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Abstract

This paper seeks to disrupt traditional ways of thinking and performing mainly qualitative social and market research in the light of digital advancements. Hinging on the argument that #digital coalesces around social media, mobile and apps; and that while low internet penetration has always been seen as the key impediment to digital investment in Africa, the true picture is not as dark. This paper hypothesizes that without a complete overhaul of systems and processes to align with the current digital demands, qualitative consumer research and insight units *will* become redundant in less than a decade to come. My discussion and subsequent conclusions further suggest that qualitative research units in both market and social research will require digital expertise to keep tabs of consumer trends within social media spaces. Questions of research ethics will also feature as cross-cutting, considering that ethics is one of the key pillars of what we do as members of MSRA.

Key words: *digital, mobile, apps, qualitative research, qualitative trinity*

Whither Qualitative Research?: Managing and Leveraging Digital Impact for African markets

At the outset, this paper seeks to disrupt traditional ways of thinking and performing mainly qualitative social and market research, (though principles could apply across the board) in the light of the leaps and bounds we are seeing in terms of both cementing the continent in the digital age, and cementing the digital age on the continent.

First, this paper hinges its argument on two premises: one, that digital coalesces around social media tech and usage; and two, that while Africa seems to play second fiddle to tech innovations and digital access, and while low internet penetration has always been seen as the key impediment to digital investment on the continent, the true picture is not as dark. In fact, to coin a phrase, *digital is the new black in Africa*. Digital is the present and the foreseeable future.

Second, this paper asserts that without a complete overhaul of the systems and processes of qualitative data collection, mining & interpretation to align with the current digital demands, consumer research and insight units *will* become redundant in less than a decade to come. The two variables here are qualitative project conceptualization on one hand, and the relevance of qualitative research in this field on the other.

Third, this paper attempts to suggest ways in which Qualitative Research can claim the digital, and how the digital can be incorporated into Qualitative Research in line with current and future client needs, arguing that a consulting approach is the only way for satisfactory client-research needs and demands. This would call for overhauling the ways in which we currently conduct research.

This paper is therefore guided by the key question: how do we as industry players manage the (virtual?) digital divide in order to leverage digital impact for our African markets through qualitative research? This is the key question that evokes further questions addressed in this paper with the aim of igniting further thinking and even debate that moves this digital conversation forward. This paper ultimately aligns with the MSRA conference theme in a number of ways: first, looking at unexplored opportunities in qualitative research; and two, identifying the 'never again' spaces qualitative needs to consider in order to be relevant and cutting-edge. It also seeks to align with the conference objectives, including defining the digital world, appreciating the need for qualitative response and relevance going forward, and throwing the gauntlet by challenging qualitative practitioners to creatively engage with digital methodologies.

Setting the context: Mapping Qualitative Research

To date, qualitative research has not only made leaps and bounds within the wider locus of research, it has also made a credible and visible impact on both people and brands across the globe, and more so, on the continent. Qualitative research, long-ago seen as the (unnecessary) extra frosting on the cake, is now integral to understanding consumer archetypes, behaviors, attitudes, motivations, and increasingly, trends. The qualitative seeks the reasons behind behaviors, remaining the authentic “voice” of the consumer. It is clear that the close-ness to the consumer in asking the whys makes qualitative research integral to the process of consumer and cultural understanding. The methodologies of the qualitative closeness to the consumer have remained staple, or what I call *the qualitative trinity* of the focus group, the key informant/in-depth interview, and the ethnographic (if not highly problematic)¹ immersion or consumer connect, taking the form of a home visit, a shopper connect, or consumer observation exercise.

However, on the continent, the bespoke nature of qualitative research, as well as the consumer landscape, has seen qualitative research lag behind on the digital continuum. The reasons for this are wide and varied, and I would argue, underpinned by what I would call the Joseph Conrad Heart of Darkness framing.²

First, the digital divide has been most evident in our markets, in terms of a West-South dynamic. It is no secret that that Africa has lagged behind on infrastructure development in general as Aker and Mbiti (2010) begin their treatise. Earlier, Chinn and Fairlie (2004), writing about the growth (or non-growth) of the tech sector on the continent, presented different variables with which they used to measure the sector’s development, including

economic variables (income per capita, years of schooling, illiteracy, trade openness),
demographic variables (youth and aged dependency ratios, urbanization rate),
infrastructure indicators (telephone density, electricity consumption),
telecommunications pricing measures, and regulatory quality...(pp1)

¹ I argue that use of ethnography in qualitative market research remains deliberately uncritical of the quality of data collected in situations where the *outsider-insider dynamic* is completely ignored, and the onus or burden of this highly skewed dynamic placed on the consumer. Other than ignoring this dynamic, use of the word (and methodology) of “ethnography”, an anthropological concept, remains unproblematized, and conducted in most cases by those without the skill and knowledge of the anthropologies of cultures, people, and research itself.

² Heart of Darkness is the 1899 Novella written by Polish-British Joseph Conrad about the encounters of protagonist Kurtz in the heart of the Congo. It has come to embody the problematic western-gaze that has since continued to see the continent as backward, difficult to navigate, and decidedly “native”.

In all these variables, Africa lagged far behind. Other scholars have been more blunt. Africa has historically been viewed as a ‘technological desert’ (Mbarika et al.: 2002), and analysed in under-developmental terms of the ‘urgency of the problem of the global digital divide in Africa’ (Fuchs & Horak: 2008). At the time, only 2.6% of all Internet users worldwide lived in Africa, despite the continent making up about 15% of the world’s population. According to renowned anthropologists Van Dijk and Hacker (2003), this low penetration was mainly driven by four barrier to access, that is, mental, material, skill and usage (Van Dijk & Hacker 2003). In short, Africa lacked the knowledge, the skill, and the equipment with which to close the gap in the digital continuum. Conflated with the variables presented above by Chinn and Fairlie, it is clear that historically, the lack of, or slow growth in development in other sectors on the continent have obviously affected the adoption of digital and tech. However, the use of the language of (socio-cultural and political) deprivation, as well as narratives of development, have meant that these arguments have stuck in their then-current realities without taking into account the fluidities of growth on the continent. As demonstrated, Africa as a continent, and individual countries, have come a long way since then, but the narrative has changed little. Further, existing within an increasingly digital age means that tech and digital have come to exist even in, or alongside, spaces where infrastructural and political developments have lagged. One can argue that digital advancements, unlike other sectors of development, do not necessarily need to exist within optimum or ideal spatial or infrastructural development conditions. We have, and continue to see this being the case in countries such as Kenya, where internet penetration and tech innovations rank first regionally despite grand corruption; or in Rwanda where the case is similar despite the country coming under fire for its supposed undemocratic and dictatorial political regime.³

Qualitative research on the other hand continues to, in most cases, be couched around the language of both the political, and the socio-cultural where digital advancements are concerned. This means that we continue to, in many cases, assume that where poverty, corruption and poor political leadership are the national or continental public discourse, then it follows that tech innovations, including advancements in digital, are not high. This is an inaccurate surmise.

Second, digital innovations around qualitative research have remained vague, expensive, or have become obsolete (referencing for instance dated or non-mobile online

³ Rwanda presents a unique case study in this case as a paradox of sorts. While Rwanda’s president has invariably been described as a tyrant, tech innovations in the country continue to thrive, debunking the notion that tech and digital cannot fully develop in States where democracy is stifled, for instance, China.

consumer platforms). Again, the narrative of the realities of the digital divide continue to dictate these innovations. My argument is that the lack of drive in qualitative innovations is the belief that they would essentially upset the order of the qualitative trinity; a disruption of the staple, traditional foundations of consumer qualitative research, even as the consumer and the global village they exist in becomes more digitized. My interpretation is that qualitative researchers are unwilling to think and operate outside the proverbial box, paying lip-service to digital and mobile innovation and methodology, saying it is the “future”, but not realizing that *the future is now*. Again, for Africa, the problem is seemingly two-fold, the key impediment being lack of tech and internet access to a large number of our consumers. It is not uncommon to hear researchers make broad claims as to the inability of a large number of their middle to lower class consumers as having no personal computers, or smart gadgets with which they can access the internet. However, as stated above, this is increasingly inaccurate, even with advances in mobile phone, and specifically, smart phone usage as I will demonstrate further along in this paper.

In essence, it is my argument that market research is still hinged on the problematic and orientalist Joseph Conrad “Heart of Darkness” narrative, and this is preventing new thought and engagement with post-emergent digital developments.

Third is the phenomena of what I call Big Agency (akin to Big Pharma), where methodologies, research tools and innovations are cascaded from a head-quarters in the West down to the local space, leaving little room for the development(s) of innovations within the local space. While these research tools and methodologies are invaluable and highly useful, I also argue that they may not necessarily be reflective of the local contexts. I would use the example of a television advertisement made in Europe and merely cascaded into the local space without testing, or customization, or total overhaul (dependent on research results). We have seen such scenarios unfold in our research lives. The truth is, while some succeed by the skin of their teeth, many fail to find footing with local audiences. Should we as researchers not also critically examine methodologies, especially at the Qualitative level, that are merely cascaded to the local space without due testing, tweaking, or total overhaul? Shouldn't we as qualitative researchers have the space within which we can also innovate our own methods, methodologies and tools that are relevant to our local contexts?

Lastly, the qualitative trinity is propped by process that can be summed up as the planning phase, implementation phase, and the analysis and reporting phase. *Most often, these three phases can be time consuming, and increasingly unprofitable.*

A 2015 MSRA industry report for Kenya shows that spend in qualitative has been shrinking year on year, from 37% in 2013 to a mere 13% in 2015. In the same period, the qualitative trinity stayed in play steadily, with focus group methodology remaining at 71% in the three years, while “online methodologies” shrunk from 4% in 2014 to 1% in 2015. Inversely, spend on quantitative has grown from 59% in 2013 to a staggering 85% in 2015. Interestingly, spend on ad hoc projects, which is the qualitative mainstay, grew from 46% in 2013 to 61% in 2015, but qualitative itself did not grow.⁴

These are interesting statistics. First, the growth in quantitative cannot be separated from recent industry trends of moving from PAPI to CAPI, and the adoption of mobile surveys and methodologies, which have considerably shortened research turn-around times, reduced errors and biases, and in turn, delivered more accurate data with actionable insight. Second, the growth of ad hoc shows a client appetite for innovation and deal-seeking. With shrinking research (and other) budgets globally, and with many companies and brands struggling to report growth in earnings and profits, brands are now going for more ad hoc research projects, seeking insights that will drive profit-making strategies. But qualitative, with its potential to cost less and deliver indicative data with actionable insights, has kept shrinking in the light of these developments. This supports the argument that all things remaining constant, qualitative research will continue to shrink in terms of spend, and indeed, the theory of redundancy is not far-fetched. It is clear that with clients and brands seeking more innovation, strategy and fresh insights, but qualitative remaining as is in terms of methodology and process, the shrinking trend will continue. However, the value of qualitative research needs no defense. Qualitative feedback is invaluable to brands and clients, and indeed, the shrink in qualitative spend can be attributed to brands themselves engaging their consumers at the qualitative level on social media, and even through internal research projects, getting live and continuous feedback on ad or communication performance, product performance, or consumer interface. This means that we must innovate qualitative using different metrics that would give our clients value and strategic insights. We must innovate where our consumers are playing in in digital, or risk death.

The question then would be, are our consumers playing in digital?

⁴ See MSRA Industry Survey 2015.

The digital landscape globally and in Africa

Part of the challenge of understanding digital in our context is that usage of the word “digital” continues in ways that are blanket, uncritical, and even viewed under the prism of suspicion. For some sections of our consumers and policy-makers, the word “digital” seems to embody the evil, the immoral, and the poisoned chalice that has been thrust upon us from the “West” to sully our cultural and moral fiber, our “African-ness”. We have seen this in the recent push by for example, the Kenya Film and Classification Board (KFCB), to regulate use of the internet, as well as digital entertainment apps such as YouTube and Netflix among others. For others, the word “digital” is encapsulated at the social media site, giving possibilities of grand exchanges with vast audiences across the globe. And, tongue-in-cheek, “digital” might mean reduced revenues for ad agencies which find themselves floundering with traditional modes of advertising, while their clients cut budgets and run to open Twitter, Facebook and Snapchat accounts with abandon, not quite sure themselves, what to do in these spaces. And for us in this market, as researchers/interface between brands and consumers, the question remains whether to follow international trends, or respond to the unique ways our consumers interact and use digital platforms to interact with one another, and with brands. Or marry both, if possible.

The reality is that on a global scale, digital is representing increased revenue and growth for brands that have plugged into this space. In July 2016, Facebook Inc. announced 6.24 billion dollar revenues in Ad Sales by end of Q2. Facebook itself has 1.7 Billion users worldwide, 1.5 billion being on mobile, and together with its three other platforms (Facebook Messenger, WhatsApp and Instagram) a total of 4.2 Billion active users, with Instagram itself having about half a billion active users worldwide. With the world population tipping at 7.4 Billion, this means that Facebook Inc. has a total of about 56.7% of the entire globe in terms of an active audience. Twitter has an active user base of 320 million users, 79% of whom are outside the US. Twitter Q2 2016 revenue hit the \$602 million mark, with ad revenue showing 18% growth at \$535 million. Newcomer Snapchat has an unknown number of users according to an April 2016 “Adweek” report, concentrating more on daily (even hourly) active usage, rather than monthly figures.⁵ However, Snapchat claims over 100 million active users in the developing world. Of the above quoted revenues, 84% of the total ad sale for

⁵ See Justin Kerby’s analysis on social media populations from April 2016 article found at www.adweek.com/socialtimes/heres-how-many-people-are-on-facebook-instagram-twitter-other-big-social-networks/637205 accessed 29 August 2016.

Facebook was in Mobile, and similarly, 89% for Twitter.⁶ The result is similar for other platforms and apps such as Google+, LinkedIn, Pinterest among other big players.

These numbers point to the fact that digital, mobile and internet are synonymous, especially in our local context where internet penetration has been driven largely by internet-enabled mobile phone and commensurate data bundle penetration. So if indeed, “digital” is commensurate with the internet and with mobile, then the next question becomes how to unpack this. The answer lies in apps. Indeed, even in the local space, it is impossible to begin to use a new smart-phone without having either a Google or Apple identity, to align with either Google Android or the iOS for iPads and iPhones, which continue to be the two major mobile user-interfaces. These identities allow users to access either the Google Play Store, or the Apple Store in order to download apps, whose usages are in four main categories.

First, are gaming apps, from children’s games, to more complex games, including the disruptive *Pokémon Go*, a recent global hit that has incorporated the ground-breaking augmented reality (AR), cited by among others Mark Zuckerberg as being the next big mainstream thing, even beyond, or perhaps before, virtual reality. Second are social networking apps, which include the ubiquitous Facebook, Instagram, Kenyan favorite Twitter, Snapchat and the rest. And third are the entertainment apps, including television, movie, YouTube, etc. Fourth is an emergent, rising popularity with utility apps, such as Uber, Office and allied apps, emoji apps, and banking apps which are increasingly popular in Kenya. Communication apps such as Gmail, as well as alarm clocks, calculators and nota-taking apps can also be lumped with utility apps, as do educational ones such as Wikipedia for example.

Underpinning all the above are ads – the advertising world is slowly mainstreaming in the above spaces, but research has not learned how to both integrate and leverage. A recent Nigel Hollis blog post⁷ argued that of the ads flighted in digital spaces, a large percentage had not been pre-tested, and were therefore literally shooting in the dark. Part of the problem is that while ad agencies and players are/have been forced to quickly adapt to the digital needs of their clients, research agencies have not, causing frustration between the two. It becomes difficult for ad agencies to recommend digital ad testing when one, research is not up to speed, and two, research does not have the speed, accuracy and intelligence needed to tackle

⁶ See adweek.com article of July 28th 2016 here <http://www.adweek.com/news/press/8-eye-opening-digital-marketing-stats-past-week-172714>

⁷ See Straight Talk with Nigel Hollis at <http://www.millwardbrown.com/global-navigation/blogs/straight-talk>. Mr. Hollis is the Executive Vice President and Chief Global Analyst, Millward Brown.

these emergent needs, and here, I refer specifically to qualitative research with its evidently shrinking spend across the board. This intelligence is important to have, as I will demonstrate later on in this paper.

Further, tech companies, according to a recent brand valuation report for 2016 by Forbes⁸, occupy 9 of the top 20 slots on the ‘most valuable brand’ scale, demonstrating the power of digital consumer interaction in terms of social networks, utility, online shopping, and product and app usage.⁹ Clearly, the consumer is increasingly occupying the virtual space, demonstrating one, a shift from the mere physical into the digital, and two, a subtle merging of both spheres in ways that present us with unique opportunities of gauging these emergent consumer interactions.

Which point brings us to new/emergent brand babble metrics that are taking center stage, with applause, feedback and amplification having more impact with regards to brand building. For example, a recent study of the ongoing race to the White House in the US released on 25th July 2016 asserts that the main reason the Republican Candidate has moved from off-center caricature to a serious contender is because of a digital strategy with a recorded 130 million “social media engagements” (brand babble metrics) compared to Democratic Party 37 million social media engagements between 1st January and 21st July 2016.¹⁰ This has been a conclusion of both quantitative and qualitative analysis taking place in real time, and taking place online. A concerted digital strategy taking place on social media has built the Trump brand into a formidable one, including creating moments of “truth” and high emotional responses (despite the candidate’s penchant for using half-truths to drive his agenda home) that are clear and visible in various political polls, such as this one by CNN, where in key states, the candidates remain neck and neck, with Trump even jumping to the lead.¹¹ Even where these polls are contested, of note here is the power of the consumer online who wields the ability to applaud and amplify a brand, especially on social media where *emojis*, images, hashtags and other devices become more specific in portraying emotion as well as going viral and trending. It is easy to tell within minutes whether consumers are ‘liking’, ‘loving’ or getting upset with a brand output, be it an ad, or feedback to the consumer experience even in the spatial sense.

⁸ See www.forbes.com/powerful-brands/list/#tab:rank Accessed 30 August 2016

⁹ Ibid

¹⁰ See study conducted by 4Cs Agency and analysis published on Adweek of 25th July 2016 here <http://www.adweek.com/news/technology/infographic-how-trump-and-clinton-stack-facebook-and-twitter-172644>

¹¹ See CNN report here <http://edition.cnn.com/2016/07/25/politics/donald-trump-hillary-clinton-poll/index.html> accessed 10 August 2016

Closer home, what does the situation look like? At a glance, the numbers are grim. Two recent reports launched in April 2016 place internet usage at only between 9% on the lower side and 20% on the upper, compared to Europe's collective 77%.¹² The African continent has 16% of the world's population, and less than 20% are internet users. These are grim statistics. However, at the individual level, the picture takes more nuanced shape. Kenya for example has 69.6% internet penetration, Nigeria has 51.1%, Zimbabwe 47.5%, Egypt 37%. and South Africa has 49%. Low penetration includes states like Niger at 17%, the DRC at 3.8% and Eritrea at 1%.¹³ Relative to these latter countries, Africa's overall percentage drops, but in strategic markets around the continent, penetration and usage are high and steadily growing. Further, a Pew Research report places smartphone usage in Kenya at 26%, Nigeria at 28%, Ghana at 21% and South Africa at 37%.¹⁴ A 2015 Ericsson Study is more optimistic, placing smart-phone usage in Nigeria at about 70%, over 60% for Kenya, and about 78% in South Africa, which is above the global average of 76%.¹⁵ In the next 5 years, smart-gadget penetration in Africa is *collectively* forecasted at 40%, and will obviously be higher in key markets. The commensurate growth in digital is expected to be exponential in the fields of finance, education, health, retail, agriculture and government, and we are already seeing smatterings of this with Kenya's e-Government, and the exclusive online filing of tax returns in 2016, a key departure from past years when filing could be done physically at the Kenya Revenue offices. Overall, digital growth, cemented in mobile phone penetration, is currently bridging the digital exclusion lacuna, leading in financial inclusion to unbanked populations, leading innovation in new services and Apps, and contributing a collective \$3.1 Trillion in GDP by close of 2015, and this is projected to go up to \$3.7 Trillion by 2020. All the above is evident in several African countries, including Kenya which can claim to being at the forefront of these very innovations (referencing mobile innovations such as the M-

¹² See for example Internet World Stats official reports here <http://www.internetworldstats.com/stats1.htm> with full breakdown of usages per country.

¹³ See GSMA Report titled "The Mobile Economy Sub-Saharan Africa 2015" found at <https://www.gsmainelligence.com/research/?file=721eb3d4b80a36451202d0473b3c4a63&download> Accessed 29 August 2016. The GSMA and Pew Research studies have been slightly critiqued for low smart-phone score across the continent for omitting Chinese brands which have driven smart-phone penetration overall, meaning even higher penetration rates on the ground.

¹⁴ See Pew Research Report at www.pewresearch.org. For instance, recent studies on smart-phone usage on the continent have failed to give a true picture of smart-phone penetration because the phone brands listed did not include the MSP-branded phones, or the non-traditional brands of apple, Samsung, HTC, Microsoft/Nokia, and Huawei. The broad spectrum of Chinese phones for instance were not included, and this is the space where a bulk of middle to lower middle class smart-phone owners and users play. The fact is that consumers are using these affordable gadgets to make their mark online, and their impact cannot be ignored.

¹⁵ See Ericsson Report titled "Sub-Saharan Mobility Report November 2015" found at <https://www.ericsson.com/res/docs/2015/mobility-report/emr-nov-2015-regional-report-sub-saharan-africa.pdf> Accessed 28 August 2016

platforms such as M-Pesa, M-Kopa, etc.). Beyond the M-platforms, apps such as *Kisafi* has ushered laundry service into the digital, and is operational in Nairobi, Kampala and Lagos.¹⁶

These are at once staggering figures and developments. And even where they appear to lack uniformity depending on the researching entity, that mobile, smart-phone and internet penetration in Africa is both present and expanding is a common fact across all studies. But qualitative research trends on the continent have tended not to reflect these changes and realities. Based on the shrinking appetite for qualitative spend across the region, it is clear that the transfer window is soon closing, threatening to render the practice inept and redundant.

The challenges of the qualitative trinity

As mentioned above, qualitative research is structured around focus groups, interviews and quasi-ethnographies. As stated, these methods find strength in the face-to-face consumer interface. Speaking to consumers at the basic level is no doubt unbeatable in terms of presenting their authentic voice.

But these methods have often been utilized uncritically. The biggest offender has been the home visit, couched as an ethnography. In essence, the disruptive nature of ethnographic research makes it such that it becomes difficult to present believable and authentic results, especially with regard to understanding consumer behavior. Even focus groups have had their problematics, though overall, these methods have been invaluable in helping us understand markets and consumers.

However, these qualitative data mining methodologies I argue, while hitherto effective and useful, have quickly become repetitive and do not necessarily produce fresh insights, save for when they combine with the digital. For an example, a study of mothers with infants in Nigeria only offered fresh insights when the mothers were equipped with internet-enabled and wearable cameras that uploaded a continuous feed of baby-care activities to a server. Mothers wore the camera as soon as they got up, and removed it when performing personal tasks, or sleeping. The onus of conventional videography and photography was not placed on the already-stretched and busy mums. Prior to this successful project, home-visits, and diary-filling (pre-group work) done in the same category and consumers had failed to offer any fresh insights into baby care, since mothers really couldn't

¹⁶ See Kisafi App new on <http://nairobinews.nation.co.ke/jobs/how-digital-mama-nguos-have-taken-laundry-services-by-storm/>

be bothered to add these tasks to their already busy schedules. While stay-at-home mums in other markets are known to fill diaries and do v-logs, the Nigerian mum, wearing varied hats from professional to religious to domestic may not have the time for detailed documentation of their lives. This sheds light on pre-group methodologies which are prevalent in qualitative research, either in behavior monitoring, or qualitative product pre-tests, where products are placed with respondents before convening focus groups. Respondents are then required to fill diaries with regards to their product usage, then coming to discuss their experiences at the groups. While mining important data across many brands, shedding light on the usage of different categories of products, this process is often fraught with challenges, chief among them the tiresome nature of physical diary filling. Respondents are known to fill diaries just before the groups themselves, missing out key information that would have been gathered live during the product tests at home.

It is my submission that such challenges would be mitigated with the use of digital methodologies and applications, ensuring a more robust feedback that offers a true qualitative and invaluable picture of consumer interaction with brands and products. It is also my submission that a concerted effort to move qualitative research from PAPI to CAPI as has happened in quantitative research is one of the key developments that will enable qualitative into a fresh realm of relevance and insight-generation. The question then becomes how to do this, and here, I offer a few examples in terms of conceptualization and process, as well as methodologically, on how we can move qualitative into the digital.

Emergent Client Needs and opportunities for Qualitative

Qualitative research in our markets has hitherto flourished with what I will call analogue client needs, including spatial market entry, sizing or segmentation (grey space consumer clusters that have needed unpacking, hence the proverbial U&A), or consumer understanding for the more established brands (hence home visits and immersion techniques). These have proven valuable time and time again. However, increasingly, brands are becoming more savvy as they embrace digital and tech, and it is not uncommon to hear, during a presentation to a client that “yeah, we already knew that”. Increasingly, we no longer offer new information, and the value of what we offer qualitatively in terms of “new” insights is shrinking, based on current client needs. The above spatial needs will soon become redundant because a client may not segment their consumers every fiscal year

The time has come for a fresh conversation around qualitative needs and questions that we can answer, because there are. My argument is that the shift to digital is giving a new

needs scopes for us and our clients, who are themselves already dabbling (some more successfully than others) in the digital worlds that their consumers already occupy. Further, new research and communication competitors are entering the market with a digital media footprint, offering new methodologies, new tools and new prospects for clients who readily admit to knowing their consumers are merging their spatial and digital presence, but may not know how to leverage and maximize across these different platforms. The question remains at whether these new international players are offering value and not fluff (as “digital” has also become a by-word that is easy to misuse and misrepresent), and whether we can, as local researchers, maximize our knowledge and experience to make the shift to digital. This last point is not really up to debate, since, as I have argued, qualitative research as is will soon become overtaken by events if changes are not implemented to embrace digital. This is to say, there is a lot of in-house research that we can leverage as we work with our clients to sharpen consumer understanding and mapping. And for the qualitative process, digitization will be expressed via shortening of turn-around times, and expanding our methods to embrace digital applications.

i. Project Planning and Understanding Briefs: Mapping Client Needs

For brands, the questions will seem obvious, but will be crucial and in line with brand babble metrics mentioned earlier in this paper. Do you have online presence? If so, where, and are your consumers aware of this? Even more fundamentally, who are your consumers in the digital space? How have you segmented them? Where are they playing strongest and weakest? What are your brand babble metrics online, and what do they mean on a qualitative level? Do you have a digital strategy? If you wish to develop an online strategy, where, what and how? How can we help you grow your brand and optimize your ad spend in the digital space as well as other spaces? These are just some of the questions that qualitative will be able to answer, and further possibilities abound here.

Some of the above questions will begin to feature prominently in the initial stages of any qualitative project. Previously the realm of digital marketing agencies, these questions will soon become the staple in briefing conversations. Already in Kenya for instance, some brands are engaged in concerted conversations with consumers on social media, with sites such as Twitter and Facebook being the major trouble-shooting and qualitative feedback platforms. These rich layers of information and existing data will begin to play a major role in how we both pitch and approach client briefs, as well as interpret trends that should offer insights. If brands do not have a digital strategy as may be the case across our markets, these

conversations will become helpful in steering thought towards this direction. It is safe to project that within the next decade or less, brands without a strategy and presence where consumers are situated online will become defunct. Leveraging brand across different social media platforms, as well as leveraging information across sites and apps will become one of the digital KPIs for major brands.

For research consultants in general, the correct data and forecasting we give our clients on these seemingly simple questions will soon become the norm. And this calls for a shift in the way we conceptualize our processes, from implementation to data processing and insight-mining.

ii. Methodology, implementation and analysis: digitizing the qualitative

While advocating for a thinking outside the qualitative trinity box, I by no means disqualify these tried and tested methodologies. From the MSRA Industry Report, the focus group continues to take the lion's share in methodology, and part of the beauty of the focus group is the robust methods of consumer engagement that can be applied. A good moderator is able to bring to the room different exercises and practices that elicit discussions which may often lead to insight. Further, ethics and confidentiality are more clear-cut during such consumer interactions. The consumer is protected by the processes of recruitment and consent-giving, and in cases where client material such as concepts, print and video ads are to be exposed for testing, the danger of leakages are far minimized. This advantage of the focus group methodology must be upheld and protected. However, current market needs require the process to be expedient as well as yield more accurate and actionable data. I use the example of the ground-breaking game Pokémon Go, launched on 6th July 2016 and taking its audiences by storm, having more daily users than Twitter, and longer daily time usage than Facebook.¹⁷ So significant is the game's impact, that it was not only downloaded 10 million times within a few hours of being available in Japan on 22nd July 2016, but Nintendo share price and value plummeted the same week after investors found out that Nintendo, creators of the original Pokémon, are not the main power behind the game, but rather, Google-affiliate NianticLabs. Any study requesting qualitative actionable feedback on the game's kinks and quarks for app development and improvement cannot take the customary two to three weeks

¹⁷ Rudzani Mulaudzi on <http://memeburn.com/2016/07/viral-marketing-pokemon-go-lessons/>

that is the qualitative process.¹⁸ Obviously, timelines vary depending on the type of study. Multi-country studies for instance are likely to take longer if a comparative analysis is required. However, on the whole, expediency is now a major need that must be addressed.

First, I have earlier suggested that the qualitative process of project planning, implementation and analysis is winded and time-consuming. It is therefore my further suggestion that reconstituting this entire process is one of the ways of expediting research. Examples here include use of pre-recruited and rolling panels, which will have to be segmented in line with projected client needs. To use the example of Pokémon Go analysis, which would require fast feedback in the light of the game's popularity and high usage, a quick panel of standby gamers would most likely give reliable on-the-go feedback, rather than a fresh sourcing of gamers. The same panel of gamers would likely give rolling feedback in terms of qualitative tracking to aid in app updating and improvements, which need to be constant and up-to-date. These are the kinds of panels that will become integral to more efficient time management.

Second, I have suggested a move to CAPI for qualitative recruitment, and further, mobile methodologies. Recruitment via pen and paper is already becoming outdated, and in some markets, highly problematic due to fraudulent practices, meaning compromised data from the outset. Those resisting a move to CAPI for qualitative will have to gauge between initial set-up costs and general loss of appetite for qualitative due to present challenges, or perhaps opt for smartphone-based SAPI as a way of mitigating costs, but still digitizing. Similarly, is the use of mobile methodologies in data capture and analysis. How this is done would be up to different players, but innovations must be allowed to happen in ways which are commensurate with our markets' socio-cultural realities.

Third, digital innovations have given rise to grey lines in terms of classifying our consumers. Traditionally, we view the market in terms of socio-economic class (SEC) or the living standard measure (LSM), depending on client preference. Both these scale consumers from a high to low score, and for the common SEC for example, high value consumers would be on the A scale, going down to scale D and E for the low value consumer. But these would have to be reconstituted and re-thought in the light of the current realities I have discussed in this paper, where I have posited that digital developments in Africa seem to be taking place

¹⁸ Illana Melzer has argued that Pokémon Go as a game presents the African market, including resource distribution to the poor, urban planning, tourism, urban regeneration and integration. See her think-piece here <http://www.eighty20.co.za/pokemon-go-opportunities-marketers-officials/> Accessed 28 August 2014. This is in line with my own arguments here on the need for a more responsive, digitized and expedient qualitative process.

outside the loci of infrastructural and political advancements. So for instance, a university student on government assistance through the Kenyan Higher Education Loans Board (HELB) is likely to file nil tax returns as required by law. He is likely to be a C/D in the SEC scale. However, if he is doing side-hustles and earning a substantial amount of (undocumented) money with which he funds a solid online footprint, does he remain a C/D? Are spatial determinants of SEC or LSM translating into the online space, and if so, in what forms? Are they determinants of brand babble on social media? These are some of the questions we would need to grapple with as we re-think consumer classifications and approaches, or use current digital realities to update our understandings of consumer clusters. At the very least, bespoke, qualitative digital segmentations will become a demand to inform digital strategies.

Fourth will be an upgrade in expertise to push accurate digital and online readings of events, trends, as well as background research, and further, into data analysis. Here are two things- first is the fact that background research and knowledge will be crucial, and not just reliance of “what the consumers said”. This will call for digital semiotics experts or analysts in gathering and analyzing **social media, gaming, entertainment and utility intelligence**. I had mentioned these four broad areas as the spaces where consumers are playing in in digital (and for gaming, Pokémon Go arguments above apply). The practical questions that we should be asking ourselves (as well as fielding from clients) will come to include whether our teams of qualitative researchers have any knowledge of digital. Are we plugged into the digital? Do we know of current trends across various social media platforms for example? And how can we leverage these trends into brand metrics that inform strategy so that our clients get ROI? Tongue-in-cheek, I would refer to the recent “Bro Ocholla” trend on Kenyan social media¹⁹, which brands such as Kenya Airways used to sell holiday get-aways “going beyond seventh heaven”. Other brands also customized the trend to suit their own needs, demonstrating the fluidity that is available to all on social media trends. Such initiatives are only possible where digital semiotic intelligence is present, and can be smartly linked to a brand’s strategy to win on certain metric and convert these to sales, brand loyalty and brand ambassadorship. Such kinds of intelligence would extend to advising clients in different

¹⁹ The Bro Ocholla debacle was a light scandal involving a religious man who mistakenly posted an explicit message to his Church WhatsApp Group with the phrase “seventh heaven”. One of the members, expressing shock, referred to him formally as “Bro Ocholla”, the title “Bro” denoting a spiritual and religious connotation that is prevalent in Kenyan Christian circles, where members see each other as brother (Bro) and sister. The message went viral. Some brands used the trending topic #BroOcholla in brand messaging in interesting ways that make for a study of digital trends and how to leverage these.

channel and platform optimization for brand communication, which is going to be crucial in the months to come in our African markets. This calls for researchers to begin to think like informed consultants who can marry consumer feedback with current knowledge to inform insights.

In line with the above would be what I would call Digital Social Responsibility, an extension of Corporate Social Responsibility. Are there ways brands can claim messaging that is both brand-centric, but also carrying social messages? I believe this to be the case, and would cite the recent school fires and the youth as missed opportunities to stamp authority with this segment. No brand came out to address school fires, not in terms of the politics of causality, but as a way of appealing to the good sense of our emergent post-millennial (?) segment. This is more pertinent as proposals to allow high school students to have mobile phones gathers momentum in the public sphere, and while these proposals may not pass currently, they are likely to be revisited, and found acceptable in future as mobile phones reach 100% saturation across the continent, and internet usage doubles in the next few years. The issue of school fires was trending on all social media platforms for weeks, presenting a possible DSR opportunity. Other trending topics are online for our consumption, but if we don't dedicate our expertise to spotting and leveraging these trends, we lose out.

In terms of analysis, quantitative businesses have perfected digitization of data and analysis. Qualitative in market research continues to lag behind with data mergers and sometimes incorrect inferences drawn from data. This is becoming problematic. Academia has, and continues to invest in researching, streamlining and updating qualitative data analysis software to ensure, on the one hand, an accurate reading of data, and on the other hand, expedient analysis. I believe qualitative businesses in our markets need to follow suit and give charts that, while not representative, can give an indicative picture that clients usually crave. Together with digital semiotic intelligence, using more bullet-proof analysis methods is likely to position qualitative research as an attractive, expedient, accurate and insight-generating option.

Conclusion

In my paper, which is confined to qualitative research field, I have started by positioning digital within mobile, the internet and apps, making a case for this stance. I have further outlined the current state of qualitative research conceptualization and process, arguing that both begin to find themselves redundant, giving the evidence, at least for Kenya, of clear loss of spend in qualitative, including my own analysis of this decline. I have stated

that this decline is likely to continue if the status quo is not changed. Using the example of the quantitative business, which has continued to perform well, in part, due to the shift to more streamlined and digitized processes, I have argued that qualitative businesses need to follow suit.

Further, I have given evidence that our African markets are ready, with a high bulk of our collective populace gaining more access to mobile, the internet, and apps through smartphones. As stated, key markets in Africa are already approaching the global median in terms of smartphone usage, and even where the research figures may not tally in terms of uniformity, the upward trends across all metrics cannot be disputed. Bearing in mind that researchers are no longer the sole connection between brands and consumers, I have laid out some clear suggestions of how qualitative may be digitized and differentiated. More than ever, the researcher is moving from a mere delivery-boy of research into an invested consultant, and this calls for a re-think, and a thinking, of fresh ways of structuring methodologies, especially in uncharted digital waters, in order to deliver qualitative to digital, and vice versa, so that indeed, we offer insights that even brands talking to consumers will not be in possession of. Digital guru-hubs to keep tabs of consumer trends within social media spaces, as well as social media immersion must, as a matter of urgency, become the *default position* and the key to unlocking current trends (economic, social, political, technological), as well as what people love. How we differentiate this is a matter of individual choice, but this is now imperative.

Underpinning these will be the need to look at questions of research ethics across the board. As researchers, ethical lines will tend to become blurred as we begin to delve into the digital, which, as I have mentioned from a policy perspective, will need to stress on consumer data protection. Questions of consent, access and sharing of information will come to the forefront in order to protect both our consumers as well as ourselves. To quote Facebook CEO Mark Zuckerberg in his most recent (and first) trip to our continent late August and early September 2016, where he has seen the technological advancements and innovations centered around our key needs, '*Africa will build the future*'. Indeed, this is the clarion call to qualitative research to be a part of that future, which is going to be in digital.

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