS AIRING AFCON



Who people will watch with and what activities they will engage in

Football matches are exciting events enjoyed by the masses. Many like to enjoy the games with others when not watching in-stadium to magnify the adrenaline of a good match, have people to root for their team with, and trash-talk alongside. What environment viewers watch the matches in determines what, other than the match, may have also portions of viewer attention. To learn more about what the environments around viewers may be like our study inquired about who respondents will watch with and what activities they may engage in while watching the 2019 AFCON tournament.

Out of all the countries surveyed, 60% of respondents said they intend to watch the matches with friends and 58% of respondents said they intend to watch with family in a select all that apply style question. 29% of respondents indicated that they intend to watch with colleagues and only 13% indicated that they would watch alone. Culture seems to be a large factor in who people intend to watch the matches with when looking at the countries surveyed individually. Nigeria had significantly more people intend to watch alone than other countries surveyed at 29%, while other countries averaged at 9 %, although more Nigerians indicated that they would watch with Friends and Family at 72% and 74% respectively. In Kenya, more respondents indicated that they would watch with friends (74%) than with family (59%), and in Ivory Coast more people indicated intention to watch with family (53%) than with friends (48%).

Beyond who people are watching with, it may be even more notable to analyze what people intend on doing while watching AFCON to understand if viewers will have multiple focuses during the matches or if their focus will be solely on the matches and advertisements. In all of the countries surveyed, in a select all that apply type question about what activities respondents will partake in while watching AFCON, the category with the highest share of responses was “socialize with friends” at 47% of responses followed closely with “drink soft drinks” at 46%. The graphic below shows the full set of results averaged across all of the countries surveyed. The social aspect of the matches, as covered above, may be beneficial for advertisers if the commercials grab attention and stimulate conversation, yet may detract attention in many other cases as well.

When looking at the countries surveyed individually, there are cultural factors that may be important for consideration. For example, only 3% of Egypt’s respondents indicated that they will drink alcohol while watching the matches, while 31% of Nigerian and 26% of Kenyan respondents indicated they will drink alcohol while watching the matches. Intended alcohol consumption while watching AFCON may impact likelihood to gamble and will likely increase alcohol sales during the tournament. Another notable comparison, 38% of Egypt’s respondents indicated that they will participate in group chats while watching AFCON, in contrast with 16% of respondents in Ivory Coast and 13% in the DRC. This is specifically notable because ads placed in Egypt on group messaging platforms may be more effective than television ads

ACTIVITIES WHILE WATCHING AFCON



for that country and the opposite may be true for the other countries surveyed. Nigerian respondents also indicated that they will use group chats quite a bit while watching the matches at 33% followed by Kenya at 26%. In terms of the countries where socializing will be popular, all of the countries were within an 18% spread. Kenya was the highest at 58%, followed by Nigeria at 49%, Ivory Coast at 47%, DRC at 46%, Uganda at 42%, and Egypt as the lowest at 40%. Despite the spread between reported socialization intent, all of the countries surveyed look to involve a significant amount of socialization whether in-person or through group chats, so attention will be more difficult to grab than other days of the year and require particularly interesting content.

Advertising Awareness and Merchandise

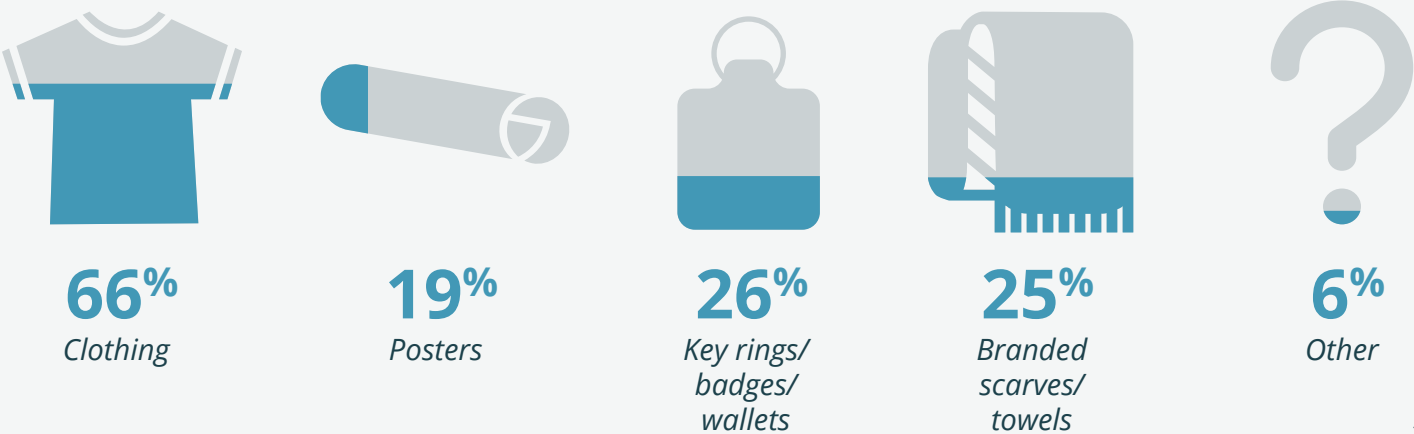
Brands invest significantly in sports events, and AFCON is no exception. While there aren't recent figures on the amount brands expect to spend on AFCON, the tournament historically has been a popular place for brands to advertise soft drinks, alcohol, sports gear, and other AFCON-related merchandise. Multiple **sports brands are sponsoring teams** by providing their match kits, including Puma, who sponsors four teams this year, Adidas, Nike, and Umbro, who is also supplying the game balls. Total, a French oil

and gas company, is the official sponsor of the entire tournament. Other brands are running promotions around the event, including Ecobank Ghana and Visa, who are giving **Visa card users prizes** ranging from prepaid cards to tickets to AFCON matches themselves.

In order to gauge awareness of brands who are involved officially in AFCON and those who have already started advertising, we asked respondents an open-ended question in which they listed those brands they associated with AFCON. We found that over 50% of respondents did not associate a brand with AFCON, responding “don’t know” when prompted to list the brands they thought of around AFCON. While results were quite varied, with over 100 brands mentioned in total, Coca Cola was the top listed brand associated with AFCON, with 15% of respondents mentioning them. Soft drink competitor Pepsi was also highly associated with AFCON, though less so than Coca Cola, with 9% of respondents mentioning Pepsi. Official sponsor Total was the third most associated brand with AFCON behind Pepsi and Coke, getting mentions from just over 3% of respondents. We do observe some country-level trends when looking at Coke vs Pepsi, with those in Egypt mentioning Pepsi more often (28% compared to Coke’s 8%), while those in Kenya and Uganda mentioned Coke at higher levels (27% each), and respondents were split in Nigeria, with 16% mentioning Coke and 14% mentioning Pepsi.

POPULAR AFCON MERCHANDISE

What types of AFCON or team-related merchandise would you buy this year?



Other brands who had multiple mentions include telephone companies Airtel, Orange, and MTN, with mentions by 2%, 1% and 1% of respondents respectively. Among sports brands, Adidas was mentioned by about double the number of respondents, approximately 1% of respondents, than Nike, which was mentioned by about 0.6% of respondents.

When looking at brand mentions by country, we find that some local trends emerge, particularly among beer producers: In the DRC, local Bralima brewery was mentioned by 2% of respondents, while in Kenya, import beer Guinness was mentioned by approximately 3.5% and local Tusker beer was mentioned by 3%. Ugandan beer Nile Special was mentioned by 4% in that country. This demonstrates that local brand advertisements around AFCON are already in play and being noticed AFCON followers.

In terms of branded merchandise, we found that 54% say they plan to purchase some sort of branded AFCON or team merchandise this year, with those in Nigeria having the highest likelihood to purchase

merchandise, at 78%. Given the popularity of the Nigerian Super Eagles throughout the country, this high figure is unsurprising. In Egypt, where the tournament is being held, only 46% plan to buy branded merchandise, while 27% are not sure yet.

Out of those who plan to buy merchandise or are not sure yet, GeoPoll finds that clothing is the most popular merchandising item, with 67% reporting they would purchase jerseys and other branded clothing. Smaller items such as key rings, badges, and wallets are the next most popular item, with 26% stating they would buy these items, and 25% state they would purchase scarfs or towels.

BRANDS ASSOCIATED WITH AFCON



Betting Activities Around AFCON

Sports Betting in Africa

Gambling is extremely popular throughout Africa, particularly in countries including Kenya, Tanzania, and Nigeria. As smartphones have proliferated on the continent, online gambling through mobile applications and websites has become a common pastime: **GeoPoll studies have found** that over 50% of youth in certain countries in Sub Saharan Africa have engaged in betting of some sort, and the gambling sector in Kenya, Nigeria, and South Africa combined was estimated to be worth around **\$37 billion in 2018**. In Kenya the perceived addiction of youth to betting has led to an upcoming crackdown on gambling firms by the minister, who has said that the ease of access to betting in the country has become dangerous for the low-income earners who are placing bets regularly.

A 2017 GeoPoll study in Kenya, Nigeria, Ghana, Tanzania, Uganda, and South Africa found that sports betting, and in particular betting on football matches, is the most popular type of gambling, above casinos, lotteries, and horse racing in most countries, with only South Africa having a stronger affinity for lotteries. The popularity of football leagues including the English Premier League has encouraged betting on football matches, and there are numerous applications dedicated to placing bets on the winners and losers of any match. GeoPoll's study on betting during the 2018 World Cup found that 77% of those in Nigeria, 77% in Kenya, and 76% in Ghana had placed a bet on the World Cup outcomes, with all age groups having high engagement with betting during the tournament. Additionally, 43% of those who placed bets during the World Cup reported that they were engaging in more frequent betting activity around the tournament than they usually do.

Betting and AFCON

Given the popularity of football betting, for this study we examined the overall prevalence of sports betting in each of the countries, as well as the likelihood that AFCON would encourage an increase in betting activities. We found that, overall, 52% had engaged in sports betting in the past, with Kenya and Nigeria having a higher rate of involvement in sports betting than the other countries, at 74% and 84% respectively. Egypt had the lowest levels of engagement in sports betting, with only 26% saying they have bet on sports matches. We did not find a large difference in engagement in sports betting based on age, but we did find that more males than females were likely to have placed sports bets, with 54% males and 45% of females stating they had bet on sports.

PERCENT WHO HAVE ENGAGED IN SPORTS BETTING

DRC

47%

EGYPT

27%

IVORY COAST

32%

KENYA

74%

NIGERIA

84%

UGANDA

40%

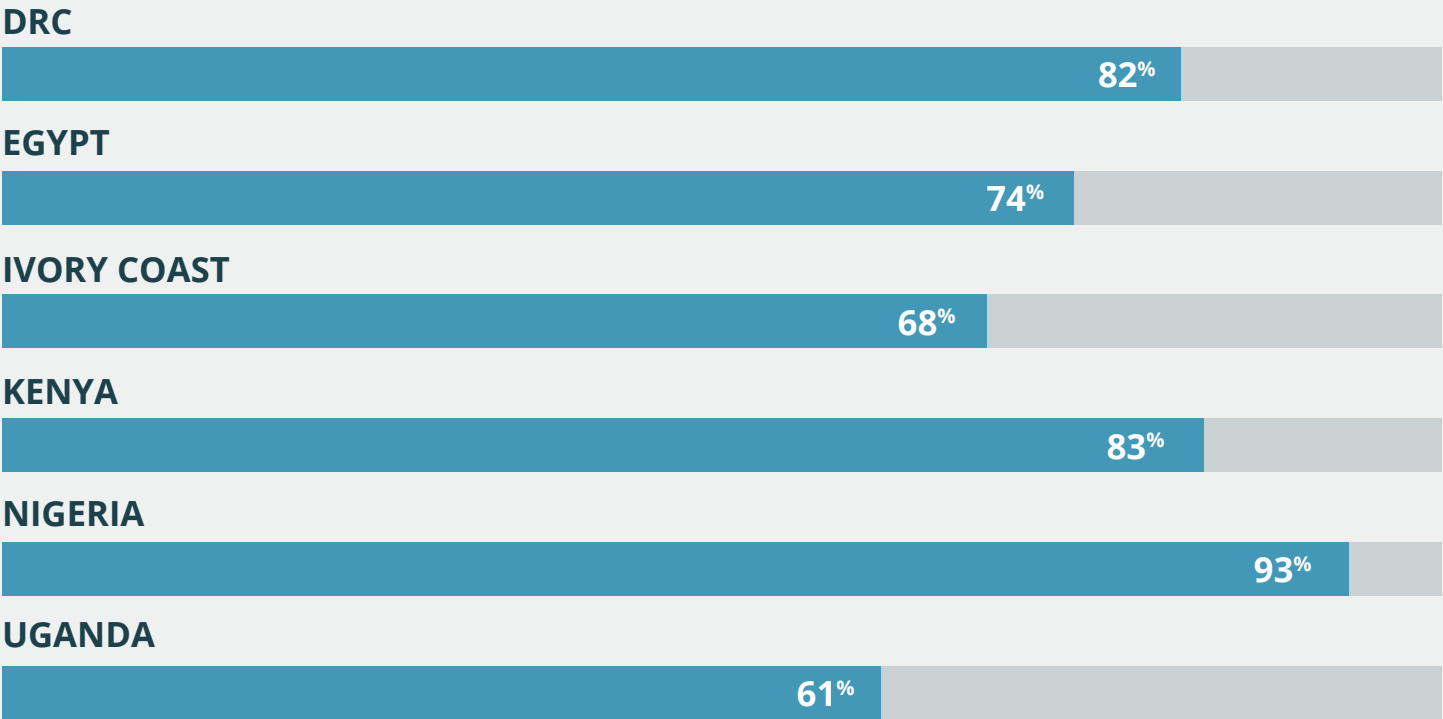
Of those who had not previously bet on sports, we found that 17% said they would consider placing a bet on AFCON as their first ever bet with more of those in the DRC (30%) and Kenya (35%) responding positively to the idea of placing their first bet on AFCON than respondents in Nigeria, Egypt, Ivory Coast, and Uganda. Interestingly, both females and males reported almost equal levels of likelihood for AFCON being their first bet, with females being slightly more likely than males to say they would place their first bet on AFCON: 18% of females vs 17% of males said they would consider AFCON as their introduction to sports betting.

GeoPoll found that overall, 79% of those who have bet on sports before or indicated they would consider betting on AFCON plan to place bets this year on one or more of the AFCON teams. This number was highest in Nigeria, where 93% plan to bet on AFCON, and lowest in Uganda, where 61% plan to bet on AFCON. The oldest age group, aged 35+, had the highest likelihood to place a bet on AFCON 2019, with 81% indicating they planned to do so, and males who gamble were more likely overall to say they plan to bet on AFCON this year, at 80% compared to 77% of females.

17% said they would consider placing a bet on AFCON as their first ever bet

79% of those who have bet on sports before or indicated they would consider betting on AFCON plan to place bets this year on one or more of the AFCON teams.

GAMBLERS WHO PLAN TO BET ON AFCON



Betting Devices

As mentioned above, mobile phones and mobile betting applications have encouraged gambling in Africa by providing a fast and convenient mechanism through which to place bets, though some continue to engage in traditional gambling methods such as slips and cybercafé machines. Given the ease of mobile-based betting, it is not surprising that it is the most popular method for placing bets on AFCON, with 72% of respondents indicating they would use mobile phones as at least one of their betting devices. Slips were the second most popular choice for placing AFCON bets, at 21%.

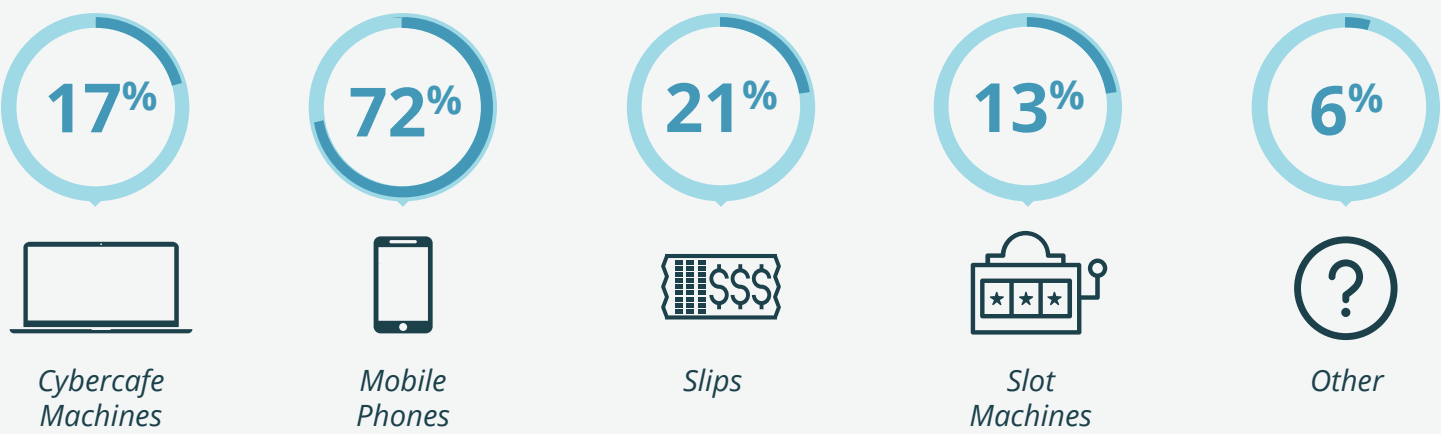
While mobile phones were found to be the most popular gambling device in all countries, we observed some differences by country, with those in the DRC ranking slips as the second most popular betting tool, with 34% in each country reporting they would use slips to bet, and 41% of Nigerians reporting that they would use slot machines. Cybercafe machines are the second most popular device in Nigeria, Egypt, and Ivory Coast.

Source of Funds and Expected Spend

GeoPoll also looked into the source of funds that people bet with and the amount, finding that pocket money is the most common source of money used to place bets, at 36%, followed by respondent's salary at 31% and profits at 29%. Those in the DRC are most likely to use pocket money to place bets, with 48% in that country indicating they use pocket money to gamble, while Egyptians are most likely to use their salary for betting.

Despite the high levels of betting expected to take place during this year's AFCON, the amounts contributed by individuals will remain quite low, with most respondents planning to spend under the equivalent of \$5 total on betting related to AFCON matches. In Kenya for example, 60% of respondents expect to spend under 500 KES, and in Egypt, 66% state they will spend under 100 EGP total.

DEVICES USED TO PLACE BETS



Conclusion

This study intended to provide an overview of interest in the upcoming AFCON games, viewing plans, and activities including betting that those following the tournament intend to partake in while watching matches. By conducting surveys in six African nations via mobile-based methods, we were able to assess these topic areas in the weeks immediately preceding AFCON, providing brands, media owners, and other AFCON stakeholders with up-to-date information on consumer's views towards the tournament. While results do not provide a fully comprehensive view of viewing plans across the continent, they do demonstrate that interest in the AFCON 2019 tournament is running high before the start of the games.

It is also clear that consumers are willing to spend money on watching matches via streaming or pay TV, buying food and beverages during matches, purchasing merchandise, and placing bets related to the matches. As brands begin their AFCON-related investments, some are already being associated with the tournament, such as rival soft drink brands Pepsi and Coca Cola, however as the games air it is likely that more brands will become associated with AFCON and see a return on their advertising investment over the 4-week tournament.

As media consumption habits change rapidly around the globe, this study finds that mobile phones, social media, and streaming applications are gaining steam as alternative mediums to television for following live events, but that TV remains the clear leader in terms of actually watching matches. We expect this shift away from traditional media to continue in the coming years, especially as a greater percentage of the population in Africa comes online via mobile-based internet connections.

With games starting on June 21st, 2019, GeoPoll will be following AFCON closely to see if the predictions of AFCON winners in this study are validated or if an unlikely team takes the prize, bringing excitement and pride to their home nation. GeoPoll Audience Measurement, GeoPoll's

daily audience ratings service, will also be picking up on viewership of matches, and we will post interesting insights around match viewership on the GeoPoll blog. For more information on this study, to conduct your own custom study, or to subscribe to GeoPoll Audience Measurement in order to measure ad campaign effectiveness and ROI, please **contact us today**.

About GeoPoll

GeoPoll is a leader in providing fast, high quality market research from areas that are difficult to access using traditional methods. Working with clients including global brands, media houses, and international development groups, GeoPoll facilitates projects that measure ROI of TV advertisements, demonstrate demand for new products, and assess food security around the world.

GeoPoll combines a robust mobile surveying platform that has the ability to conduct research via multiple modes with a database of over 250 million respondents in emerging markets around the globe. Strengths lie in GeoPoll's ability to target extremely specific populations, deploy surveys in multiple countries, and provide expert guidance on how to collect accurate, reliable data through the mobile phone.

GeoPoll's flagship product, GeoPoll Audience Measurement, is the only provider of real-time ratings for TV, radio, and print in multiple markets throughout Africa. Using a unique mobile-based diary approach, GeoPoll Audience Measurement allows media houses, brands, and advertisers the ability to view audience ratings and demographic breakdowns, identify top-performing ad slots, and measure ROI of campaigns. GeoPoll Audience Measurement is available as a subscription product, with next-day data available via an interactive portal, or can be used to create custom reports.

For more information or to contact us please visit www.GeoPoll.com.