

Insights into the average South African mobile phone user

 By Leigh Andrews

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Mobile is definitely the way forward for market research, but you need an accurate profile of the respondents, and don't dare ignore consumers' fears of online and mobile security...

In the second keynote session of the first day of Merlien Institute's Market Research for a Mobile World or MRMW conference, we heard from [Jarrod Payne, account director](#) and Desre Mann, operations director for Africa and Middle East at Millward Brown. Payne kicked off with a graphical timeline showing key mobile developments from the birth of the universe 6 billion years ago to the invention of the first smartphone - an enormous time lapse and now mobile phones dominate the world.



Mann then spoke of Millward Brown's mobile research journey, saying it involved lots of hair-pulling and fun, with their first [Link Express](#) on mobile in 2009. They soon found that respondents were fast-forwarding through the ads, so they brought in added video security and GPS measures to ensure the respondents really were who they said they were and really were from where they said they were from.

Mann said parameters can also be set up in GPS if an interview is completed too fast, and said fingerprint devices as well as strict media control all enhance overall survey effectiveness. This in turn leads to incredible advantages as mobile is cheaper and faster than other methods, with a better interview context. The challenge lies in keeping it representative and embracing the new as new changes come. As an example, Payne spoke of a mobile phone survey into shopping in South Africa, with just 20 questions per survey. This resulted in data from 1,000 South Africans, with the results that South Africans really do use their phones a lot.

Leverage info on how, where and when people use their mobile phones

Specifically, this accounts for 2.6 hours of phone use per respondent per day, which is 40% more than the global average, across the age gap. Of this, 14% of respondents' time is spent on social media, with the majority of that on Facebook. Payne interjected that they had to spell out 'IM' as instant messaging as respondents didn't understand the phrase for chat services - the most popular of these was Whatsapp.

This then has implications on how people use their phones while shopping. Interestingly, Payne said that 34% of

respondents in the US research products on their phones for an hour or more before making a purchase. In South Africa, 88% of this is done using online mobile, almost twice as much as is done on PC.

Results also showed interesting mobile usage trends while shopping. For example, respondents claimed to use their phones while in the dressing room to send pictures of the item as well as to compare prices, to check in on a social network and to look for product discounts online. In addition to this, a mindboggling 13% of respondents claim they even make a purchase in an online store while browsing in a real one.

Consumers have online and mobile shopping fears

The most mentioned online 'shopping' site was Google. Those who said they don't shop online said they're afraid of fraud, identity theft and data costs, with 5% honestly stating they don't shop online as they simply don't know how to. Demonstrating the power of word of mouth, 74% of the sample said they actually had a product in hand in a store but did not leave the store with it as they did a product review online through mobile while in store. They either found negative online reviews, or found the product at a better price or even a cheaper version of the product elsewhere. Payne gave an example of Burger Lab using Facebook in a 'phone caller ID hijack', which saw a 30% increase in sales with zero marketing budget. All Burger Lab did was to override the McDonald's call number when people accessed it through Facebook, so that callers wanting to place an order were redirected to Burger Lab instead. [Draftfcb calls it](#) "Quite possibly one of the cheekiest ideas of all time."

Payne summarised that it's about catching the market in terms of knowing who your audience is, when they shop, where, and serving them the right content while they're in store. But this will continue to change and we will be able to do more than we ever thought possible with more accurate data, faster than before. Mobile keeps bucking the trend and showing why it's the future of market research.

In a later session, Ryan Smit of GfK spoke of types of smartphone users that have been identified through mobile market intelligence and in tracking mobile behaviour both anonymously and passively through the [Fundi app](#), offering education on entrepreneurship content to users in return for anonymous user information from the device. The reason? Entrepreneurship and business are popular topics in the country and across the continent.

“ Only 15% of people who read [@EntMagazine](#) are entrepreneurs, says Ryan Smit of GfK at [#mmw](#) points to interest in business in Africa- Rambling Litchi (@Leigh_Andrews) [November 5, 2014](#) ”

Consumers use their mobiles most after work

Smit explained that from a sample of 1,138 users and 200 million data points, they segmented AMPS data and compared to a panel for weightings. In looking into total time spent on smartphones by time of day, they found the peak is between 8pm and 10pm, with the phone used for 3 to 8 minutes per hour and slightly higher use by females than males. Phone use is mostly based on apps and browsers with 44% accounted for by communication 15% on social, 15% on games - and the bulk of that game time on [Candy Crush](#). The top sites visited on mobile were Google, Facebook, Gumtree, Youtube and Wikipedia and News24. It's interesting as these aren't necessarily the same sites the respondents visit on desktop. We use smartphones to find out specific information rather than to browse like we do on the web. Focusing on Android mobile users, respondents on average have 19 sessions per day on Whatsapp and 9 daily sessions on Facebook.

What this data tells us about user categories and future suggestions

These mobile activities led to the definition of user categories, ranging from lightweight to heavyweight users. Lightweights spend 'just' 49 minutes on their phone per day and are the highest income earners of all the defined clusters. Other categories include surfers; socialites, chatters, who spend 137 minutes on phone per day, video gamers, heavy gamers, which is surprisingly skewed toward females, but 23% of these are children's games like [Talking Tom](#). Smit says this is irritating to adults so a clear sign the device is shared with children.

In the final category, heavyweights spend 174 minutes on their phone per day. Overall, calling peaks in the late afternoon and early evening, with SMS peaking at midday - the audience agreed this is when most of us received bulk SMS marketing messages. In future, Smit said researchers need to look at mobile users' needs such as information, leisure, interaction, community, love and intimacy rather than the actual mobile activity as the end point.

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