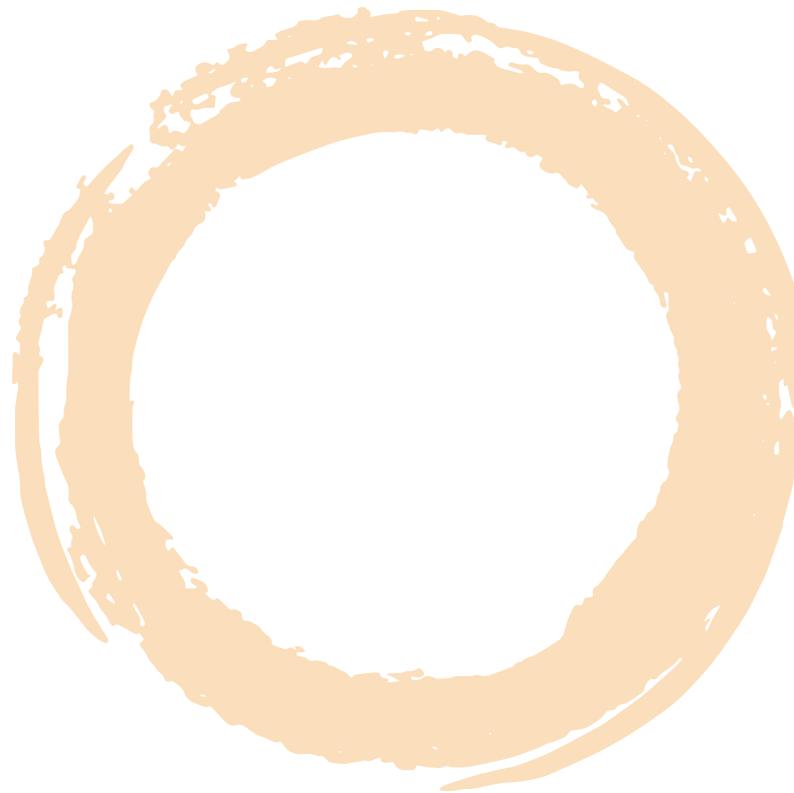
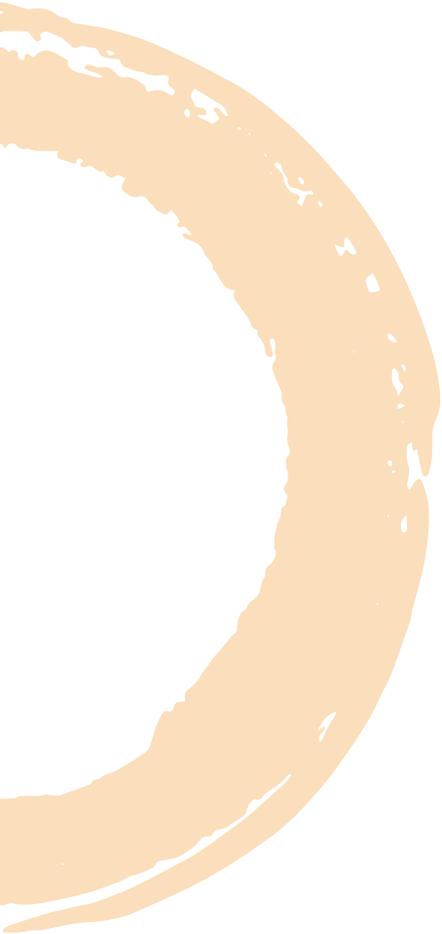




**THE  
STATE OF  
SUDAN DIGITAL  
2019**



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SUDAN  
DIGITAL  
2019**



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# ABOUT THE REPORT

Early in 2018 the first annual State of Sudan Digital was released on [www.SudanDigital.com](http://www.SudanDigital.com). With no meaningful marketing, the report was read by more than **64,000** people. **69%** of readers were from outside Sudan. **39%** of people were C-level executives. There were readers from some of the world's largest institutions: **McKinsey & co, Google Ventures, Facebook, The British Council, Shell and countless others**. In reality, the first annual state of Sudan Digital was a business case for the authors' investment into digital businesses within Sudan. We only decided to release the report to the public in order to help local digital entrepreneurs have access to basic foundational data that would help them in their ventures. Therefore, it came as a great surprise to see so many readers from such a diverse global audience. **Upon investigation, a few things became clear:**

1. There is a lack of independent data on the digital landscape in Sudan.
2. There is an interest in the entrepreneurial environment and potential investment opportunities in Sudan.
3. Sudanese entrepreneurs need more insights into digital development opportunities in Sudan.

**The State of Sudan Digital** in 2019 will be globally distributed across multiple channels. We aim to highlight the current scope of digital acceptance within Sudan, accelerate digital adoption within Sudanese organizations, and attract investment in both funding and knowledge into Sudan, particularly to support budding Sudanese entrepreneurs. **There are no paid sponsors of this report neither in cash nor kind.** Adverts within the report are either for businesses that are currently part of AMC group, existing well established technology focused Sudanese organizations or up and coming digital startups.

We hope that you find the report insightful and welcome any feedback for the 2020 version of this report .

# Sudan Digital

Sudan Digital is a leading Digital marketing agency in Sudan working with global brands to access local and global consumer .

## OUR SERVICES

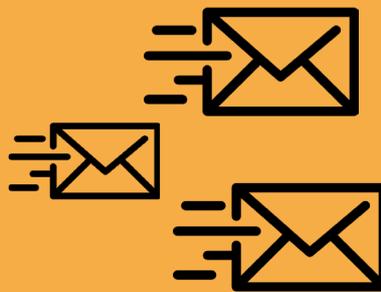
### DIGITAL MARKETING

Access Sudanese consumers with in app advertising .



### EMAILS

A Large database of Sudanese email address creating incredible awareness campaigns.



### SOCIAL MEDIA

Strategy, creative management and delivery of social media campaigns across all platforms.



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[Lumyaa@SudanDigital.com](mailto:Lumyaa@SudanDigital.com)

+249 122 718 859

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**M3ROUD**

Full Design, Marketing Social media, digital ads, events



**HEALTH TV**

Content creation, Social media, Digital advertising.



**CAREEM**

Digital app acquisition.



**LEMON APP**

Digital app acquisition.



**DUNLOP**

Social, Digital app acquisition.



**FALKEN TYRES**

Social Digital app acquisition.

# ABOUT THE AUTHORS

## Abdelaziz Mohammed Abdelaziz Musa



**Abdelaziz** moved to Sudan in 2017 following a 20-year career spanning the UK, USA, Australia, France and Dubai. He is a graduate of the Prestigious Warwick Business School (a **Global top 20 MBA program**), from where he obtained his MBA, and wrote a published dissertation entitled “**How Big Companies Grow Small**” an assessment and recommendation plan for creating innovation in different organizational structures. At the time of writing this report, Abdelaziz is the Chief Commercial Officer at Canar Telecom, where he transformed their commercial and marketing function and led the business to realize triple digit percentage growth in new customers in the first year.

Prior to this, Abdelaziz was the CEO of Forbidden Technologies plc, a cloud video infrastructure company. He was the youngest public company CEO in the UK and the only Sudanese plc CEO in Europe at the time. He led Forbidden Technologies to becoming one of the fastest growing companies in Europe following signing a multiyear agreement with Microsoft. He also negotiated agreements with NBC, Amazon and the BBC among many others.

Prior to this, Abdelaziz ran a digital agency in the UK called Pegasus Digital, part of the renowned Pegasus Agency. He has also been the General Manager of PhotoBox Australia, Global Product Strategy Director at PhotoBox Group, Director of Product Marketing at Reed Business Information(part of Reed Elsevier plc) and had several leadership roles at lastminute.com.

Abdelaziz is a digital leader who has grown several companies from nothing, and has a proven track record of generating rapid growth and high performing teams. He specializes in digital transformation, marketing strategy and creating high growth companies using a multidisciplinary approach.

**In his own words:**

*“The response from the last report was unbelievable and there is a real interest and desire in Sudan’s digital landscape, especially from international businesses looking for future investment opportunities. We hope that this report helps to highlight those opportunities, as well as highlight the upcoming digital businesses that will make a difference to Sudan over the coming years.”*

# Lumyaa Kamaledeen Majzoub

**Lumyaa** is CEO of AMC Group, and CEO of its subsidiaries including **Sudan Digital**, **Wfir** and **M3roud.com**.

She was a judge on Mashrouy (Sudan's equivalent to BBC's "The Dragon's Den") and works regularly with digital startups to improve their effectiveness.

Lumyaa is a Graduate of The **University of Khartoum** where she received a first class honors degree in Finance and Accounting Management. Following her degree, she pursued a career in marketing in the UK. Whilst in Sudan, Lumyaa's focus has been on acquiring, mentoring, and investing in digital startups and growing the AMC group with the aim of becoming a leading Digital Player in Africa. Whilst in the UK, Lumyaa worked for a number of digital companies including Captevate, the world's simplest online video editing solution, eva a social network



designed for millennials and Forscene a professional broadcast solution. During her time at these companies, she developed new methodologies for B2B marketing and Social Media Management.

Lumyaa is an expert B2B marketer, using a range of techniques both digital and traditional to collect data, segment and deliver targeted marketing communications designed to drive leads. She has an exceptional record of driving new leads, engaging prospects and closing large contracts.

**In her own words:**

*“Working with Digital Companies in Sudan has been an extraordinary experience. We have seen with this report that the digital landscape is both underutilized and growing. The future of Digital in Sudan is bright and AMC group aims to lead the market in multiple digital verticals through organic growth and acquisitions.”*



# EXECUTIVE SUMMARY

The State of Sudan Digital 2019 aims to; highlight emerging and existing digital businesses within Sudan, offer a platform of data for new digital businesses to guide their development, and attract interest and investment in digital businesses both from within and without Sudan. The data used in this report is collected from a digital survey complete by digital users within Sudan, a street survey completed by non-digital users within Sudan, and interviews with business leaders.

In order to understand Sudanese digital behaviors it is important to understand Sudanese society and cultural nuances. In Sudan, entrepreneurialism is as much a choice as a necessity for new graduates. There are a limited number of opportunities in existing firms both within Sudan and abroad, as well as a fluctuating economic environment. Digital offers a simple, low cost method for graduates to start up and enter into a market. This has, in part, fueled a large number of digital startups within Sudan over the past 12 months.

This growth has created a gap in the digital experience required to run digital businesses. This gap is most often filled by accelerator programs, or angel investors. Haggar Group, The Embassy of the Netherlands and The British Council have run some exceptional accelerator programs. Yet a gap in the business knowledge required to drive digital businesses is still lacking. An influx of angel investors willing to dedicate time (more than funds) to mentoring digital startups would make a significant impact on their commercial viability.

The digital landscape in Sudan remains similar to 2018. Android users make up 68% of the market, and this is predominantly driven by 2 factors: the relative difficulty in maintaining iOS devices and the market norm of having dual sim devices. Laptops remain the most used devices at home, with 79% of those having access to a computer

at home using a laptop. The Ride Sharing market is becoming saturated, and there will likely be market consolidation in the coming 12 months. The entry of Careem into the market has forced new market dynamics to become apparent. Specifically, it is clear that price competitiveness remains a core market driver, but also the quality of both the digital and physical experience. The largest lever to brand selection in this space is pricing model (rather than price). Players that have a fixed cost model based on distance rather than time have a significant advantage. The second largest driver of brand selection is ride acceptance rates. The impact that ride sharing has had on Sudanese life cannot be underestimated. Brands such as Tirhal are now used as a verb. There remains horizontal growth opportunities in the market with solutions such as food delivery being leveraged by some players. A core corporate success factor here will be in speed to market of solutions, and this is related in part to corporate and ownership structure. Lemon Labs (owner of Lemon Taxi) are well positioned to exploit other horizontal markets quickly.

2018 has been a busy year in ecommerce. Two large telecom operators, Zain and Sudatel entered the market with their ecommerce brands 3amir and Soooqna. This complemented existing players such as M3roud and Platform. The ecommerce market remains in its infancy in terms of sophistication, service, usability and business model, however it is ripe for significant growth. Only 8.6% of the digital community have ever bought a product from an ecommerce company, and only 48% have ever visited an ecommerce website. However, 94% of those same digital users have an intention to buy regularly from ecommerce as long as trust and simplicity of transactions can be achieved. Juxtapose this data with the fact that 82% of digital users have bought products being advertised on Facebook, WhatsApp and Instagram, and it's clear to see there's a large opportunity for ecommerce players in the market. In January 2019, AMC group (Owners of Sudan Digital) acquired M3roud.com with the aim of growing the ecommerce market.

There has been a rise in the number and usage of food delivery platforms in the last 12 months. 54% of digital users have ordered food delivery via an app or website, and the customer experience is improving. The challenge in this sector remains the ability to have a range of restaurants covering the large geographic span of Khartoum, and having a business model that can drive good margins. Restauranteurs remain slow to adopt to this changing model which prevents any single player becoming dominant in this space.

One of the key drivers to the amount and quality of digital startups occurring in Sudan is the exceptional work being done by shared workspaces and other entrepreneurial focused organizations. For example, by taking the lead in developing the Social Enterprise Framework, the British Council has brought together entrepreneurs from around Sudan. Their TV show Mashrouy (Sudan's Equivalent to The Dragon's Den) has generated some exceptional new business ideas, and our hope is that it will help to attract angel investors into Sudan to leverage their digital knowledge to help some of these businesses realize their potential.

Since the 2018 report, knowledge of digital concepts such as SEO and in app advertising has increased, and this has been due to a number of factors. The excellent work of 249 Startups, Impact Hub and Riaed Club has helped make digital knowledge accessible to many. Also the 2018 State of Sudan Digital report has helped people access the types of learning they require to create lasting digital businesses.

The State of Sudan Digital 2019 reflects a country going through a large change in attitudes and behaviors around digital technologies, similar to the changes seen between 2003-2007 in the West. This has created opportunities for new business entry and investment into a large and growing digital landscape. A missing piece of the jigsaw is digital experience, and therefore investors willing to put time into their investments to help deliver business change as well as digital change are likely to see positive returns on their investment.

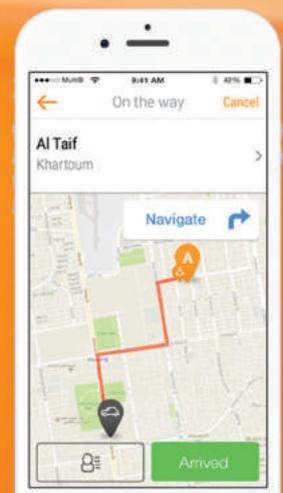
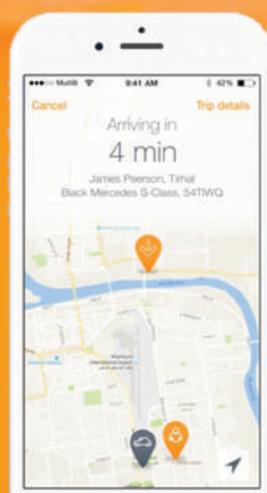
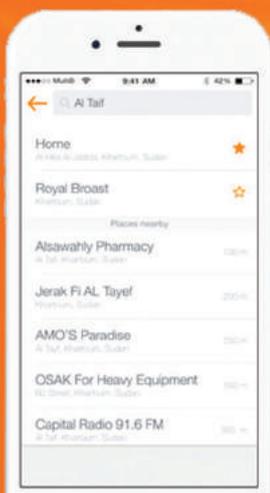


# تيرحال

*Tirhal is the leading Taxi service in Sudan.*

*Wherever you are in Sudan, Khartoum state, Wad Madani, Elobeid and Portsudan ... Call us and get in touch. With Tirhal you can book an Economy, Saloon, Van, Double cab, Amjad, Two truck or Prestige car - as you need. As we have an exclusive option for ladies. The app automatically calculates the cost.*

*You can also book for another person. Our drivers are skillful and registered. We are with you up till the end of your journey. All of this happens safely and comfortably with Tirhal. Soon you will find us in the rest of the states of Sudan.*



# DATA COLLECTION

## METHODOLOGY

Data collection for this report began in July 2018 using 3 primary methodologies. Firstly the Annual State of Sudan Digital survey. This digital survey was distributed across multiple digital channels. It was also distributed internally with several large organizations within Sudan for staff to complete. Critically, this was a digital only survey, meaning it could only be completed by those with some form of digital access, be it email, social media, or adverts via Google Display Network. The data from this collection source represents how current digital users experience the digital landscape within Sudan. These users will be referred to as “The Digital Community”, and represents more than 12mn people in Sudan. Over 1,000 people engaged with the digital survey.

The survey was limited to existing residence of Sudan, of Sudanese nationality. Secondly we conducted 20 C-level interviews with CEO’s and CXO’s of large organizations, as well as with founders of digital start-ups. Street surveys were conducted, with the aim of accessing the non-digital majority and exploring their perceptions of the digital landscape. Finally months so desk research and data collection from various NGO’s and Government Ministry’s have helped to add some detail into the report.

Finally we also conducted a range of mini experiments to test the value created by specific verticals. For example in the rideshare market, to determine what drives perceived customer value, we engaged in more than 30 test rides across different platforms. This allowed us to better understand the data collected from the research and add firsthand experience into the analysis. Where this data was used, it is clearly marked in the report as a ‘mini experiment’.

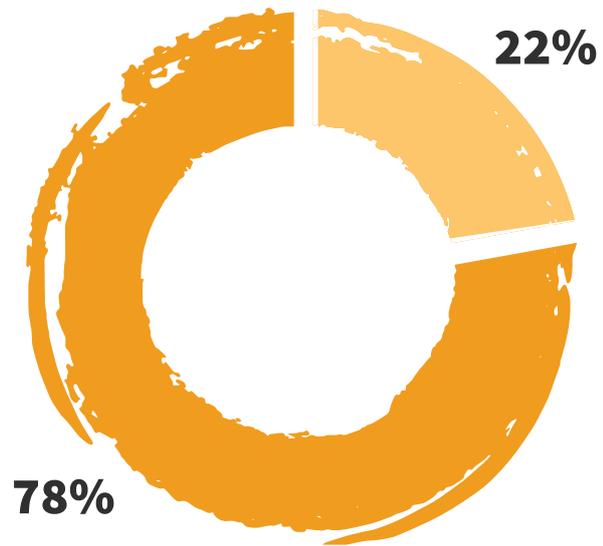
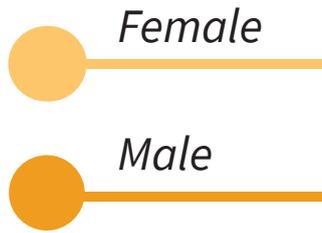
## RESPONDENT DATA

78% of respondents to the digital survey were male. This represents an over sampling of male respondents. As with other countries around the world there is a concerted effort in Sudan to engage women into technology roles and entrepreneurship. The challenges in Sudan are somewhat different, as cultural biases create a gender gap.

For example, the telecoms sector. Given that the telecoms sector deliver a large number of graduate roles, this causes some disparity across the genders. There is a cultural reason for this disparity: the majority of Telecoms Engineering roles involve a lot of outdoor work. This kind of work isn't necessarily suited to Sudanese women culturally, however there is also a concerted effort by all the telecoms companies to be gender neutral when offering these roles, particularly in the graduate training programs and they should all be commended for this.

The majority of respondents were Millennials or Generation Z which directly reflects the population of Sudan, in that more than 70% of the Sudanese population are under the age of 36. Comparatively there is an over sampling of Generation x, and an under sampling of Baby Boomers and the Greatest generation. This reflects digital adoption trends both in Sudan and globally whereby there remains a challenge of digital inclusion for elder generations. This challenge is twofold in Sudan: firstly the need for greater digital adoption across all generations, and secondly the challenge of digital adoption within the elderly. Given that much of the digital innovation that currently exists within Sudan is focused around healthcare, the service sector and agriculture, this should be a core focus for all digital entrepreneurs.

## Your Gender

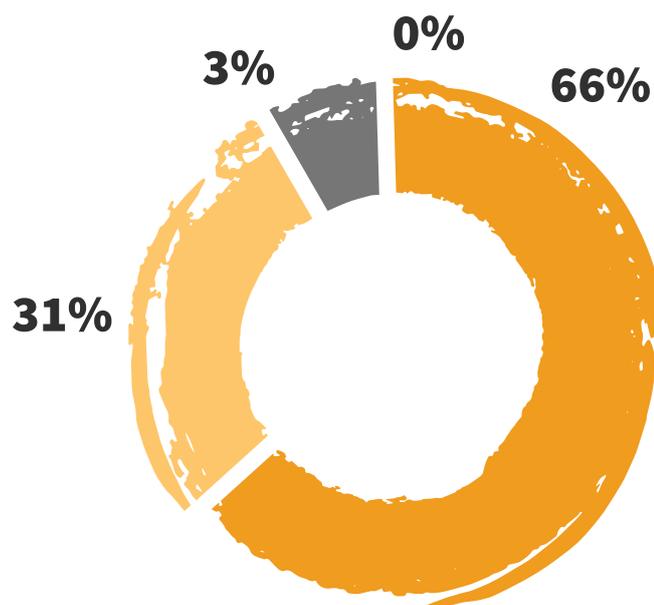
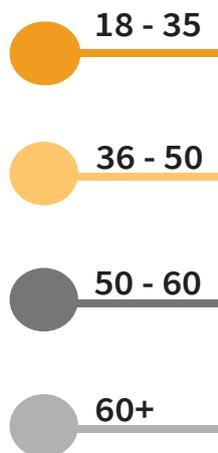


64% of respondents are working at a company, with 26% self-employed. Identifying

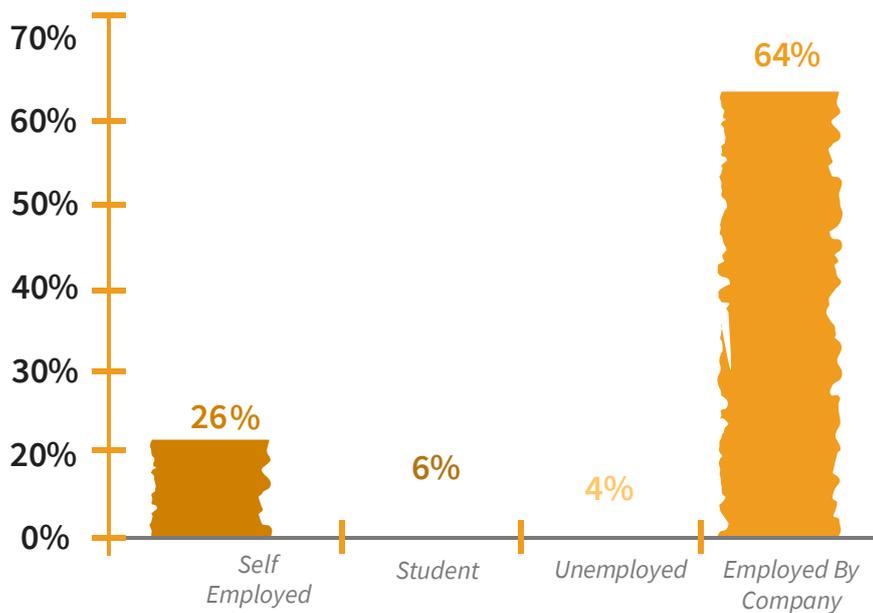
work status is somewhat more difficult in Sudan compared to other countries. In Sudan it is very common for people to have multiple jobs. For example, of the 26% of respondents who identified themselves as 'self-employed' 85% actually also have another job. Conversely of the 64% of those who identified themselves as 'employed by a company' 72% also have a secondary income. This income need not always be a personal venture, it could be as simple as being a driver for a ride sharing firm or working as a teacher or trainer.

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## Respondants Age Range

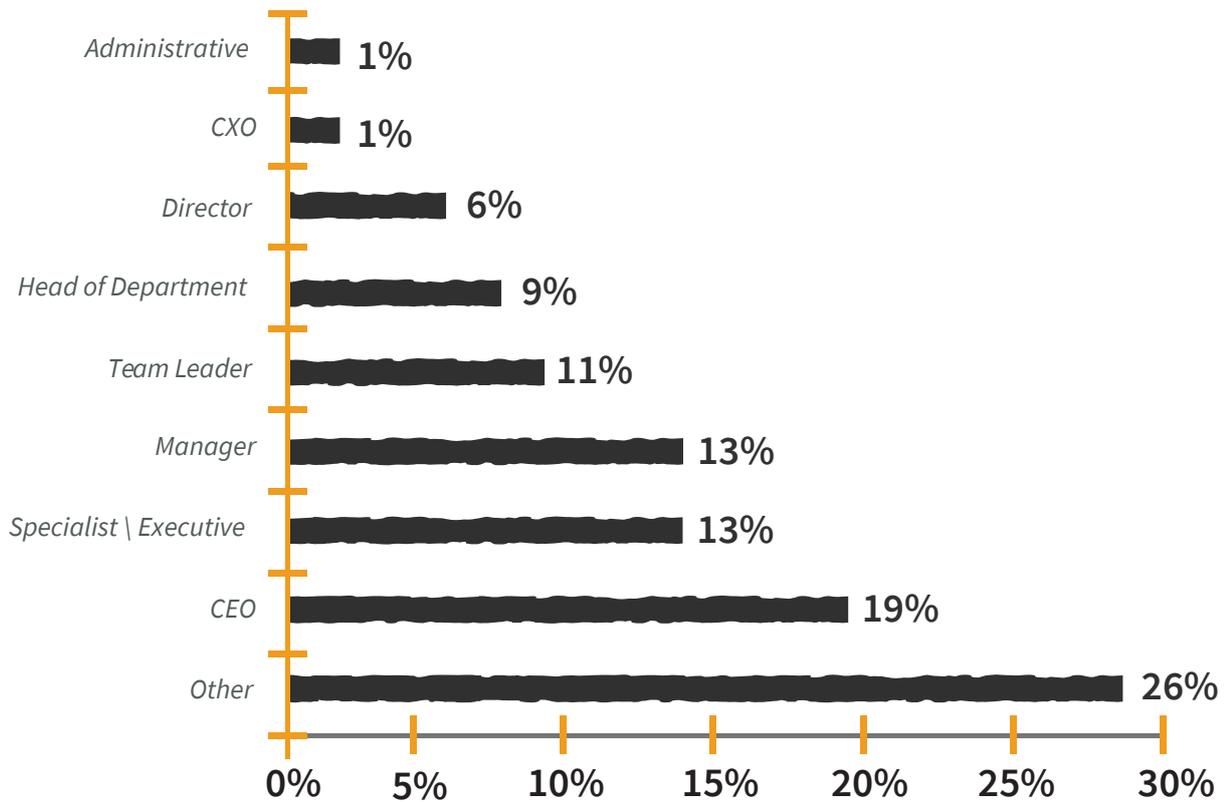


## Respondent Work Status

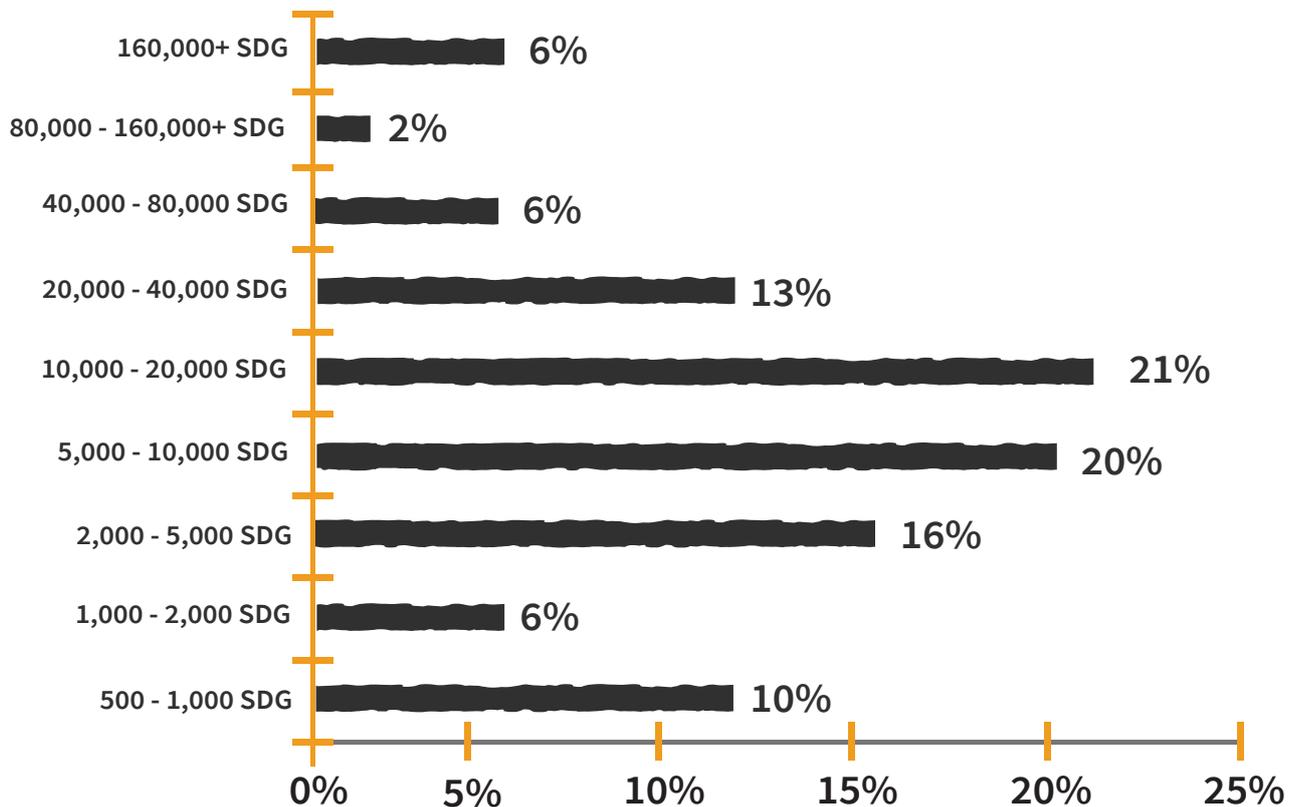


In this report there has been a significant increase in the actual number of junior to mid level employees and students engaging in the report. In 2018 the majority of respondents were CXO level, and whilst the actual number of CXOs responding to this report has increased, the percentage has declined due to a significant rise in the number of students and junior employees engaging in the report. This is reflective of a surge in interest in entrepreneurship and digital businesses over the last 12 months. The initial catalyst for this interest was companies such as Mishwar and Tirhal, but over recent months, dedicated efforts by the British Council, 249Startups and companies such as Sudan Digital, have increased awareness and opportunities for young people to see digital startups as a valid career route. Upon investigation and interview it became clear that the main reason cited was: “There’s very little cost to starting a digital business, and basically they can compete on a level playing field” Abdul Hai Ali Hamid (CEO Op-tric). This theme of ‘ Digital being the great equalizer’ appears regularly throughout this report.

## What Is Your Current Role ?



## What Is Your Current salary range ?



# CULTURAL NUANCES

## USE OF SOCIAL MEDIA

Sudan is a society built on social connections. These connections extend into social media, and create behaviors that would seem alien to other cultures, including other Arab cultures. The Sudanese are extremely, personable, friendly and generous. They befriend each other instantly, and social connections are such that it is likely that upon meeting someone for the first time, within the first 10 minutes an existing social or family connection will become apparent. This leads to differences in the use of social media. It is completely normal to 'friend' someone, or 'connect' with someone that you've never actually met before; the assumption being that with some contact or other there is a family or friendly connection. Furthermore, it may be considered rude or inappropriate to not welcome a new connection with a direct message, tweet or Facebook messenger message. Imagine this following scenario: You receive a Facebook connection request from someone you've never met. Within minutes of accepting the invitation, the person sends you a message saying something like "Salam Alaykum Mr x". You respond with "Alaykum Salam" (as is religiously and culturally required). What ensues would be a 30 minute conversation about anything from football to family. Now imagine this happening in the US or UK. It is almost impossible to consider that this sequence of events could happen outside of Sudan within the receiver assuming that the sender 'wants something'. In Sudan this is completely normal.

## A TRUSTING SOCIETY

Sudanese are a trusting society. They assume that their business partners, friends or family are always well intentioned. They also forgive quickly. On an almost daily basis whilst driving you can see a small accident or 'fender bender'. The conversation between the two drivers normally goes something like this:

“Are you ok?”

“Yes, praise to God. Are you ok?”

“Yes, praise to God. Thankfully we’re both ok.”

And then the drivers drive away, unless there’s a need to involve insurance companies. There’s no drama, no arguing, the two drivers primary concern is for the health and well-being of the other driver regardless of who is to blame. Whilst this doesn’t always happen, and there are occasions where discussions get heated, in the main, Sudanese believe that people are generally good and nobody wants to harm anyone else.

This trust extends to interactions online. When purchasing goods via Facebook, Instagram or WhatsApp groups, there is an enormous amount of trust that exists between the buyer and seller. However this trust extends beyond the financial interaction and stems from deep rooted cultural nuances. Perceived fraud does occur with social media transactions, and there two main types:

1. A genuine misunderstanding as to what was being bought and what was being sold. This is the majority of failed trades that occur and is normally settled amicably.
2. A genuine case of someone being defrauded out of either cash or a product. This is extremely rare, and we had to really search to find any cases at all.

That such cases are so rare is bizarre given that the technologies themselves could be easily manipulated for fraudulent purposes. However, the strength of social connections as well as cultural and religious influence create a set of unwritten red lines that society abides by.

This trust extends to the consumption of news and media. News spreads rapidly via WhatsApp. Without any journalistic rigor, the reality is that much of these news stories are fictional or misleading. Nonetheless, the news spreads quickly and there is consumption and ‘chatter’ around the specific story. To a layman, it may appear that Sudanese believe this news without questions. The reality is different. Almost everyone knows

that the news is likely to be fake, however the chatter acts as a source of entertainment. It becomes a reason to talk to the person next to you whilst having a coffee, regardless of the news' authenticity.

## ENTREPRENEURIALISM AS A CHOICE

Unemployment is high in Sudan particularly with Graduates. Globally, times of crisis fuel entrepreneurialism and innovation<sup>1</sup>, and Sudan is no different. Students and graduates are looking at entrepreneurialism as a career choice. Particularly those graduating from an engineering or computer science degree. This is fueling a movement of new highly motivated, but inexperienced entrepreneurs. This is encompassed best by Magdi Taha "These entrepreneurs are not working as individuals, they're working as a movement. This movement is growing, and it's becoming a wave, and this wave will disrupt many larger organizations in Sudan over the coming years." Digital is the great equalizer and their ability to use digital business models to create value from very little investment is attractive and for many necessary.

## KNOWLEDGE VS APPLIED KNOWLEDGE

Sudanese graduates are highly intelligent, and there remains a kudos associated with going to the ‘right’ university, and studying the ‘right’ course. Typically, the greatest kudos exists in medicine and engineering. At AMC we have a focus on employing new graduates where ever possible. Whilst grades remain an important success factor we measure, there are a number of challenges we face when employing graduates. Some are unique to Sudan and others match global trends:

1. **Lack of soft skills:** Soft skills such as presentations, holding conversations, organizing workloads, holding meetings and interpersonal skills are lacking. Specifically as it relates to digital, EQ needs development. One core premise of a digital startup is the concept of fail “fast, learn fast”. This requires a great deal of emotional intelligence, to allow the entrepreneur to let go of ideas as quickly as they are disproved through real data. This leads to a significant investment being required on training the basic soft skills required to meet the needs of a modern work environment.
2. **Applied Knowledge:** Graduates come with a large amount of knowledge and data that they have often memorized verbatim. However they are sometimes unable to apply this knowledge into a real work setting. A regular conversation we have with our graduate trainees is around market segmentation and its importance in marketing. Typically, a graduate will state how important it is to do billboard advertising. When we explain that our target customer is more likely to see an ad on their phone than on a billboard, and go through our target marketing methodologies, almost always the reply is “yes, we learned this in university. I never knew you could apply it to an actual business.” This lack of applied knowledge creates a gap between education and industry. This gap is filled by cultural norms which often go against best practice.

3. The Millennial Problem: Every country and organization in the world is either going through or has gone through the millennial problem. Essentially millennials are digital natives. The world of digital is one of instant gratification, and this contributes to a need to achieve immediate results for millennials. The business world is based on strategic decision making, that by their nature take time. Millennials therefore get frustrated quickly at a perceived lack of progress. This challenge is in no way unique to Sudan, and its solutions are based in industry. It is our responsibility as industry leaders to fill that gap through coaching and training, as well as to harness that impatients to drive rapid change.

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*M3roud.com is a Sudanese online store that helps its customers Be Unique. We source handmade goods from around our beautiful country and bring them straight to your door. Our partners across Sudan work tirelessly creating exquisite handmade gifts, accessories, fashion and furniture to make sure you stand out from the crowd.*



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BE UNIQUE



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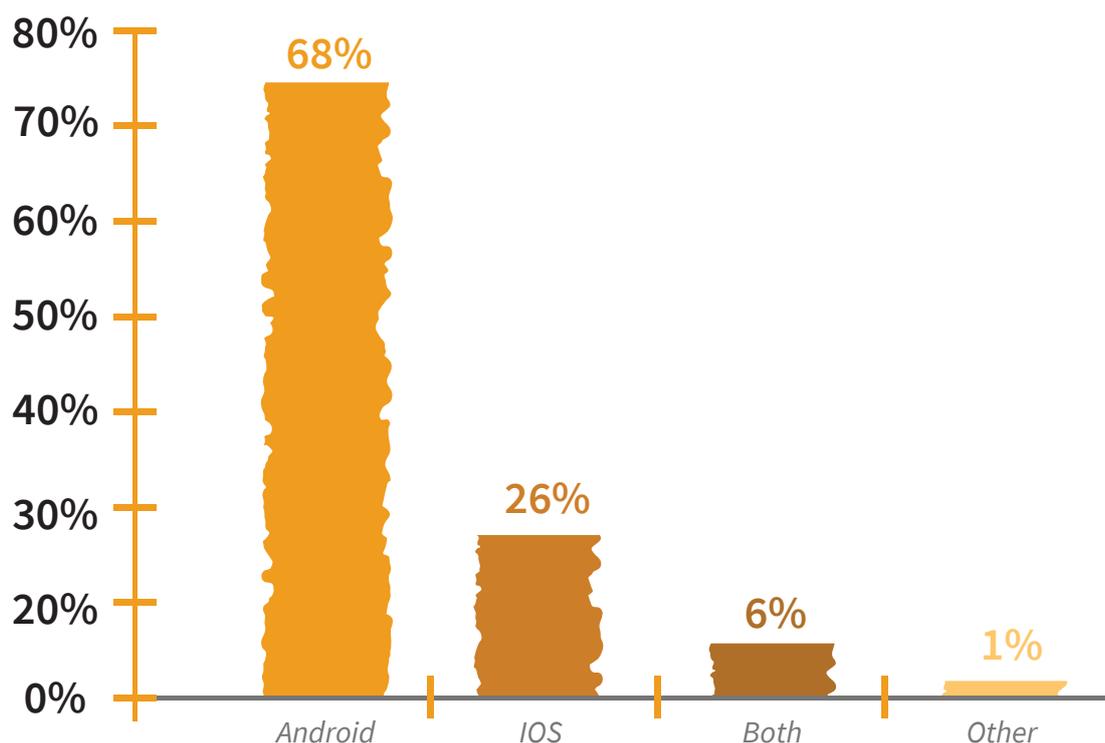
# DIGITAL LANDSCAPE

## MOBILE OS

Android phones remain the most popular in Sudan amongst the digital community, for a number of reasons; Firstly the comparative price difference and range of feature phones available. Secondly, despite sanctions being removed in October 2017 iOS remains blocked for Sudanese users, therefore updating apps, downloading apps and accessing iCloud can only be achieved via a VPN, and finally because the market standard in Sudan is to have 2 sim cards which is currently unsupported on iOS devices. The prevalence for dual sim devices stems from some operators having better phone and SMS tariffs, whilst others having better data packages. Therefore switching between operators is common in Sudan.

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### *What Mobile OS Do You Use ?*

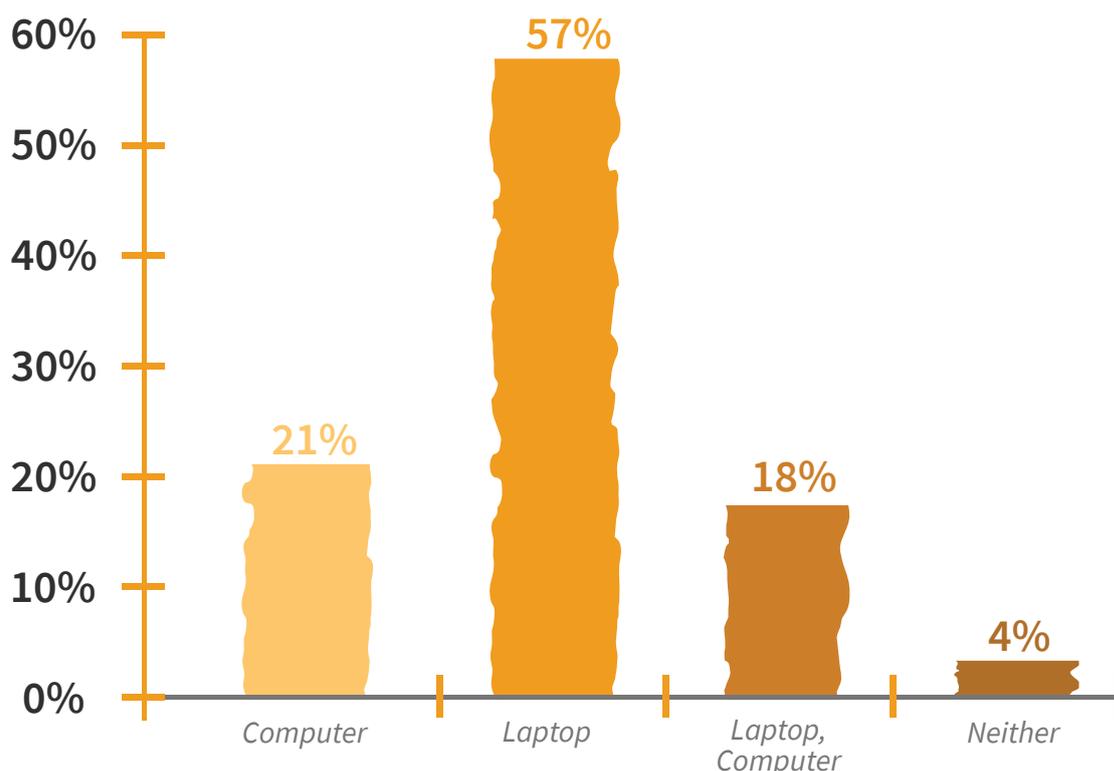


## LAPTOPS & DESKTOPS

In total 24% of the Sudanese households have either a laptop or computer at home<sup>2</sup>. However, in a work environment, laptops are most prevalent within the digital community. It is common within some organizations to have shared desktop computers which either run legacy products that are only available on that computer, or that are used for high powered computing tasks such as SPSS or other statistical analysis solutions.

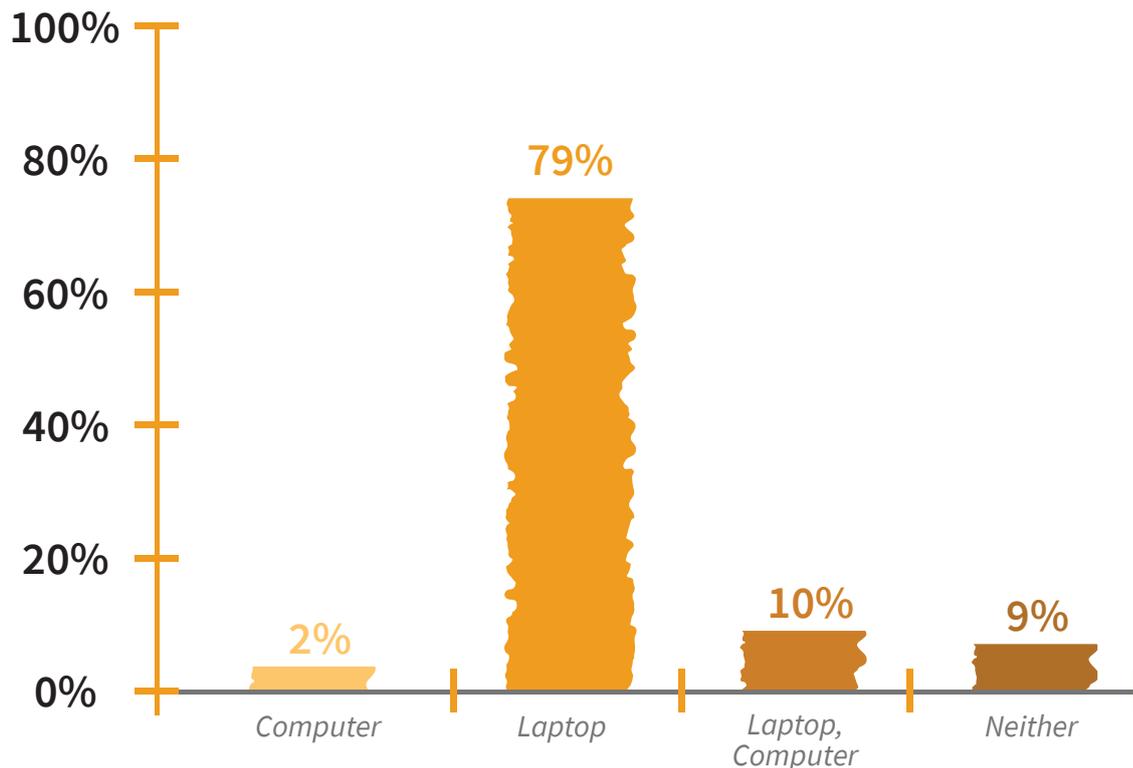
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### *At Work Do You Use a Laptop Or Computer ?*



At home 79% of the digital community use laptops. This is important when considering both web design and digital advertising. The use of a desktop at home is limited. Upon investigation, this is for a number of reasons.

## At Home Do You Use a Laptop Or Computer ?

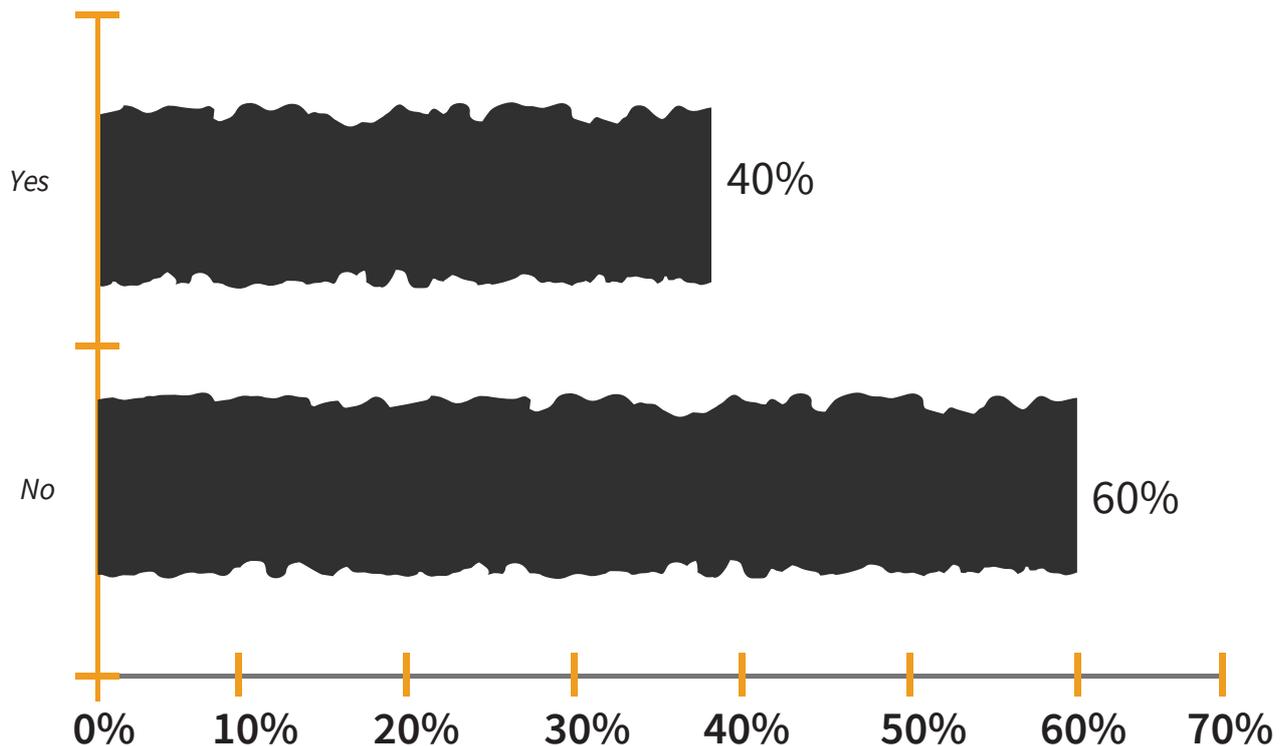


The relative computing power required for home computing is limited, therefore there are no real advantages to having a desktop computer. Whereas there are major disadvantages, such as mobility, space required to house the desktop, the risk of failure due to dust accumulation and most importantly the risk of data loss due to power cuts.

## TABLET USAGE

Tablet usage has increased over the past 12 months, from 25% of the digital community owning a tablet to 39% in 2019, this represents a 56% increase year on year. There are significant advantages to owning a tablet, especially as a student. Most of the large universities now offer course texts on digital media, be they PDF, PowerPoint or any other format. The ability to access this media on the move is a great advantage to students.

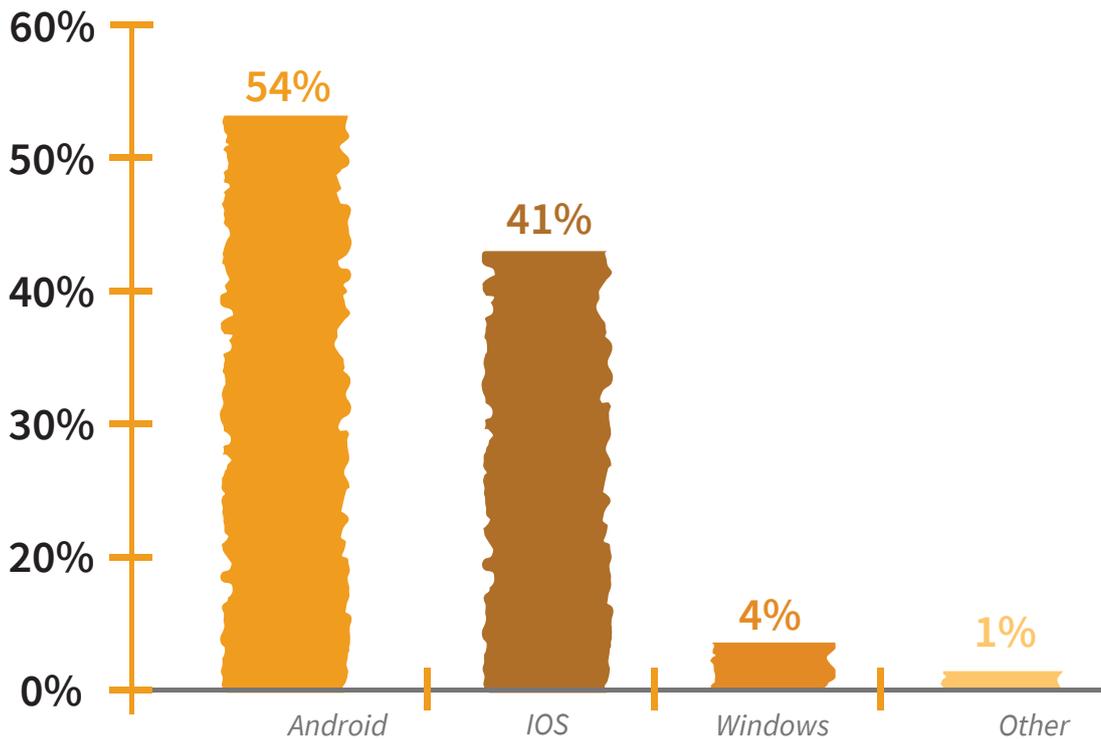
## Do You Own A Tablet ?



The majority of the growth in 2018 has come from Android tablets. Samsung and Huawei are both major local players serving this market. However, there is a large market of second hand tablets sold via social media groups, as well as a significant growth in the number of computer hardware and software stores available in the markets. **iOS remains difficult to maintain and update in Sudan for 2 main reasons:**

1. There is still limited access to the iOS app store which creates the need to use VPNs when using an iOS device
2. Most iOS updates require at least 1GB of data usage. Whilst ostensibly, this is not an issue, what is an issue is that most internet service providers have a daily fair usage policy limit of less than 1GB making it difficult to update to the latest iOS version.

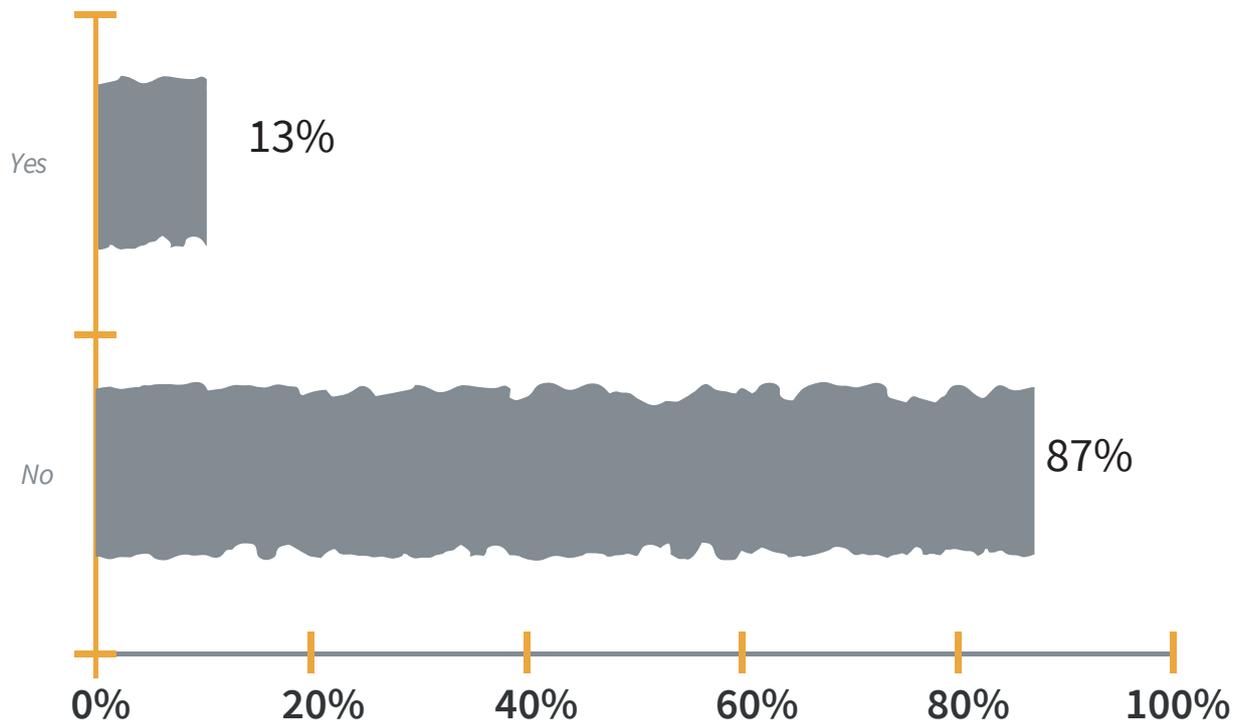
## Which Operating System ?



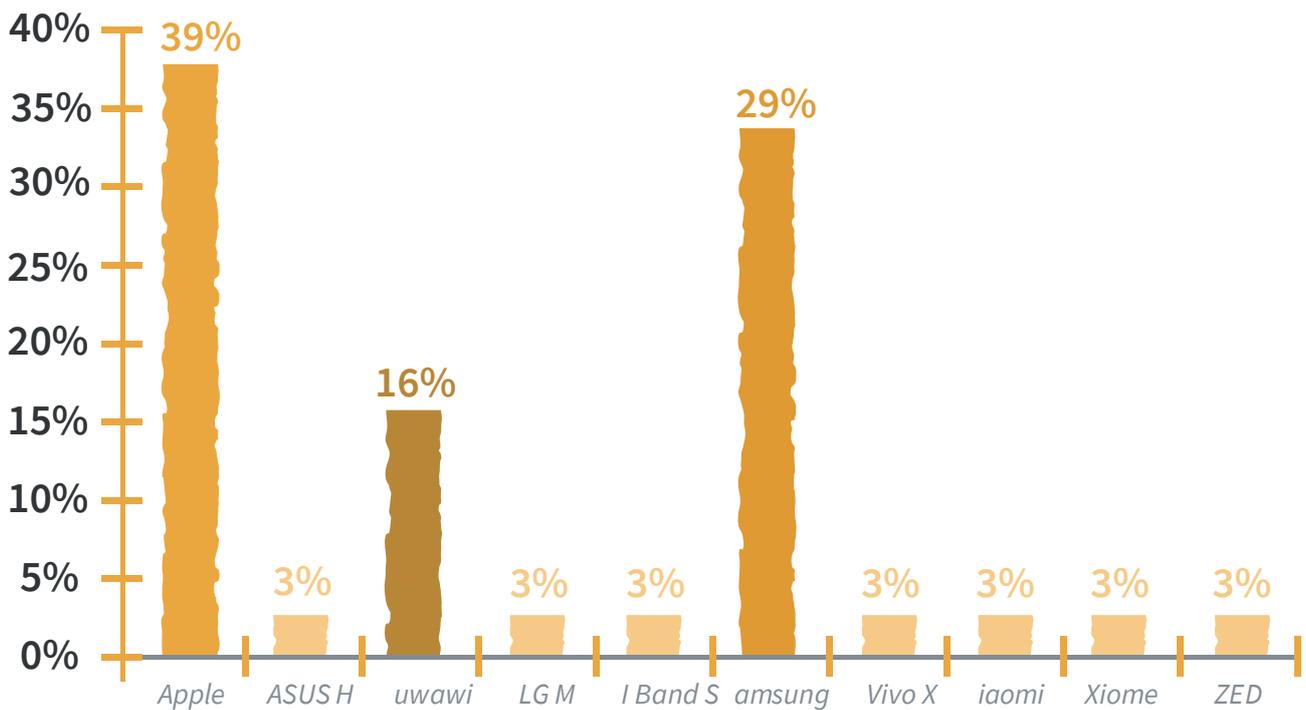
## SMART WATCH USAGE

Smart watch usage remains almost entirely within the digital community. 98% of all smart watches are sold to those with an existing digital footprint, and this will likely remain unchanged. However, unlike other hardware verticals, Apple Watch dominates the smart wear landscape. In fact, 86% of iPad users also own an apple watch. Compare this to 22% of iPhone and iPad users globally who own an Apple watch, and it's easy to see why Apple could have a significantly larger share of the Sudanese market if it so desired<sup>3</sup>. What's more, from our research, Apple customers in Sudan would likely have a 10-20% higher LTV (Life Time Value) compared to Apple customers in the rest of the GCC, due to their desire to create a total Apple ecosystem including iMac, iPhone, iPad, Apple Watch and Apple TV. It appears that in Sudan, Apple truly is the forbidden fruit.

## Do You Own A Smart Watch ?



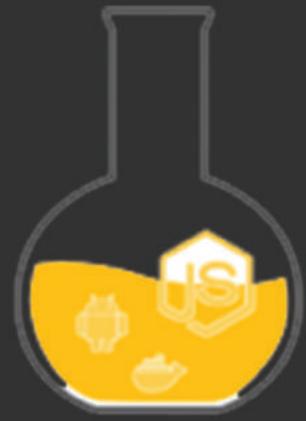
## Which Brand ?



## SECOND SCREEN TECHNOLOGIES

There are currently limited use cases where second screen technologies are augmenting TV viewership within Sudan. This is mostly used for international TV formats such as Arab Idol and Arabs Got Talent, as well as other similar format shows within the GCC region that are broadcast in Sudan. To that end, there really hasn't been the advance of second screen usage in Sudan as we have seen globally. This is partly because media companies' understanding of the use of social content and second screen technologies' impact on viewership and audience stickiness remains limited. This is a trend we see regularly throughout the research: Larger organizations are missing the social and digital revolution, and it is being powered and driven by young entrepreneurs and students.





# LEMONLABS

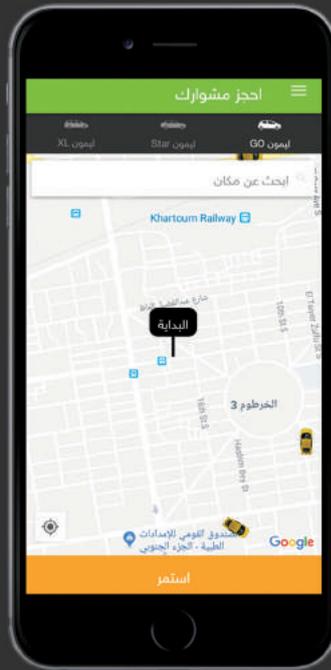
# LemonLabs

*LemonLabs is a transportation and delivery company, based in Khartoum, Sudan.*

*The vision is to build 'Lemon' platform/ecosystem, as a mobile on-demand services, connecting providers with consumers & mainly focusing in transportation, delivery and logistics sectors.*

*Currently we manage two successful services:*

- *LemonTaxi: a ride-sharing & taxi hailing service.*
- *LemonFood: a food delivery service.*
- *LemonBus (coming soon): a public transportation service.*



+249-900940222

admin@lemonlabs.sd



# RIDE SHARING PLATFORMS

## DISCLAIMER – SUDAN DIGITAL

*Sudan Digital has worked as a digital marketing partner for both Careem and Lemon Taxi.*

## THE RIDE SHARING LANDSCAPE

The Ride Sharing market landscape is a credit to entrepreneurialism in Sudan. It began with Mishwar, who were followed by Tirhal. There were then more than 30 different ride sharing solutions in the market until Careem, the global billion dollar company entered the market. This market is the perfect exemplar of how digital solutions can disrupt an existing market, and grow the market significantly to the point of creating new market segments, and engaging customers who would typically not engage in the market at all.

## ALL IN THE EXPERIENCE

As part of this study we conducted a range of experiments to understand users buying behaviors and levers to success in this market. We began by reviewing success factors leading to a successful ride request. Careem had a 95% ride acceptance rate in our studies when a car was available within the request location. However it also had 15% less availability of vehicles in Bahri and Omdurman than the other main players in the market, although this availability is improving almost daily.

Their ride acceptance rate was extraordinary compared to the average which was just 48%, with the lowest player in the market having just a 10% acceptance rate in central Khartoum. This leads to one of the core differences in market approach that Careem has brought into Sudan.

They encourage their drivers (otherwise known as Captains) to consider Careem a career rather than a stopgap. They do this with a range of incentives and a clear Captain driven business model that encourages not only Captain's to drive revenue but also to drive a high value customer experience.

Careem entered a relatively mature market and the standards were set by Mishwar then Tirhal. One such standard is the setting of a journey price at the beginning of a trip regardless of traffic, detours or delays. This heavy customer focused approach created extraordinary levels of loyalty within the consumer base. In fact, during surveying, when asked how many ride share applications users had on their phones, the average user had 2.6 ride sharing apps. 94.7% had Tirhal on their phone. When asked what happened if they couldn't find a Tirhal for their trip, the most common response was "wait until a car is available" (46%).

The responses were interesting to us for a number of reasons. Careem's customer experience is undoubtedly better when a Careem is available. Their pricing when there is no delays or traffic is negligibly different to the mean in the market. They offer regular discounts, and promotions and have an extraordinary global brand appeal. However, when asked which Ride Share platform was most expensive, 73% responded Careem. Of those 73% only 42% had ever actually taken a Careem Ride. Upon questioning, it becomes clear that the lack of a fixed price at the point of ordering a ride (which was a standard norm before Careem entered the market) creates a customer anxiety and a perception of an expensive product. An alternative hypothesis (which is unconfirmed in the data) is that Sudanese ethnocentricity is a guiding customers towards Sudanese brands primarily.

Lemon Taxi appeared in 2018 as a significant market player. Structured much more as an entrepreneurial startup with small management team and a heavy focus on innovation and leveraging their platform. They have recently moved into Food Delivery with 'Lemon Food' in a way that makes the market much more appealing: They own the delivery experience. At their current trajectory and relatively low overheads, we expect Lemon Labs to make a significant impact in the digital life of Sudan within 2019.

## FUEL AND KEEPING THE ECONOMY MOVING

Sudan is prone to occasional fuel shortages, especially of diesel. When this happens the most effected segment is public transportation. This creates greater demand for ride sharing solutions. The ride sharing market, can in part, be credited with keeping the economy moving during these periods. They have created thousands of jobs for the citizens of Sudan and a secondary income for many thousands more at a time when inflation has impacted families.

## THE FUTURE OF RIDESHARING

There are a number of growth opportunities within the Ride Share market yet to be exploited. The obvious opportunities can be lifted from existing markets such as multi trip rides, delivery services and tuc-tuc or bike rides. However, there are other opportunities which are relatively specific to Sudan. Owning a car in Sudan is beyond the reach of many individuals. Even saving to own a car is difficult as inflation is currently moving a rate that makes saving unrealistic. One option for many is rent a car. A small car would typically be rented for 15,000sdg per month. A trip from Central Khartoum to Central Bahri with a ride share company costs 115sdg. If one was to take that trip 4 times per day for 30 days it would still be cheaper than renting a car. This simple calculation is actually more relevant to businesses that rent cars for their employees. It is usually more cost effective, less hassle and more convenient for companies to offer B2B ride share solutions to their employees than to rent a car for them.



*GAPCO (Sudan) Ltd was incorporated after it acquired Agip Sudan Ltd in June 1999. Agip was one of the 3 main International Companies which started petroleum marketing in Sudan way back in the 1950s. Along with these companies, Agip was responsible for creating the basic petroleum infrastructure for importing, storing and distributing petroleum products in Sudan.*

*The Company engages in nationwide retail operations through directly managed outlets and dealer-managed outlets. The Company is proactively engaged also in sales of LPG cylinders; bulk LPG to bakeries, commercial and industrial consumers. The company supply industrial-use fuels to commercial consumers.*

*The Company markets and sells high quality and internationally recognized Automotive and Industrial lubricants “Veedol Brand” in the market.*

*The distribution of the petroleum products is supported by three company-owned & operated storage depots well located nearby the supply sources and a fleet of tank-trucks for fuels & road truck for lubricants.*



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# THE IMPENDING RISE OF ECOMMERCE

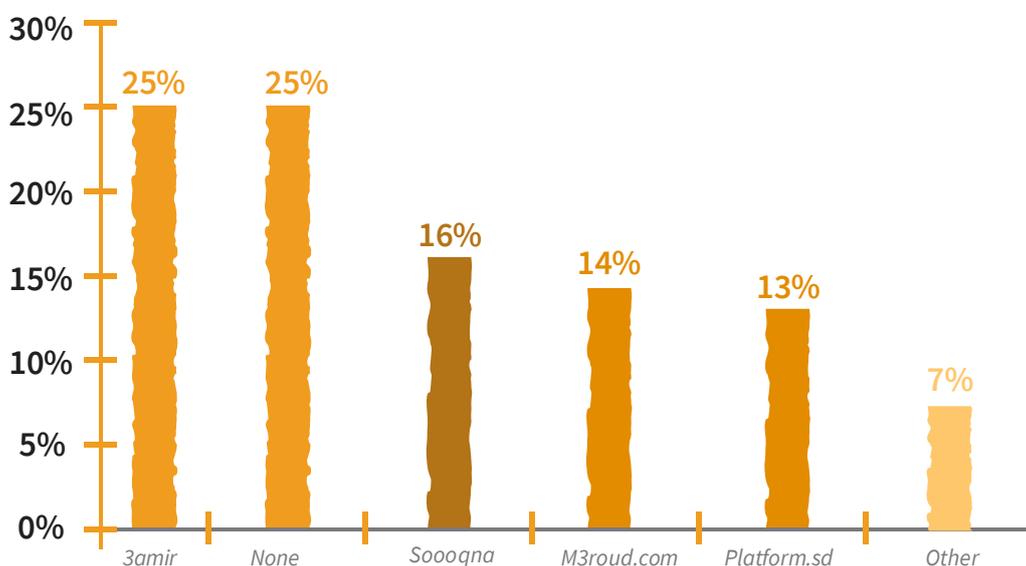
## DISCLAIMER – M3ROUD

*At the time of writing this report, AMC (the parent company of Sudan Digital) has acquired a majority share in M3roud.com.*

## USAGE

Awareness of ecommerce in Sudan is limited, even within the digital community. 25% of the digital community have never heard of any of the ecommerce brands. Whilst 84% of the total population have never heard of an ecommerce brand. What makes this data extraordinary, is that 82% of the digital community have actually bought products from Facebook, Instagram or WhatsApp groups. Essentially the sales model is the same as ecommerce, and yet there is a large difference in the percentage of people who have bought from those platforms and those that have bought via ecommerce.

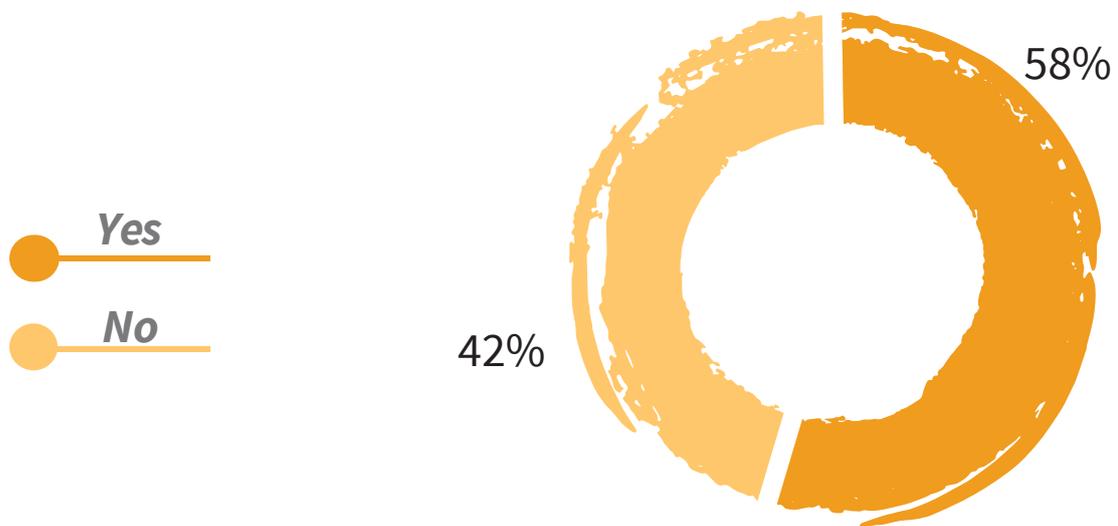
### Which Ecommerce Brands Are You Aware Of?



Despite so few people having ever bought via an ecommerce site, 48% have visited at least one of those sites in the past. This gives credence to the hypothesis that there is awareness in the category, and that the category has potential for growth. However, it begs the question, why do so few people buy via ecommerce?

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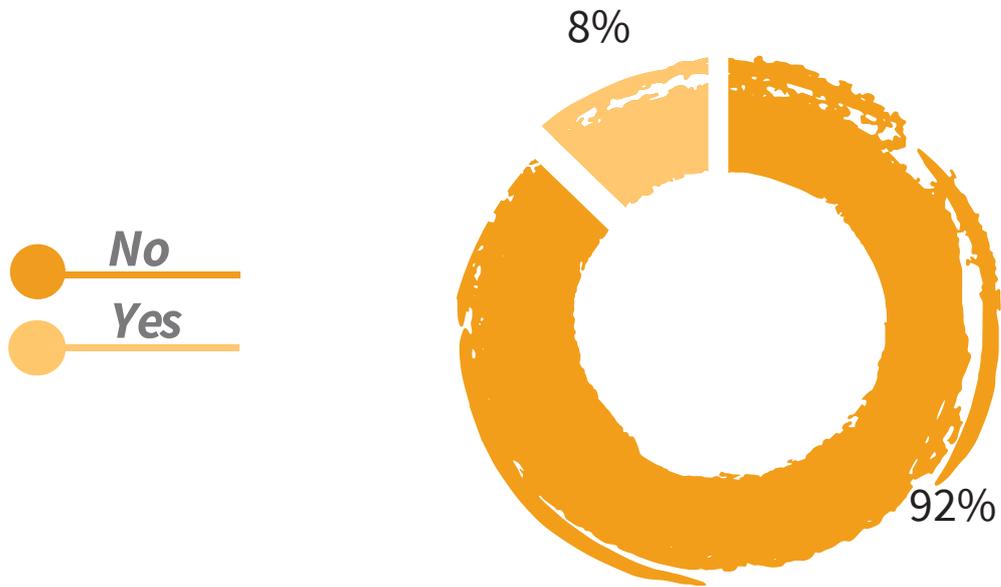
### ***Have You Ever Visited One Of These Sites ?***



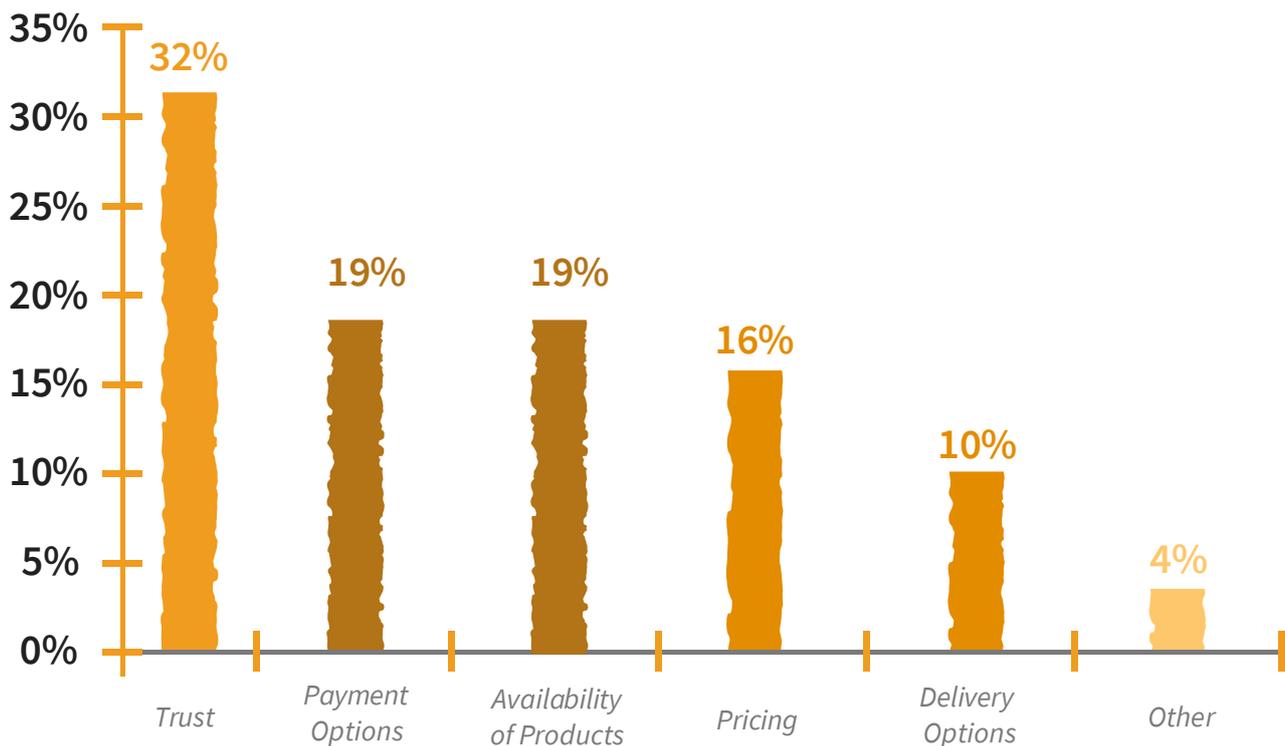
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The main reasons for people not buying from ecommerce sites is Trust, payment options and availability of products. This leads to the some of the core findings of the study. There is a perceived lack of trust in ecommerce platforms from Sudan. We say this specifically, because when asked whether respondents where they were likely to purchase from online the top answers were Amazon and Souq.com. This is a paradox; on the one hand Sudanese are highly ethnocentric. On the other hand they are unwilling to purchase from Sudanese brands.

## Have You Ever Bought From One Of These Sites ?



## What prevents you from buying from an Ecommerce site ?

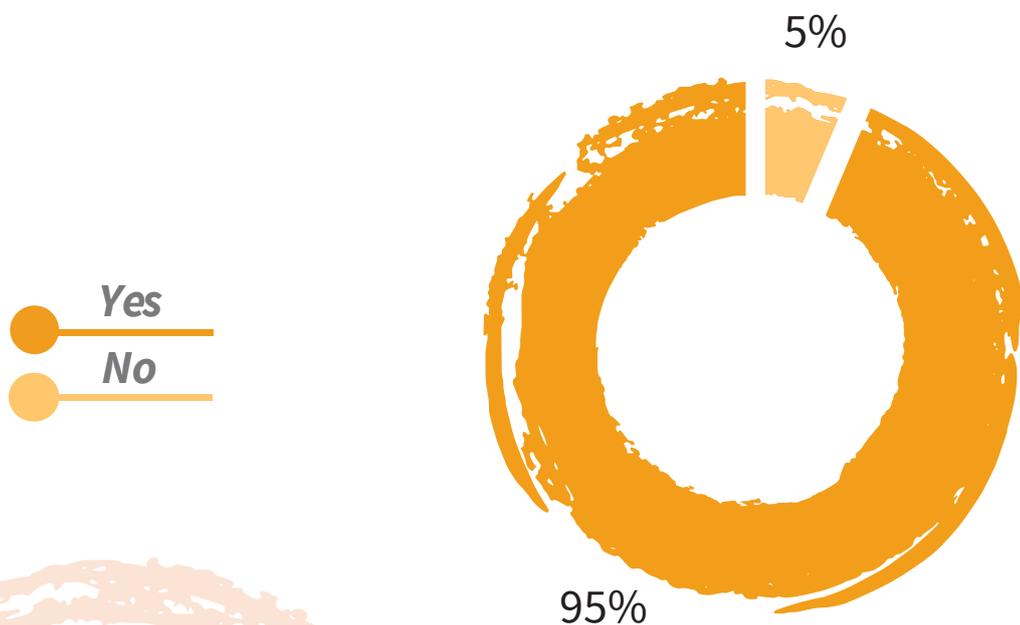


## FUTURE USAGE

What is encouraging in the market is the intention to use ecommerce in the future. 94% of the digital community have an intention to use ecommerce in the future. If this intention was realized this would create a market opportunity of over 10,000,000 orders per year from the digital community alone. This intention to purchase is dependent, not on the consumer, but on ecommerce platforms ability to adapt to users needs.

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### *Do You Intend To Buy Online In The Future ?*





## TELECOMS ENTRY TO ECOMMERCE

Both Zain (3amir.com) and Sudatel (Sooqna.com) have recently entered into the e-commerce market space. This is a huge positive for the market as a whole. One of the core challenges of all digital businesses in Sudan is customer acquisition, as most traditional paid methods of customer acquisition (Facebook Ads, Twitter ad , Google Ads, Affiliate Marketing) are still blocked and unavailable to Sudanese businesses. Combined these two telecoms have more than 17 million customers via their mobile business, therefore in theory they have circumvented the customer acquisition challenge by making their existing customer base available to their ecommerce platforms. This, executed correctly, could create a seismic shift in the perceptions of ecommerce within Sudan enabling other businesses to compete within a market that already understands ecommerce.

With that said, there is one large disadvantage that those specific ecommerce players have to contend with, that no other market player needs to worry about: Size. Being part of a telecoms company means being part of a relatively slow moving, slow decision making organization. This is not a criticism, it is a fact globally; the larger the organization, the more deliberate and careful it needs to be with decisions. Here, as with startups across the global, the stand-alone entrepreneur has a massive advantage. Ecommerce is about to get interesting in Sudan, and we predict that within 24 months, one or more ecommerce players will be subject to a partnership, or buyout by an international ecommerce player.

# THE IMPACT OF ECOMMERCE ON THE ECONOMY

Ecommerce has a ripple effect into numerous verticals and a number of studies conclude that ecommerce has a net positive effect on GDP and the overall stability and resilience of an economy<sup>4</sup>. Ecommerce reduce entry barriers to individual traders to a larger market, impacts R&D and innovation, and facilitates the growth of infrastructure, particularly as it relates to delivery. The ecommerce model should, when applied properly, significantly reduce complexity within any given value chain. It also reduces the information gap within a supply chain, allowing access to source materials without the need for brokers or middlemen. This information gap is exploited by brokers to increase price, and skim value from the value chain. The ecommerce model reduces this significantly by delivering value from the supplier directly to the consumer, therefore it should, in theory, be cheaper and better for customers. This efficiency increase in turn increases demand, which increases supply, which perpetuates growth in any given market. Multiplying this effect to multiple markets creates demands to increase efficiency in other areas of the value chain, such as manufacturing and fulfilment. The cumulative effect of this is economic growth, and most importantly, stable economic growth.

# BANKING INFLUENCE ON DIGITAL USAGE

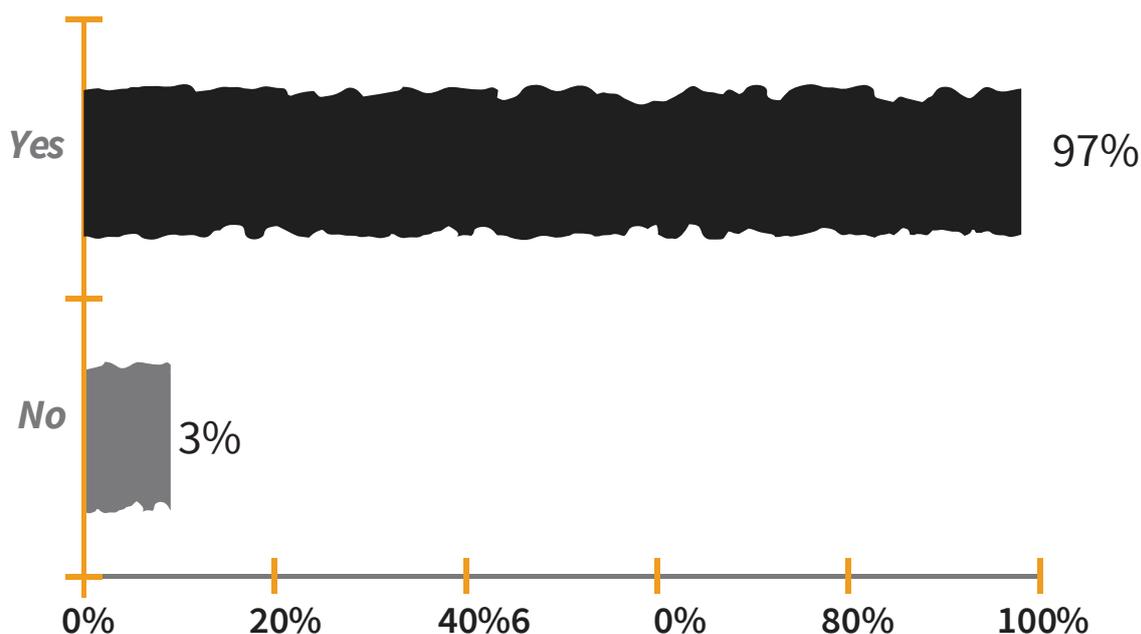
## THE BANKED VS UNBANKED

Banking and access to banking services is a hot topic within Sudan. 97% of the digital community have access to a bank account, compared to 15% of the total population, and 26% of the labor force<sup>5</sup>. The use of banking, and accepting payments is an enabler to both the economy, but more important for our purposes the digital economy. There has been a concerted effort by banking institutions and the government to encourage banking and digital payments as a primary method of money transfer. This effort has paid off within the digital community, and our data shows that digital banking via apps is becoming more and more prevalent. However, the reality is such that Sudan remains a 'cash' society.

Currently 84.7% of person to business (P2B) transactions complete via cash whilst 15.3% complete via a digital payment method<sup>6</sup>. Within Sudan, the ability to pay digitally via mobile payment or via a PoS has become an entry barrier for many consumers, particularly in the digital community. There is a favorable preference for merchants who are able to accept mobile banking as a form of payment, and this is driven mostly by the lack of cash available. A large driver of cash availability is that 71.3% of B2B transactions complete via cash, rather than digital payment methods. These high order values have a large impact of cash liquidity, and a ripple effect on the consumers ability to accept cash.

Another driver of digital acceptance in the banking sector is the increase in business to person payments being completed via digital banking solutions. Currently 80.3% of business to person transactions are completed in cash rather than via digital payment methods. EBS (electronic banking systems) actively encourage merchants to adopt digital banking, and have a range of API's for merchants both digital and physical to use.

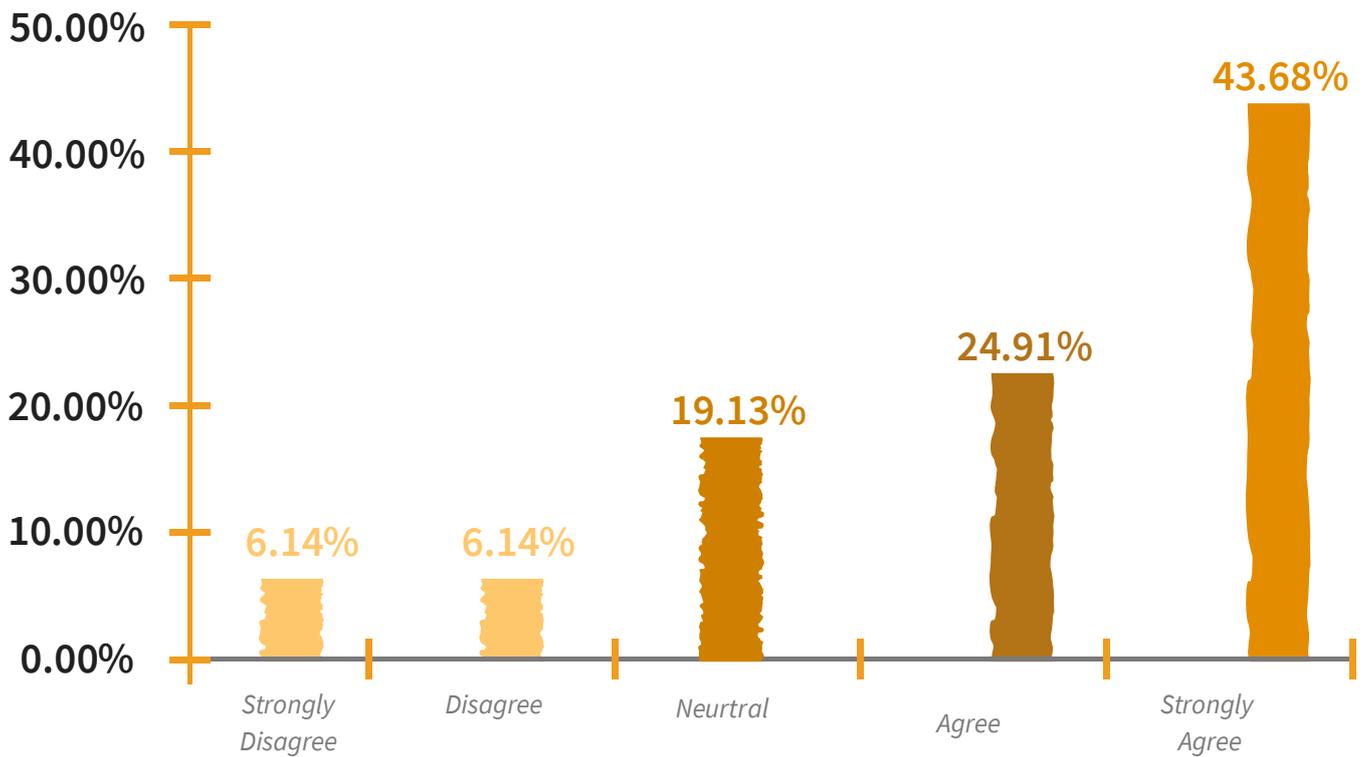
## Do You Have A Bank Account ?



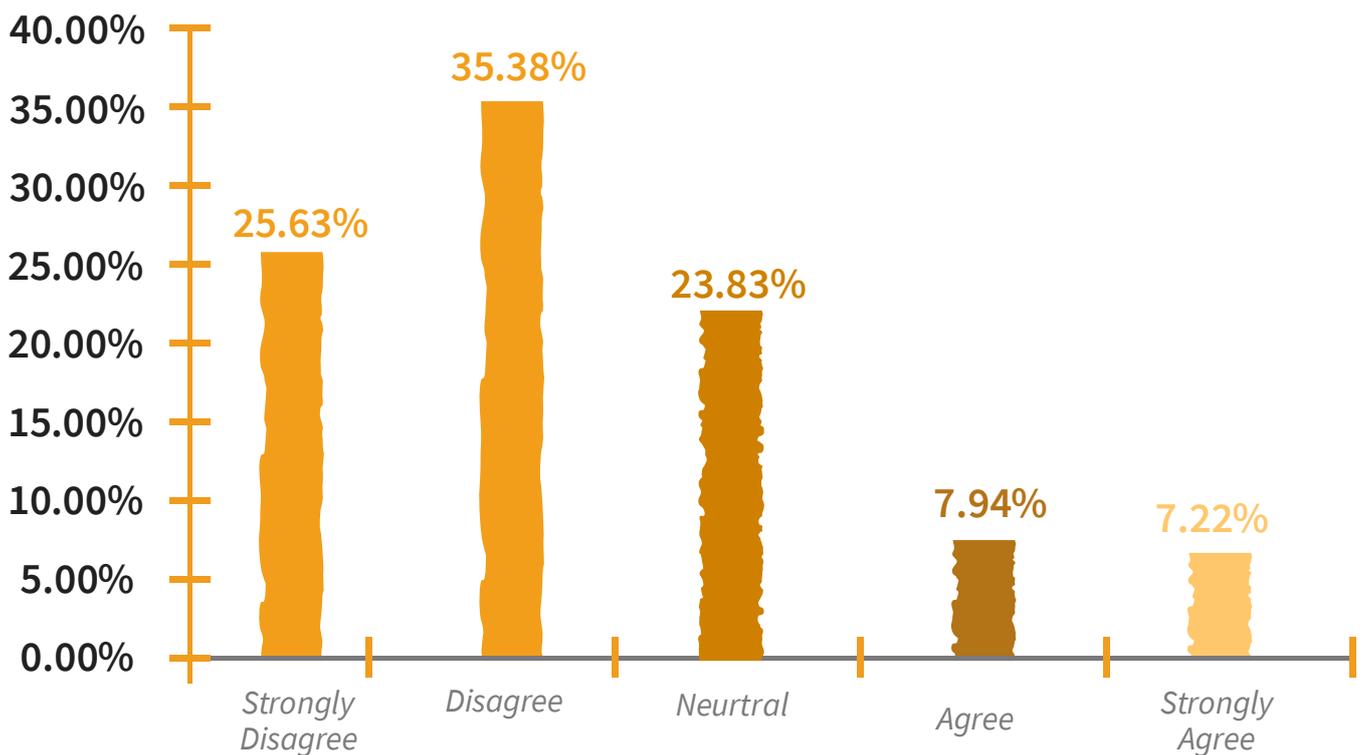
## PROLIFERATION OF DIGITAL BANKING VIA MERCHANTS

The core driver of digital banking and payment is merchant acceptance. The vast majority of both the digital community and wider population accept that digital banking is a safer cash management solution than carrying cash. This has been impacted further by recent events in which large stores of cash have been burned in accident fires, leaving trader losses to exceed SDG60mn. However, most people also suffer from a lack of card or digital payment solutions accepted by merchants. Whilst larger stores, and restaurants tend to accept at least a card payment, the majority of the market only accept cash as a payment method. This continues to drive the cash requirement within Sudan and therefore acts as a major limiter to digital adoption. This is proven further with the data collected around drivers of digital payments, with the largest driver being that not enough companies accept digital payments. Other drivers specifically of mobile app payment solutions, include both trust in the banking system and issues that occur within specific banking apps.

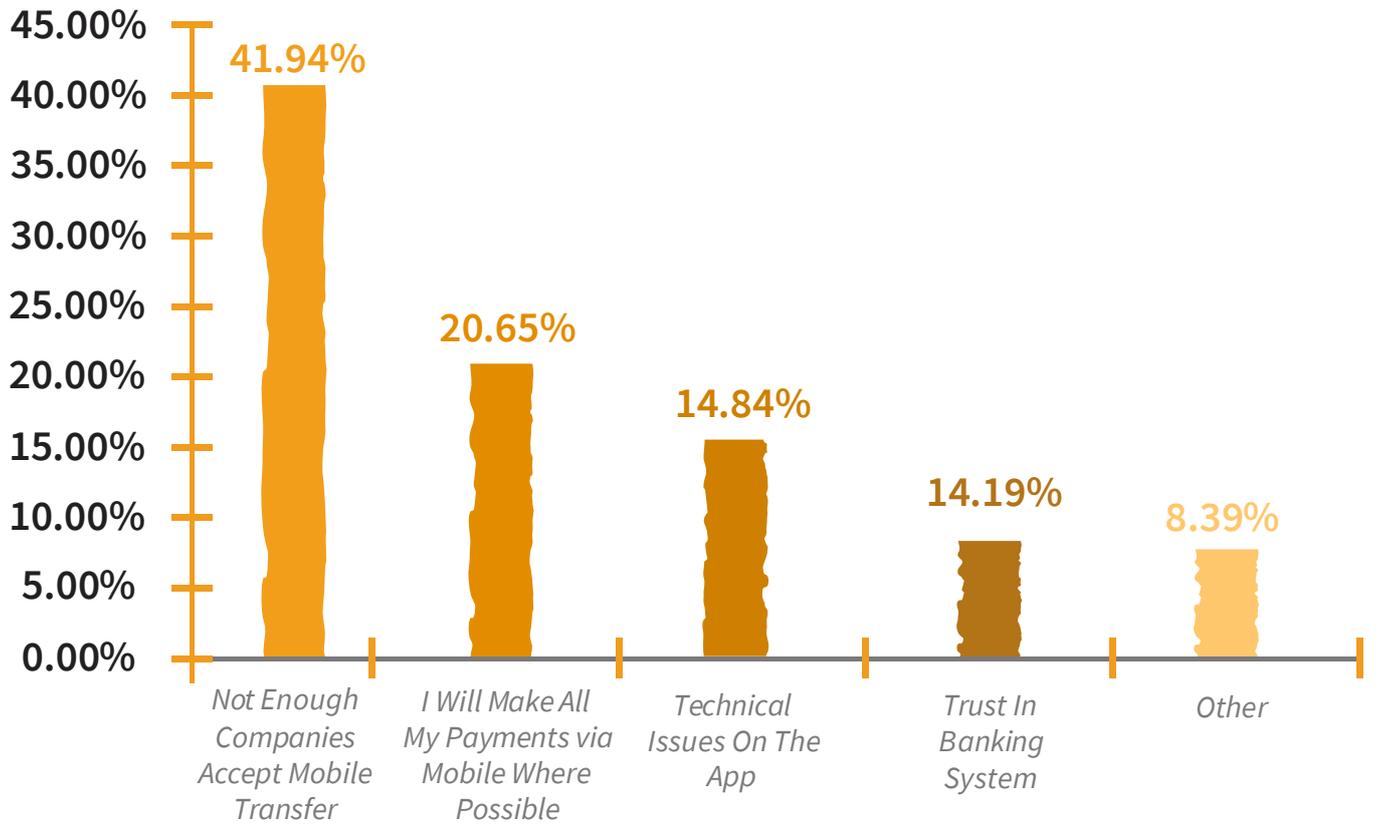
## Mobile Banking Is Safer Than Carrying Cash



## Most Shops And Retailers Have The Ability To Pay Via App Or Card



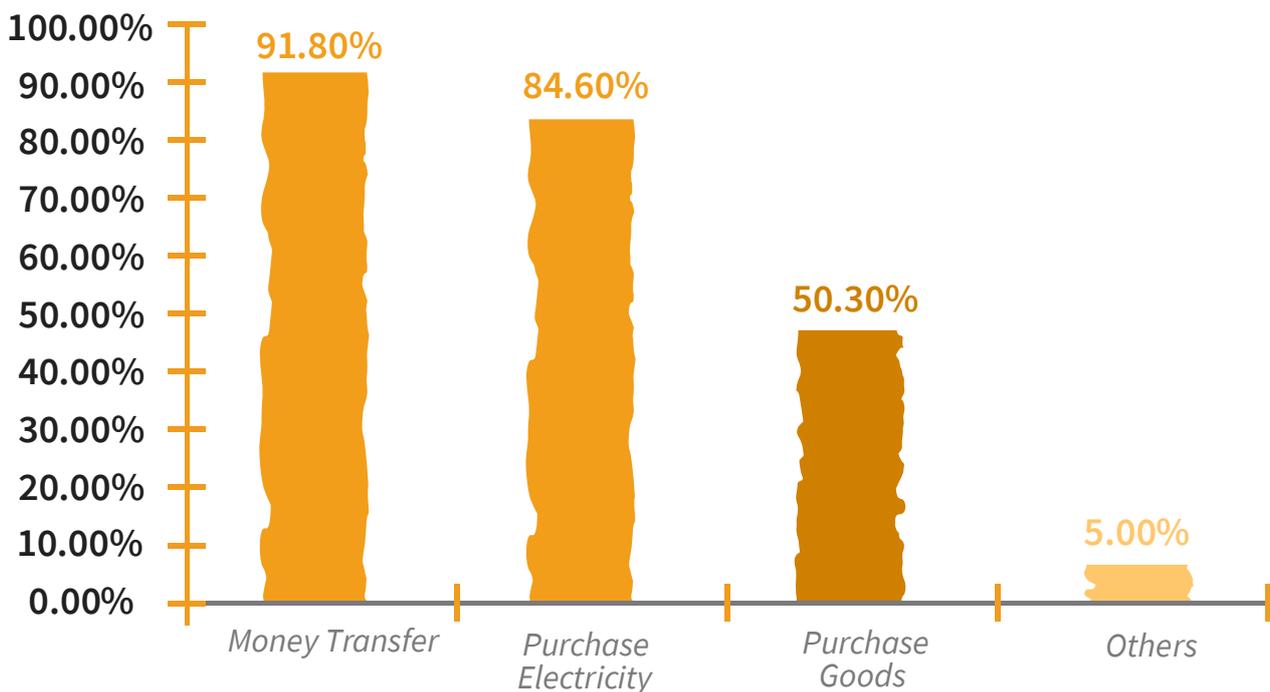
## Why Don't you Make More Mobile Payments ?



## APP USAGE

The most common uses of mobile banking is for transferring money. 42% of the digital community have made a mobile transfer within the last 24 hours and 71% have made a payment in the last week. In summary the banking sector remains a large driver of digital adoption. Currently most digital apps find effective workarounds. Whilst there are centralised digital payment solutions, such as Syberpay, these solutions add a surcharge to each order. Whilst this surcharge may be negligible in terms of the total order value, it adds an entry barrier to digital payment for a society already struggling to adoption digital payments as a standard purchasing method.

### *What Do You Use The App For ?*



The segmentation of the banking sector also makes digital adoption more difficult. Some banks are part of the centralised payment gateway, and others are not.

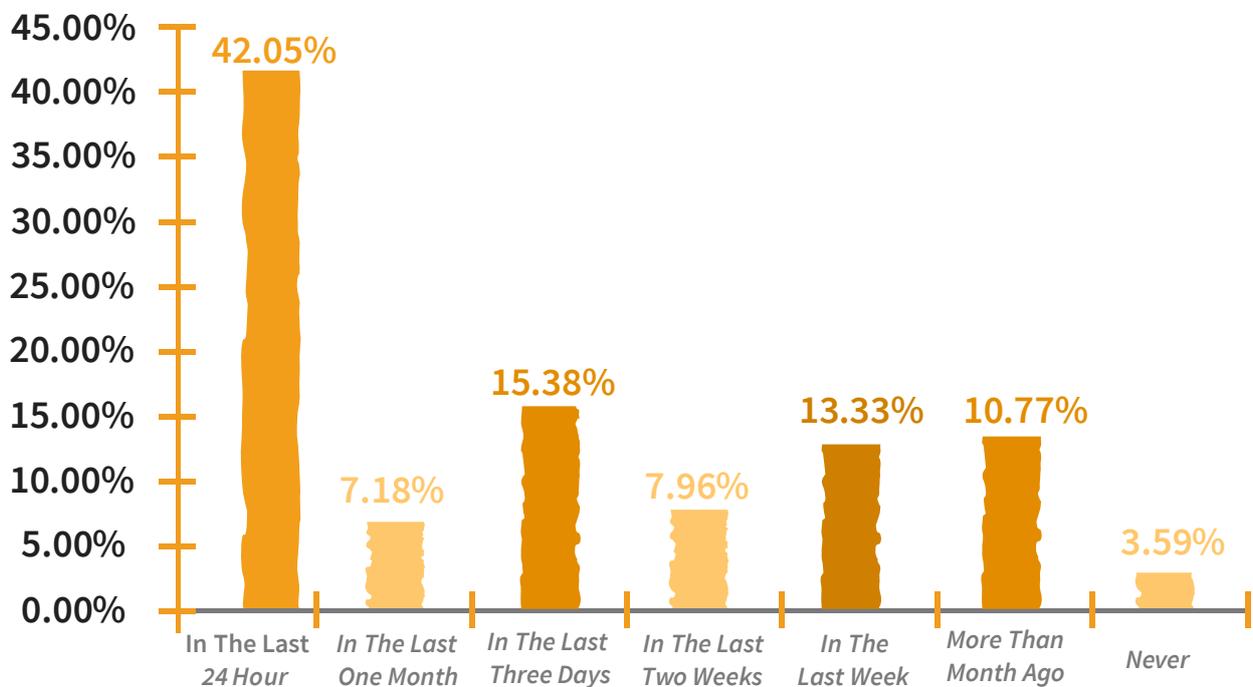
Strategically, we believe that digital businesses should look to drive digital payment solutions by doing 2 things:

1. Managing total margins for products and services being sold, and
2. Offering a discount for using a digital payment.

Whilst the centralised gateways will still add their surcharge, this cost can be mitigated by total margin management; Looking at the transaction and pricing of products as a whole, in order to offer a discount for those paying via digital methods.

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## *When was the last time you made a payment or transfer via the app ?*

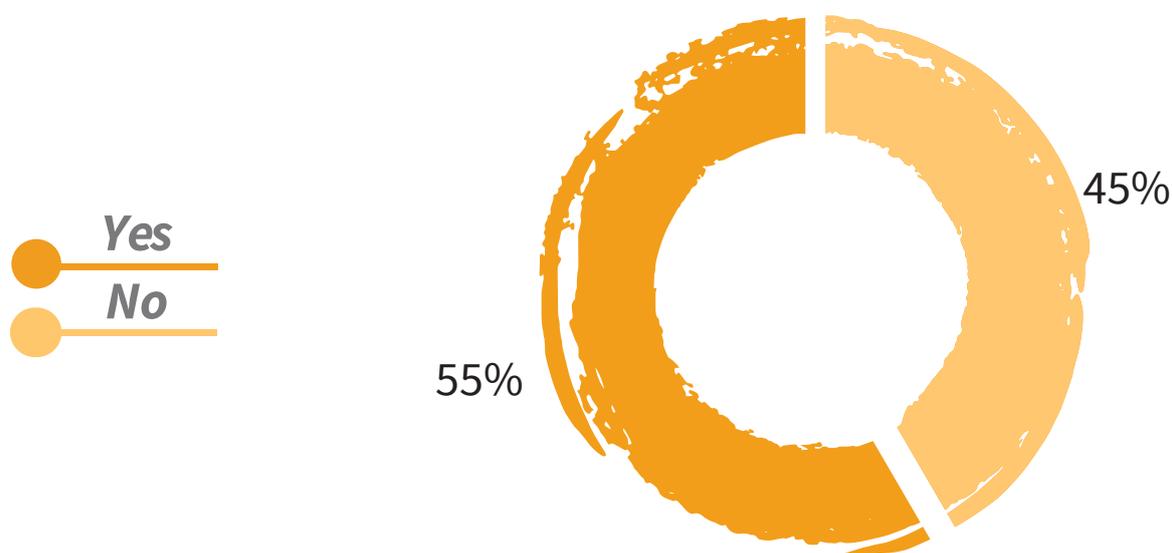


# FOOD DELIVERY SERVICES

## MOST POPULAR PLATFORMS

Awareness of food delivery platforms has increased significantly over the last 12 months but there remain fundamental issues in the customer experience preventing growth in the sector. 55% of the digital community have tried to order online via an online delivery service, however, only 15% have ordered more than once. Given the huge expansion in the number of restaurants in Khartoum, and the competition that exists in the sector, it seems strange that this sector hasn't grown more. However, the reasons are clear.

### *Have You Ever Ordered Food From An Online Delivery*



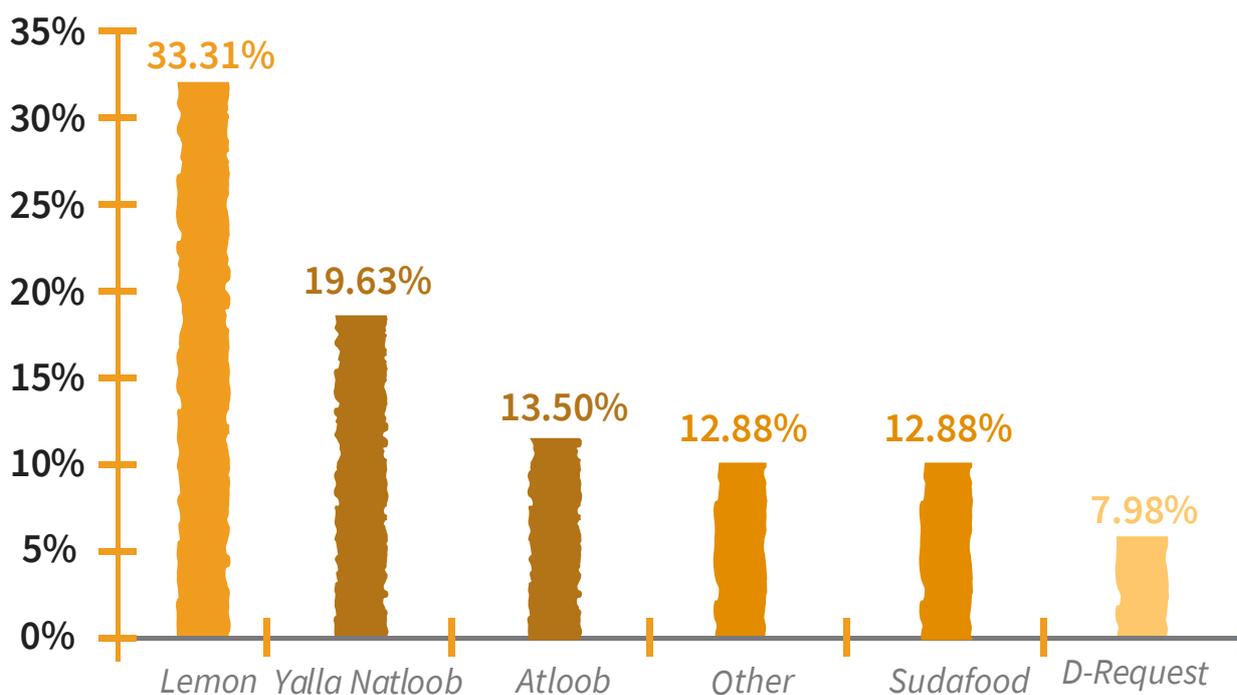
A large part of the growth of the sector in terms of awareness is driven by the entry of Lemon Food and Yalla Na6lob. Lemon Taxi is a successful ride sharing solution that has grown quickly due to its simple captain retention model and reliable service.

Strategically, they made the intelligent move of a horizontal shift into food delivery leveraging their existing network of drivers to ship food rather than people. More recently Yalla Na6lob (say; YallaNattlob) has successfully gained market share with it's extremely well designed application and simple user interface. Furthermore, in mini experiments it is clear that they have started to take a leading role in the market with their extraordinary customer service and delivery experience.

Many other brands exist in the space, but the logistical issues of working with restaurants and structural issues with the business model have limited growth. **The winner in this market will be the company that delivers 3 key things:**

1. A range of restaurants across the state of Khartoum, giving more options to everyone
2. A guaranteed delivery time
3. Ownership of the delivery process

### *Which Food Delivery Brands Are You Aware Of ?*

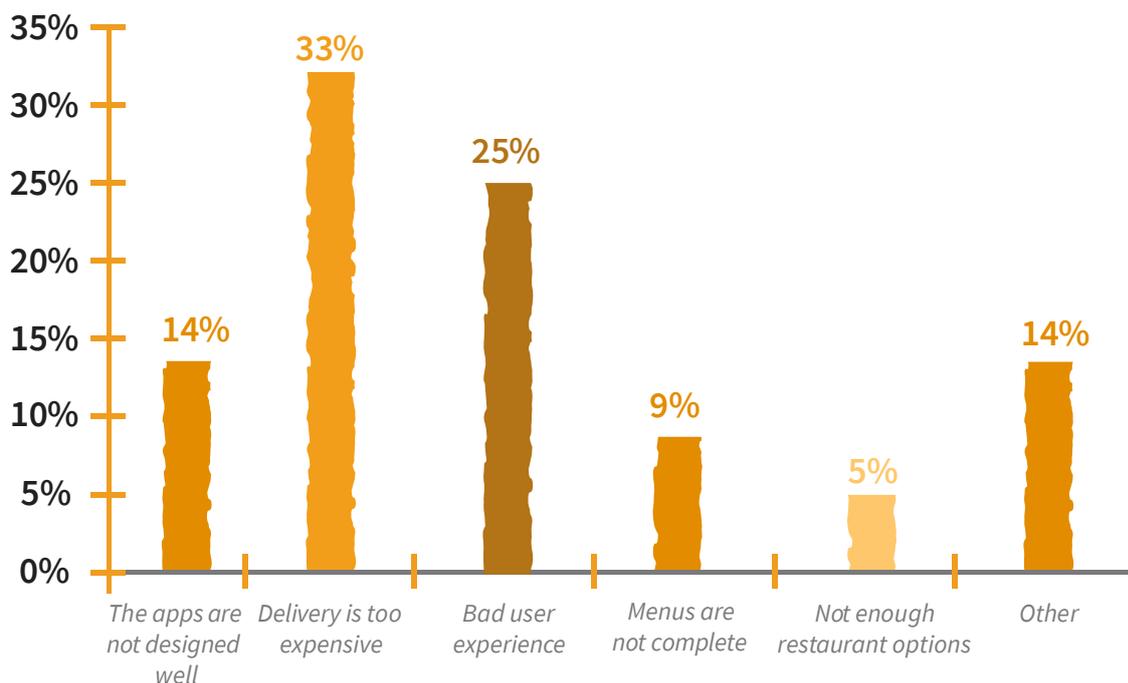


## USAGE AND THE FUTURE

The largest pain points for this sector are deliver costs and reliability and an overall bad experience, such as ordering and the order being cancelled, or ordering and being told that delivery is not possible in your location. Having worked within the restaurant sector in Sudan with one of our brands 'Wfir' it is clear that management and ownership in the sector has a rudimentary understanding of marketing channels and customer acquisition. This makes it a challenge for both digital business owners and customers alike.

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### *What Stops You Ordring Food Online ?*



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Whilst delivery charges can be a pain point, customers are generally willing to pay a reasonable fixed fee delivery and service charge if they can be guaranteed a quality service.

A quality service is defined as food arriving on time, at the right location, within 45 minutes and hot. **To achieve this is difficult without a capital investment on behalf of the food delivery solutions for three reasons:**

1. Having a fixed cost for delivery means owning the delivery infrastructure rather than outsourcing this part of the value chain
2. It also means having the volume of customers required to justify owning the delivery infrastructure
3. Also guaranteeing a delivery time requires a good understand of both restaurant and customer locations and algorithmically calculating the most appropriate routes.

Add to this challenge the relative unwillingness for restaurants to give away any margin, and it is clear that this sector has endemic challenges which are difficult to overcome. Much like the ride sharing sector, this sector is ready for one player to make a dominant move to capture a majority market share. The customer demand exists and marketing costs are minimal comparatively.

The challenge is how to deliver the service required. To achieve this one player must invest in a delivery infrastructure based around bicycles or motorbikes strategically positioned around the city. They must then build such strong relationships with restaurateurs that they are able to receive a portion of each order as a 'commission'. This will then allow them to fix delivery costs, and more importantly offer regular promotions such as 'free delivery', which will act as both customer acquisition, and a category growth catalyst. Once this is achieved then it becomes easier to launch loyalty programs and segment customers by behavior and cohorts.

It is worth mentioning that 'online payment' is not a key driver of this market, or at least customers do not recognize this as a core driver. However, in an increasingly cashless society, being able to digitally manage cash for both restaurateurs and customers will make a significant difference to the efficiency and efficacy of the value chain.



## FRESH MOBILE APP

*Fresh is a sales service of vegetables and fruits - and other products - carefully selected at the central market prices with home delivery at a nominal price, submit your order now through this app or by calling 4753 to receive your request the next morning. A kg of tomatoes, for example, exchange between 3 and 5 intermediaries between farmer and consumers. They provide speeding up sales and distribution service to end up with that kg of tomatoes in your fridge in less than 24 hours after harvesting. But these intermediaries come at a high cost that affects both farmers and consumers. Fresh is a service designed to accelerate sales and distribution but in an innovative way that allows - over time - to skip all intermediaries and provide an excellent service at lower cost to consumers and guarantee a great empowerment for farmers. We believe that using Fresh service helps to create a healthier system for selling and distributing vegetables and fruits, thus directly supporting the simple farmer to regain what he deserves without confronting the intermediaries.*



# THE ENTREPRENEURIAL ENVIRONMENT

## USAGE AND THE FUTURE

There is a wave of young entrepreneurs emerging in Sudan. The majority are students who have not found work post-graduation and are left with little option but to try and build something themselves. This has been supported and accelerated by a number of Share Work Spaces which have emerged in Khartoum. These shared spaces offer a tremendous service to the entrepreneurial community by bringing in guest speakers, offering training, offering mentors and bringing the community together to share experiences and knowledge.

**Here we highlight three of the main Shared Working Spaces in Khartoum:**

- **Impact Hub** – Impact Hub is well established and has a vibrant community working on everything from ecommerce businesses to healthcare solutions. Part of the Impact Hub Global community, it has well established international and local links. The environment itself resembles shared work spaces we have visited in San Francisco and London, and the community is tightly knitted.
- **249 Startups** – 249 Startups re-launched in 2018 with a beautiful location in Khartoum. It hosts regular events, talks, training, coaching and mentoring sessions. Their collaborations with Haggag group for the Haggag Acceleration program has generated some extremely promising digital startups. They were also partners of the Global Entrepreneur Week 2018 and Orange Corners.
- **Raied Club** – Raied is slightly different to Impact Hub and 249 Startups. They offer a shared work spaces, mentorship and training. However they tend to focus more on partnership with existing Sudanese businesses to create business opportunities for their startups.

## INVESTMENT LEGISLATION & INVESTORS

In Sudan there remains a lack of comprehensive investment legislation. This creates issues when trying to invest, purchase or support businesses. That said, many small businesses still rely on trust and social connections to create their shareholder base, with there being greater trust in social connections than in the legislator.

There are a number of investors in Sudan, however there remains a lack of pure digital investors, specifically angels. When surveying digital startups the number 1 barrier they believe to their success is 'access to funds'. However, in our experience this is rarely the major barrier. The major barrier is a lack of skilled experienced mentors in the digital space.

Sudan has, thanks in large part to 20 year sanctions, been in the digital dark ages. Whilst the rest of the world has leaped forward in the last 20 years with the digital revolution, Sudan has to a large part been left behind. This has created large gaps for potential businesses to thrive, but has also meant that the foundational expertise that are required to support businesses in those spaces is missing. Digital is the great equalizer. Digital businesses thrive best when they bring consumers closer to the supply chain, and reduce the information gap. However they fail most regularly when they fail to apply business best practice.

Angel investors who came to Sudan, or injected time and capital into Sudanese digital entrepreneurs would likely see a multiple return on their investment compared with other countries'. The market is green, opportunities so plentiful and market so primed, that the investment risk is much lower than in other markets (excluding macro-economic risks). What is lacking is the basics of both business practice and digital business practice in particular. Examples of this can be seen most clearly when a prospective investment comes to AMC asking for investment.

Their business cases usually show a return on investment within the 1st month. This is reflective of the trader mentality whereby you invest in a trader and expect the return instantly. However, Angel investors know that an investment is for the medium to long term. Sustainable growth is attractive to investors, and profitability is a byproduct of being a well-run business with strong founders. Therefore, prospective Angel investors from the international digital community should be aware that their investment is likely to require more of their personal time than in other countries, but that their returns are potentially greater.

# SOCIAL MEDIA LANDSCAPE

## FACEBOOK

There are currently 3.6mn Facebook users in Sudan, the numbers has increased year on year due to two main factors:

1. The total internet penetration rate has increased to 28.9%
2. Zain has allowed 'Free Basics' access to Facebook in partnership with the company.

Facebook penetration is 8.9% of the total population. This gives a total of 3.649mn Facebook users, and 11.849mn internet users. Within the digital community, there high Facebook penetration rate, making the platform ideal for targeting this community.

We urge caution with the Facebook statistics however. There is a trend in Sudan for Facebook users to have multiple accounts. As part of this study we assessed the number of fake or duplicated profiles that were used in competitions in Sudan, and we conservatively estimate that 45% of all competition entries are from fake profiles. This could be to separate friends from family, and most commonly for competition entries. Facebook competitions in Sudan still heavily revolve around 'liking and sharing' posts or pages. Whilst this approach does improve overall statistics, it has a limited effect on page or post engagement over the long term. The reason being there are a large number of fake or duplicate accounts within Sudan specifically for this purpose.

Canar Telecommunications circumvented this challenge by launching a poetry competition when launching its new TDD LTE service. The concept was simple: write a short poem on how the Canary (their 4G service) affects their lives. By taking this approach there was a huge engagement, and a much more limited use of duplicate accounts as

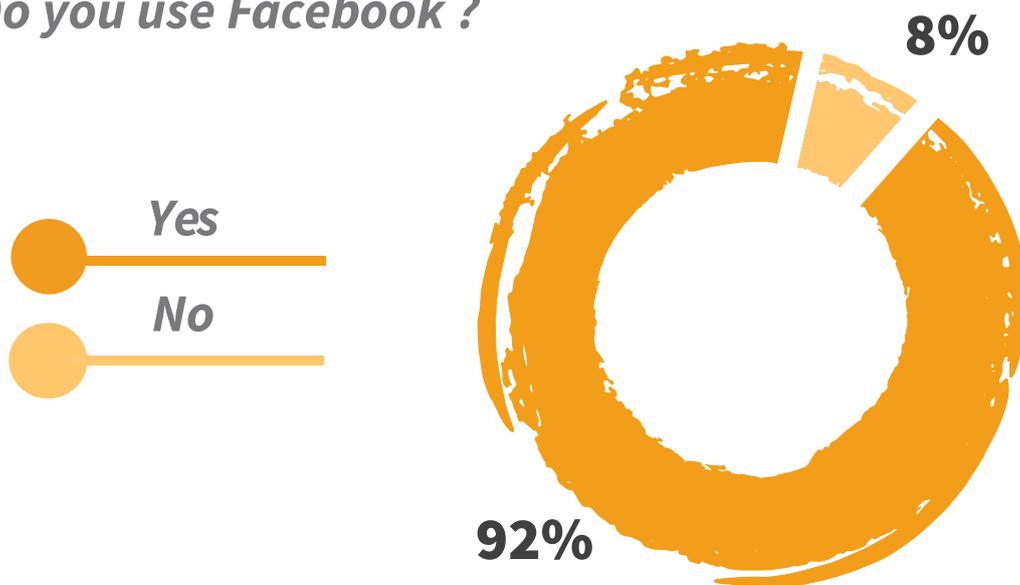
the entry barriers to the completion were higher. In general, companies that wish to deliver compelling Facebook competitions that actually influence their brand should focus on creatives that have some form of entry barrier. A simple 'Like' or 'Share' attracts too many duplicate accounts, and therefore creates both distrust in the brand, and promotes a lack of social intellect within the community.

A wide range of Facebook features are used within Sudan. Groups are the most popular, and often organizations who wish to attract a large audience leverage social connections by using Groups as oppose to simply pages. The invitation to a group has a higher conversion rate to invitation to like a page.

The largest brands on Facebook are dominated by the three mobile telco providers: Sudani (Sudatel), Zain and MTN. However it is impressive to see brands such as Tirhal (Sudan's equivalent to Uber) and AlSoug.com (Sudan's equivalent to Ebay) making the top 10 brands within Sudan's Facebook community.

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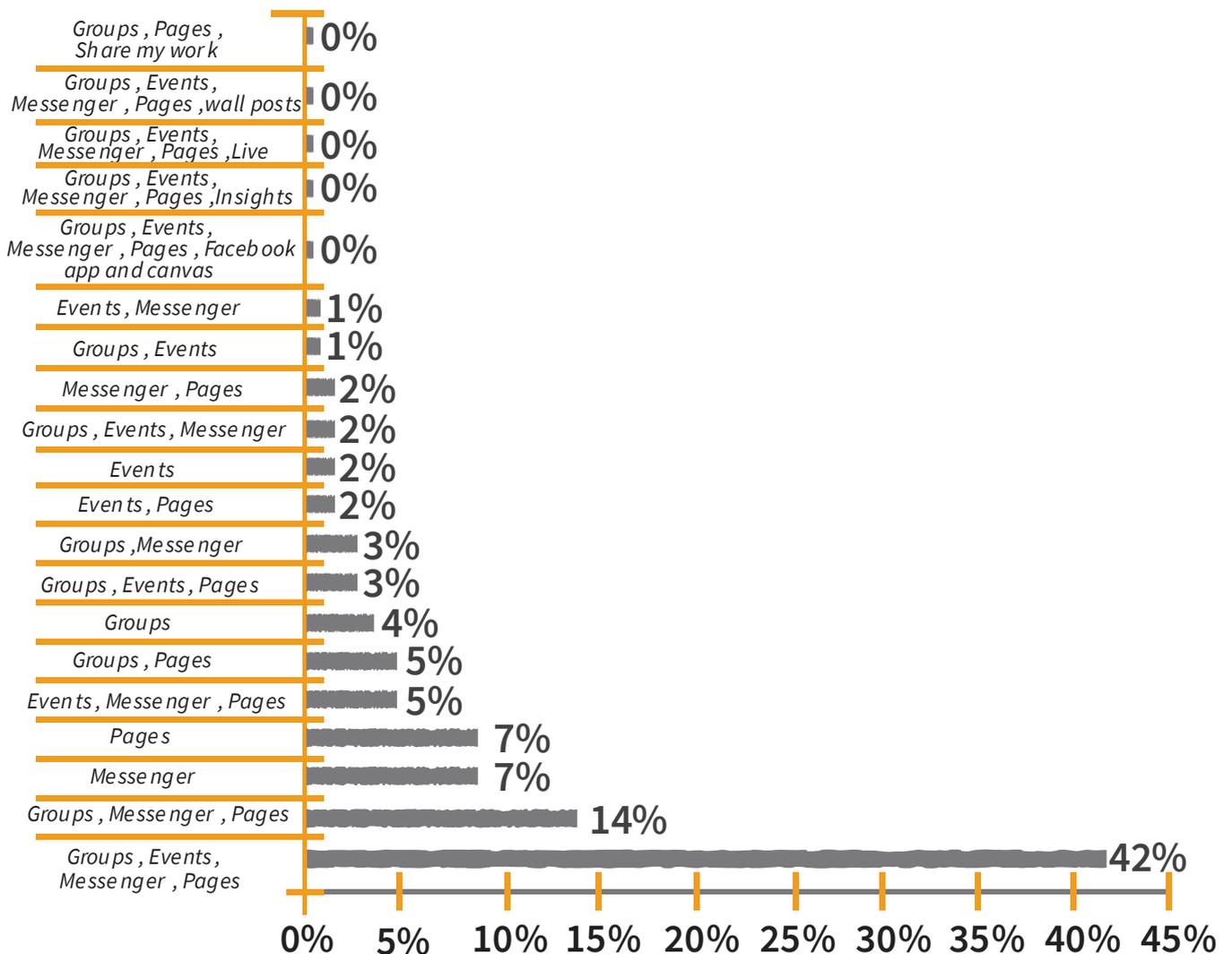
### *Do you use Facebook ?*



*Total fans*

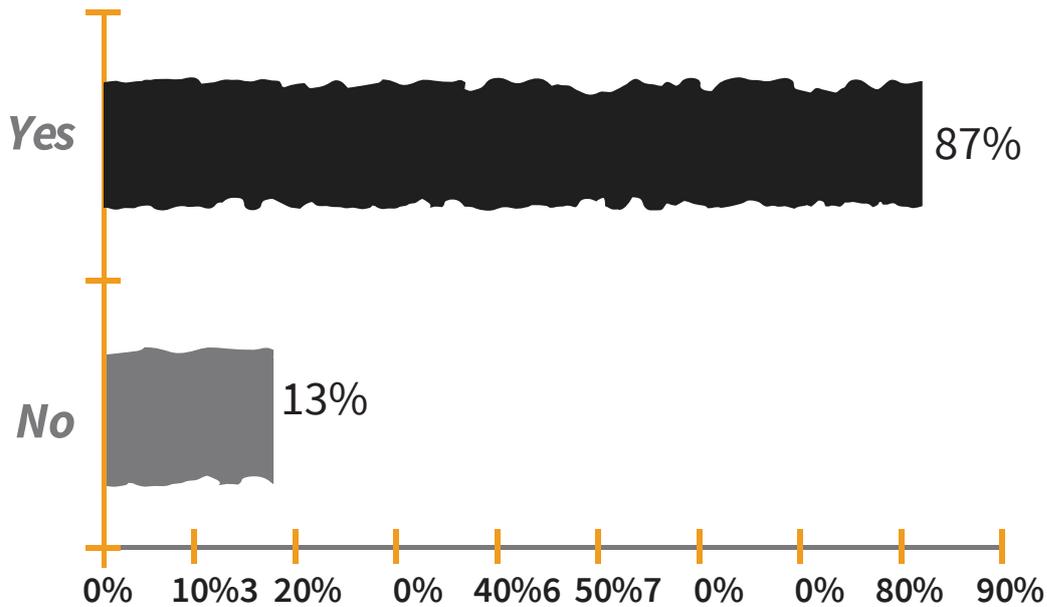
1		<i>Sudani</i> SUDAN	<b>660 627</b>
2		<i>Zain Sudan</i> SUDAN	<b>641 557</b>
3		<i>MTN Sudan</i> SUDAN	<b>594 831</b>
4		<i>Sudan Jobs</i> SUDAN	<b>159 769</b>
5		<i>Bank of Khartoum</i> SUDAN	<b>130 799</b>
6		<i>Tirhal</i> SUDAN	<b>118 606</b>
7		<i>Alsoug.com</i> SUDAN	<b>111 184</b>
8		<i>Al Salam Rotana Khartoum</i> SUDAN	<b>87 200</b>
9		<i>Araak</i> SUDAN	<b>38 062</b>
10		<i>Aywa</i> SUDAN	<b>34 306</b>

## Which Facebook features do you use most often ?



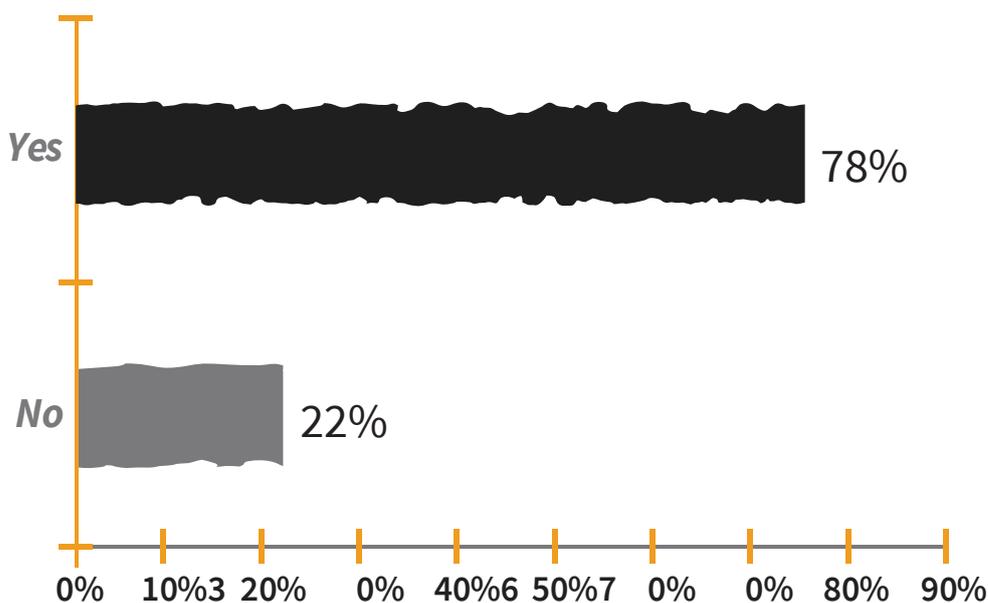
At the time of writing this report, Sudan is undergoing street protests. This has created a new audience of Facebook users: Watch Party or Live Viewership audience. Until this moment, 'Live' was used on rare occasions because of its perceived consumption of bandwidth and data. However during this period 'Live' has allowed people close quarters action of what was happening on the streets. Staying up to date with news has always been a staple requirement for all Facebook users. One of the key reasons for this is that Sudanese are keen followers of political developments.

## *I use Facebook to stay up to date with news*

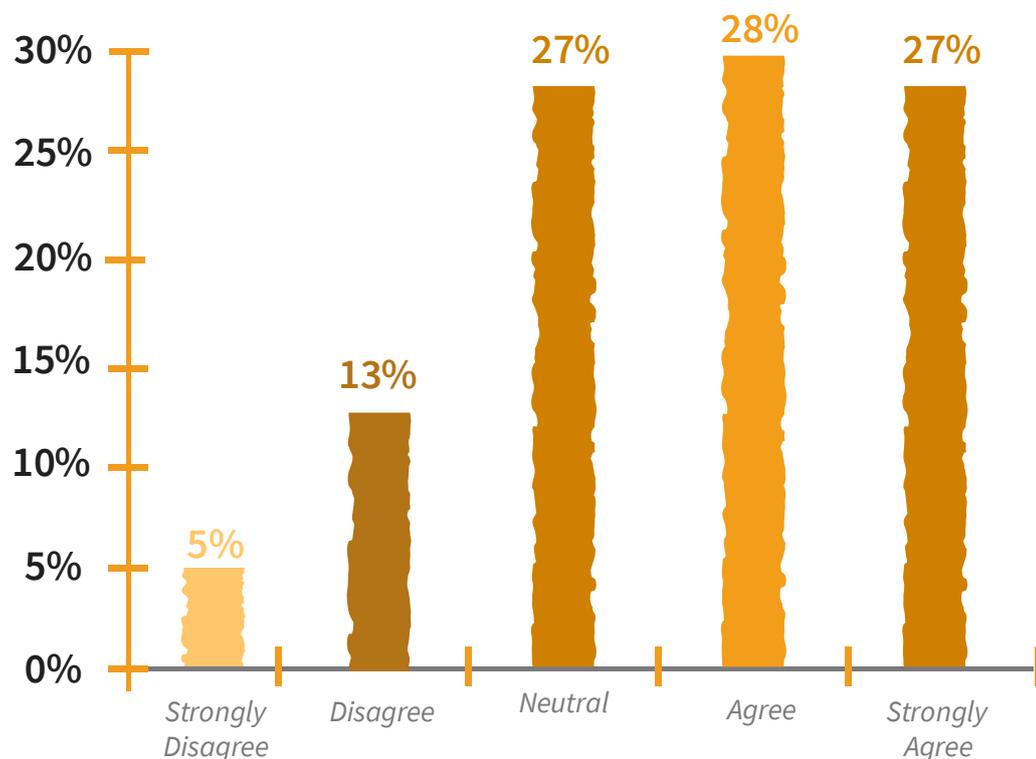


Despite politics being a divisive topic, politicians in Sudan are generally much closer to the general population than in other nations. They pray with the congregation on Fridays, and it is not unusual to see a leading minister or the President himself at a wedding or in a funeral procession. This in itself creates a lot of social content which fuels opinion and debate around the political system in Sudan.

## *I use Facebook to explore new brands and companies*



## Facebook is where I found out about new products and services ?



Exploring new brands and products is a core element of Facebook usage in Sudan. Despite not having access to Facebook paid advertising, or the full suite of Facebook Insights, brands and companies use Facebook as a direct marketing channel. This leads to brand behaviors that would appear counter intuitive outside of Sudan. For example, research on the top 15 Sudanese brands in Sudan discovered that on average they post 19 posts per week, whereas research suggests that the actual recommended number of posts per week is seven<sup>7</sup>. This means that Sudanese brands post 2.7 times more often than is recommended. However, we should note that these brands also do not see a degradation in their engagement rates.

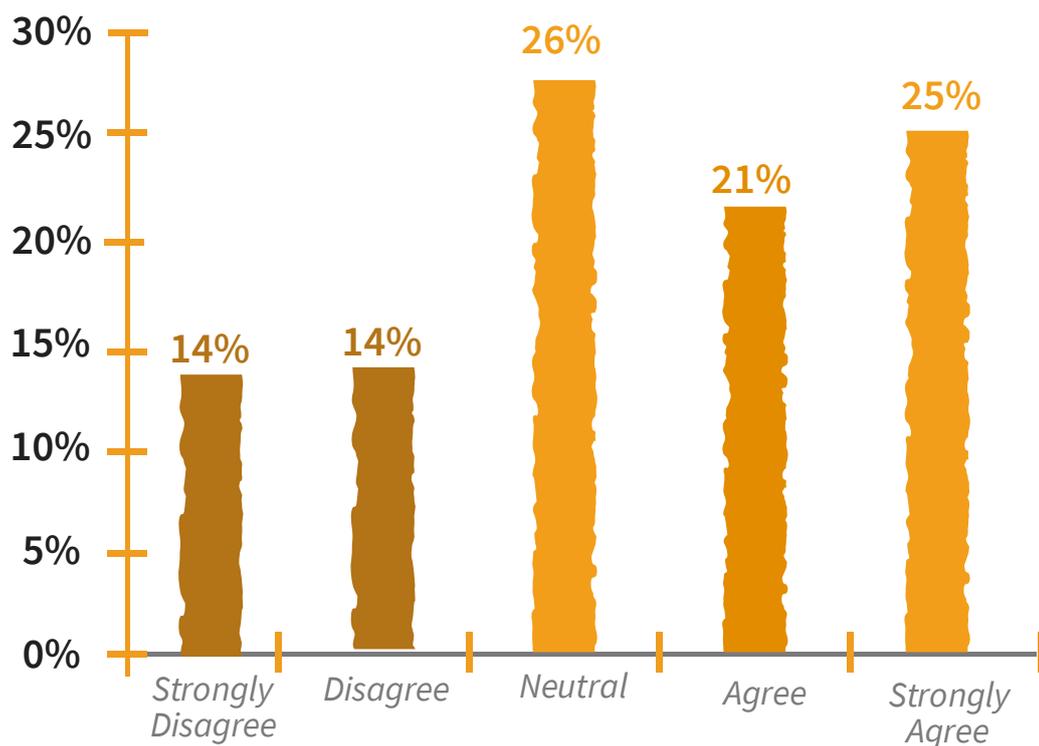
Post relevance and times contribute to this, but we believe the biggest contributor is the lack of other tools such as Facebook Paid advertising. Outside of Sudan, Facebook Paid Advertising can act as a background brand building activity (as well as of course for specific objectives), augmenting daily posting activity.

Without this luxury in Sudan, brands have resorted to, what external observers, would suggest is ‘over posting’ or ‘spamming’. The results however speak for themselves. It is clear that Sudanese consumers have a higher tolerance for high post volumes, and given that 77% of users use Facebook to explore new brands, and 55% use the platform to explore new products, we hypothesises that this is a requirement in this market.

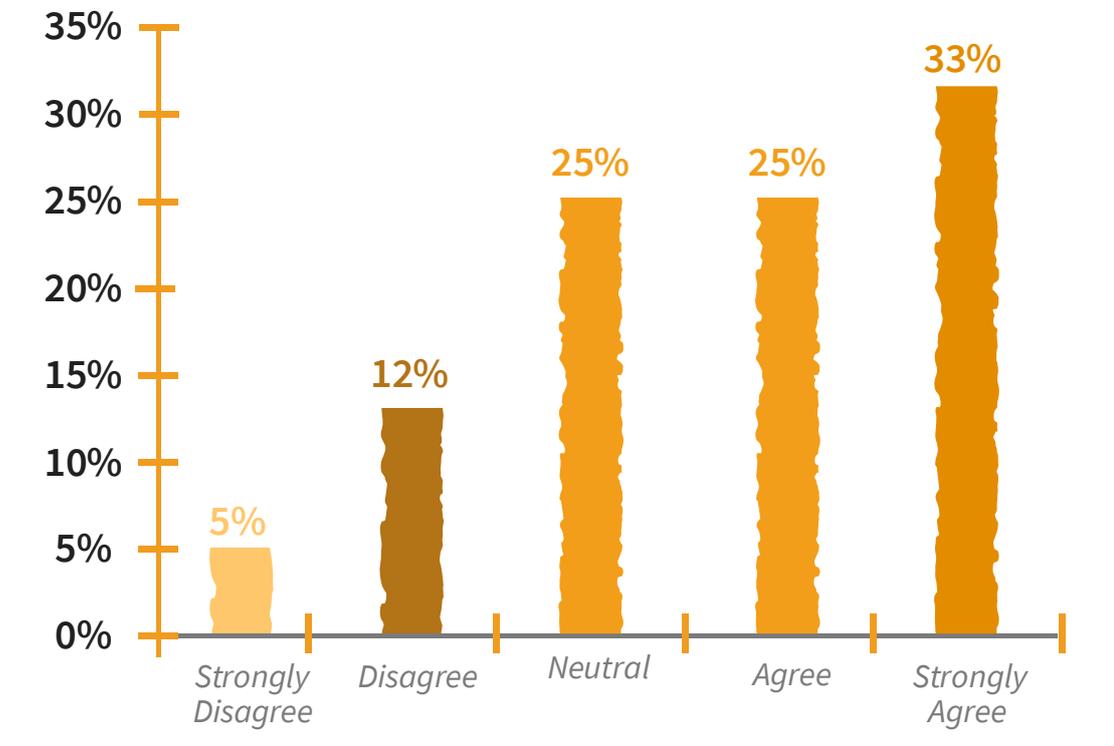
Facebook is also an ideal platform for the growing entrepreneurial movement who are engaged in digital businesses. Sudanese are ethnocentric, meaning they place a high value on products and services that are made locally<sup>8</sup>. This extends to a sense of nationalism and collective success at Sudanese businesses or scholars who are successful internationally. Therefore, whenever a new Sudanese product is launched, there is a sense of collective support that is felt most vehemently on Facebook. What leads to these brands and products not delivering on their brand promise is most often a lack of customer centricity, which stems from a lack of relevant education; A topic we will refer to in ‘Knowledge vs Applied Knowledge’.

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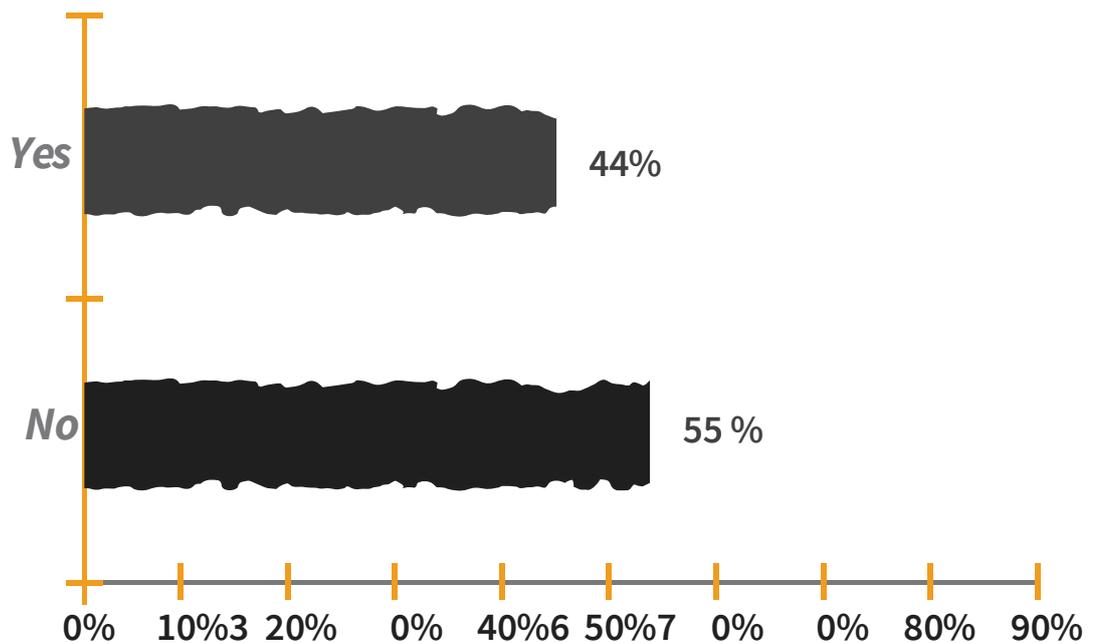
## ***Facebook is where I meet new people ?***



## Facebook is where most companies advertise their products ?



## I use Facebook to advertise for the company I work for

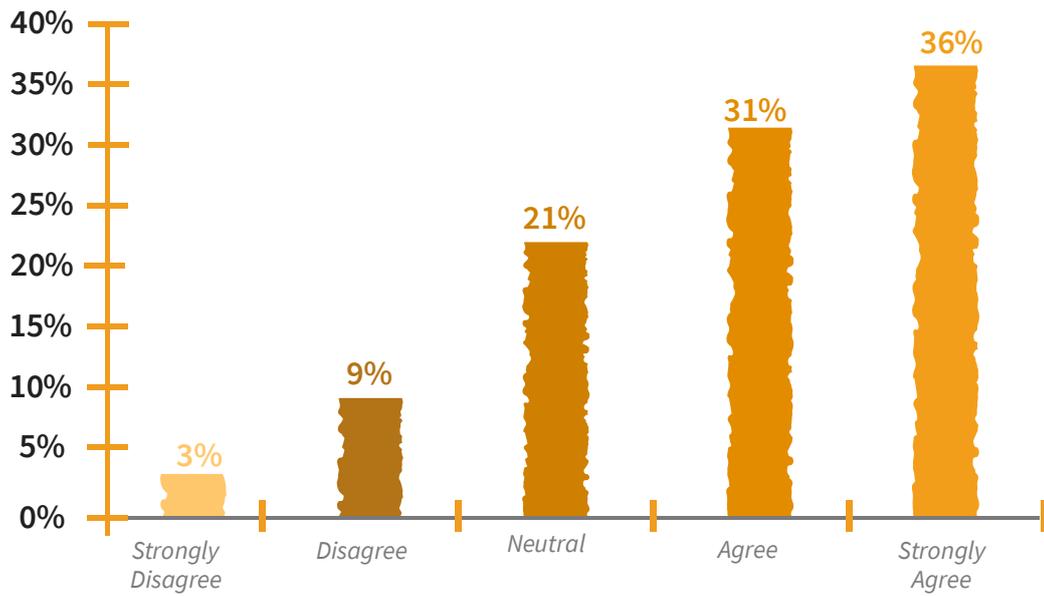


There is a second Facebook trend that extends beyond Facebook; the use of Market Place, or more specifically selling products on Facebook, whether using market place or dedicated Facebook Groups. There are over 30,000 products being bought and sold on Facebook every month. Only 8% of the digital community have ever bought a product via an ecommerce website, and less than 1% of the wider population have ever bought a product via an ecommerce website.

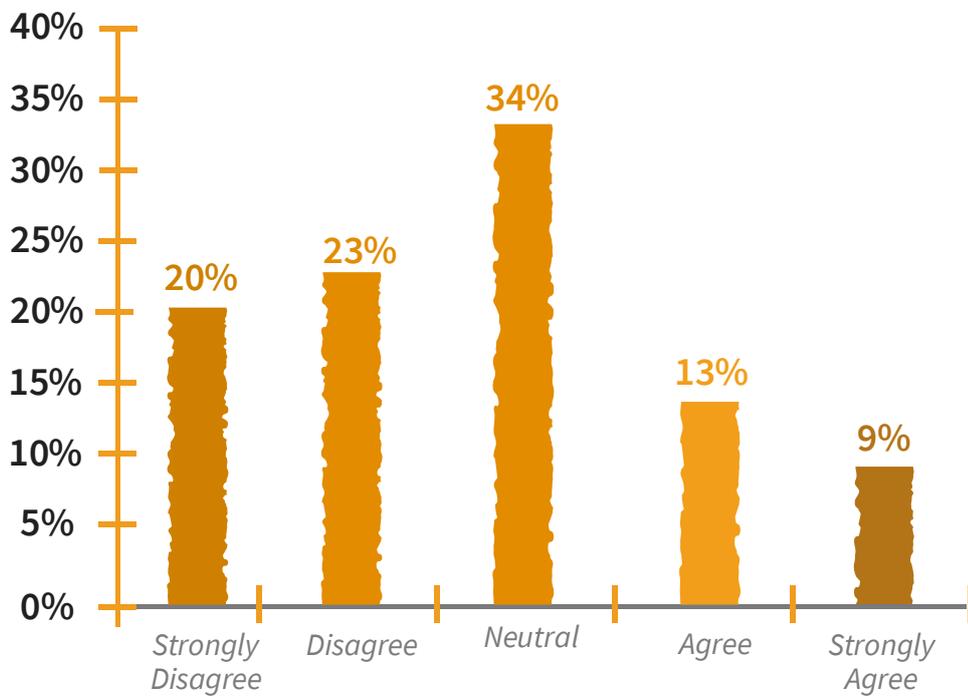
**This paradox required further investigation, and we discovered three pertinent points that help explain this trend:**

1. The single largest reason customers don't buy via ecommerce websites is perceived Trust. Whilst there is no lesser or greater trust that can be inferred from an individual selling a product via Facebook, the trust placed within Facebook itself is somehow passed onto the seller and the seller is credited with greater trust than some Ecommerce sites. This point is of critical importance so we shall reiterate it: Digital Buyers trust individuals selling random items on Facebook more than Ecommerce companies who's primary role is to sell products online.
2. The range of products available is almost limitless, and the ability to communicate directly with the seller via messenger only adds to the immediacy that digital buyers require when buying products online.
3. Facebook and other digital platforms offer a chance for buyers to hold sellers accountable if they engage in any fraudulent activity.

## Facebook is where people sell their products ?



## Facebook is where I buy products ?

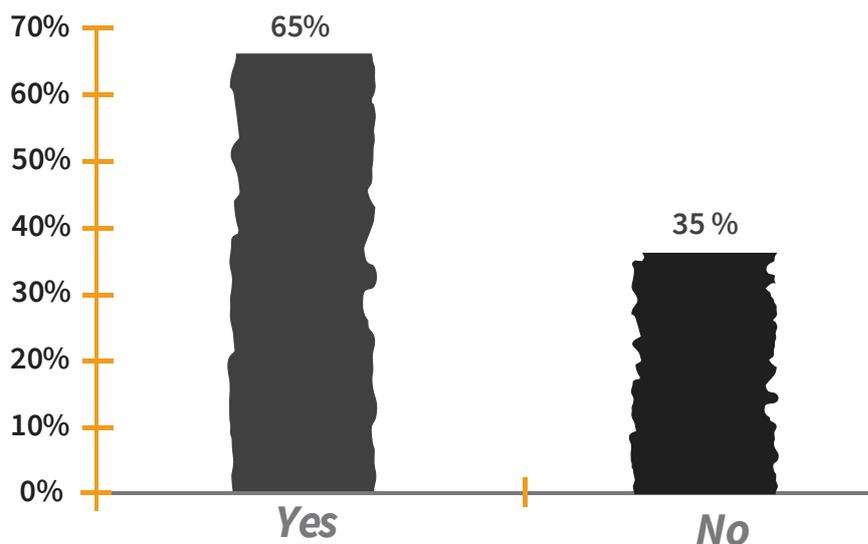


# TWITTER

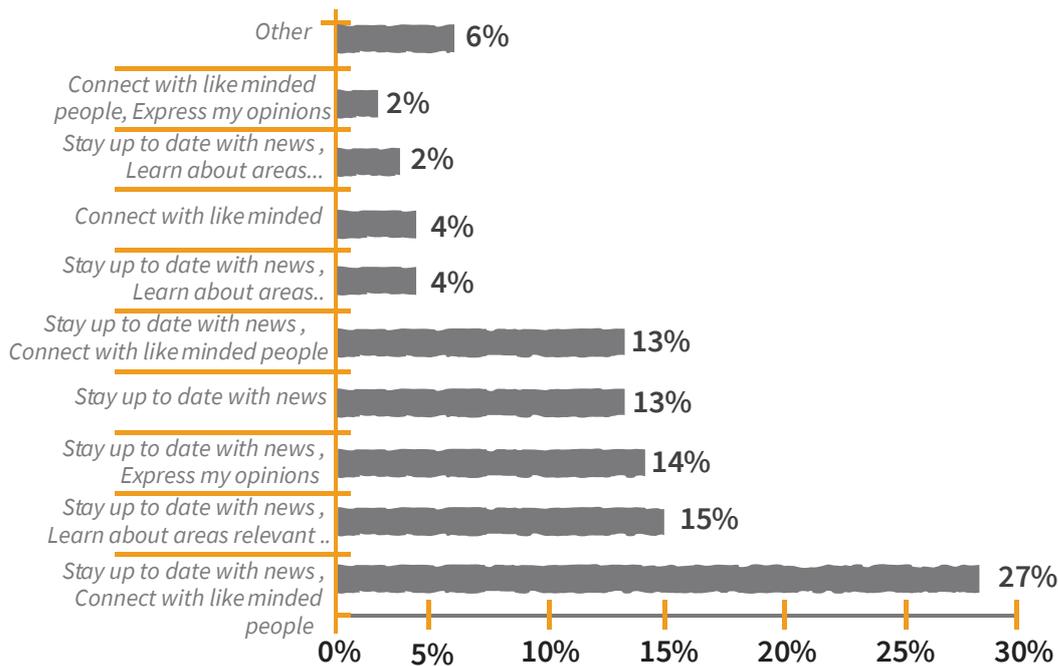
Twitter is possibly the most interesting platform for the digital community. During experimentation with our own brands, twitter traffic & engagement was both 156% greater than any other social platform, and more importantly, Twitter users spent on average 240% longer on our websites and apps engaging in the product. During further investigations, we discovered that twitter users typically are early adopters of all technologies. Whilst Twitter is mainstream globally, and the adoption rates are relatively stable, in Sudan, Twitter, even as a concept, attracts those who are inquisitive, vocal and opinionated. This is reflected in the data. The most common uses of Twitter, aside from staying up to date with news (63%) are to connect with like minded people (43%) and to express an opinion (38%). Twitter users have an identity unto themselves. To use twitter is, in and of itself, an act of self-expression; a marker as to the kind of person you are. That being someone who is independent, self-expressive and opinionated.

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## *Do you use Twitter ?*



## Why do you use twitter ?



## INSTAGRAM

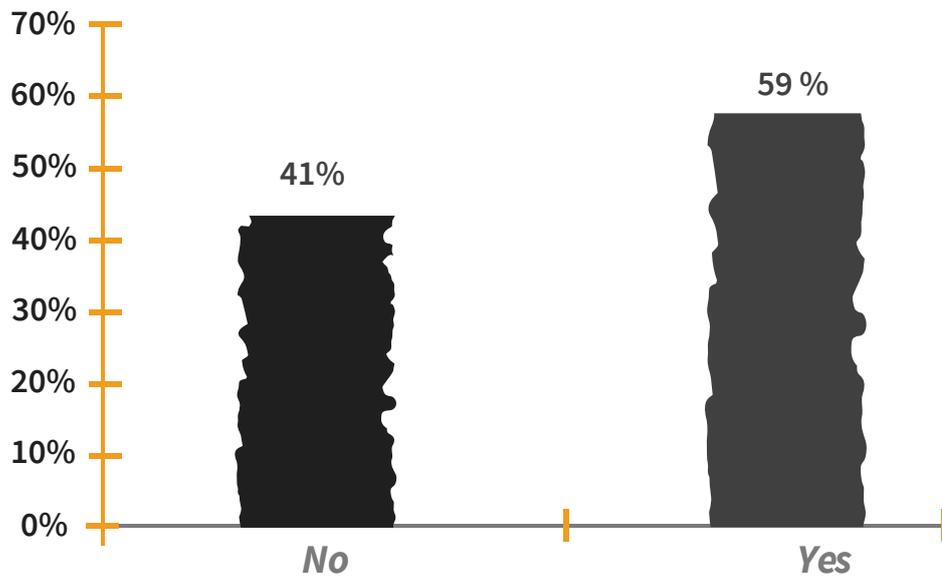
Instagram usage tells a tale of generations and how different generations view and use social media. More than any other platform, Instagram divides the generations, and gives insight into how Millennials will consume in the future. Whilst on average 59% of the digital community use Instagram, when we isolate millennials, we see that 67% of millennials regularly use Instagram, whereas only 46% of Generation X use Instagram.

To a large extent, instagram in Sudan acts in a similar way to Pinterest globally (Pinterest penetration in Sudan is less than 1% and therefore not part of this study). **Instagram users use the platform in a similar way to others globally:**

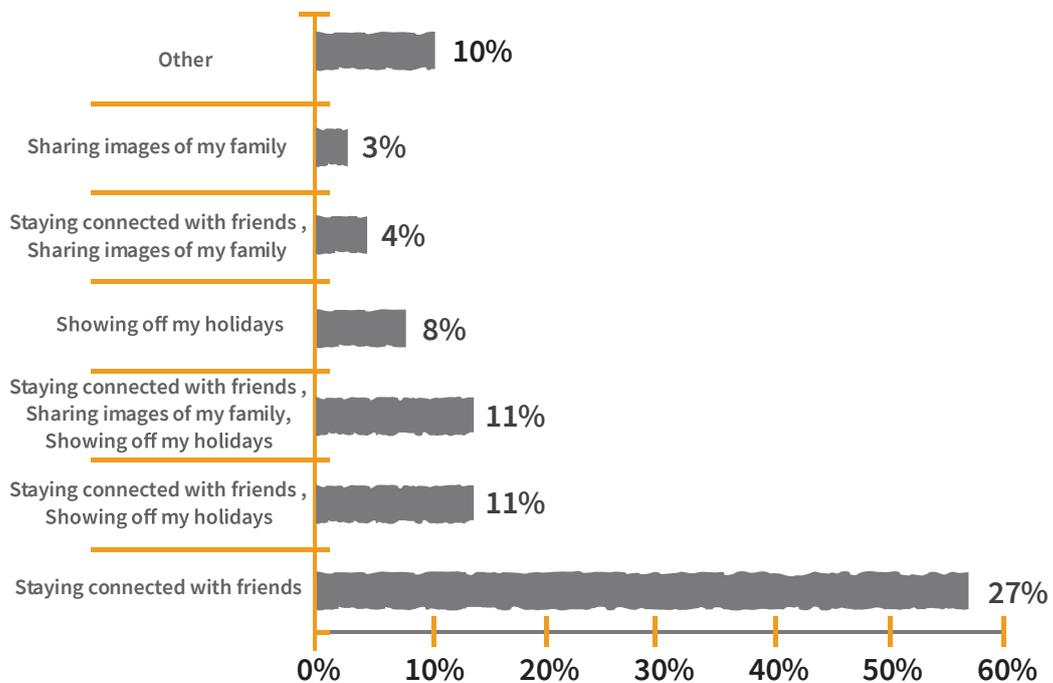
- The Humble Brag (showing off vacations, restaurants, clothes etc.)
- Artistic self-expression.
- Exploring new places.

However in Sudan there is a separate usage of Instagram; browsing for products, in a similar way to one who browses asos.com or Pinterest.

## Do you use Instagram ?



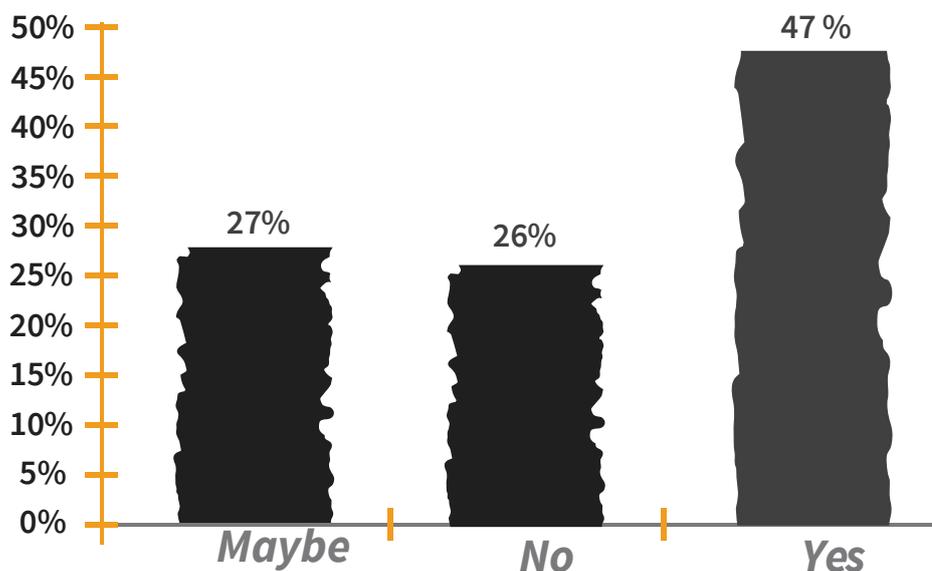
## Why do you use Instagram ?



74% of Instagram users either regularly or occasionally use Instagram to browse for products. The most popularly product based profiles are almost always vertical focused. In that they focus on either electronics, women's clothing (specifically tayaab, a type of traditional dress worn by Sudanese women) or children's clothing. What's even more interesting is that 49% of people have bought directly from an Instagram seller.

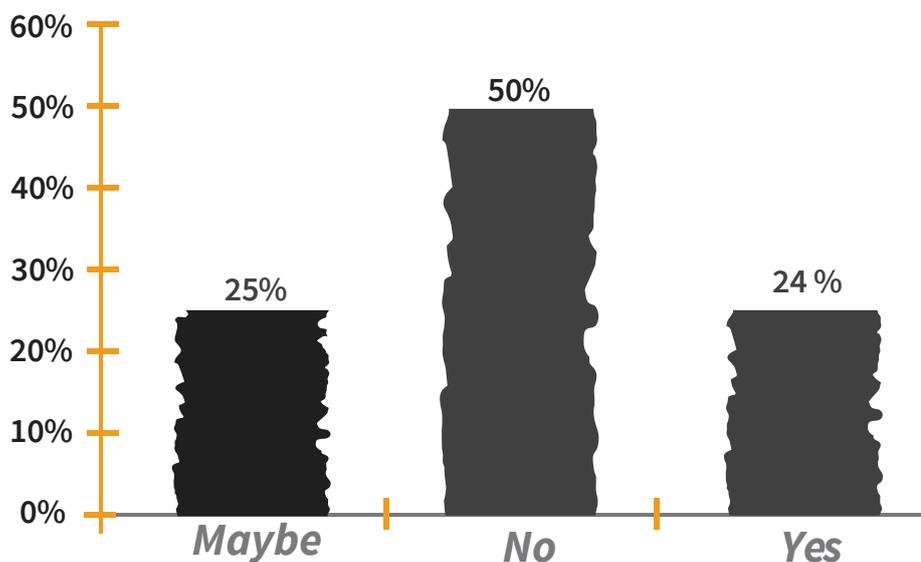
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### *Instagram helps me find new products and services*

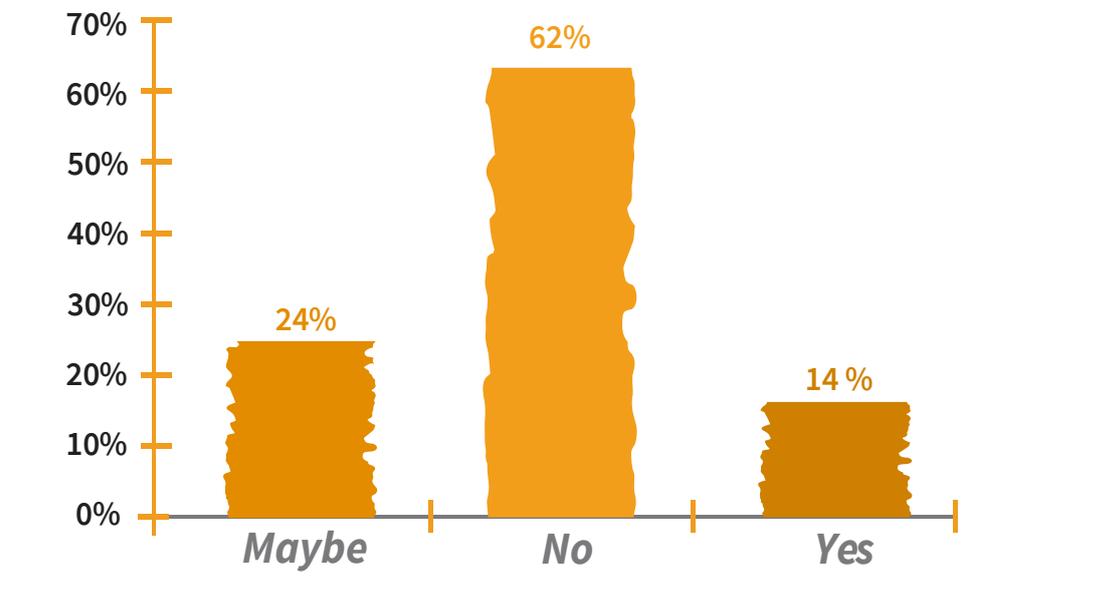


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### *Instagram helps me buy products and services*



## *Instagram helps me sell new products and services*



This isn't limited to career traders who import, or create goods to be sold via Instagram. It is also common place for individuals to use Instagram as a platform to market their own items that they'd like to sell. This isn't limited to Instagram, but it is interesting to see this behavior in Sudan being a major part of the platform. 32% of people either regularly or occasionally sell their products on Instagram. The use of social media as an ecommerce platform is in and of itself a reaction to the perceived lack of ecommerce platforms available within Sudan. We cover this in more detail in the Ecommerce section.

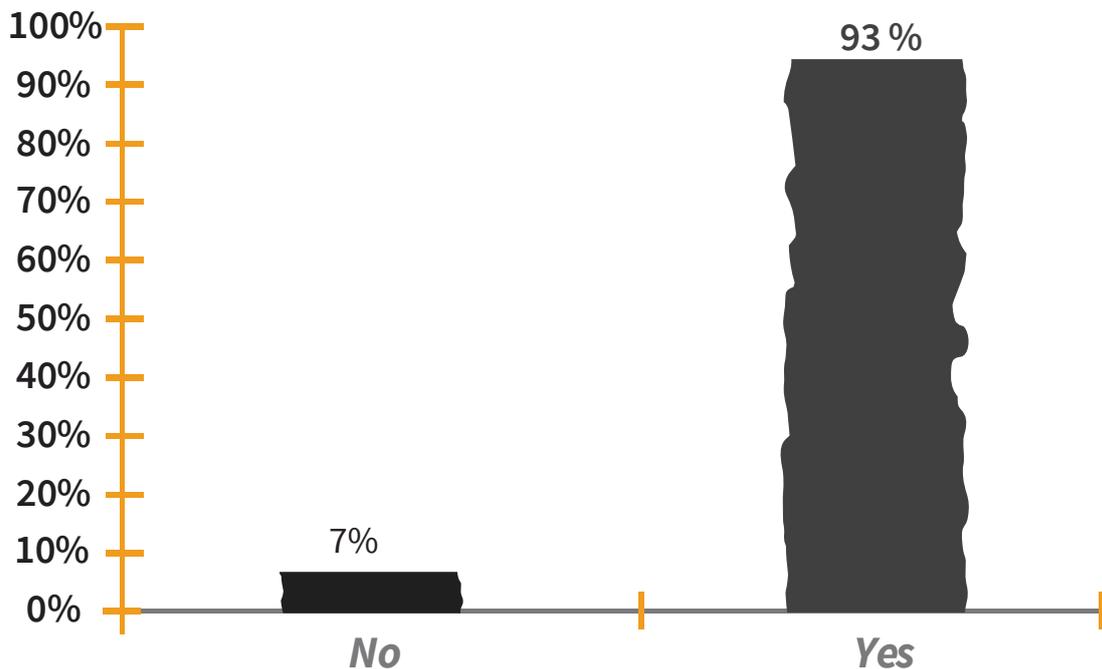
## LINKEDIN

93% of the digital community have a LinkedIn account. This is not unusual, when we explore the rationale for LinkedIn usage. Globally 85% of LinkedIn users use the platform for job seeking<sup>9</sup>. In Sudan the percentage is lower at 34%. However the majority of usage is connected to two other core LinkedIn functions: Learning and connecting with people in the same industry.

Staying connected is an important part of Sudanese social media usage. We see this in every micro study conducted. For example we see that Sudanese LinkedIn users are 4 times more likely to congratulate a connection on a work anniversary than non-Sudanese. They are also 3 times more likely to send a ‘thanks for connecting’ message. Whilst unsolicited LinkedIn messages are often associated with sales and recruitment behaviors, in Sudan, it’s very much cultural. Saying ‘hello’ is just good manners, be that in public or via social media.

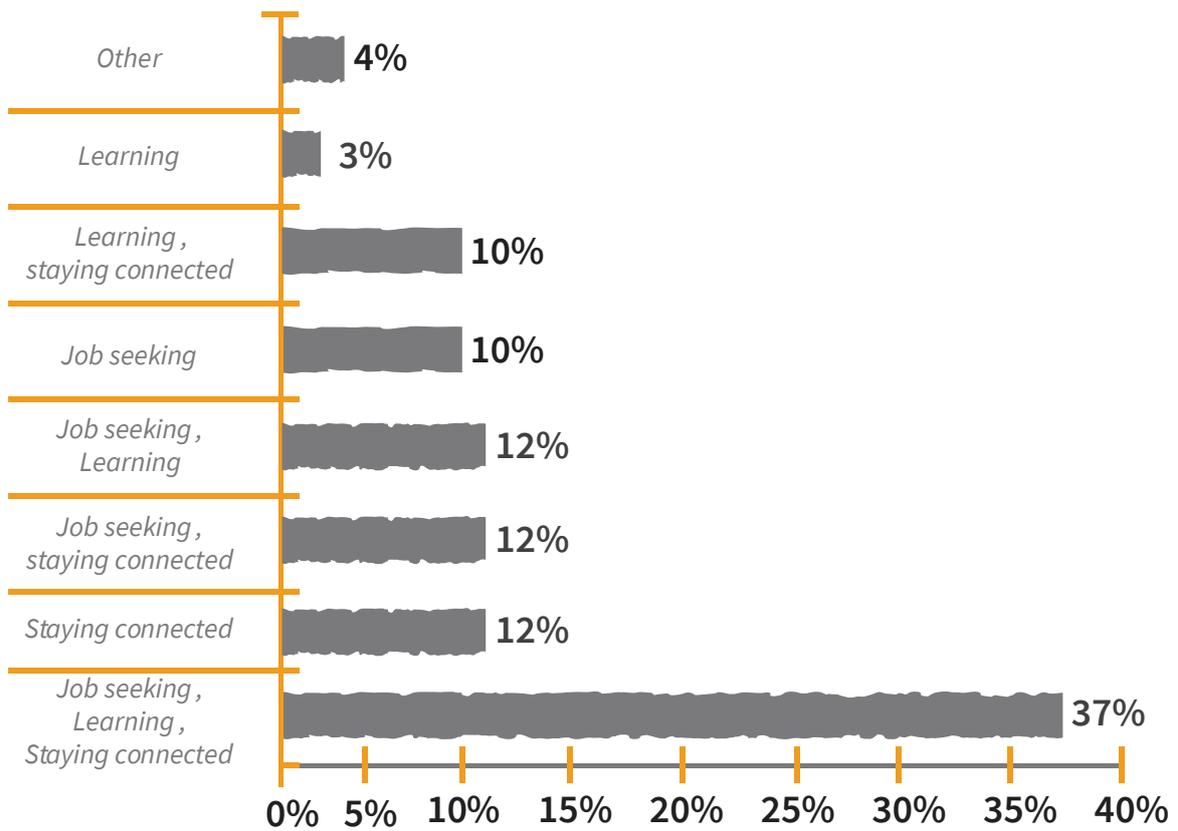
Being connected within an industry is an important part of Sudanese usage of the platform. This again reflects behaviors in culture and society. Most people tend to define their career life by their degree or their work industry. For example, telecoms employees, regardless of their department or educational background have extremely strong links with other telecoms employees. This creates behaviors which are normal for Sudan but extraordinarily abnormal outside of Sudan. One interviewee who requested anonymity recounted a story. He works in one of the four large telecommunications companies in Sudan in an engineering team. He said; “One time we were really struggling to understand the root cause of a network problem. I called my friend who worked at ‘another telecommunications company’ who immediately came to the site where we were working and helped us fix the problem.” Could anyone image a Vodafone employee calling an Orange employee and asking for assistance with a critical problem? This behavior is typically Sudanese. The need and desire to help other industry professionals supersedes loyalty to a company.

## Do you use LinkedIn ?

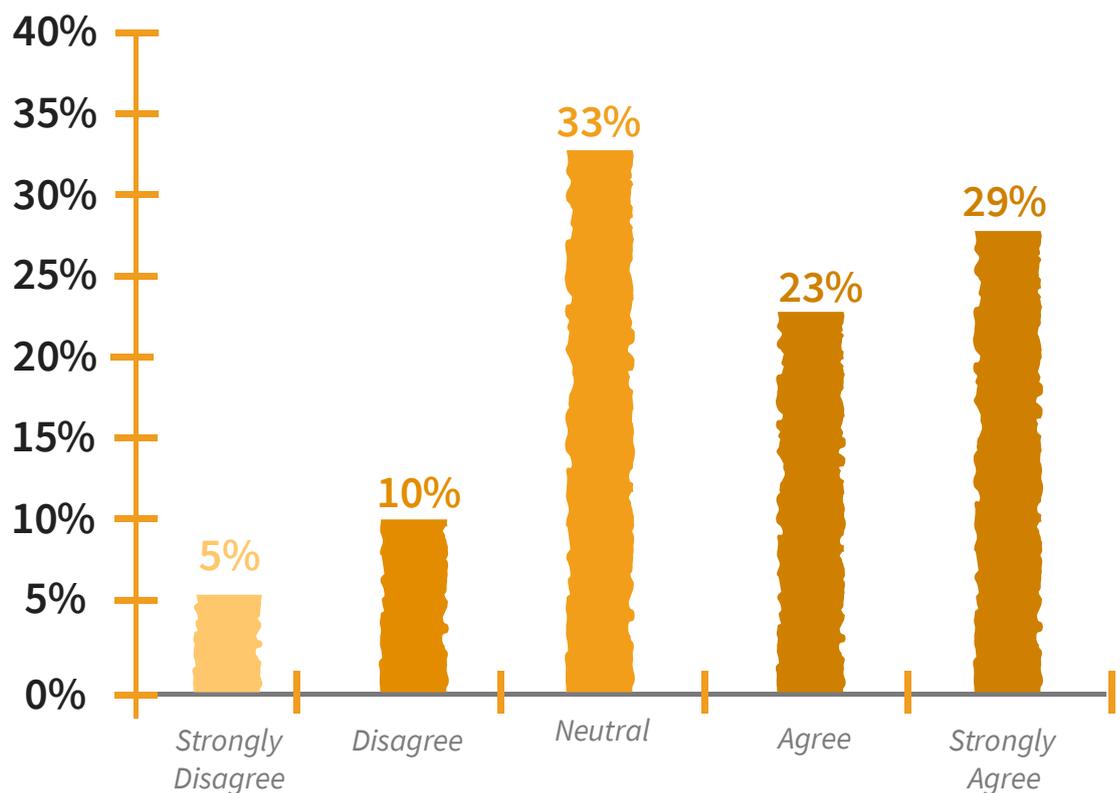


In our opinion this is one of the most admirable traits of Sudanese business life, and is best summed up by Lumyaa Eltayeb, CEO of M3Roud and Co-Author of this report: “I don’t want to beat the other ecommerce platforms. I want us all to win.” Collaboration between competitors should be a priority within the digital landscape. The overall aim of every digital business is to grow the size of the addressable marketing. This can be best achieved through cooperative competition (co-opertion).

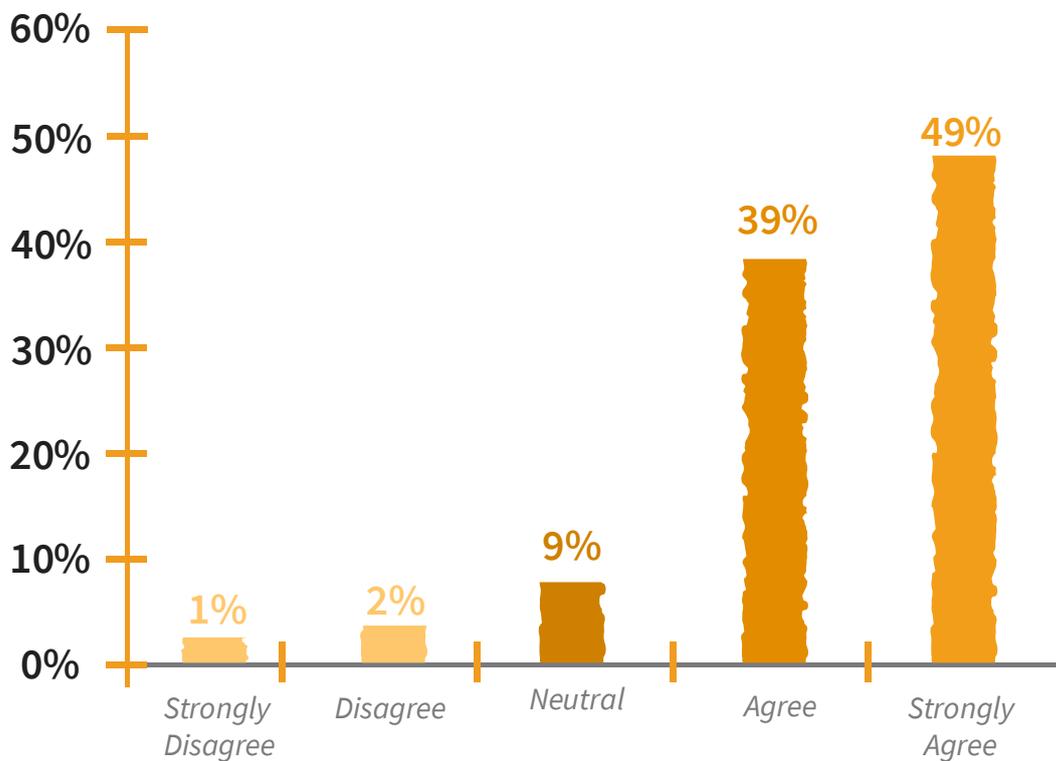
## Why do you use LinkedIn ?



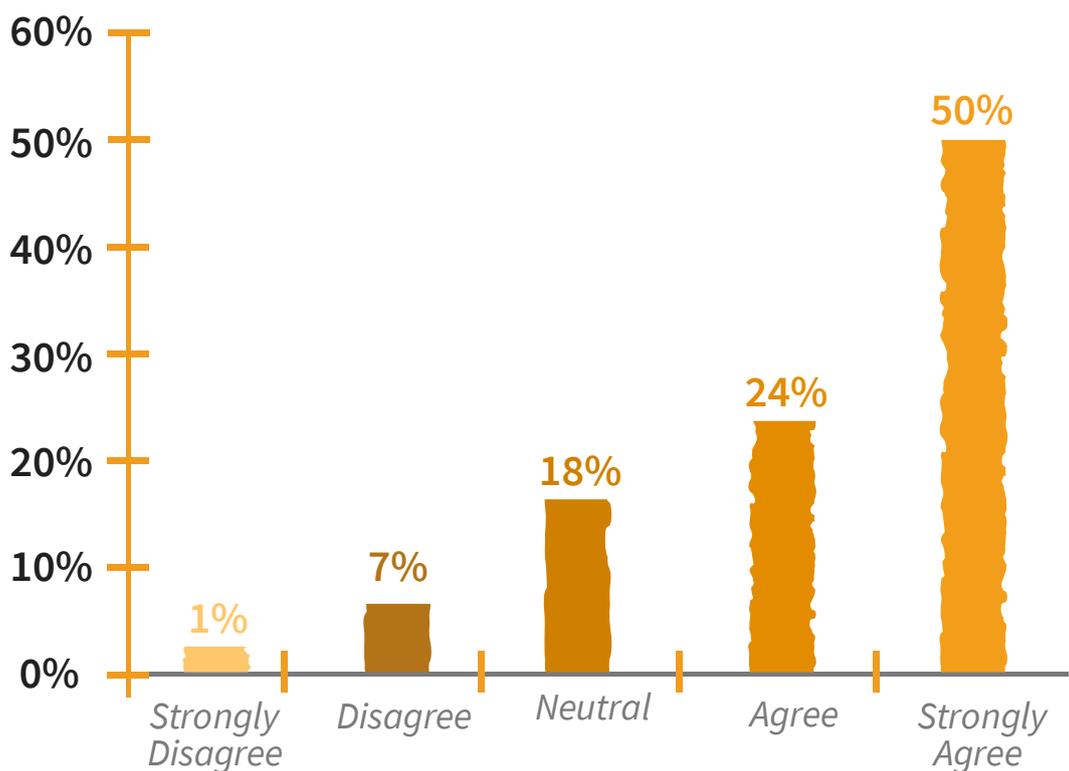
## LinkedIn helps me find new jobs ?



## *LinkedIn helps me connect with people in my industry ?*



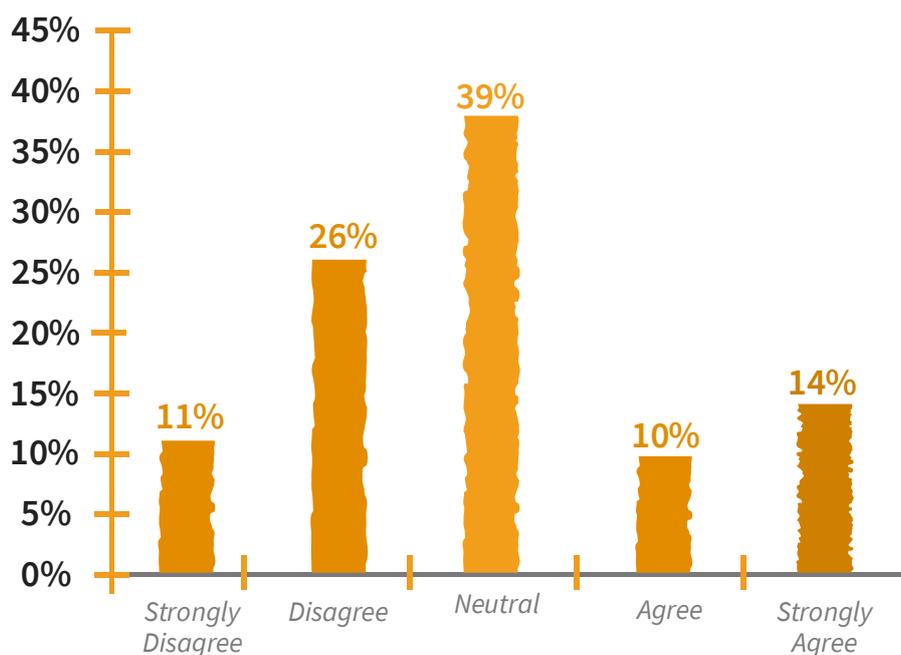
## *LinkedIn helps me make connections I wouldn't normally be able to make*



Unlike in other countries, preparing for meetings with people one has never met isn't really a core purpose of LinkedIn in Sudan. In Sudan if you've never met someone and you're about to meet them, the first 10-15 minutes of the conversation is most discussing one's personal background and family history. It is extremely common to find not only a connection of acquaintances in those first 10 minutes, but more often than not, a family connection. The co-author of this report, Abdelaziz Mohammed Abdelaziz speaks of an incident that best reflects this kind of intense cultural connection; "I was once on business in Toronto Canada, driving towards London Ontario which is about 2 hours away. I stopped at a small coffee shop which was isolated. Whilst ordering my coffee I could hear the distinct language of two Sudanese men talking, and I went to say hello. Within the first 10 minutes of discussion, we discovered that his family home is next door to my family home in Al Halfiya, Bahri, Sudan, and he attended my wedding." This kind of encounters would seem almost supernatural outside of Sudan, but the strength of personal bonds and connections in Sudan makes this the norm.

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### *LinkedIn helps me prepare for meetings*



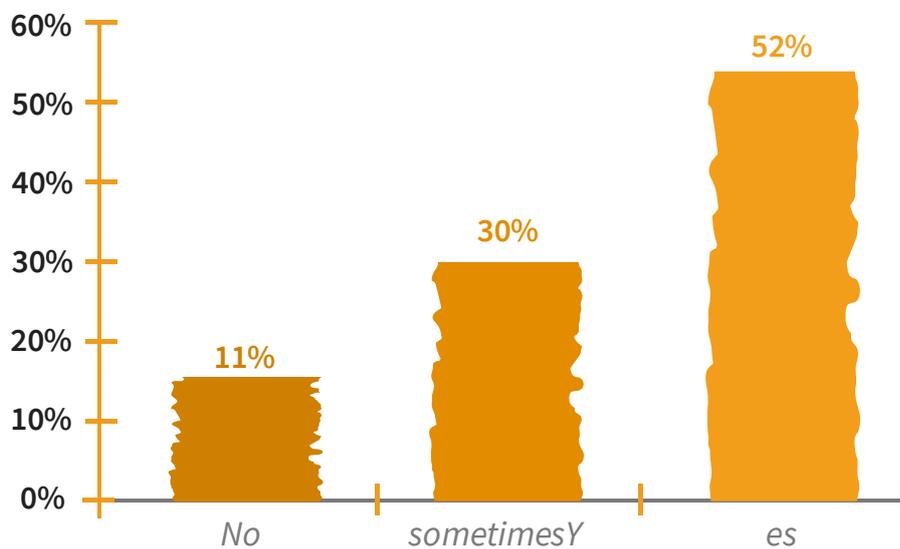
# WHATSAPP

WhatsApp is the most ubiquitous of all social platforms in Sudan and the usage is very similar to global trends. “Al-Whats” is a noun used to denote how one will share any given piece of information, be it a contact, email address or some photos. There is to some extent a ‘WhatsApp Addiction’ in Sudan. In 2015, the NTC announced that on peak days, up to 57bn (yes Billion!) WhatsApp messages are sent by Sudanese<sup>10</sup>. Given mobile internet penetration rates this would be more than 2,000 messages per day per person, which seems excessive. However, it does reflect a few cultural behaviours which are uncommon in other countries. Firstly there is a culture of sending broadcast messages to hundreds of people at a time, especially on Fridays and on public holidays. Secondly there’s a tendency to share ‘news’ very rapidly on WhatsApp, announcements by the central bank and international news directly affecting Sudan.

However it’s important to reiterate, WhatsApp news is used much in the same way that reading a tabloid news paper is in other societies. Whilst in the UK, we would regularly read ‘The Mirror’ or ‘The Sun’ newspapers, regardless of the authenticity of the journalism, or biases they may harbour. We read those papers for entertainment. In Sudan news spread via WhatsApp is known to be unreliable, but acts as a form of entertainment.

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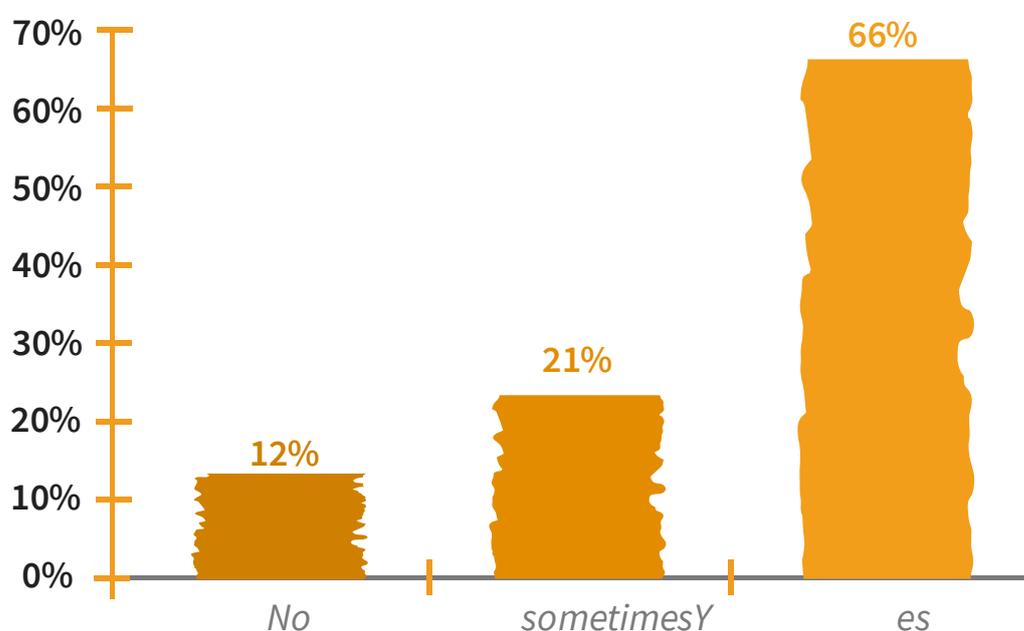
## *WhatsApp is useful to stay up to date with news*



Family groups are inevitably larger in Sudan than in other countries. In a recent study, 0.95% of WhatsApp groups in the US were seen to have 50+ members in the group<sup>11</sup>. In our smaller study we discovered 9.3% of groups created had more than 50 users in them. This is not surprising in Sudan. Whilst family groups could essentially have an unlimited size, even more mundane groups such as ‘a local 5-a-side football team’ could have as many as 80 members in the group. This large groups create an additional platform to sharing opinions in public.

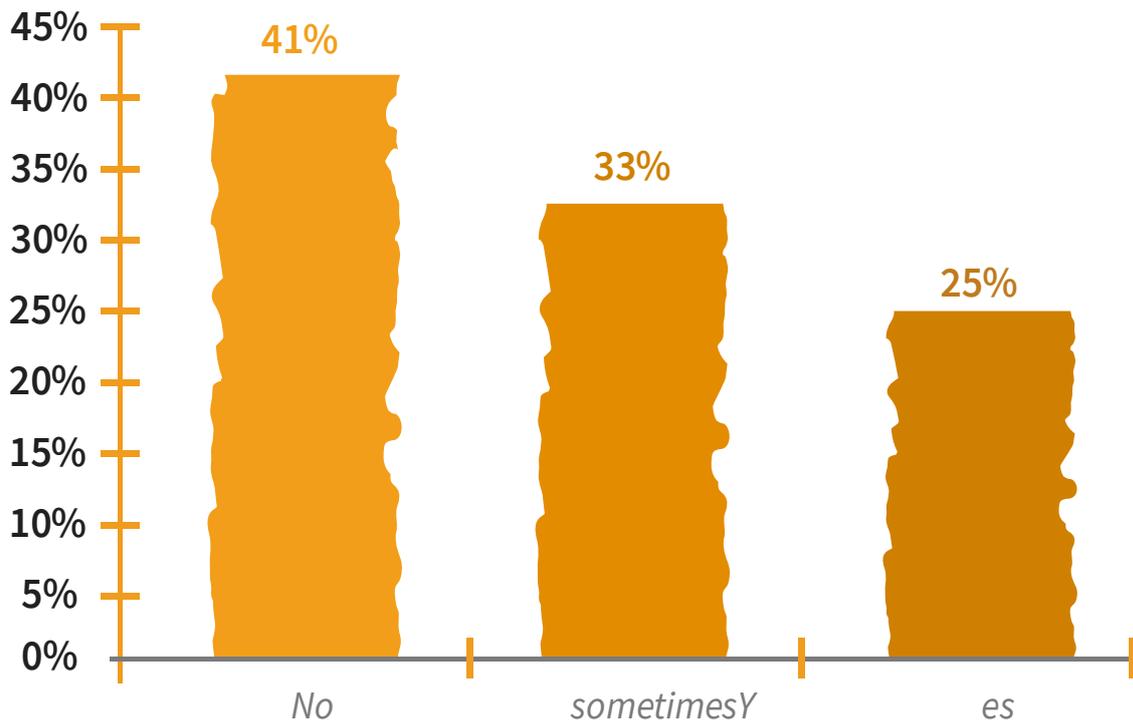
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### *WhatsApp is useful to share my opinions*

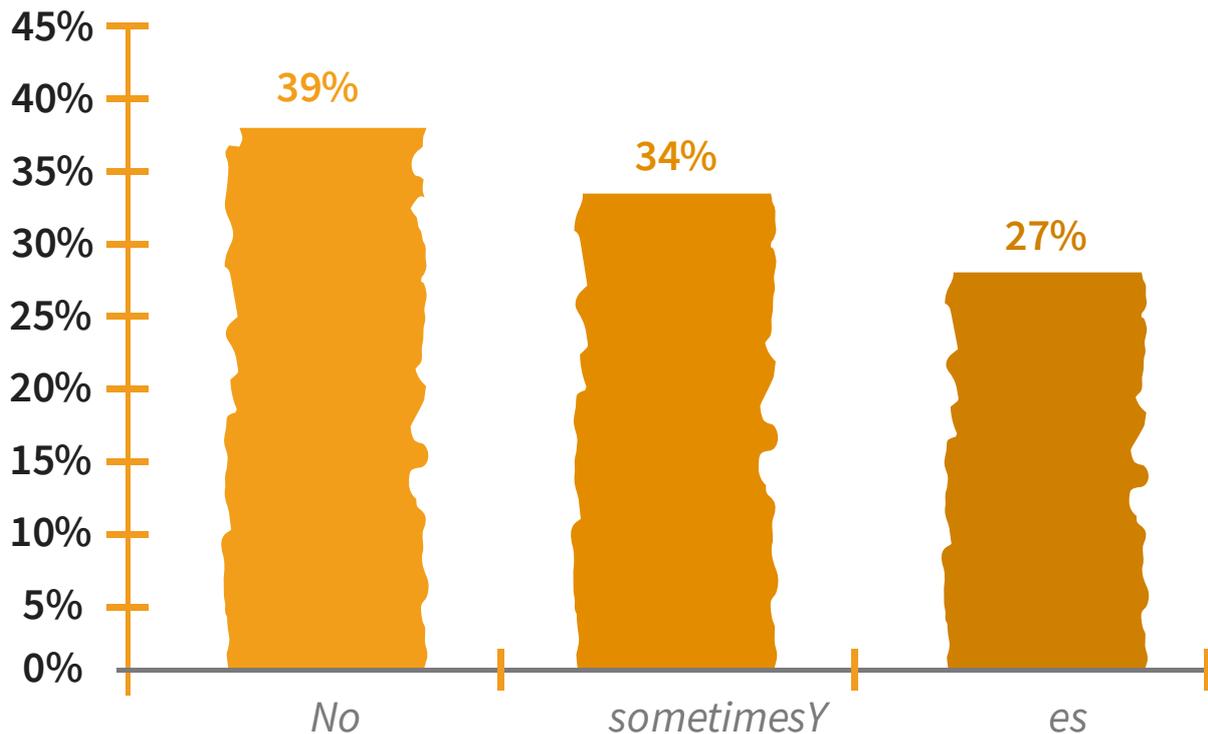


There are also specific groups that are set up to buy and sell products. Again, filling the gap of Ecommerce. 55% of WhatsApp users explore products via these groups which are most often set up by a single seller of a single range of products. It is, in it's own way, a genius form of market segmentation. Whilst in other countries, highly sophisticated behavioral analytic segmentation tools define micro buying segments in order to market appropriate products to them, in Sudan, social connections are used to create micro target segments. Whilst this works wonderfully for individual sellers, it clearly cannot be scalabled, and the role of Ecommerce has to be to leverage both social connections and high technology to deliver a comparable ‘personalized’ experience.

## WhatsApp is useful to buy products



## WhatsApp is useful to explore new products





**Chuma will conveniently satisfy its customers by being the fastest delivery service with the widest distribution network in Sudan by using a smart, friendly, reliable and secure payment platform.**

**Make delivery payments by cash or using the app's e-payment platform**

- Onsite e-Payment at restaurants .
- Track delivery .
- Post or view ratings.
- E-Payment on delivery.
- leave or read reviews.
- Locate outlets using the app.
- Receive push notifications.
- E-Payment on Pickup.

**Users can:**

**Pay by bank card**

**Pay by mobile wallet**



+249123300711

z-unit06@hotmail.com

www.chuma.sd

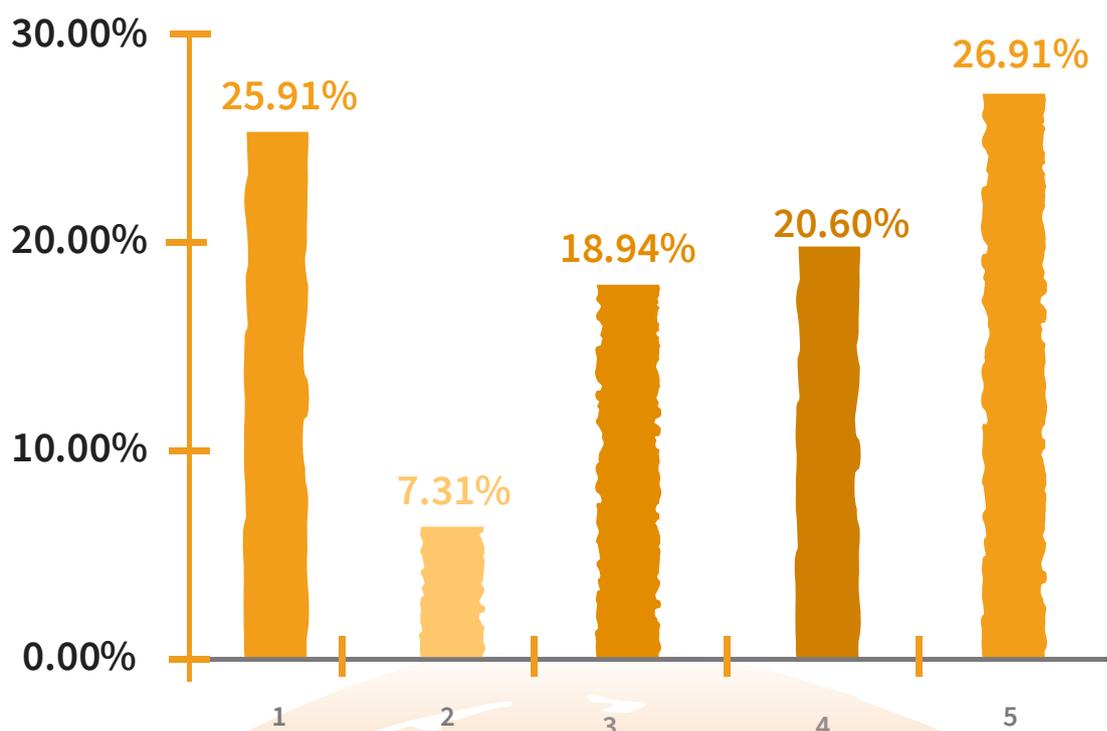
# THE GROWTH OF DIGITAL KNOWLEDGE

## SEO

There has been a 17% improvement in the understanding of SEO since the 2018 report. This is in part due to greater education within digital training sessions and a greater willingness of digital marketers to better acquaint themselves with all digital marketing channels. In further questioning during interviews, it's clear that the current levels of understanding of SEO are still rudimentary and focused on On-Page techniques.

However given that the levels of competition for ranking is so low, well executed on-page SEO with minimal off-page work still has a large impact on rankings for local searches. What's more the most encouraging thing is that there is a desire to learn the finer arts of SEO within the digital community.

### *How well do you understand SEO*



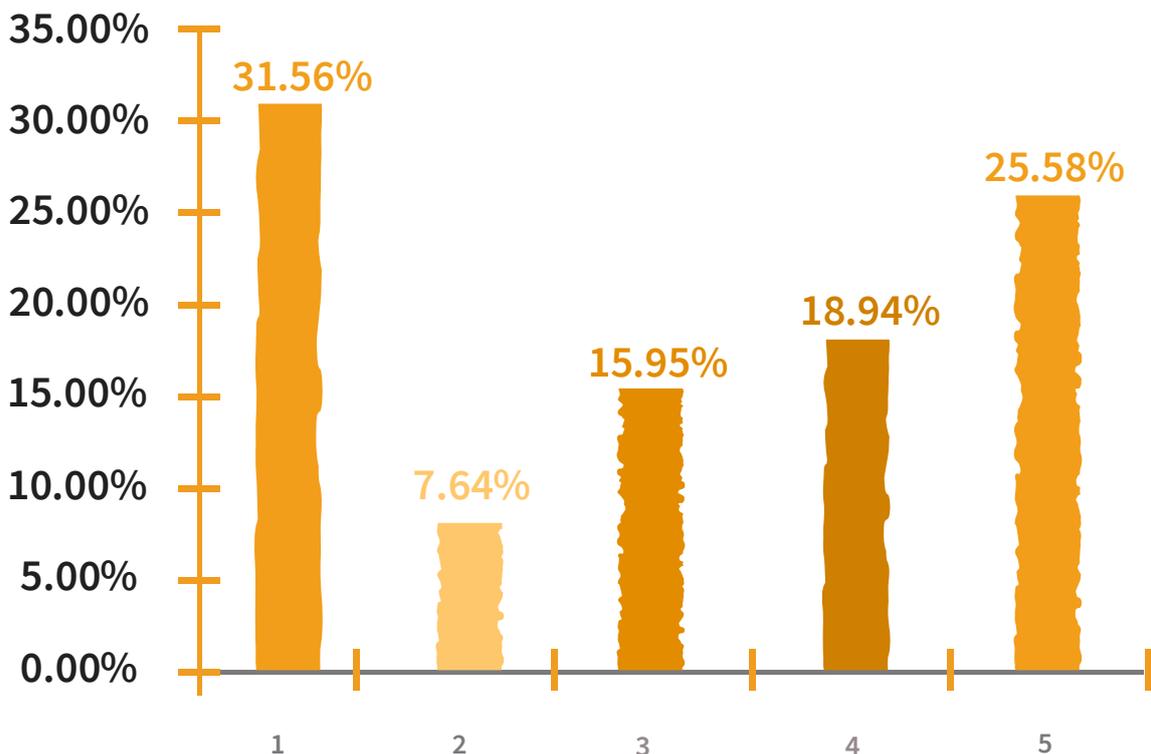


# RESPONSIVE DESIGN

There is a significant increase of 40% year on year in the understanding of responsive and mobile first design. This is critical to Sudan, as so much web traffic is mobile. This understanding has seeped into design behaviors. We noted in the last report that 48% of websites launched within the previous 12 months were not 'mobile first' even if they had an element of responsiveness to them. However, in the last 12 months, this number has halved, and now 76% of new websites launched in Sudan are mobile first.

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## *How well do you understand responsive design*

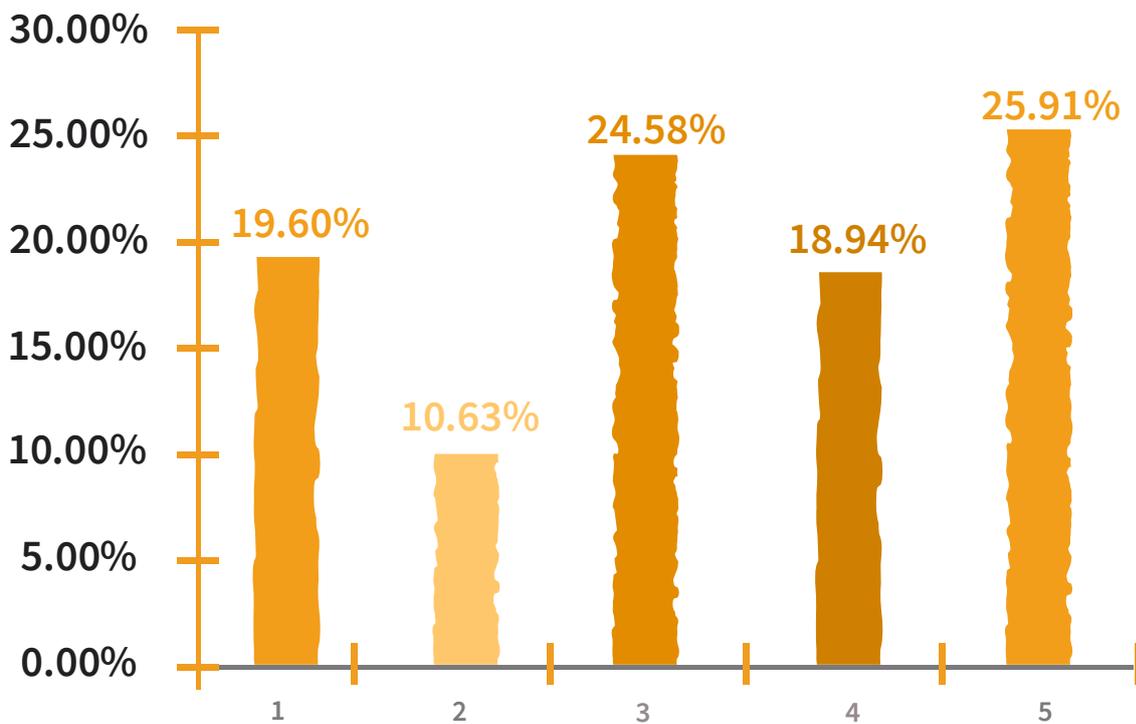




# DISPLAY ADVERTISING

There has been a 22% increase in understanding of display advertising and this is seen particularly strongly with digital startups trying in vain to target Sudan via Google’s Display Network. As Sudan Digital we continue to be the only company to be able to target Sudanese consumers with an 80% accuracy using GDN and continue to lobby Google, Facebook and Twitter to allow Sudanese businesses to use their platforms effectively.

*How well do you understand display advertising*



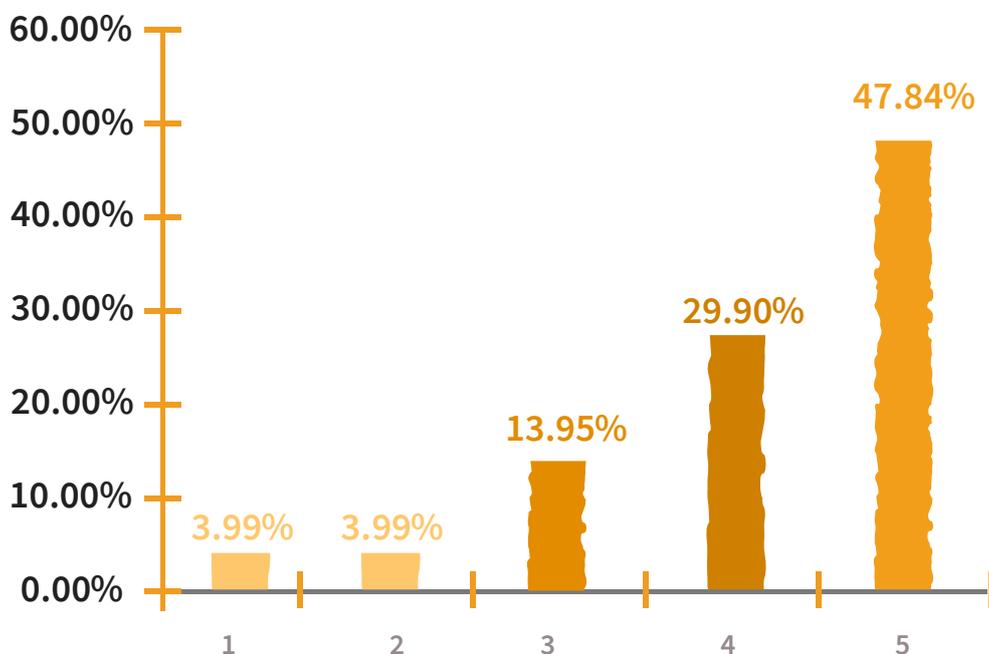


## KEYWORDS

The knowledge of 'keywords' is directly related to a better understanding of SEO. There has been a 12% rise year on year in understanding of keywords. It's clear during interviews that this is related to better performance of on-page SEO and not related to keyword targeting or segmentation through Google Adwords.

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### *How well do you understand Keywords*



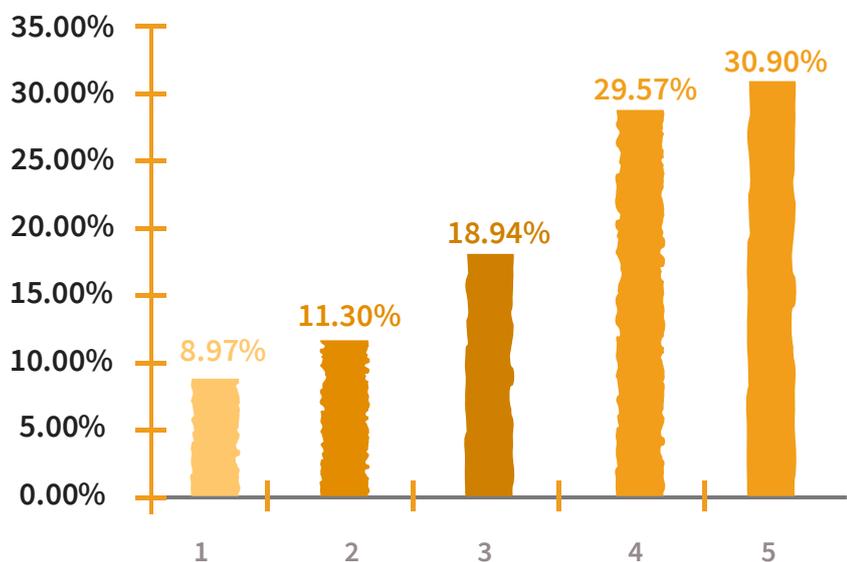
## EMAIL MARKETING

There is a 14% increase year on year in understanding of email marketing, which remains surprising since email marketing works so effectively in Sudan. Following the last report, we received a number of queries regarding how open rates can be so high in Sudan, specifically from other companies who were seeing much lower open rates and click through rates. We can confirm that following over 50 separate email campaigns

run by Sudan Digital and AMC's subsidiaries, open rates in Sudan remain over 28% for well designed campaigns, which is extraordinarily high. Upon investigating why other companies were unable to achieve such results, the answers became clear. For the most part, email marketing communications are unsophisticated, with unoptimized subject lines, preview text, and sender addresses. Email layouts are often poor with very high spam scores and email systems used are rudimentary without any consideration for server effectiveness.

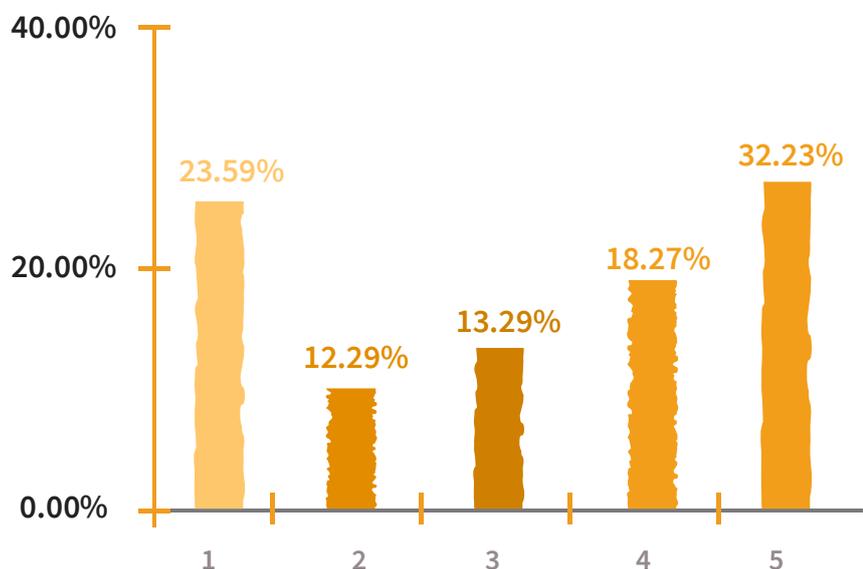
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### *How well do you understand email marketing*



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### *How well do you understand email open rates*

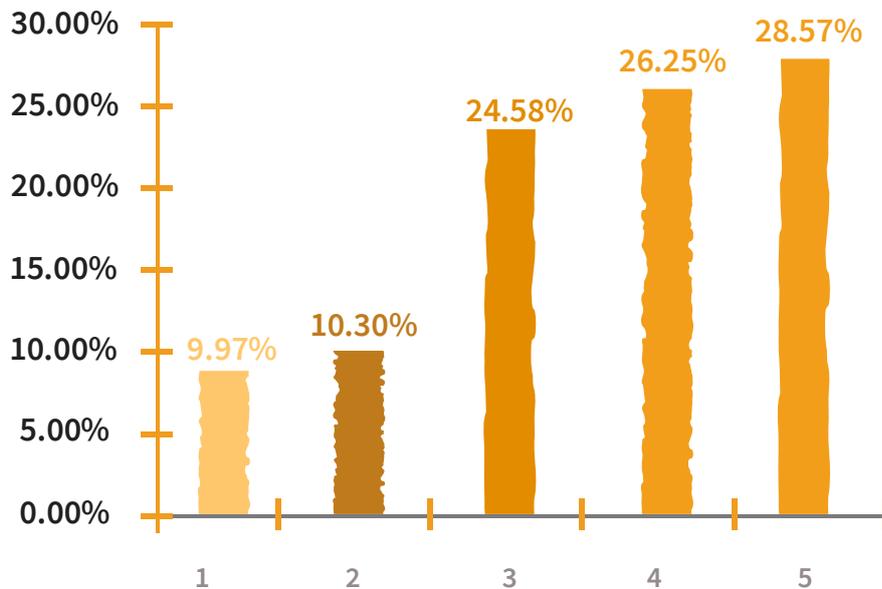




# IN APP ADVERTISING

There is a 16% increase year on year in the understanding of in app advertising, with many startups trying in vain to delivery ads via GDN. The increase in awareness has driven an increase in desire to engage in display and in app advertising, yet most companies remain unable to access this market effectively.

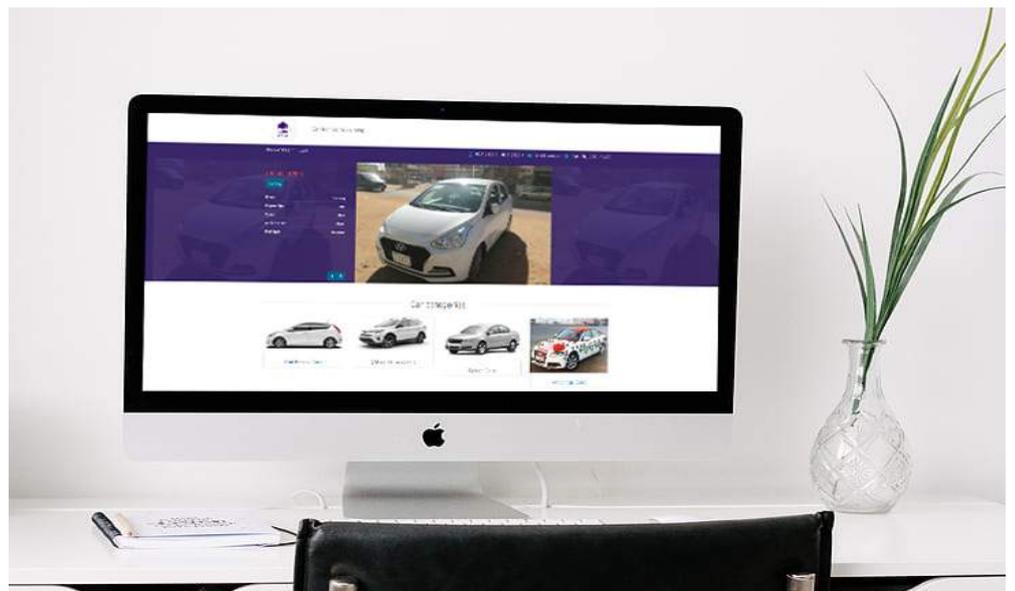
*How well do you understand in app advertising*





## RENTX Car Rental , Dealership

*RentX is the first dedicated web platform & marketplace in Sudan that allows Car sharing between individuals, aiming to optimize the use of existing resources and offer a better alternative to car ownership by inventing a new form of responsible mobility based on exchange. Rentx is made to add values for car renting marketplace by making the car rental process much easier, faster and more secure by offering best of services according to the highest standards. It is a platform that connects, regulate and maximize the benefits to all different parties in the car rental ecosystem, starting from car owners, renters, insurance companies, auto repair workshops, and even the brokers.*



 [info@rentx.sd](mailto:info@rentx.sd)

 [www.rentx.sd](http://www.rentx.sd)

 +2499 2122 2214 / +2499 2122 2213

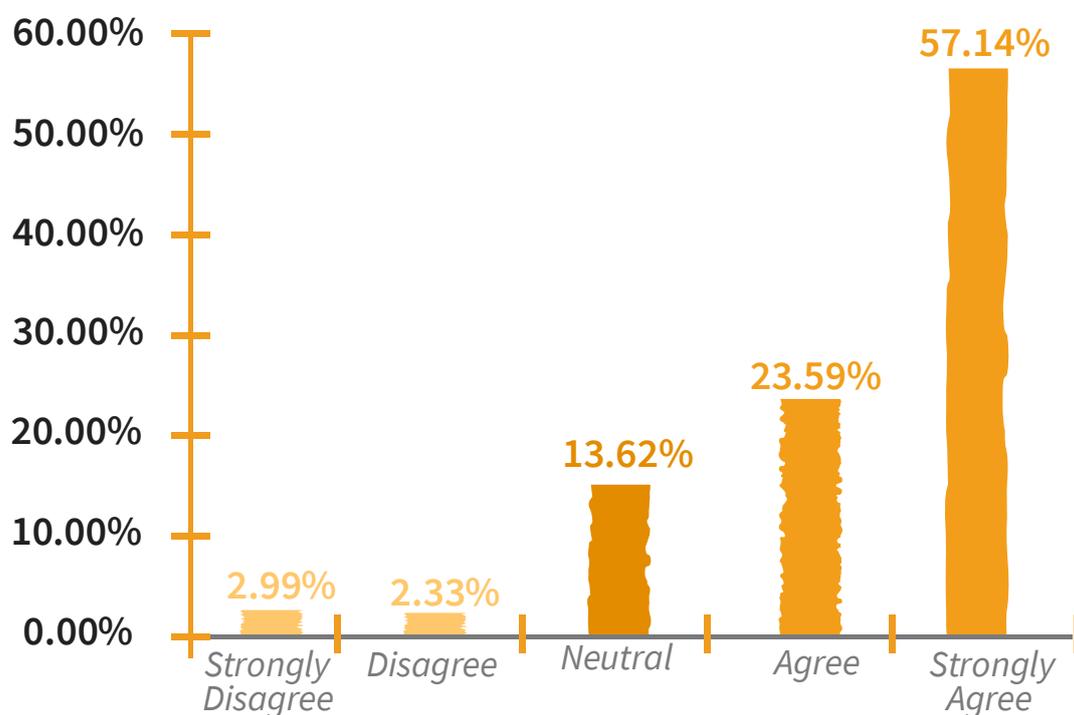
# DIGITAL SENTIMENT

## DIGITAL AND THE ECONOMY

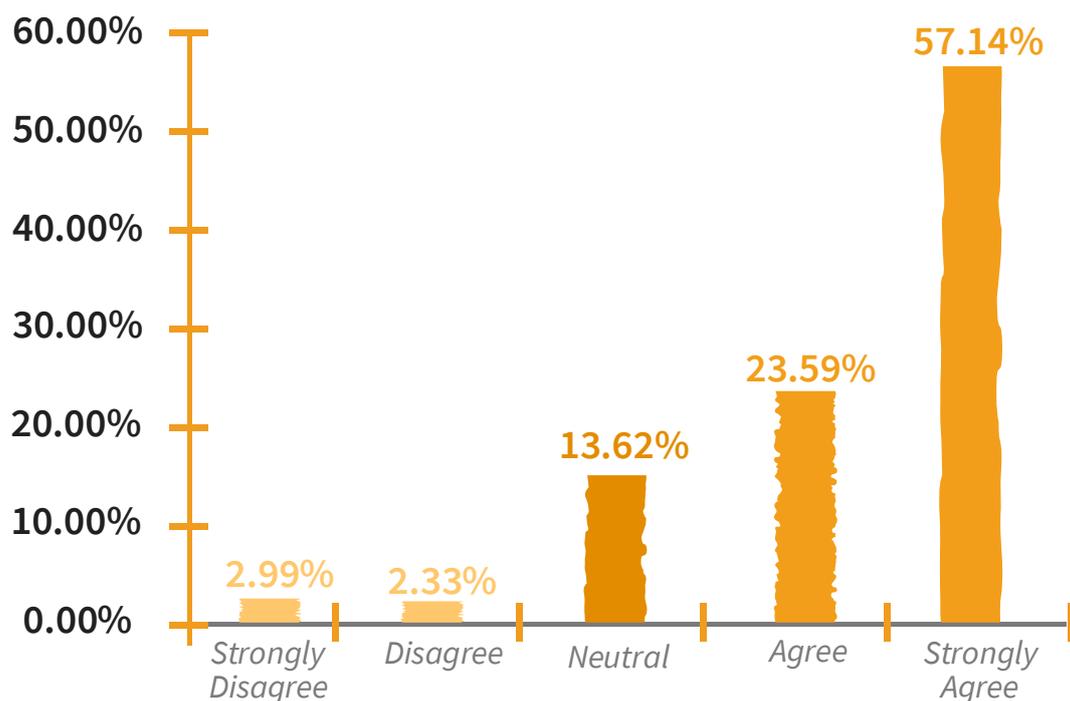
Digital is clearly an important part of the Sudanese economy, yet it's current contribution to GDP is negligible. During the survey and interviews we explored this topic in some detail, and it's clear that there is an acceptance that digital is currently an important part of the economy, with 66% of respondents agreeing to the statement, an increase of 7.53% over last year.

However there is growing confidence in the ability of digital businesses to make a more significant impact on the Sudanese economy. This is fueled in part by the success of ridesharing apps, the entrance of Careem into the market, and the success of new digital startups such as Fresh, M3Roud and Lemon Labs. This is reflected in the data, with 81% agreeing that digital will become of greater importance to the Sudanese economy in the future, which is an increase of 24.2% vs last year's survey.

## Digital will become of greater importance to the Sudanese economy



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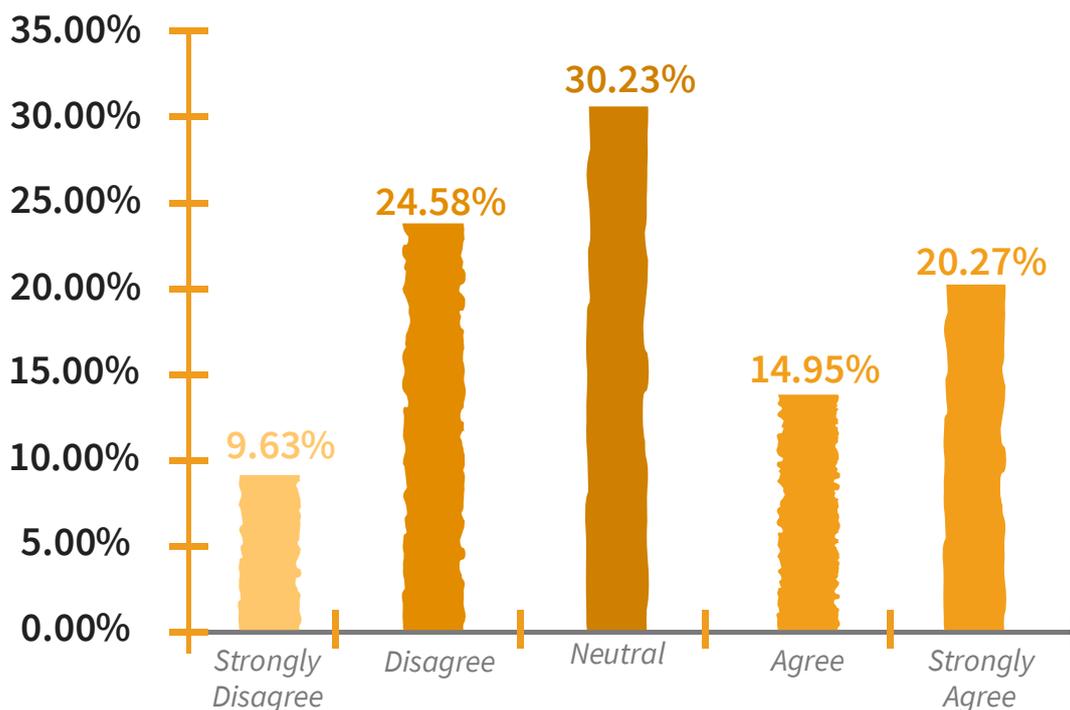
## COMPANIES PERSPECTIVES ON DIGITAL

There remains a skepticism of company's ability to understand and deliver truly digital strategies in Sudan. 35% both agree and disagree that most companies understand the importance of digital strategies. When we explored the topic further we discovered that the growth in digital startups has created a bias in the question. When asked specifically about larger companies, 70.5% of disagree that companies understand the importance of digital strategies.

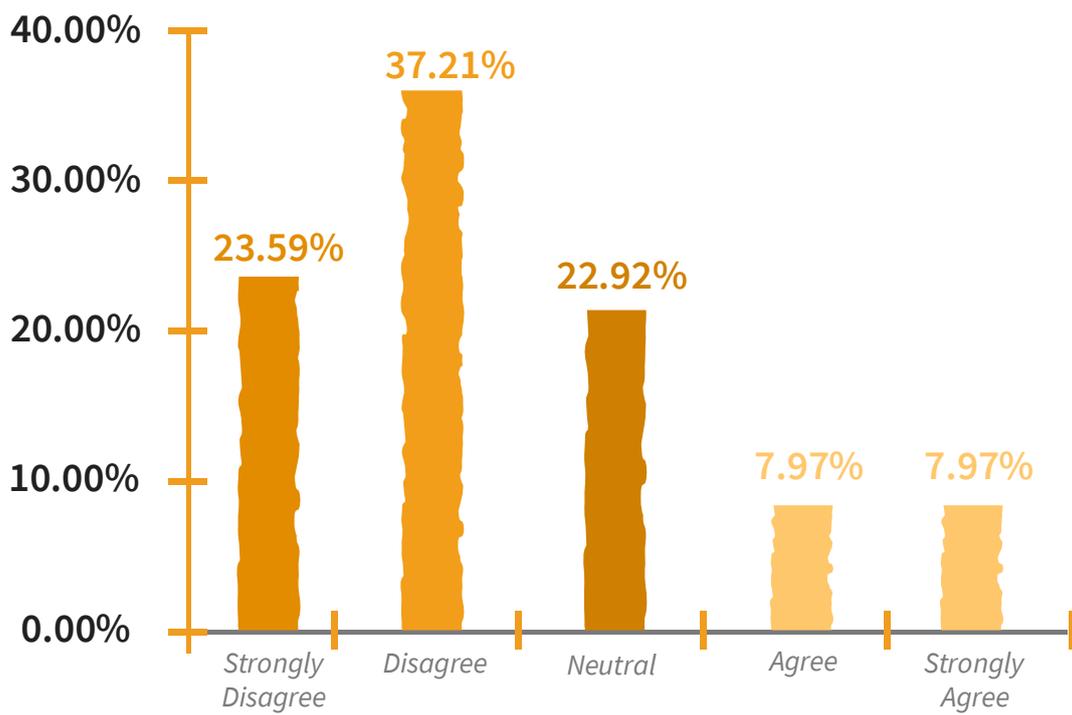
This is further reflected in the questioning around digital channels and behaviors. Only 16% of people agree that most companies have a website in Sudan. In reality, 48% of the companies we questioned have a website, but a large proportion of those websites were created prior to 2012.

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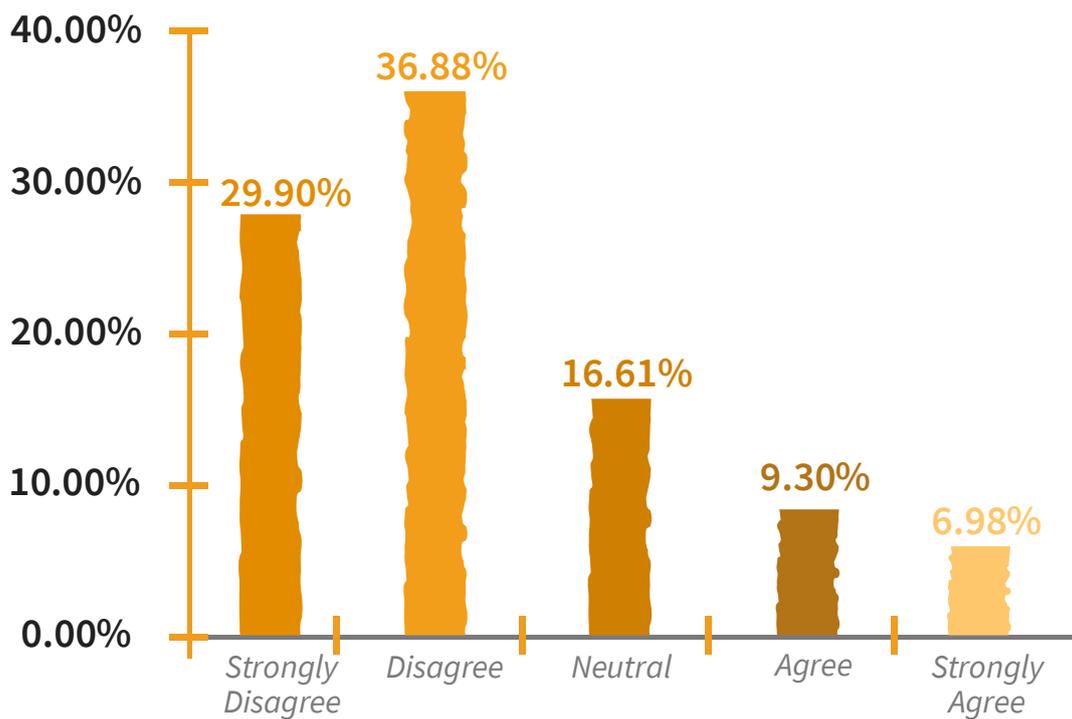
### *Most companies recognize the importance of digital strategy*



## Most companies in Sudan have websites



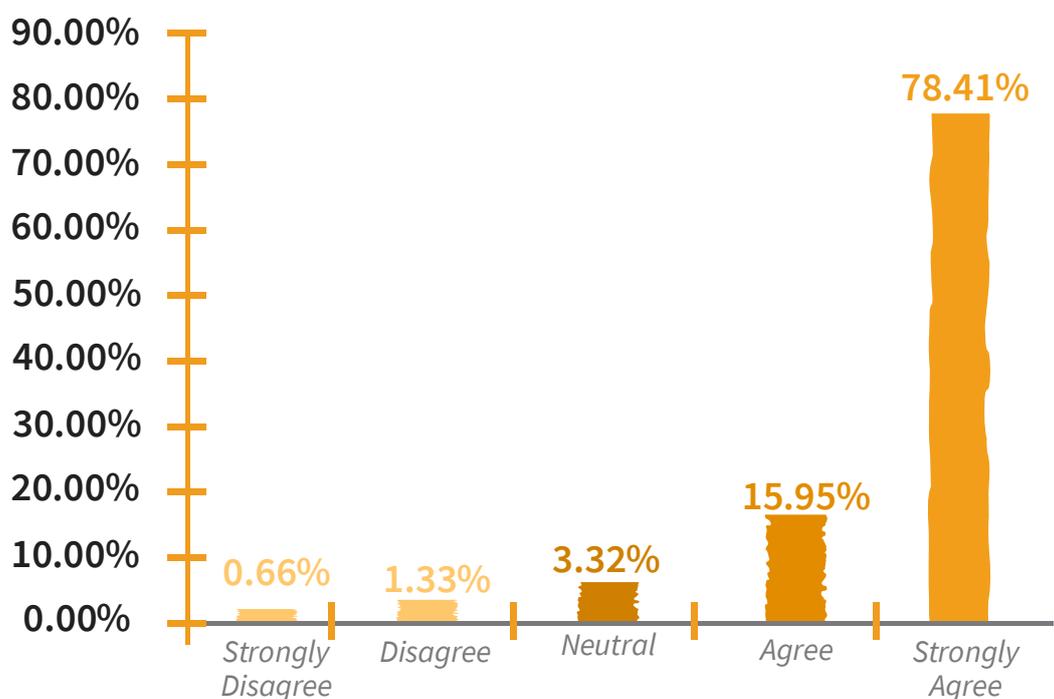
## Wbsites in Sudan are generally very good



This gives rationale to the acceptance that most Sudanese company websites are not particularly professional or well designed. Only 16% of respondents believe that Sudanese company websites are generally good. Given this it's important to understand whether a company website is actually important in Sudan, and the data is emphatic. 94% of respondents believe that Sudanese companies need a website. When questioned further, it's clear that the digital community in particular, are much more comfortable researching companies before they attend in person. Simple things such as locations, pricing, telephone numbers and email addresses are not available to them if the company does not have a website. This directly effects their buying decision making which we will come to later in this section.

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## *Sudanese companies need websites*

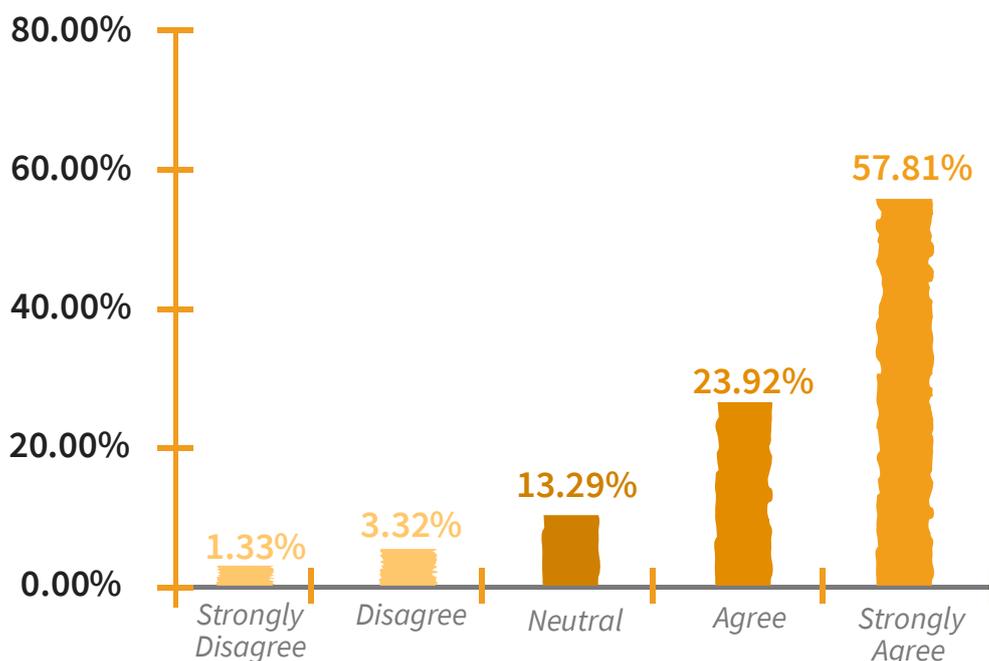


# THE FUTURE OF DIGITAL

There is a general optimism around digital and its future. The ‘movement’ of digital entrepreneurs is starting to have an impact on mainstream society. 82% of respondents believe that will be more companies such as the wildly successful Tirhal in the future. This is a 4.8% increase on last year’s responses. In questioning, the belief was further clarified. There is an expectance, not only of more digital companies, but of digital solutions that disrupt existing markets. One such example to look out for in 2019 is Tiskariti, a digital startup looking to simplify the intercity public transport service in partnership with existing distributors in the space. Khalid Abuelgasim CEO of IATL said, “Not only are there great digital opportunities that we are exploring as standalone businesses, but there’s an even bigger opportunity to digitize existing businesses and workflows.”

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## *There will be more companies like Tirhal in the future*

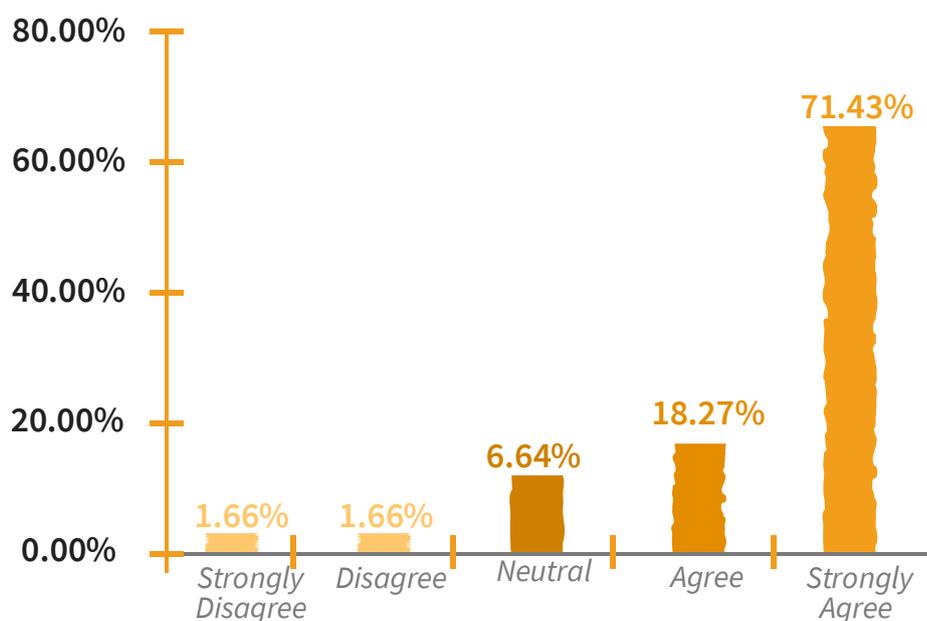


## DIGITAL SPENDING

There is a wide acceptance that companies need to spend more on digital marketing. This is a conceptual challenge for a number of reasons. Firstly there remains a status impact for companies that pay for outdoor advertising, regardless of its efficacy. It is not unusual to see billboards for steel companies and concrete companies, despite this being an entirely ineffective form of targeted B2B marketing. Secondly, there remains a lack of understanding at leadership levels when it comes to digital. This then creates a further gap whereby larger companies don't invest in digital training for their staff – and those that do tend to focus on Social media training rather than any other form of training.

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### *Sudanese companies should spend more on digital marketing*

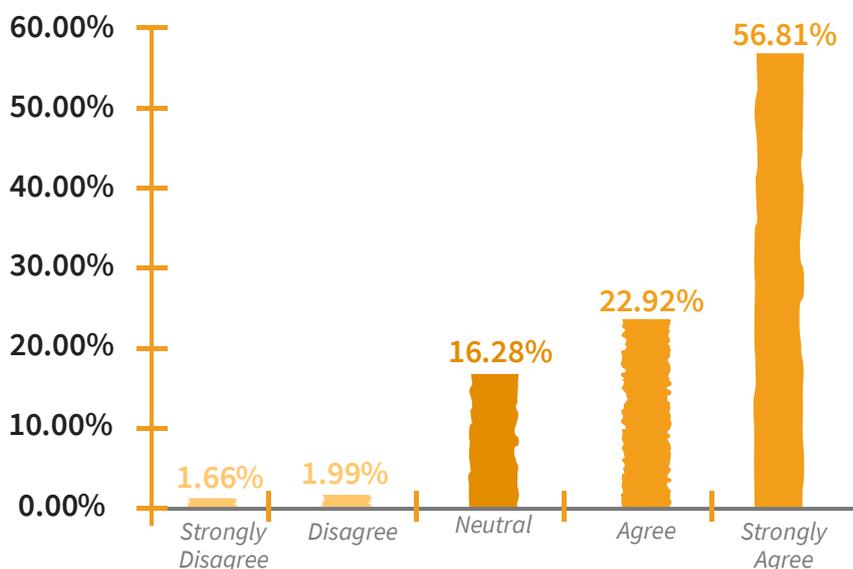


# WEBSITES AND APPS INFLUENCE ON TRUST

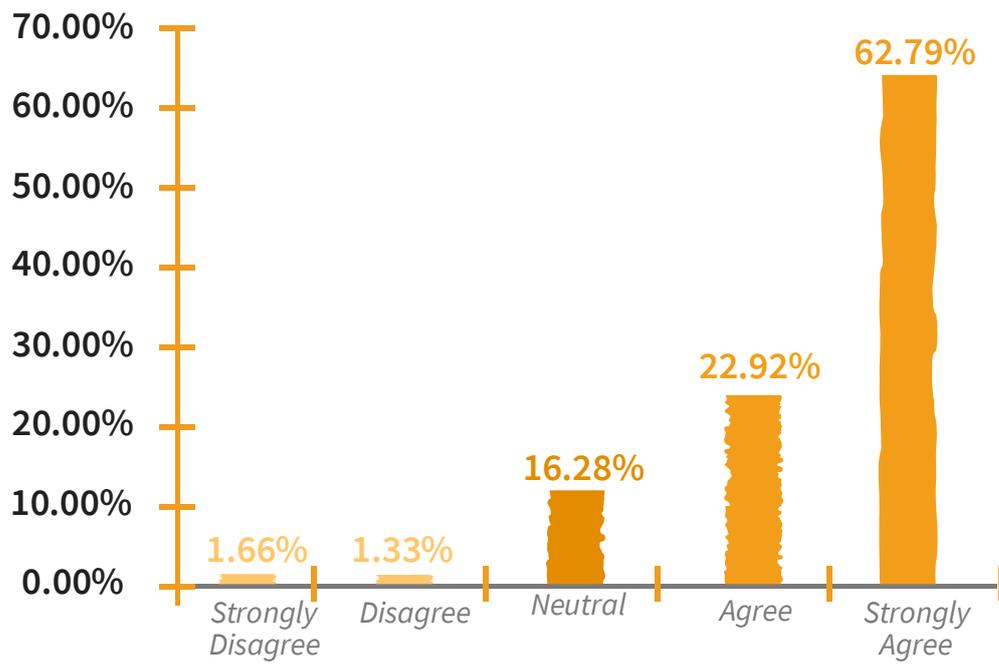
If there were ever a clearer set of results on why companies in Sudan need to invest in digital it is shown here. The most financially valuable segment of Sudanese society have exponentially higher trust levels in companies that invest in digital channels. 80% of respondents have higher trust in companies that have a website. A further 86% said that they are more likely to talk to a company that has a website. This makes digital the second most effective marketing channel following personal recommendations and word of mouth. Yet, the vast majority of companies do not invest adequately in digital advertising. Finally an investment in digital it's not just about generating interest of leads. It is also about intention to purchase. 79% of respondents are more likely to purchase from a company with a digital presence. It is clear in the data, digital is a way to differentiate in Sudan, and therefore should be a critical focus for all leadership teams and marketing directors.

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## *I trust companies with websites more*



## *I am more likely to talk to a company with a website*





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# CONCLUSION

The results of this study show three key points that are relevant to existing digital companies, newly emerging digital companies, prospective investors, and existing large non-digital companies:

1. Digital channels are growing in Sudan. The opportunity to target and segment consumers based on their digital usage is significant. Most existing organizations are not adequately taking advantage of this opportunity
2. There is a growing market of new and existing digital businesses. The foundational infrastructure required to build those businesses is available, and the knowledge workforce of entrepreneurs is ready to deliver. As far as the research shows us the only missing ingredient is investment. Not investment of funds, or in any monetary sense (although this is also required) but investment in terms of digital business knowledge. This gap is best filled by angel investors. We encourage angel investors to explore opportunities in Sudan and reach out to the organizations listed in this report.
3. Sudan is ready for digital disruption. In 2019 new digital businesses will emerge in multiple segments, and if executed correctly will have an equally disruptive effect as the Ride Sharing platforms.

# REFERENCES AND THANKS

Special thanks to all of our contributors; those who filled out the online Survey and those who took part in the street survey. A special thanks to everyone who gave up their valuable time for one on one interviews:

- **Magdi Taha**
- **Abdulla Saeed**
- **Khalid Abuelgasim**
- **Abdul Hai Ali Hamid**

Any everyone else who took time from their business schedules.

## References

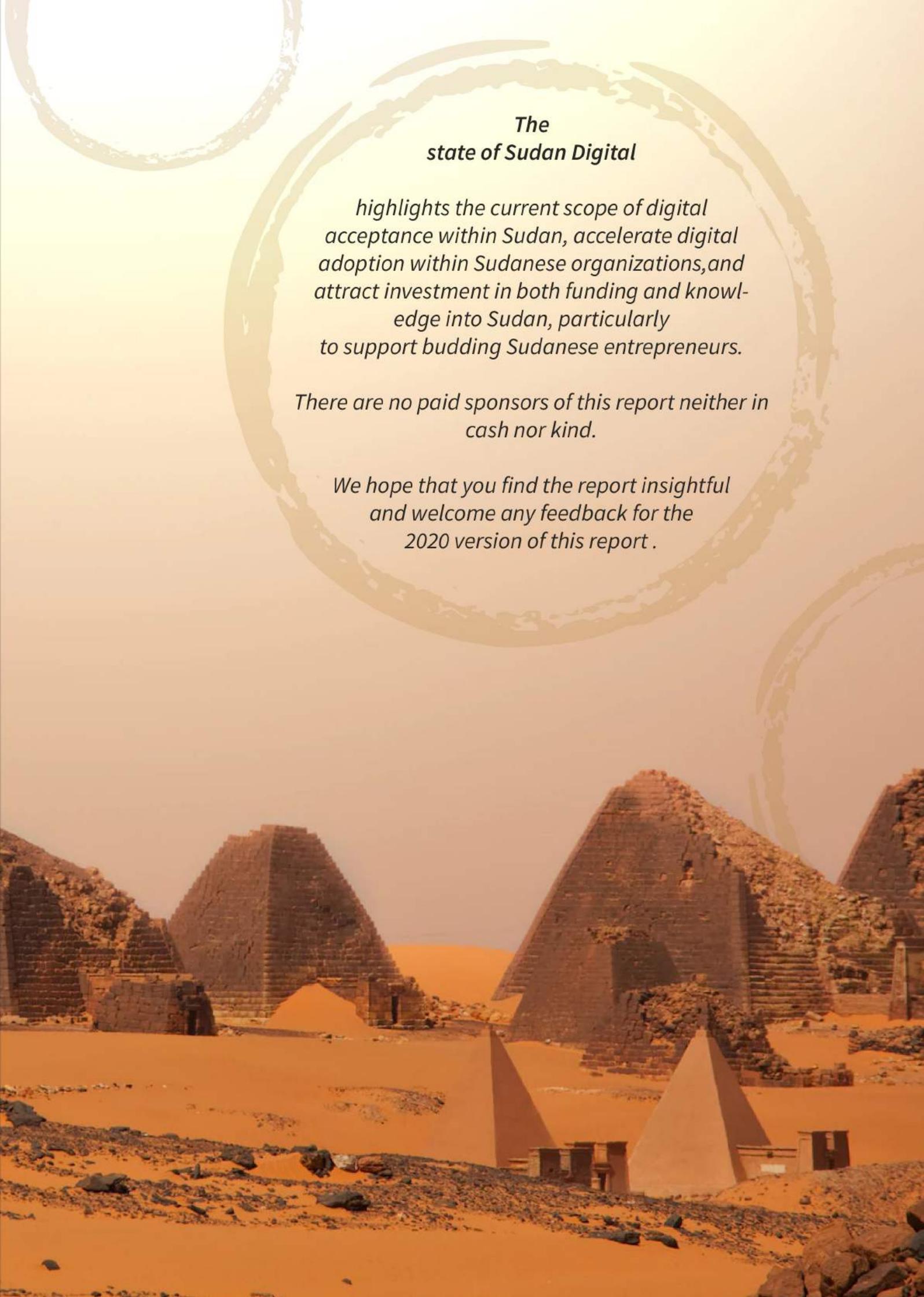
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*The  
state of Sudan Digital*

*highlights the current scope of digital acceptance within Sudan, accelerate digital adoption within Sudanese organizations, and attract investment in both funding and knowledge into Sudan, particularly to support budding Sudanese entrepreneurs.*

*There are no paid sponsors of this report neither in cash nor kind.*

*We hope that you find the report insightful and welcome any feedback for the 2020 version of this report .*