

How the African marketing intelligence business has changed in 10 years

 By [Peter Searl](#)

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I started Dashboard Marketing Intelligence 10 years ago in 2004 and since then, the business has witnessed many changes as it has always positioned itself to advance traditional market research methodologies by using the latest technology available and providing clients with information that is fast, accurate and accessible.

In this piece, I have identified the changes that have altered the space in Africa most significantly. In reflecting on these points it's strange to see that much of what is familiar and taken for granted in 2014 didn't exist 10 years ago. Is Aldous Huxley's Brave New World here already?



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1. THEN: Mobile voice and basic data (SMS) vs NOW: Smartphones and mobile web

Mobile technology sits at the root of the most dramatic changes over the last 10 years. I like to call it the grand enabler, and this was the initial impetus behind Dashboard. It amazes me how far we have come since 2004, when we had mobile technology, but it was limited to voice and basic data (SMS) applications.

The arrival of the smartphone, and more latterly the tablet, has contributed enormously to connectivity. Hand-in-hand with other enabling technologies (like Wi-Fi, satellite, fibre optic, apps etc.) it has catapulted our industry forward - the convergence that was the buzzword 10 years ago has now happened.

Instead of equipping field workers with pens, papers, cameras, tape recorders et al, courtesy the smartphone or tablet, they are more mobile, less reliant on paper-based systems, and more accurate. We are now able to verify data with GPS and time stamps. Where we are still using fieldworkers we can follow the route a fieldworker has taken, and ensure that the data was collected at the right place and time. It also speeds up the process of data processing and getting results to clients.

2. THEN: Receiving personalised marketing messages was cool vs NOW: We value our privacy

The backlash against the abuse of public data (and spam) manifests in a heightened desire and need for digital privacy. While still in its infancy in South Africa, this will play a stronger role in the near-term future. People reject hard core marketing that invades their personal space, and businesses need to be aware of and sensitive to this. Critical also is the security of sensitive information, especially regarding payments and banking details. Without

guarantees and feelings of trust, businesses will face big barriers to growing their digital footprints and markets.

We will remain sensitive to what data is collected about us, but ultimately we are now in a world of data freedom. That means that all this new information and all these new tools cannot remain hidden for long. As we become tuned in to the value of this information, our focus will move from fighting against the collection of data to demanding ways to access and use it. Soon, our paradigm with respect to data collection will switch from a fear of data 'collected about me' to an interest in data 'collected for me'.

3. THEN: One-way marketing communication vs NOW: Social media

Today, computer-mediated communication dominates, and we - marketers and consumers - are deeply enmeshed in it, not on either end of it. Consumers are no longer targets. The networked world means that all connected individuals are potentially exposed to the marketer's message. This is passed on, spread quickly and modified; in this way consumers have become participants and generators of communication.

But as marketers grapple to come to terms with how this has changed the way they interact with consumers, few have realised that the ever increasing channels and information sources will change, has changed, the way marketers gather data and conduct research.

Data is proliferating at a rate that would shock even Alvin Toffler - visionary author of *Future Shock*. This is more than just oodles and googleplexes of data, but massively complex, interconnected, continuously modified and viral streams, growing exponentially.

In my opinion, tomorrow's marketers must rely on this data to inform their decision-making, and not just the feedback they receive from customers through the connected social media space. This is the big data we keep hearing about.

4. THEN: Cubes of data vs NOW: Big data

This is a complex arena that is receiving substantial attention from businesses now. No one wants to get caught without a strategy here, or indeed without a solution to get value from all of this data. Or worse, not knowing what it is...

As key aspects of our lives migrate in to the digital world we are creating the data that will build the next generation of information for us all to use and access. There are few limitations to how far this can go, as we build on this huge repository of information layer after layer. Who our friends are, what we like, what we read and watch, where we go, how we spend, how far we run and even what we think about, are all captured and stored for future analysis. This is the 'big data' that dominates forums, symposiums, blogs, news reports and sales pitches. Data sets that are too large and complex to manipulate or interrogate with standard methods or tools.

There are numerous approaches to tackling this leviathan, but the best approach is not to panic and plan for what you need now. Start simply, keep scope and costs to what is really required, not just nice to have... then grow from there.

5. THEN: Data silos vs NOW: Freedom of data

The inevitable next step is to develop means to curate this complex information and turn it in to meaningful intelligence that people can use. Marketers are currently hard at work finding ways to organise, interrogate and interpret these riches of big data as they become available. They're looking for patterns in behaviour, understanding the underlying needs behind those patterns, analysing sentiment, exploring drivers of choice and predicting responses.

The curation tools and skills that have been developed for marketers will evolve into tools for consumers and the general public in response to the demand. Wikipedia, Facebook and Twitter are already excellent hints at what these may look like. Each one is in its own way a highly effective tool for understanding the knowledge, likes, habits or opinions of others.

As the data supporting these types of tools becomes exponentially deeper and richer (think for example of the new data being collected on location, moods and sentiments, financial behaviour, shopping habits, media usage and health) - these tools will evolve and new ones will emerge - each one supported by smarter curation rules and algorithms and putting more access and power in the hands of all its users.

Then big data can come of age. But this is only a part of the picture. The only way to effectively understand consumer motivation is by direct communication, not just inference. So research still has a role to play in linking business to consumer requirements.

6. THEN: Long surveys, cumbersome reportbacks vs NOW: Quick surveys, internet-enabled reporting

Clients realise that long and arduous surveys not only take long to deliver, but they are less likely to produce accurate data due to respondent fatigue and time pressures. Clients want immediate feedback - they're connected, they have access to smart technology.

At Dashboard, our central philosophy has always been to cut the process to the bone. Eradicate the nice-to-knows. Get the data that you need to make the decision. That's the essence behind our name Dashboard. It's a speed gauge, not a rear view mirror. Most of our research processes are designed to bring the client closer to the information flow, which leads us to where clients in the marketing space are - wanting it now!

As a result, we make many of our research reports accessible live by clients. For example, there's Pinpoint, our media consumption and audience tracking tool for the African continent. Pinpoint tracks media consumption across countries where information is scarce or irregular. Similar immediacy is delivered in the customer experience arena for Eskom using Dashboard's proprietary ATI (Automated telephone Interviewing) methodology. ATI offers levels of speed, accuracy, flexibility and customer intimacy that outperform familiar market research interviews conducted by live agents.

7. THEN: Random respondents vs NOW: Representative research panels and communities

It is not only technology that helps improve research delivery. The way that we organise consumer communities into specialised groups and generally representative panels is also a big part of the future.

The three primary benefits of a panel are the higher speed, reduced cost, and greater engagement of research

respondents. Respondents are pre-qualified and used to participating in studies. They usually get paid for this, but the primary motivation behind participation should ideally be interest in the research that is being done - and a desire to contribute to the conversation. This is an important paradigm shift for market research.

There is therefore an important health warning that accompanies the use of panels. Having access to a huge database or list of cellphone numbers is not a research panel. Like traditional research, the representative nature or engagement level of a respondent ultimately determines its usefulness. One thing is as true today as it was a decade ago; sadly there are many unscrupulous panel or would-be panel operators in the space, so Caveat Emptor!

8. THEN: The unknown continent vs NOW: The connected continent

The number of research providers has shrunk sharply in the face of multinational consolidation of the research industry; there are few independents left. The multinationals have been focused on Europe and the USA, and are only now waking up to the potential in Africa, realising that first world approaches cannot just be copied and pasted here.

In Africa, Asia, and South America, internet penetration rates are skyrocketing and the major impediments to growth, lack of access and lack of information are falling away. As a result, our industry's ability to conduct market research on the African continent has improved dramatically.

While some brands such as MTN have been extremely successful in establishing and positioning itself broadly across the continent, others are only now starting to look to the continent for growth and seeking safe beachheads from which to move. The prudent application of a thought through research process will certainly lower the risk of entry and ensure sustainable brand building.

Welcome to the brave new world!

9. THEN: People vs NOW: People

I couldn't discuss change without at least touching on an important constant. Marketing intelligence lives or dies by how well it can connect business to people and their needs. People are people. Yes, demographics change (becoming younger and more affluent in Africa), but basic underlying needs do not change so fast. We still need to sleep, eat and play. Whoever is best able to satisfy our desires will win the lion's share of revenue. True in 2004, true in 2014.

In conclusion, the rapid development of mobile technology has shaped the way that consumers interact - with each other and with brands and business. A large and growing volume of information is being generated, and this needs to be curated and effectively mined.

What does this mean for our industry in Africa? Africa is an emerging business focal point, as global giants wake up to the fact that this is the continent that will provide future growth. As a result of this, plus new technology, social forces and the need for accurate and timely data, research processes are being driven to become more efficient.

Understanding this complexity enables leading marketers to successfully navigate the fast flowing data rivers to extract meaningful insight and plan winning strategies.

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