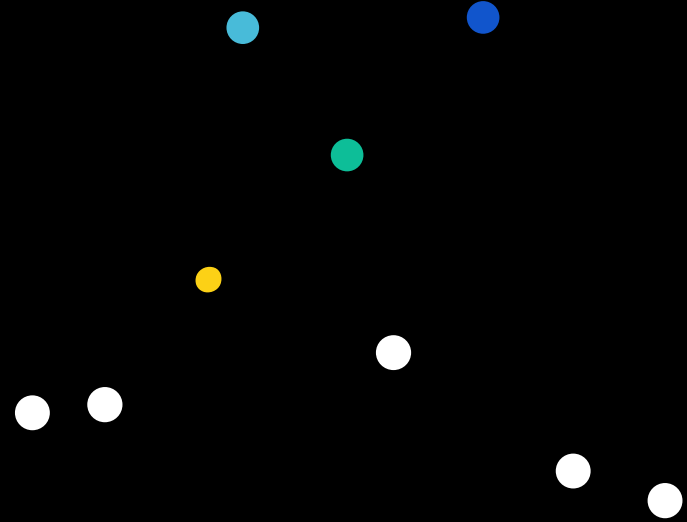


Introduction & Contribution

Ringier Africa AG

eCommerce Week 2018
Development Dimensions of Digital Platforms

Leonard Stiegeler
General Manager, Ringier Africa AG



We inform.
We entertain.
We connect.

Africa

A close-up photograph of a woman with a joyful expression, wearing a vibrant red headwrap and a patterned scarf. The image is partially obscured by a dark overlay on the right side where the text is located.

who we are

Sub-Saharan Africa's leading
media and marketplaces
group outside
South Africa.

Part of  Ringier

we are present in 8 markets with 15+ platforms.

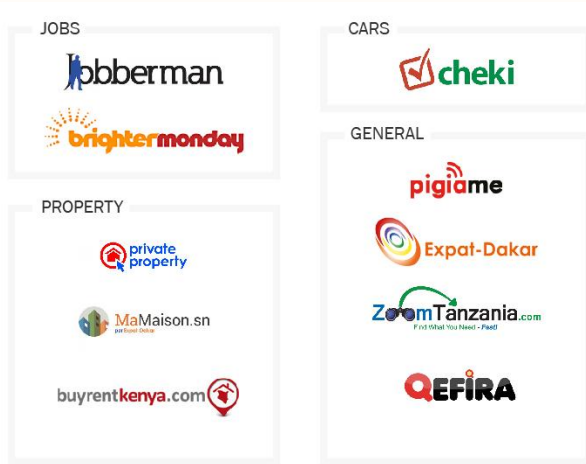
Our Media



+ Our Production Brands



Our Marketplaces



the 360° breakdown

What we do
with our
platforms...

...to serve
the mass
market



Our leading new media
publisher



Our leading
video
content brand



The universe of all our
brands, partners &
influencers



Africa's creative
content partner



Running platforms for country-
wide trade of cars, property, jobs
and merchandise across Africa



Building digital
foundations for
businesses



Building digital
capabilities for
professionals



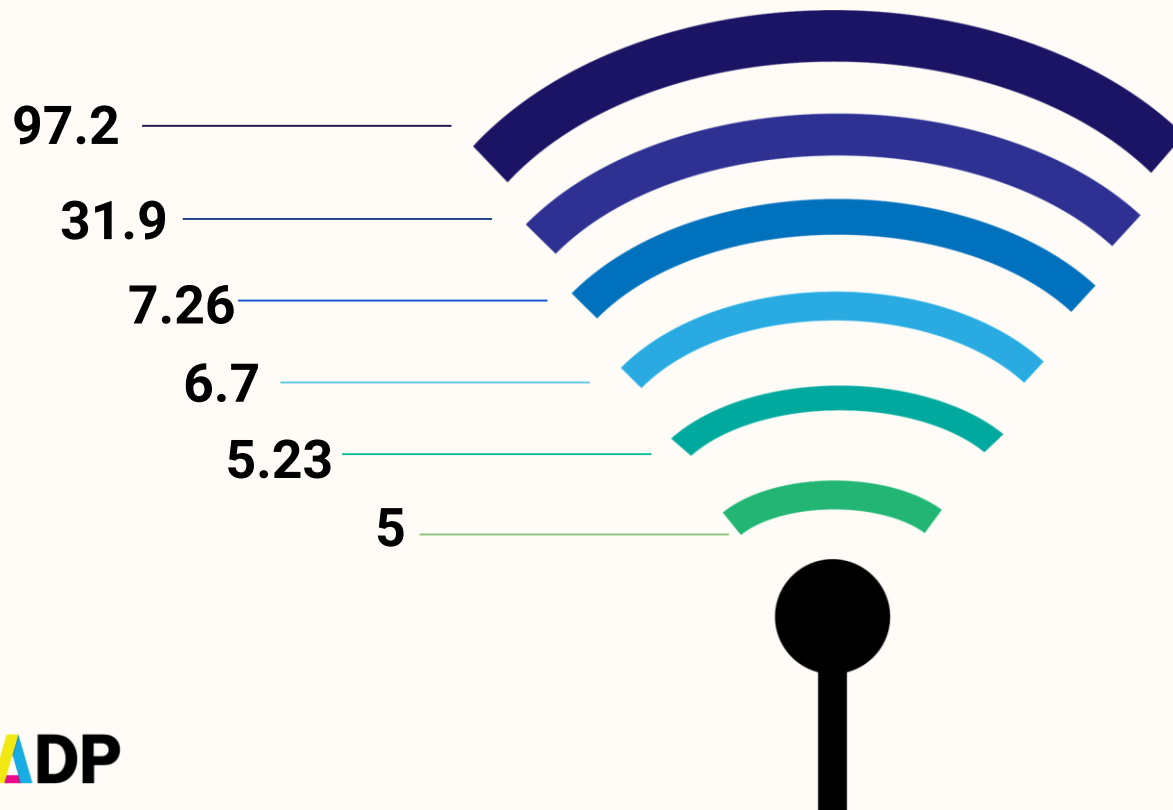
what we look for

The basis of our business is the explosion of **mobile internet use in Africa** in the past years – especially by young people.



Sub-Sahara Africa Internet Users

in million



- Nigeria
- Kenya
- Senegal
- Ghana
- Ivory Coast
- Uganda

Growth

Internet penetration is growing significantly across Sub-Saharan Africa.

And users are eager for local content.

[This is a big opportunity.](#)

Sub-Sahara Africa

Active Social Media Users in millions



Social

African internet users are very social, want to share and express themselves. [This is unique.](#)

Nigeria •

Populous

185 Million
Population

+50% under 20
Population

Young

+2.89%

Avg. Yearly GDP
per Capita Growth
2006 - 2016

30%

Smartphone
Penetration

94%

Mobile
Penetration

Mobile

Growing

+15%

Avg. Internet Pen.
Yearly Growth
2005 - 2015

47%

Internet
Penetration

Digital



Ghana

Populous

28 Million
Population

+56% under 24
Population

Young

+7.7%

Avg. Yearly GDP
per Capita Growth
2006 - 2016

21%

Smartphone
Penetration

132%

Mobile
Penetration

Mobile

Growing

+30%

Avg. Internet Pen.
Yearly Growth
2006 - 2016

28.4%

Internet
Penetration

Digital



Kenya

Populous

48.5 Million
Population

+59% under 24
Population

Young

+2.9%

Avg. Yearly GDP
per Capita Growth
2008 - 2016

44%

Smartphone
Penetration

96%

Mobile
Penetration

Mobile

Growing

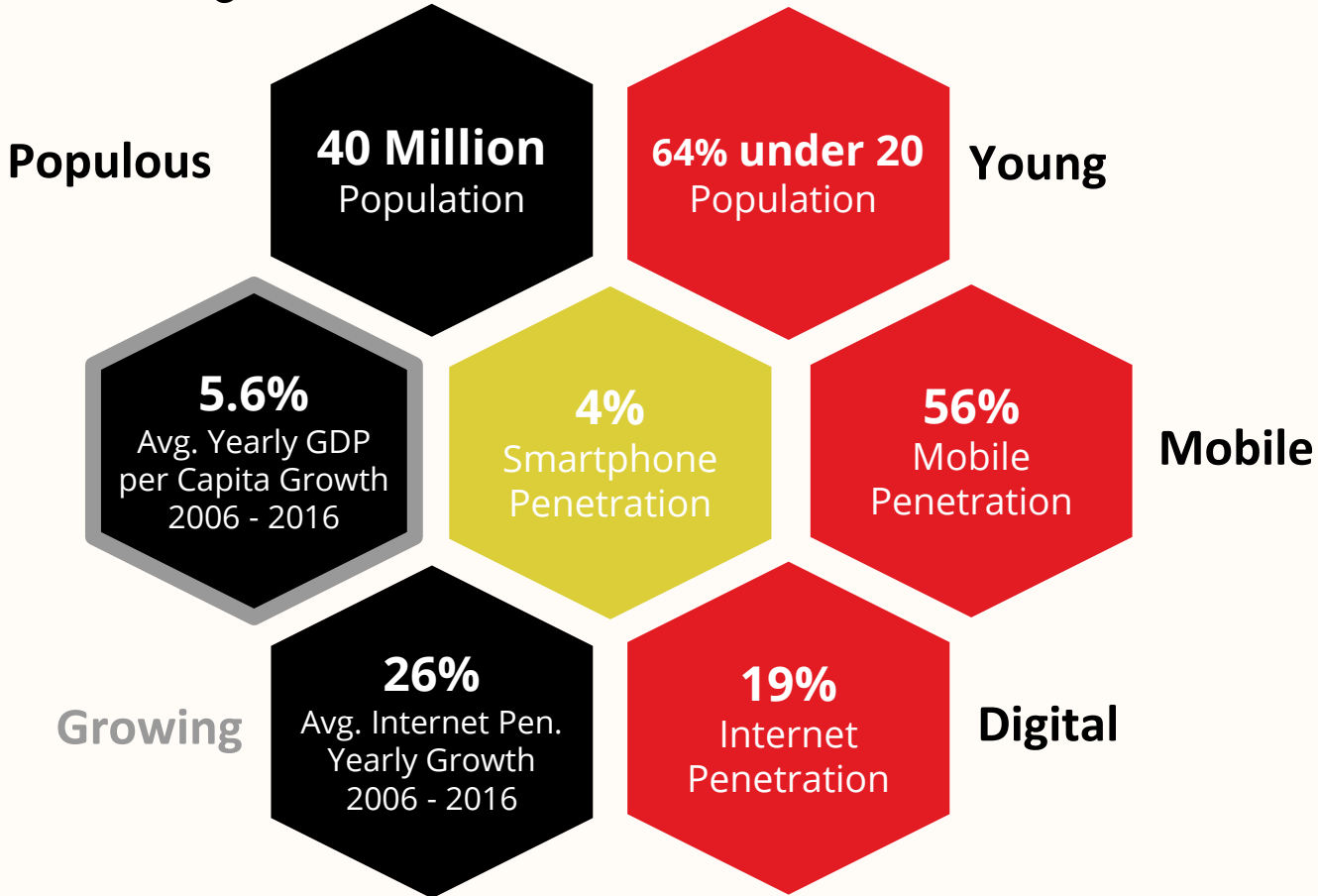
+37%

Avg. Internet Pen.
Yearly Growth
2006 - 2016

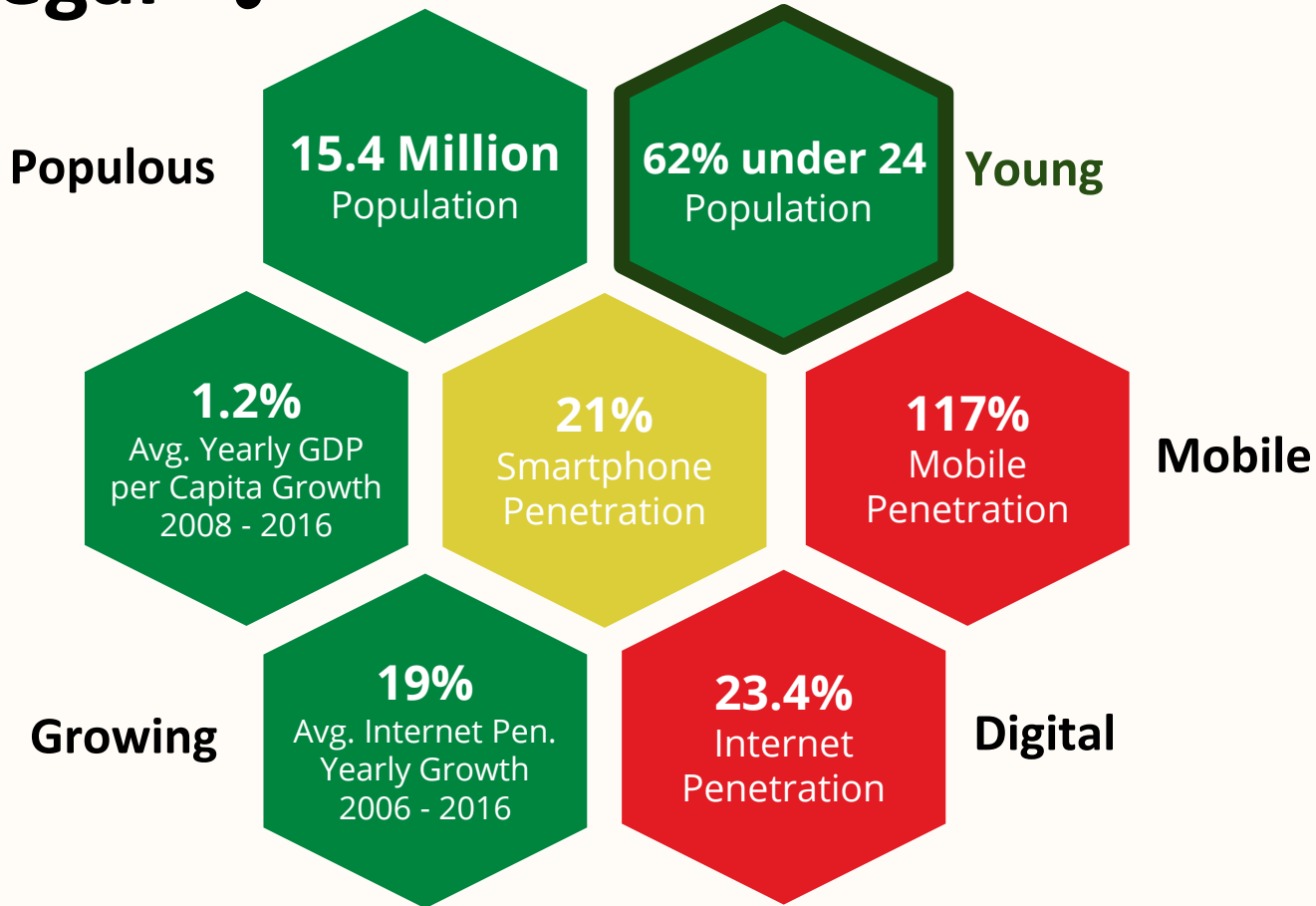
89%
Internet
Penetration

Digital

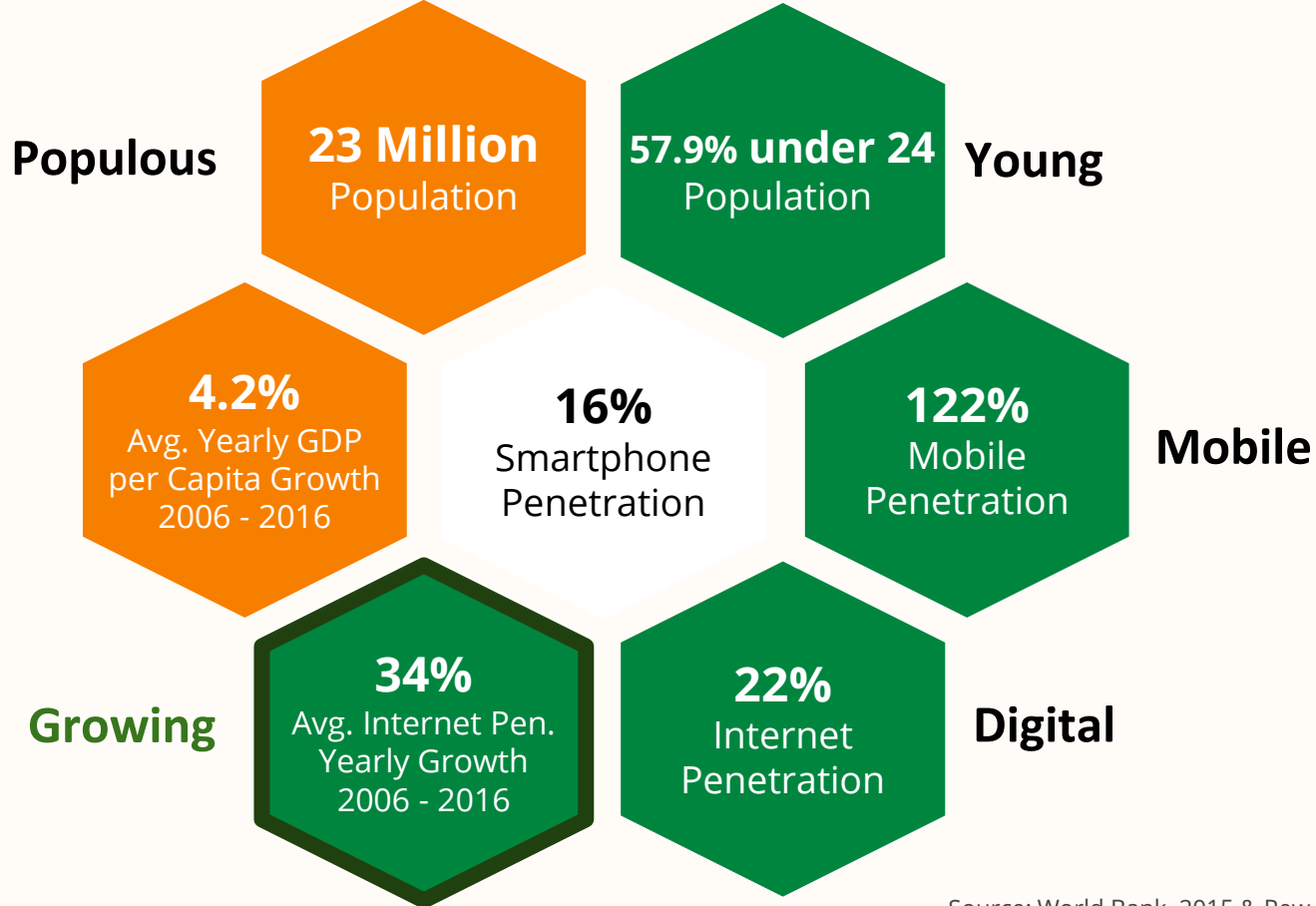
Uganda .




Sénégal



Côte d'Ivoire

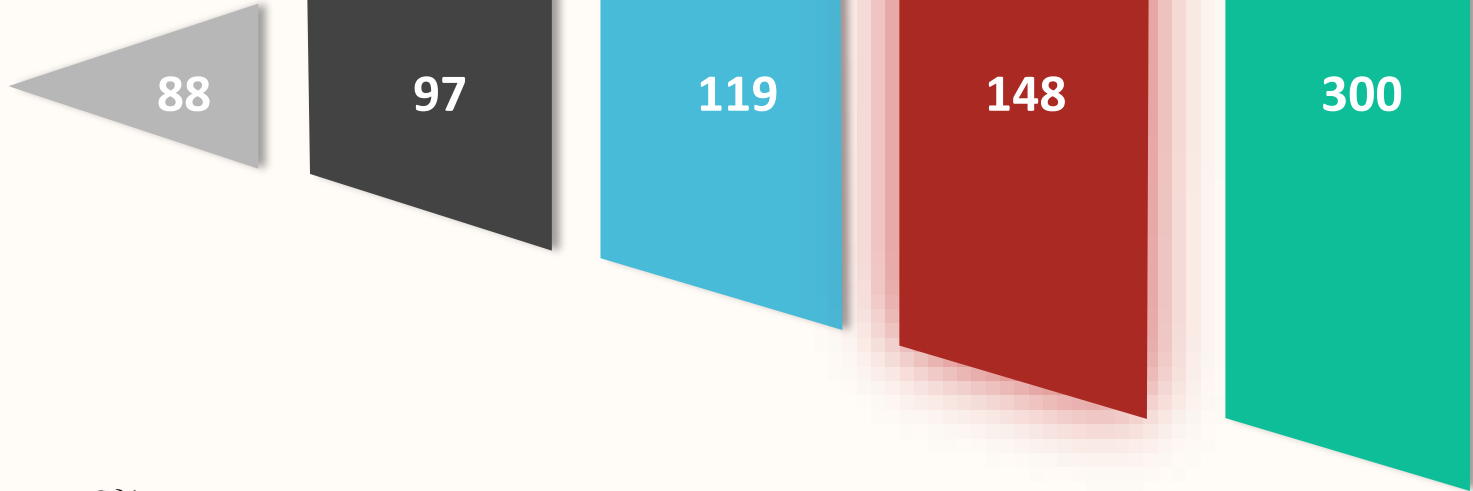




We have often
been surprised by
the **high growth**
and learnt a lot in
Africa.

And exemplary number: 148million

...views of our videos in Africa online per month
...and about 100 million user-reach cross-platform



beating global benchmarks in distribution power



Our Learnings from Sub-Saharan

Africa / Outside South Africa



The Sub-Saharan African digital eco-system (1)

Users:

- **Hundreds of millions of young, aspiring, mobile internet users in Africa - with still relatively low economic means.**
- Internet and social media usage rates are continuing to grow rapidly with the proliferation of cheap smart phones and reducing mobile data rates – **sophisticated use of mobile, video etc. en masse.**

User Behavior:

- Users are **open to online opportunities to cover basic needs – of communication, information and non-physical trade, and desires – of entertainment and connection.**
- They are still much less inclined to **physical eCommerce**, as the underlying infrastructure does not support large-scale local uptake.

The Sub-Saharan African digital eco-system (2)

Corporate Behavior:

- Corporates are now thriving to move online and digitize. They lack behind in **sophistication of data, availability of technology and tracking on the one hand**, but naturally embrace the newest, natural forms of digital advertisement and other forms of digitization.

Investors:

- Primarily strategic Chinese and early-stage American investors are dominating the current VC scene in Africa, but newly-raised Africa-focused European **technology funds** are showcasing a growing European interest.
- However, overall **too little funding is present in the eco-systems** to embrace all opportunities and foster more digital entrepreneurship.

Our Recommendations



What we see as crucial for SSA countries to embrace (1)

Best Practices:

- Active learning from other markets that have established **thriving internet eco-systems and forward-looking corporates** is crucial.
→ What have other countries done to attract **high-growth technology companies and made them thrive?**

Understand Unique Advantages:

- With best practices in place, different markets have **unique opportunities** – embrace them!
→ For example, how can digital use a large single market economy or a well-positioned regional hub?

What we see as crucial for SSA countries to embrace (2)

Ease of Doing Business:

- Entrepreneurship is difficult enough. It should be easy to start a company; **operate it in the legal and regulatory environment** and get it funded.
- What are the basic needs for entrepreneurs & corporates and how can they be facilitated?

International Investors:

- International investors will be crucial both from **a financial as well as from a knowledge-transfer perspective** to boost the digital economy in SSA
- **Investors should be deliberately attracted to invest in SSA.**

Thank you.

Contact

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