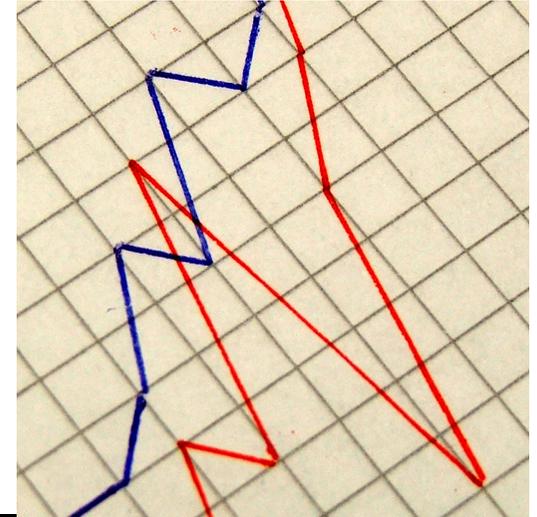
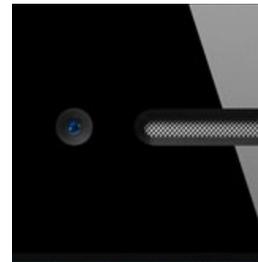


Connected world

Social skills in the classroom: digital media use in Sub-Saharan Africa



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For the world's fastest-growing Internet population the web is a social, educational and largely handheld tool. Brands must adapt their digital strategies to the available technology in order to succeed.

Sub-Saharan Africa boasts the world's fastest growing Internet population, increasing by over 2500 percent between 2000 and 2011. However, these consumers' experience of digital media remains very different to that of audiences in other markets, focused on less playful, more purposeful roles such as social networking, e-learning and banking.

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Digital life is mobile

Sub-Saharan consumption of digital media is predominantly mobile. The spectacular growth in Internet access for the region has been driven by even more impressive rises in mobile penetration. The 695 million mobile subscriptions in the region today equate to 65 percent mobile access, and represent a 4000 percent increase over the last 10 years. The expansion of mobile broadband and increasing competition between networks will further boost the availability and affordability of mobile web access through driving down the cost of both data plans and handsets. Four out of every five Internet users in Sub-Saharan Africa accesses the Internet via mobile phone, compared to one in three globally. Three quarters of Sub-Saharan Africans say they would be happy to do all of their Internet surfing via mobile phone (compared to just over a quarter in developed countries).

The region's typical mobile web consumer cuts a distinct figure, very different to the smartphone or tablet-

wielding archetype of more developed markets. He or she is typically younger (43 percent are aged 16-24, compared to 27 percent of web users worldwide), with lower spending power, and holds a Nokia or Samsung feature phone rather than an iPhone or Android handset.

Such differences have shaped a distinct approach to digital media in the region, with the popularity of different services and solutions often depending on their accessibility via mobile technologies such as WAP and SMS. Constraints on Internet access speeds and affordability mean a reduced appetite for online entertainment (only 6 percent of web users watch YouTube videos compared to 37 percent worldwide) and shopping (10 percent have browsed and 2 percent completed purchases online, compared to global figures of 37 percent and 24 percent respectively). Instead, Sub-Saharan consumers' use of digital media is focused on immediate needs, via platforms that can be accessed across a range of handsets.



of Sub-Saharan smart phone or tablet users aged 16-24



of worldwide smart phone or tablet users aged 16-24

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Social networks shape the web experience

Communication is the foremost of these needs and social networking is the digital channel that Sub-Saharan Africa's mobile web users turn to, in order to fulfill it. Social networking is the most important online activity for 58 percent of Internet users in the region, compared to 26 percent globally. Four out of five use Facebook compared to two out of five worldwide. Accessed relatively easily on a broad range of mobile handsets, there are signs that social networks are becoming the cornerstone of the digital media experience, used for sharing information as well as catching up. Significantly for advertisers, 70 percent of Sub-Saharan web users say that social networks are a good place to learn about products and brands.

Major role for information and education

Education and learning is the second most important use of digital media in Sub-Saharan Africa. The 18 percent of web users nominating knowledge-gathering and education as their most important



58%

of Sub-Saharan Internet users think social networking is the most important online activity



26%

believe this globally.

online activity compares to 10 percent worldwide. This reflects both the younger average age of the Internet population – and the role that the mobile Internet is playing in extending access to educational content to rural classrooms.



Tanzania case study

In Tanzania, the BridgeIT initiative, known locally as *Elimu kwa Teknologia* or Education through Technology, enables teachers to access a catalogue of educational video content using Nokia N95 mobile phones, which are then connected to classroom TVs.

The University of Pretoria In South Africa uses mobile technology to support its paper-based distance-learning programmes for postgraduate students in rural areas.

Dr Math, launched in 2007 and with 32,000 users in South Africa, provides a mobile tutoring service hosted via a free application, MXit and available for less than the price of an SMS. Although many mobile-based educational programmes are in their infancy, there is clearly strong demand for suppliers who can match quality resources to innovative forms of low-cost mobile delivery.

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Numerous studies have attested to the value of the mobile web in bringing market knowledge and information to remote rural communities. Establishing early-mover authority in such areas could prove an important strategy for mobile providers looking to retain market share. Nokia is one example, having recently launched its OVI Life Tools app to provide African consumers with affordable access to agricultural information, educational content and market prices.

Strong growth in mobile banking

Overcoming traditional barriers to opportunity is the driver of another significant use of digital media: mobile banking. This area has seen major growth since the pioneering launch of Safaricom's M-PESA in Kenya in 2007. M-PESA is now used by over 14 million subscribers in Kenya and a further 2.7 million in Tanzania. The platform, which allows customers to deposit, withdraw and transfer money via SMS using a network of M-PESA agents has conducted transactions worth USD \$12.75 billion and created more than 32,000

jobs. MTN has launched its own Mobile Money service across 12 African countries with 5.1 million registered subscribers by June 2011.

Mobile banking will continue to grow in Sub-Saharan Africa, powered by distrust of banks and the demand for safe, affordable financial transfers, often in small denominations. As the capabilities of phones increase, mobile banking may well become more sophisticated. Amongst Sub-Saharan web users, 65 percent say they are interested in Internet banking (compared to 27 percent worldwide); 70 percent say they are interested in banking via mobile phone.



14 Million

M-PESA subscribers in Kenya



32,000

jobs have been created since the launch of M-PESA



9.6 Billion

total transaction value since the launch in 2007 (\$)

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Immediate and future opportunities

Sub-Saharan Africa's army of Internet users is still a relatively small one at 12 percent of the total population, and it remains very focused on immediately practical, low-cost, mobile web applications. However, significant opportunities exist for organisations that can adapt digital communications strategies to fit this pattern of web use.

The reaction of mobile owners to the Somalian famine provides a demonstration of the role that social networks and mobile banking can play when aligned with broader awareness through offline media. Facebook, Twitter and SMS were used to mobilise support across Kenya's urban and rural populations after mainstream media initially raised awareness of the plight of Somalian refugees. Kenyans responded by donating USD \$67 million, with the majority of private donations coming through M-PESA

Market forces within the mobile industry will lead to continued strong growth in web access and to a broader range of opportunities for businesses targeting the online population. Mobile broadband access will rise with infrastructure investment (over USD \$70 billion infrastructure investment by mobile operators in 2012) and the reduced cost of handsets and data plans as a result of competition. Smartphones will play a greater role as they become more affordable: the Huawei Ideos smartphone launched in Kenya in 2011 sold over 30,000 units in its first month and mobile manufacturer HTC has announced its intention to launch a sub-USD \$100 Android smartphone into the region. However, the most significant area of increased opportunity is consumers' growing familiarity with the digital platforms available through their handsets. Most mobile owners in Sub-Saharan Africa have been using their phones for two years or less – and their appetite for a broader range

of digital platforms and functions is likely to increase as phones become a more familiar feature of daily life. At the same time, marketers must continue to adapt their activities to the capabilities of mobile handsets in different markets, as well as the broader characteristics of different countries and cultures. Exporting business models from other regions (or even other countries within Sub-Saharan Africa) is unlikely to prove effective. This is an extremely diverse region, and understanding of cultural nuances, demographics and different stages of digital development is crucial to creating engagement.



12%

of Sub-Saharan total population use the Internet

About In Focus

In Focus is part of a regular series of articles that takes an in-depth look at a particular subject, region or demographic in more detail. All articles are written by TNS consultants and based on their expertise gathered through working on client assignments in over 80 markets globally, with additional insights gained through TNS proprietary studies such as Digital Life and Mobile Life.

About TNS

TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long-established expertise and market-leading solutions. With a presence in over 80 countries, TNS has more conversations with the world's consumers than anyone else and understands individual human behaviours and attitudes across every cultural, economic and political region of the world. TNS is part of Kantar, one of the world's largest insight, information and consultancy groups.

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