



Mobile and Africa: Are Smartphones Really Smart?

Reflections on opportunities in the African mobile market

By Souleymane Camara

Commentators have remarked on the opportunity for mobile handset manufacturers, operators and mobile apps in sub-Saharan Africa for years. But, with the exception of M-PESA, a popular money transfer service, the pace of product, service and commercial development seems slow.

Mobile phone companies, such as Nokia, are struggling to increase market share in the global mobile market because of new entrants such as RIM (BlackBerry) and Apple (iPhone). Nokia after all, used to be *the* must have phone for every reason you can think of.

From a user experience and interaction design perspective, it is hard to explain how major mobile network operators and mobile application designers have not yet made more significant inroads into the African market.

You might be quick to point out that there is limited mobile phone and internet infrastructure in Africa but, consider this:

- There are more than one billion inhabitants in Africa.
- According to [GSMA](#), “Africa is the world’s second largest mobile market”.
- In Africa there are already nearly 650 million mobile phone subscribers (according to 2011 figures in the [African Mobile Observatory](#)).
- 735 million are expected by the end of 2012.
- Nigeria alone counts for 93 million of them.



In Europe and America, iPhone and BlackBerry (and now other players), maps and social media dominate the mobile phone market. By contrast, there is no noteworthy mobile phone, application or service that is popular in Sub-Saharan Africa, other than M-PESA.

M-PESA is by far the most successful and contextually fit for purpose mobile application in Africa. It has 8.5 million users in Kenya alone. But, even this service is so far limited to some East-African countries (Kenya, Tanzania), and now South Africa.

So, why aren’t ambitious manufacturers, developers and networks - under intense competitive pressures in developed markets like Europe and N. America - turning their attention to this business opportunity?

Africa: the ‘assumed’ context

The reason for the tardiness in innovative ideas for the continent may be found in our collective and tacit ‘understanding’ of the African context (and market). I for one hold my hands up for supporting and contributing to some of the following preconceptions we may have of African cultures.

To use [Geert Hofstede’s](#) dimensions of culture, the African context is generally known to have:

- **High Uncertainty Avoidance Index:** “*I don’t know how to, so I don’t touch*” e.g. I need someone to explain how to use mobile features.
- **High Masculinity Index:** Men make decisions and set trends, e.g. men know which mobile phone is the best.



- **High Collectivism Index:** “What the group says I do. I’m no different.”
- **Short-term orientation:** The need for quick ROI. No long term planning.

This is a completely different context from that of Europe and North America, where innovative ideas for mobile phones are often generated.

In addition, users’ requirements for their mobile phones are clearly different. In 2008, I conducted some research in the urban city of Conakry, Guinea (West Africa) with 200 mobile phone users from different socio-economic backgrounds. Their key requirements and characteristics were:

- **Longer battery life:** the phone was an entertainment device for radio and music.
- **Multiple SIM card capability:** network providers were battling for monopoly; reaching someone on another network was very difficult and costly.
- **Memory cards for music:** users were constantly updating their music libraries.
- **Sharing capability – Bluetooth:** to share multimedia content without using a computer or the internet.
- **High Uncertainty Avoidance Index:** illiterate or semi-literate people would often ask someone else to do a task for them i.e. transfer music, add a contact, etc.
- **Gender based trends:** women choose their phone for the style; men ideally want their phone to have all the latest features.
- **More calls than SMS:** texting was very limited due to cost and inefficient service.

From a user experience (UX) perspective, I see a huge opportunity for innovation. But, from an investment perspective, many believe that economic conditions are not favourable to invest in suitable mobile services in Africa - that the ROI is too low.

However, judging from the current state of the African market and the range of Smartphones users carry around within different income groups, we might have got this one wrong.



A young taxi driver with an iPad in Accra

Revisiting the African context

The current adoption and usage of mobile phones in Africa has dramatically changed in terms of socio-technical requirements. I recently organised small-scale research interviews in two capital cities in West Africa: Accra in Ghana and Conakry in Guinea.

The objective was to understand the current state of the mobile phone market and usage in Sub-Saharan Africa. The study involved respondents from different socio-economic backgrounds: professionals, students, self-employed (small businesses), unemployed, illiterate and semi-literate people.

Ghana (an Anglophone country) and (Guinea a Francophone country) were chosen for their potential cultural differences and contexts. Further studies are currently underway with the biggest mobile



A street mobile phone vending in Conakry (iPad and Smartphones on display)



phone market in Africa (Nigeria) in addition to two East-African countries (Kenya and Tanzania). The aim is to simply gauge mobile phone adoption and usage since the Smartphone revolution. While data from this research is being fully examined and analysed, the initial findings lead me to identify three general personas/market segments

1. The Professional



- Can afford any brand or model
- Status conscious: the phone must be the latest and the best
- Must be connected (Internet) and fast
- Has a Smartphone and a backup phone
- Longer battery life
- Self taught (usage)
- Represents a small proportion of mobile users

2. The Student



- The cool user – knows it all
- Trendsetter
- Can't afford what he or she wants
- Happy with a second hand phone
- Highest in mobile usage
- Entertainment and news are important
- Longer battery life
- Always seeking new features to showcase
- Self taught (usage)

3. The manual worker



- Low literacy
- Will stick to a basic phone
- Calls and entertainment (multimedia) are important
- Asks to be shown how so he or she can do it next time. Lower uncertainty avoidance
- Longer battery life
- Largest segment of the market



A close look at these segments and characteristics reveal that African users have distinct pain points and opportunity areas. While we continue to load new breeds of Smartphones with features and capacity, more than half a billion users are still waiting for the next killer app or fit for purpose mobile phone.

There could well be more market segments within the three proposed here. However, the current mobile phone propositions do not provide enough differentiation.

Are Smartphones really smart?

Here's how the world is missing out on the African market.

First there's a mismatch between current African requirements for mobile phones against current Smartphone offerings:

Current African Requirements

- Torch light: mobiles are used as an alternative when there is no electricity.
- Longer battery life.
- SMS: now, text is more frequent than phone call given the cost.
- Entertainment: multimedia capabilities.
- Radio.
- Fast Internet access.
- Storage for multimedia.
- Sharing facilities: Bluetooth or other form not requiring Internet.
- Dual SIM cards.
- Warranty: minimum manufacturer warranty for repair.

Current Smartphones in Africa

- Short battery life.
- Frequent screen breakages.
- Irrelevant apps.
- No built-in tutorials on how to use or set it up.
- No tailored entertainment: games are for a different culture and audience.
- European models are preferred over the cheap counterfeit models that are always in disrepair.

The only requirement that may be more difficult to address outright by a particular Smartphone is access to the internet. The rest are pure UX and phone form-factor issues.

Mobile phone manufacturers and application developers have traditionally shunned the African market. The fatal contextual and cultural mistake they repeatedly make is by combining markets due to the size they represent within their businesses.

Remember the terms MEA (Middle East and Africa) or EEMEA (Eastern Europe, Middle East and Africa)? While these market interests might have been justified given a company's expansion drive, the socio-technical and economic contexts now dictate a completely different picture that does not make a UX practitioner proud of such a cultural mix.

Coming back to Nokia and their experience in the mobile phone business, it seems to me that they are still in the dark with regard to the African market.

This screenshot is the homepage of a whole department dedicated to the Middle East and Africa:



What are you looking for?
Find the right product

 Phones

 Accessories

Know what you're looking for?

Select a phone

Select an accessory

OVI NOKIA

Do more with Ovi
Learn more about Ovi Store, Maps, Music and the full suite of Nokia apps.



Ovi Store – Top Apps



World Mate 2009 Gravity Tetris Bloomberg Shazam

Based on what's been discussed so far, what is an attractive proposal for the African market? It's not Tetris. How many will be interested in a Bloomberg App in a culture of quick ROI? Even in countries like South Africa or Kenya where stock market monitoring is a bit of a trend, most users would not make use of Bloomberg to track the African market.

The concept of OVI and all the other apps on this screenshot require access to the Internet. How many African users does Nokia expect will find these relevant?

For a UX practitioner in the mobile business sector, this is an exciting challenge. Until then, I look forward to meeting whoever wants to take on the challenge. Nokia is rumoured to have created the perfect phone for Africa. I am looking forward to seeing it.



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