

Research needs to include mobile users

Delivering a keynote address at the recent 31st annual SAMRA conference at Mount Grace Country House and Spa, James Fergusson, TNS global director Emerging Markets, said developments in countries such as China and the Emirates have proven that things change very rapidly in emerging markets and Africa is at the tipping point.

In emerging markets we see a very mobile-centric view with consumers leapfrogging fixed-line telephones, straight to mobile where it is heavily used throughout the day, largely due to lack of alternatives. This is going to grow exponentially, he said.

"From a market research perspective, we, as researchers have also got to leapfrog. Internet panels are yesterday's heroes, they are not relevant anymore. Internet panels do not pick up people accessing the Internet via I-café's; they do not pick up people accessing the internet via mobile phones. Those of us investing in panels will probably in two years' time only be capturing some 10%-20% of the online market, so we have to look at alternative technologies and other ways of capturing.

"We've got to re-invent the way we do online research for emerging markets. If we follow the US or European models, which is what we do now, we will not be able to meet clients needs. We won't be able to offer the required services down at the bottom of the pyramid, even at the middle of the pyramid, hence we will fail our clients," he cautioned.

While Internet usage in Africa is currently skewed to the top of the pyramid, this is bound to change rapidly: a critical factor that both marketers and market researchers need to keep in mind while marketing to, or researching trends among emerging market, mobile-centred consumers.

Monumental economic shifts are driven by the huge change in the availability of products and services and people can leapfrog from having very little to something significant very quickly, technology being the cornerstone. He fully agrees with analysts predicting very strong, positive growth across the African continent over the next few years.

Mobile penetration in Africa huge

He pointed out that from 2000 until 2009, Internet subscriptions in Africa have grown by a massive 1067%, from 3m to 32m. Likewise, mobile penetration increased by 2236% over the same period, from 11m to 246m. Already the percentage of smartphone users in Africa (20%) is only slightly lower than global smartphone use (23%).

More bandwidth, lower prices, the influx of low-cost smart phones from China, advanced mobile usage, the desire for more utility from mobile devices, incremental value of the Internet and experienced operators at the base of the pyramid are, digitally speaking, setting the scene for the 'perfect storm' in Africa, he predicted.

Social is going to become all the more important, with the development of localised social networks a strong emerging trend. "Social is moving to mobile. We know that mobile is largely about keeping in contact and increasingly about sharing moments. Sharing life through your mobile is an emerging area, but it is poised to grow in importance going forward."

Also in the service world, we will see movement of services across devices that will allow consumers to do anything anywhere and increasingly, that anywhere is mobile.

"The advantages that are enjoyed in the PC world - managing more contacts, varying the degree of interaction, aggregation of services - are even more powerful through a mobile device. While growth is coming from developed markets like the US, UK, Hong Kong and Singapore, developing markets like China, Russia, Brazil and Africa also show rapid growth - which marketers and marketers better heed," Fergusson concluded.

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