

SUMMARY

In a nutshell

Ovum view

The next billion users will have a unique hierarchy of expectations of their devices

Most devices shipped to the next billion will be entry-level and feature phones

Device charging solutions are as crucial to the next billion as the device itself

IDENTIFYING THE NEXT BILLION

Who are the next billion?

Ovum's definition of the next billion

BUSINESS MODELS FOR THE NEXT BILLION

Traditional business models don't apply

Affordability is measured in value, not price

Group ownership will influence demand

Literacy represents a real but surmountable challenge to adoption

DEVICE VENDOR STRATEGIES FOR THE NEXT BILLION

Connectivity leading to connectedness

The next billion's hierarchy of expectations

Devices must be durable

Devices must solve "real world" problems

Devices must be versatile

Devices should be connected to services

Cheaper smartphones will create a trickle-down effect

Smartphone momentum is undeniable but will take time

Vendors are trying to blur the lines between smartphones and feature phones

Operator-branded feature phones may be the quickest way to reach the next billion

CHARGING SOLUTIONS FOR THE NEXT BILLION

Reliable access to electricity is a major challenge

A phone is only as good as its battery life

Battery life on entry-level and feature phones has improved significantly

Users typically have to buy charging devices or pay to recharge

The business of charging devices is progressing

Solar charging devices

Solar phones from device vendors

Solar phones have a long way to go before they are a viable option for the next billion

External solar charging devices

Multi-purpose charging devices

Kinetic charging devices

Bicycle generators

Hand-crank chargers

Replaceable battery powered devices

The move towards universal chargers

APPENDIX

Methodology

Further reading

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Disclaimer

FIGURES

Figure: The next billion in the global socio-economic pyramid

Figure: The next billion's hierarchy of expectations

Figure: Nokia's Kinetic Bike Charger