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Methodology Note for Sub-Saharan Africa: Economic Impact of Meta

Economic Modelling

Economic impact of Meta products and services

We define the economic activity created for businesses by Meta's products and services as the return on advertising spend for businesses marketing their products on Meta's family of apps. We estimate this by multiplying the following together:

- **Market size**. We draw on Statista data on the value of the market for paid social media advertising in Sub-Saharan Africa (SSA).
- **Meta's social media market share in Sub-Saharan Africa**. We draw on Statcounter data on the market share of Facebook, Messenger, Instagram, and Threads relative to other social media, and Wordstream analysis on the click-through rate to WhatsApp from these social platforms.
- **Return on advertising spend**. We draw on Meta's update to Tadelis et al., 2023, which estimates the return on advertising spend for businesses in the US in 2024. We apply this to our estimate as a proxy for returns in Sub-Saharan Africa in the absence of a Meta-backed estimate for ROAS in this region.

We account for the economic activity generated by the vertical integration of Meta AI into the family of apps by applying a higher, Meta AI-augmented ROAS to the portion of business spend that is likely to benefit from Meta AI. We estimate this portion as the rate of consumer AI adoption in Sub-Saharan Africa more generally, which we estimate using Sensor Tower data on AI app users in the region.

Finally, we add economic activity generated from the WhatsApp Business Platform API. As a platform predominantly used by larger businesses to generate leads at scale, we estimate this by multiplying large business share of GDP in the region by an adoption rate for the API and the incremental percentage increase in sales.

We estimate an adoption rate for the API by multiplying the proportion of regional consumption derived from ecommerce by GSMA polling data on the share of online businesses that use WhatsApp for marketing. We estimate ecommerce consumption using Statista data on the size of the ecommerce market in Sub-Saharan Africa and World Bank data on household final consumption expenditure.

Consumer savings from Meta-driven market access

We estimate consumer savings from Meta-enabled market access by combining estimates of consumer use of Meta platforms and average percentage price savings from increased competition, and applying that to estimates of total final consumption expenditure in SSA.

We estimate consumer use as the share of individuals using at least one Meta platform by applying SSA market share estimates to global daily average user counts of Meta's platforms from SensorTower data.

To determine the price savings from increased competition, we draw on evidence from Aker (2010) on the price elasticity of supplier numbers, multiplying this by the average increase in the number of vendors a consumer can access as a result of Meta. We proxy this as the increase in supplier numbers from access to ecommerce, measuring this using GSMA polling of MSMEs engaged in e-commerce in Africa.

We apply this percentage decrease in price from increased competition to World Bank estimates of final consumption expenditure in SSA.

Business savings from Meta platforms

We estimate the business savings from Meta platforms reducing internal and external communication and coordination costs by first estimating the annual number of working hours saved per worker. We do so by multiplying the following together:

- **The proportion of businesses using Meta platforms**. We draw on GSMA polling of online enterprises for the proportion of these businesses which use at least one Meta platform for commerce. We then multiply this by the region or country's Internet penetration rate, using data from the Federal Reserve Bank of St Louis' FRED database.
- **The efficiency gain from communicating using Meta platforms**. We draw on Forrester research on the economic impact of Meta for business messaging and customer care. The research finds a 35% increase in agent efficiency across 30% of communications.
- **The daily proportion of labour time spent on communication**. We draw on South Africa's most recent time use survey in 2010 as the best available source of locally-relevant, robust data on time use at work. These survey findings for the proportion of daily labour time spent in communication continue to align strongly with findings from more recent time use surveys in other regions of the world, such as the UK's 2024 time use survey of public sector workers.
- **Annual working time**. We draw on data from the International Labour Organisation (ILO) on weekly working hours, multiplying this out to estimate annual working hours.

To estimate the total business hours saved by Meta platforms, we then multiply the annual number of working hours saved per worker by the total number of workers in the region or country. We draw on ILO data for the total number of workers.

To monetise these time savings as productivity gains, we multiply the total business hours saved by Meta platforms by hourly GVA for the country or region. We estimate hourly GVA using World Bank data on GVA by country, dividing by our previous estimates of annual working time and the total number of workers to identify hourly GVA per worker.

Consumer savings from Meta platforms

We first calculated the number of families reliant on Meta platforms for communication and then calculated the corresponding cost savings.

To calculate the number of families reliant on Meta for communication we combined the following:

- Total number of unique adult users of Meta's communication platforms in SSA. We used global estimates of daily average users of Meta platforms and estimated the share of those which are from SSA by applying market share estimates.

- The percentage of users who rely on these platforms for long-distance/cross-regional family communication. We use Geopoll and KnowBe4 survey statistics on the share of those who use Facebook and WhatsApp respectively to communicate with friends and family.
- Average number of Meta users per household. We first calculated the number of mobile internet users per household, then calculated the Meta penetration rate among the population of internet users, and calculated the latter as a share of the former to estimate the average number of Meta users per household.

To calculate the subsequent annual consumer savings, we then multiplied together:

- The number of users using at least one Meta platform
- The average cost of traditional communication methods like phone calls and SMS per unit in SSA countries for which such data is publicly available (Kenya, Nigeria and South Africa), adjusted for a frequency factor representing the volume of communication via each channel in each country
- An annualising factor (12) to convert the above monthly estimate into an annual equivalent.

Economic activity for the telecommunications sector

We estimate the economic activity created for the telecommunications sector from data demand driven by consumer use of Meta's platforms. We do this by multiplying the following together:

- **Meta's share of Internet traffic in Sub-Saharan Africa**. We draw on Analysys Mason reporting on the share of Internet traffic in the region that is accounted for by Meta's apps.
- **The share of telecommunications revenue derived from new users coming online**. We draw on longitudinal data on internet penetration in the region from the Federal Reserve Bank of St Louis' FRED database. We compare year-on-year growth in Internet penetration, calculating the proportion of users that are new in a given year to proxy the proportion of telecommunications revenue from new users coming online.
- **The telecommunications sector's GDP contribution in Sub-Saharan Africa**. We draw on International Telecommunications Union (ITU) data on the proportion of GDP in this region which is driven by the telecommunications sector, and World Bank data on the region' s GDP.

Economic impact of Meta's infrastructure investments in 2025

Meta is boosting connectivity in Sub-Saharan Africa with investments in edge infrastructure, terrestrial backhaul, and subsea infrastructure such as 2Africa. We estimate the incremental GDP impact of Meta's investments in 2025 by multiplying the following together:

- **Meta's share of total digital infrastructure investment in SSA**. We proxy Meta's share of total investment in digital infrastructure using its share of SSA Internet traffic as reported by Analysys Mason, leaning on the assumption that spending on content delivery and other digital infrastructure is broadly proportional to the volume of Internet traffic that passes through it.
- **Increase in connectivity from additional connectivity infrastructure**. We estimate this by calculating the additional decline in bandwidth costs in SSA over and above global declines using Telegeography data. We assume unitary price elasticity, so the percentage decline in broadband costs is the percentage increase in broadband consumption.
- **The GDP elasticity of Internet connectivity**. We use analysis by Briglauer et al. (2025) on the percentage increase in GDP from a marginal percentage increase in connectivity.
- **SSA GDP in 2025**. We use World Bank data on SSA GDP in 2025.

Economic impact of Meta's infrastructure investments in 2035

Meta's investments into edge infrastructure, terrestrial backhaul, and subsea infrastructure such as 2Africa are set to continue to boost connectivity in SSA over the next decade. We estimate the incremental GDP impact of Meta's investments by 2035 by multiplying the following together:

- **Meta's share of total digital infrastructure investment in SSA**. We proxy Meta's share of total investment in digital infrastructure using its share of SSA Internet traffic, leaning on the assumption that spending on content delivery and other digital infrastructure is broadly proportional to the volume of Internet traffic that passes through it.
- **Projected increase in connectivity from additional connectivity infrastructure**. We estimate a projected increase in connectivity by drawing on current international bandwidth capacity data from the Africa Telecom Transmission Map relative to projections for bandwidth capacity delivered by major infrastructure projects like 2Africa.
- **The GDP elasticity of Internet connectivity**. We use analysis by Briglauer et al. (2025) on the percentage increase in GDP from a marginal percentage increase in connectivity.
- **Projected SSA GDP**. We use linear forecasting techniques on World Bank data on SSA GDP.

To estimate the impact of the 2Africa cable overall, we follow the same method, defining the projected increase in connectivity as the design capacity of 2Africa relative to average projected bandwidth capacity between 2025 and 2035 without the impacts of 2Africa.

Economic Impact of 2Africa

We estimate the potential economic impact of 2Africa by translating the capacity increase the project is expected to deliver into an incremental uplift in connectivity relative to the likely counterfactual. We model this counterfactual by deriving a compound annual growth rate (CAGR) in regional bandwidth from historical growth rates from the Africa Telecom Transmission Map. We then express the reported bandwidth increase 2Africa is expected to deliver as a proportion of this counterfactual to Briglauer et al. (2025)'s estimates of the marginal impact of connectivity on GDP. Finally, we apply the resulting GDP uplift to projected regional GDP, drawing on World Bank data.

The digital opportunity

We measure the digital economy using a hypothetical extraction method (HEM) based on Input-Output (I-O) analysis which allows us to measure the value of an economy with and without its digital industries.

We use input-output tables from the Groningen Growth and Development Centre database for Africa. We define digital industries as the computer and electronics industry (C26tC27) as well as a component (J) of the communications and media sector (JnMN), using estimates from the literature to define the scale of this share in each country. We use input-output modelling techniques to estimate GDP for entire economies and these same economies without their digital industries by setting the value of these sectors to zero. We take the difference between these two estimates as the value of the digital economy, an approach that captures both the direct contributions of digital industries and their indirect supply-chain linkages.

For countries without specific IO data, we impute values using regional averages adjusted for relative GDP size. Since the base data is from 2019, we estimate 2025 values by scaling the digital share of GDP against growth in internet penetration and e-commerce. For 2035, we project future penetration using an S-curve based on historical data to determine the long-term trajectory of the digital economy.

Impact of Meta LLMs

We estimate the economic impact of Meta's Large Language Models (LLMs) over the next decade by summing the following:

- Labour productivity gains across the economy from use of Meta's models.
- The boost to domestic and international trade from Meta's models reducing linguistic barriers to trade across low-resource languages.

Labour productivity gains

Our headline estimate for the potential impact of AI is based on the Goldman Sachs methodology for calculating the growth and productivity impact of AI.

In order to estimate the economic impact of AI, we:

- Draw on the US O*Net occupation database, which contains information on 51 different types of work activity for around ~800 types of occupations
- Based upon Goldman Sachs' identification of the types of tasks exposed to automation by generative AI, classify the proportions of tasks in each occupation that are susceptible to automation.
- Aggregate this into broader economic categories based on their overall share of US employment and average wage bill, and then create our own crosswalk to convert the results from each occupation to the corresponding occupation in ISCO-08.
- Aggregate by wagebill, occupation and sector using International Labour organisation (ILO) data to produce an estimate of the total possible improvement in labour productivity.
- Assume capital intensity remains constant, and convert this labour productivity improvement into an overall improvement in GVA.

We multiply this estimate for the total improvement in GVA by Meta's market share of AI tools. We proxy this share by taking an average of LLaMa's share of total LLM token usage from OpenRouter data, and the proportion of machine translation on Wikipedia that draws on NLLB.

Boost to trade

We estimate the percentage uplift in trade from NLLB translation tools by multiplying the following together:

- **Levels of linguistic overlap in SSA**. We draw on the Domestic Common Language (DCL) index from the Domestic and International Common Language Database (DICL) to measure starting levels of linguistic overlap in the region
- **Percentage decrease in linguistic barriers**. We use the percentage decrease in language barriers across low-resource languages estimated by Costa-Jussà et al. (2022).
- **Projected value of exports across SSA in 2035**. We use linear forecasting techniques on longitudinal trade data from the World Integrated Trade Solution (WITS) database.

Impact of 2Africa on connectivity

We estimate the additional number of Africans in Sub-Saharan Africa who will come online over the next decade due to the construction of the 2Africa cable. We do so by first identifying the set of countries expected to benefit from connectivity boosts through 2Africa. This is based on publicly available reporting and documentation from the project.

We then draw on evidence from Cariolle (2020) on the impact of subsea cables in Africa for Internet connectivity, multiplying the marginal uplift in connectivity identified in this work by the total design capacity of the 2Africa cable. We apply this scaled connectivity impact to historic and projected levels of Internet penetration in the region, adjusting for faster initial growth in penetration before growth stabilises as a country approaches 100% penetration rates.

Finally, we multiply the resulting increase in Internet penetration by each country's projected 2035 population to estimate the total increase in the number of internet users.

Impact of Meta for SMEs

We estimate the number of Sub-Saharan SMEs that leverage Meta's platforms to start or grow their business by multiplying the following together:

- **Count of SMEs**. We draw on World Bank policy research on the total count of SMEs in the region, accounting for the informal sector and own-account businesses.
- **Internet penetration rate**. We draw on internet penetration data for the region from the Federal Reserve Bank of St Louis' FRED database
- **Proportion of online SMEs that use Meta platforms**. We draw on GSMA polling of online SMEs for the proportion of these businesses which use at least one Meta platform for commerce.

We estimate the contribution of these businesses to regional GDP by multiplying the following together:

- **SME share of regional GDP**. We estimate this by taking a GDP-weighted average of SME GDP share across countries within SSA, drawing on data from business and SME surveys conducted by national statistical bodies in the region as well as reporting from the International Finance Corporation (IFC).
- **Proportion of consumption driven by e-commerce**. We estimate ecommerce as a proportion of total consumption using Statista data on the size of the ecommerce market in Sub-Saharan Africa and World Bank data on household final consumption expenditure.
- **Proportion of online SMEs that use Meta platforms**. We draw on GSMA polling of online SMEs for the proportion of these businesses which use at least one Meta platform for commerce.

Polling

Public First conducted a poll of 1,000 online adults and 254 business decision makers across nineteen countries in sub-Saharan Africa between 2nd September and 3rd October 2025.

All results of the consumer survey are weighted using Iterative Proportional Fitting, or 'Raking,' by interlocking age and gender and geography to representative proportions of the online population in the region. The margin of error for this survey is ±3.1%. Smaller subgroups have higher margins of error (i.e. SMEs, regions). The countries included in this polling are as follows: Angola; Benin; Botswana; Cameroon;

Côte d'Ivoire; Democratic Republic of the Congo; Gabon; Ghana; Kenya; Mozambique; Namibia; Senegal; South Africa; Sudan; Tanzania; Uganda; and Zambia.

All results of the business decision makers survey are unweighted. The margin of error for this survey is ±3.0%. Smaller subgroups have higher margins of error (i.e. SMEs, regions). The countries included in this polling are as follows: Cameroon; Democratic Republic of the Congo; Ghana; Kenya; Mali; Mozambique; Nigeria; Senegal; South Africa; Sudan; Tanzania; and Zimbabwe.

Polling was conducted online using a range of different panel providers who contacted respondents on our behalf; in return for their participation in our survey, respondents were provided with a financial incentive.

Like all polling data, market research is susceptible to poor memory or consumers not answering truthfully. In order to reduce the risk of this, we completed a number of standard quality checks on the polling data to help ensure that respondents are paying attention:

- Excluding respondents who take too long to answer;
- Excluding respondents who fail an attention check, e.g. in the middle of a longer question, we ask them to pick a particular option if they are reading;
- Excluding respondents whose open text answers are incoherent or look like they have been generated by a computer bot.

Methodology Note for Country Factsheets: Economic Impact of Meta

Economic Modelling

Economic impact of Meta products and services

We define the economic activity created for businesses by Meta's products and services as the return on advertising spend for businesses marketing their products on Meta's family of apps. We estimate this by multiplying the following together:

- **Market size**. We draw on Statista data on the value of the market for paid social media advertising in Nigeria, South Africa, Kenya, and Cote d'Ivoire.
- **Meta's social media market share**. For each country, we draw on Statcounter data on the market share of Facebook, Messenger, Instagram, and Threads relative to other social media, and Wordstream analysis on the click-through rate to WhatsApp from these social platforms.
- **Return on advertising spend**. We draw on Meta's update to Tadelis et al., 2023, which estimates the return on advertising spend for businesses in the US in 2024. We apply this to our estimate as a proxy for returns in Sub-Saharan Africa in the absence of a Meta-backed estimate for ROAS in this region.

We account for the economic activity generated by the vertical integration of Meta AI into the family of apps by applying a higher, Meta AI-augmented ROAS to the portion of business spend that is likely to benefit from Meta AI. We estimate this portion as the rate of consumer AI adoption in our target countries, which we estimate using Sensor Tower data on AI app users per country.

Finally, we add economic activity generated from the WhatsApp Business Platform API. As a platform predominantly used by larger businesses to generate leads at scale, we estimate this by multiplying large business share of GDP per country by an adoption rate for the API and the incremental percentage increase in sales.

We estimate an adoption rate for the API by multiplying the proportion of regional consumption derived from ecommerce by GSMA polling data on the share of online businesses that use WhatsApp for marketing. We estimate ecommerce consumption using Statista data on the size of the ecommerce market and World Bank data on household final consumption expenditure.

Business savings from Meta platforms

We estimate the business savings from Meta platforms reducing internal and external communication and coordination costs by first estimating the annual number of working hours saved per worker. We do so by multiplying the following together:

- **The proportion of businesses using Meta platforms**. We draw on GSMA polling of online enterprises for the proportion of these businesses which use at least one Meta platform for commerce. We then multiply this by the country's Internet penetration rate, using data from the Federal Reserve Bank of St Louis' FRED database.

- **The efficiency gain from communicating using Meta platforms**. We draw on Forrester research on the economic impact of Meta for business messaging and customer care. The research finds a 35% increase in agent efficiency across 30% of communications.
- **The daily proportion of labour time spent on communication**. We draw on South Africa's most recent time use survey in 2010 as the best available source of locally-relevant, robust data on time use at work. These survey findings for the proportion of daily labour time spent in communication continue to align strongly with findings from more recent time use surveys in other regions of the world, such as the UK's 2024 time use survey of public sector workers.
- **Annual working time**. We draw on data from the International Labour Organisation (ILO) on weekly working hours, multiplying this out to estimate annual working hours.

To estimate the total business hours saved by Meta platforms, we then multiply the annual number of working hours saved per worker by the total number of workers in the country. We draw on ILO data for the total number of workers.

To monetise these time savings as productivity gains, we multiply the total business hours saved by Meta platforms by hourly GVA for the country. We estimate hourly GVA using World Bank data on GVA by country, dividing by our previous estimates of annual working time and the total number of workers to identify hourly GVA per worker.

Economic activity for the telecommunications sector

We estimate the economic activity created for the telecommunications sector from data demand driven by consumer use of Meta's platforms. We do this by multiplying the following together:

- **Meta's share of Internet traffic**. We draw on Analysys Mason reporting on the share of Internet traffic in the region that is accounted for by Meta's apps.
- **The share of telecommunications revenue derived from new users coming online**. We draw on longitudinal data on internet penetration from the Federal Reserve Bank of St Louis' FRED database. We compare year-on-year growth in Internet penetration, calculating the proportion of users that are new in a given year to proxy the proportion of telecommunications revenue from new users coming online.
- **The telecommunications sector's GDP contribution**. We draw on International Telecommunications Union (ITU) data on the proportion of GDP in each country which is driven by the telecommunications sector, and World Bank data on national GDP.

Economic Impact of 2Africa

We estimate the potential economic impact of 2Africa by translating the capacity increase the project is expected to deliver into an incremental uplift in connectivity relative to the likely counterfactual. We model this counterfactual by deriving a compound annual growth rate (CAGR) in regional bandwidth from historical growth rates from the Africa Telecom Transmission Map. We then express the reported bandwidth increase 2Africa is expected to deliver as a proportion of this counterfactual to Briglauer et al. (2025)'s estimates of the marginal impact of connectivity on GDP. Finally, we apply the resulting GDP uplift to projected regional GDP, drawing on World Bank data.

We estimate national impacts by allocating the regional effect across countries based on cable landing / coverage and each country's share of regional GDP.

The digital opportunity

We measure the digital economy using a hypothetical extraction method (HEM) based on Input-Output (I-O) analysis which allows us to measure the value of an economy with and without its digital industries.

We use input-output tables from the Groningen Growth and Development Centre database for Africa. We define digital industries as the computer and electronics industry (C26tC27) as well as a component (J) of the communications and media sector (JnMN), using estimates from the literature to define the scale of this share in each country. We use input-output modelling techniques to estimate GDP for entire economies and these same economies without their digital industries by setting the value of these sectors to zero. We take the difference between these two estimates as the value of the digital economy, an approach that captures both the direct contributions of digital industries and their indirect supply-chain linkages.

For countries without specific IO data, we impute values using regional averages adjusted for relative GDP size. Since the base data is from 2019, we estimate 2025 values by scaling the digital share of GDP against growth in internet penetration and e-commerce. For 2035, we project future penetration using an S-curve based on historical data to determine the long-term trajectory of the digital economy.

Impact of 2Africa on connectivity

We estimate the additional number of people in each Sub-Saharan African country who will come online over the next decade due to the construction of the 2Africa cable. We do so by first identifying the set of countries expected to benefit from connectivity boosts through 2Africa. This is based on publicly available reporting and documentation from the project.

We then draw on evidence from Cariolle (2020) on the impact of subsea cables in Africa for Internet connectivity, multiplying the marginal uplift in connectivity identified in this work by the total design capacity of the 2Africa cable. We apply this scaled connectivity impact to historic and projected levels of Internet penetration for each country, adjusting for faster initial growth in penetration before growth stabilises as a country approaches full penetration.

Finally, we multiply the resulting increase in Internet penetration by each country's projected 2035 population to estimate the total increase in the number of internet users.

Impact of Meta for SMEs

We estimate the number of Sub-Saharan SMEs that leverage Meta's platforms to start or grow their business by multiplying the following together:

- **Count of SMEs**. We draw on World Bank policy research on the total count of SMEs in each country, accounting for the informal sector and own-account businesses.
- **Internet penetration rate**. We draw on internet penetration data from the Federal Reserve Bank of St Louis' FRED database
- **Proportion of online SMEs that use Meta platforms**. We draw on GSMA polling of online SMEs for the proportion of these businesses which use at least one Meta platform for commerce.

We estimate the contribution of these businesses to national GDP by multiplying the following together:

- **SME share of national GDP**. We draw on data from business and SME surveys conducted by national statistical bodies as well as reporting from the International Finance Corporation (IFC).
- **Proportion of consumption driven by e-commerce**. We estimate ecommerce as a proportion of total national consumption using Statista data on the size of the ecommerce market and World Bank data on household final consumption expenditure.
- **Proportion of online SMEs that use Meta platforms**. We draw on GSMA polling of online SMEs for the proportion of these businesses which use at least one Meta platform for commerce.

Impact of increasing AI adoption

Our estimate for the economic impact of adopting AI across the economy is based on the Goldman Sachs methodology for calculating the growth and productivity impact of AI.
In order to estimate the economic impact of AI, we:

- Draw on the US O*Net occupation database, which contains information on 51 different types of work activity for around ~800 types of occupations
- Based upon Goldman Sachs' identification of the types of tasks exposed to automation by generative AI, classify the proportions of tasks in each occupation that are susceptible to automation.
- Aggregate this into broader economic categories based on their overall share of US employment and average wage bill, and then create our own crosswalk to convert the results from each occupation to the corresponding occupation in ISCO-08.
- Aggregate by wagebill, occupation and sector using International Labour organisation (ILO) data to produce an estimate of the total possible improvement in labour productivity.
- Assume capital intensity remains constant, and convert this labour productivity improvement into an overall improvement in GVA.

Polling

Côte d'Ivoire

Public First conducted a poll of 1,087 online adults and 229 business decision makers in Côte d'Ivoire between 4th September and 3rd October 2025.

All results of the consumer survey are weighted using Iterative Proportional Fitting, or 'Raking,' by interlocking age and gender to nationally representative proportions of the online population in Côte d'Ivoire. The margin of error for this survey is ±3.0%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

All results of the business decision makers survey are unweighted. The margin of error for this survey is ±6.5%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

Polling was conducted online using a range of different panel providers who contacted respondents on our behalf; in return for their participation in our survey, respondents were provided with a financial incentive.

Like all polling data, market research is susceptible to poor memory or consumers not answering truthfully. In order to reduce the risk of this, we completed a number of standard quality checks on the polling data to help ensure that respondents are paying attention:

- Excluding respondents who take too long to answer;

- Excluding respondents who fail an attention check, e.g. in the middle of a longer question, we ask them to pick a particular option if they are reading;
- Excluding respondents whose open text answers are incoherent or look like they have been generated by a computer bot.

Kenya

Public First conducted a poll of 1,008 online adults and 349 business decision makers in Kenya between 2nd September and 16th September 2025.

All results of the consumer survey are weighted using Iterative Proportional Fitting, or ‘Raking,’ by interlocking age and gender to nationally representative proportions of the online population in Kenya. The margin of error for this survey is ±3.1%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

All results of the business decision makers survey are unweighted. The margin of error for this survey is ±5.2%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

Polling was conducted online using a range of different panel providers who contacted respondents on our behalf; in return for their participation in our survey, respondents were provided with a financial incentive.

Like all polling data, market research is susceptible to poor memory or consumers not answering truthfully. In order to reduce the risk of this, we completed a number of standard quality checks on the polling data to help ensure that respondents are paying attention:

- Excluding respondents who take too long to answer;
- Excluding respondents who fail an attention check, e.g. in the middle of a longer question, we ask them to pick a particular option if they are reading;
- Excluding respondents whose open text answers are incoherent or look like they have been generated by a computer bot.

Nigeria

Public First conducted a poll of 1,000 online adults and 250 business decision makers in Nigeria between 2nd September and 18th September 2025.

All results of the consumer survey are weighted using Iterative Proportional Fitting, or ‘Raking,’ by interlocking age and gender to nationally representative proportions of the online population in Nigeria. The margin of error for this survey is ±3.1%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

All results of the business decision makers survey are unweighted. The margin of error for this survey is ±6.2%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

Polling was conducted online using a range of different panel providers who contacted respondents on our behalf; in return for their participation in our survey, respondents were provided with a financial incentive.

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- Excluding respondents who take too long to answer;
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- Excluding respondents whose open text answers are incoherent or look like they have been generated by a computer bot.

South Africa

Public First conducted a poll of 1,005 online adults and 255 business decision makers in South Africa between 2nd September and 16th September 2025.

All results of the consumer survey are weighted using Iterative Proportional Fitting, or ‘Raking,’ by interlocking age and gender to nationally representative proportions of the online population in Nigeria. The margin of error for this survey is ±3.1%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

All results of the business decision makers survey are unweighted. The margin of error for this survey is ±6.1%. Smaller subgroups have higher margins of error (i.e. SMEs, regions).

Polling was conducted online using a range of different panel providers who contacted respondents on our behalf; in return for their participation in our survey, respondents were provided with a financial incentive.

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