

# Africa leads the world into the future of market research

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*As the growth in mobile communications brings about a revolution in market research, it is the vast continent of Africa that is leading the way. Though some may be reticent to adopt mobile solutions, the advantages are too big for African researchers to ignore.*



We don't need to think very hard to understand the power of mobile in Africa - it has already helped to topple governments and fuel revolutions. As companies like MTN connect the continent, mobile is fast doing the same for market research. The one thing that just about every African has in common is access to a mobile phone-and not just the basic models that you might expect.

## The rise and fall of the feature phone

In Africa today basic feature phones are quickly being replaced by smarter devices. The rate of change is making the feature/smart phone distinction redundant. Looking at the operating system however, we do start to see a trend that may provide key insight into segmenting the mobile market - the rise of Android. BlackBerry's fall from grace across the rest of the world has not been mirrored in Africa; its low-cost uncapped internet offering has kept it in high regard. Yet rising connection speeds and lower data costs are enabling internet access for all. Millward Brown's Africa database shows the rise of smarter devices, and the proliferation is coming from low-income consumers (personal income of less than USD360 per month). Samsung's growth is driven strongly from both the top and bottom of the market; BlackBerry shows dominance at the low end of the market and Apple at the top.

## Revolutionising market research

Market research in Africa has traditionally been expensive and time-consuming. The continent is vast with significant differences within each country that have been difficult to capture using traditional market research techniques.

Moving to mobile research requires a significant change of mindset. Market researchers in Africa are faced with two options: remain the same and lose relevance or embrace change and benefit from the new world order. Millward Brown has embraced this change and is helping our clients navigate these new uncharted waters.

## Africa is now always available

The rapid growth in mobile penetration means that respondents are always available. It's not necessary to travel long distances, and it's easy to re-contact. Research can now get everywhere brands are. Distance is no longer a barrier - even on this massive continent.

## Embrace simplicity

Because respondents are widely dispersed and not easily accessible, when they have been reached, researchers have tended to bombard them with questions. Mobile users won't stand for this, as their interest wanes quickly. It is now, more than ever, essential to focus on the business issue and identify only the key information needed to make a strategic decision.

Millward Brown's Brand Performance Programs - shorter, more strategic questionnaires with questions validated against

behavioural outcomes - are helping with this. Conducting these via the mobile platform is significantly decreasing time barriers and delivering business - critical information about the African consumer.

## Forget about quotas

Getting detailed demographic information to ensure the appropriate demographic splits in Africa is incredibly difficult and quickly outdated. The randomness of mobile, however, means that you are always getting a representative split. We see responses to our surveys matching population density data very closely across a wide spread of countries. Geo-coding responses eliminate questions about the respondents' locations, since our responses come from where the people are. This change in thinking means that we can go back to what the survey is all about - providing strategic business information that will answer our central questions.

## Time is of the essence

The numerous processes that go into creating, printing, transporting, capturing, and coding paper-based questionnaires means that the majority of time is spent on the operational elements of research. Mobile bypasses this. Clients can now get a real-time glimpse into Africa, further helping to illuminate the views of its people.

## Mobile is delivering more variability in the data

Many will worry that this means mobile data is unreliable, but the truth is the complete opposite. Self-reported data has more variability in the responses, and the data is very descriptive, which makes modelling and running descriptive statistics far more informative.

For emerging, less research-savvy markets, mobile is providing data that better reflects the market reality. This has already been seen in markets like India, Saudi Arabia, and Malaysia where mobile data has proven more accurate than door-to-door. This has huge implications for Africa and other developing markets. Mobile will allow us to skip a step and move straight to a self-reported mobile platform.

## Change is the only constant

We need to embrace the new way of working. Budgets will continue to be put under pressure and Insights teams will need to continually justify their spend. Changing mindsets may be a lot harder than changing handsets, yet the future is clear. Mobile is here, and it is not going anywhere any time soon. Just because we are comfortable with the trade-offs of the current way of working doesn't mean we should miss this opportunity. Embracing the nuances of this new technology will allow us to get more from research budgets and get closer to consumers. Mobile is bringing quality, speed, and cost efficiency closer, so that there is less to trade off and more value to be found. When it comes to mobile, Africa may change from being one of the last frontiers to leading from the front.

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