

# Driving mobile from Cape to Cairo

 By [Charles Foster](#), issued by [Kantar](#)

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Mobile is now a critical channel for marketers who want to embrace new technology and benefit from the huge opportunity for growth in mobile marketing communications.



The world is changing and along with it, consumer preferences and behaviour patterns keep shifting, ostensibly overnight. Marketers need to be at the top of their game to identify these details, even before they happen. So, who do they call in to help? Research firms, who can sift through mountains of divergent data feeds to arrive at conclusions that work, that's who.

According to the 2013 ESOMAR report, global market research figures increased by 3.2 percent to USD 39,084 million, buoyed by fast-growing emerging markets. For the first time, Africa and the Middle East are reported as distinct regions. Research revenues for Africa grew to USD 399 million, fuelled by a further increase in foreign investments. The Middle East however saw a 4.3 percent decline, reflecting the continued unrest and international sanctions. The research markets in Kenya and Nigeria, Africa's star performers, are predicted to grow by 17 and 10 percent respectively, profiting from the burgeoning middle class, relatively steady democratic governments and foreign investment.

And the framework for market research has changed too. Research agencies like Millward Brown are now focusing on strategy, branding, consultancy and innovation. It's no longer about designing and selling surveys, but about generating insights about consumers and working with brands to help develop appropriate strategies to leverage those insights. Insights must be translated into business opportunities, and research agencies need to show value and be actionable. Research such as Millward Brown's Cross-Media™ that determines the ROI of different media channels, equity measures that determine the size of opportunities in financial terms, creative copy evaluation via neuroscience techniques, and alternate marketing activities are increasingly being demanded by marketers.

The key tools however are the same as they have always been: qualitative and quantitative research. But what has changed dramatically over the past few years is data collection - through the use of the internet and mobile phones, and not forgetting various neuroscience techniques such as Implicit Association, Eye Tracking and Facial Coding.

Mobile research itself has changed fundamentally. Simply being able to call people up on their mobile phones and ask them questions while they're out and about is no longer what mobile research is all about. The greater opportunity mobile presents is in capitalising on the features of the devices themselves. More than half of mobile users access the internet on their mobile phones, 82 percent take pictures with it, 44 percent record video, 43 percent download apps, 29 percent do online banking and 31 percent look for health information online (according to Pew Internet Research). In South Africa, there are more than twice as many mobile phones as there are TV sets (31.8 million versus 15.9 million), and there are 4.6 times more households with a mobile than a computer.

Handset penetration continues to grow, particularly in Africa, and especially in South Africa where mobile phone penetration is one of the highest in the world. According to the InterNations Telecommunication Union, in 2013, there are almost as many mobile-cellular subscriptions as people in the world, with more than half in the Asia-Pacific region (3.5 billion out of 6.8 billion total subscriptions). Mobile-cellular penetration rates stand at 96 percent globally; 128 percent in developed countries; and 89 percent in developing countries. Internet penetration is increasing significantly everyday due to internet connectivity now being widely available through mobile devices. In Africa, more people have access to mobile phones than clean drinking water!

So the number of phones now nears the number of people in the world, and phones themselves are becoming even

smarter. The opportunity to access nearly everyone on the planet via the device in their pocket is without a doubt, tremendously exciting, and brings into sharp focus how much has changed in the world of research. Mobile is now a critical channel for marketers who want to embrace new technology and benefit from the massive opportunity for growth in mobile marketing communications. And market research must adapt to meet clients' needs for faster feedback on brands and marketing activities. As we become a more mobile-based world, what better way to engage with consumers than by delivering surveys directly to their mobile devices? It makes research in emerging markets, fast, accurate, affordable and accessible.

Marketers are shifting to mobile research and have found that the mobile data collection methodology can be adapted for brand equity, tracking, ad testing as well as numerous other ad-hoc applications such as in-store and sponsorship evaluations, geo-tagged location based research and time critical campaign evaluations - unlocking whole new opportunities for their brands.

Millward Brown South Africa first started piloting mobile studies in 2009, and have actively been using mobile as a methodology since then, conducting numerous mobile surveys across 16 African countries, and reaching thousands of respondents on every type of internet enabled handset imaginable. In one recent study done for client using geo-targeted respondents, 600 responses were received within three hours. The data was ready for analysis the following day, and was in line with existing client data at a national and regional level, displaying a speed of delivery and level of accuracy that is increasingly critical for marketers to make informed and rapid decisions.

So you're probably wondering why didn't researchers automatically shift to this new technology for data collection as soon as it was available? The best answer is that mobile is not a replacement to traditional research, but rather an exciting addition to traditional research. Often highly complex and technical analysis requires way more than 10-15 questions to complete, (the limit beyond which mobile surveys become too cumbersome) and in many cases single source data is key (i.e. one respondent answering all questions - not simply breaking a questionnaire into bite size chunks and matching samples). In these cases mobile would be a less viable option, but in others it makes for faster, quality insights.

## ABOUT CHARLES FOSTER

Charles Foster is Managing Director at Millward Brown Africa & Middle East.  
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