



Trading Currencies For The Buying And Selling Of Media Space And Time

Dr Paul Haupt

Chief Executive Officer, SAARF

CPD Workshop, 20, 21 & 22 October 2008



"YOUR WINDOW TO THE WORLD OF RESEARCH"



South African

Advertising Research Foundation

Index

**Part 1: A Short History Of Media
Audience Research In South Africa &
The Role, Structure And Operation
Of SAARF**

Part 2: The Currency Surveys

**Part 3: Future Challenges & New
Developments**

**Part 4: Segmentation (Separate
Presentation)**



Contents – Part 1

- **What is Media Audience Research?**
- **A Short History Of Media Audience Research In South Africa**
- **SAARF's Raison D'être**
- **The Common Currency**
- **Joint Industry Research vs. Own Research**
- **SAARF And Its Activities**



What is Media Audience Research?

It is the study of all aspects of media audiences – their characteristics as well as their sizes

This may include aspects such as demographics, media platforms, consumption of products, brands and services, activities, attitudes, interests, life styles, lifestages, LSM's and psychographics



History of Media Audience Research In South Africa - 1

Dates Back To 1948

- **Radio Listenership Survey – 1948**
- **Readership Survey – 1948**
- **National Readership Survey – 1962**
- **SABC Broadcast Index – 1968**
- **SAARF formed in 1974**
- **All Media and Products Survey (AMPS)
annually/twice a year since 1975**



History of Media Audience Research In South Africa – 2

- **Radio Audience Measurement Survey (RAMS) since 1976 (Including TV)**
- **Television Audience Measurement Survey (TAMS) since 1991**
- **Out of Home Media Survey (OHMS) 2006**
- **Child AMPS and Teen AMPS from time to time on request from stakeholders**



Primary Reason For Existence Of SAARF - 1

There is a need for a
comprehensive, unbiased, reliable,
regular and technically excellent
survey to determine the
following:



Primary Reason For Existence Of SAARF - 2

- **Comprehensive characteristics of users of media, products, brands and services**
- **Their use of the mass media**
- **The consumption of products, brands and services by users of the mass media**



Primary Reason For Existence Of SAARF - 3

This is required for:

- **The selection of media for advertising campaigns**
- **The buying and selling of media space or air-time, and**
- **thus to enable sensible Target Marketing**



SAARF's Raison D'être

**The provision of a
common trading currency
for the selection and buying of
appropriate media space and time
and to enable effective target
marketing**



The Common Currency

Provides an orderly trading environment

An independent, credible measure of audiences accepted by all

Provides comparable data to buyers of media space and time

Provides an even playing field for individual media

Provides competitor intelligence

Necessary condition for Media Freedom

> R 20 Billion Ad spend in 2007



Some Advantages Flowing From The Formation Of SAARF

- **Strategic editorial and programme planning can be done by media owners**
- **Tracking studies by media owners can be confirmed and supported with objective data from SAARF**
- **Credibility / Stability of currency have direct effect on competitiveness and survival of a medium**



Joint Industry Research vs. Own Research - 1

When and how do we do Joint Industry Research?

- Currencies are established by **pre-competitive Joint Industry Research**
- When required for inter-comparisons and therefore needed by everyone
- Thus to provide an even playing field
- To ensure buy-in from everyone



Joint Industry Research vs. Own Research - 2

Why do we do joint industry research?

- It's too expensive for individual media owners**
- Media owners have a responsibility to provide clients with credible information on their media**
- Media owner currencies are often distrusted and seldom comparable**



Joint Industry Research vs. Own Research - 3

What is Own Research?

- **It's research required to support own business objectives**
 - **Qualitative studies (normally affordable and easy to carry out)**
 - **Research that will enable a better understanding of e.g. a specific publication or radio station's own particular audience**



Important Points To Remember

- SAARF is unique in that it is not just another provider of research – it is the provider of the trading currencies
- The trading currencies are there primarily to enable marketers to make informed decisions about where and how they spend their advertising money
- As such, it is also in the interests of media owners as it ensures fair trading conditions and creates trust in the value of the media on offer






Current Joint Industry Research Compared To 1974 - 1

Points to ponder

-  The power of Demographics has been waning for the past 25 years or more
-  Ted D'Amico of MRI in the USA at the recent WRRS in Vienna:
 -  Demography is a horrible predictor of consumer behaviour
 -  Selecting print vehicles on the basis of demographically defined targets = “insanity”



Current Joint Industry Research Compared To 1974 - 2

-  What is ironic is that in a country such as the USA millions of dollars have been spent in trying to link consumer behaviour with television viewing
-  However, in the RSA print vehicles have had this ability for more than 30 years but I still get asked why we need product and brand information on AMPS!
-  To enable users to make informed decisions, simple media surveys based on demographics are just not adequate



Current Joint Industry Research Compared To 1974 - 3

Information gathered as part of currency surveys:

- **Product and Brand information**
(Austria*, Belgium*, Denmark, Estonia*, Finland, France, Latvia, Lithuania, Netherlands, Norway, Romania, South Africa, Spain, Switzerland)



*products without brands

Current Joint Industry Research Compared To 1974 - 4

Information gathered as part of currency surveys:

- **Attitudinal information** (Austria, Belgium, Denmark, Estonia, Netherlands, Norway*, Romania, South Africa, Spain)
- **Life style information** (Estonia, Netherlands, South Africa, Spain)



*not owned by NRS

Current Joint Industry Research Compared To 1974 - 5

Information gathered as part of currency surveys:

- **Interests and activities**
(Netherlands, South Africa, Spain, Switzerland)
- **Psychographics/Values** (Netherlands, Switzerland)



**South African Advertising Research
Foundation –
SAARF**

Established 1974

**(Association Incorporated under Section 21 of
the Companies Act)**

**A non-profit organization owned by its
members**

First Common Currency –

**ALL MEDIA AND PRODUCTS SURVEY
SAARF AMPS® 1975**



Main Business Of SAARF - 1

SAARF is tasked with facilitating, co-ordinating and determining the joint industry research needs of its stakeholders and to ensure that these needs are met within the limitations of the funding available for this activity

SAARF is an independent authority, acting as the custodian of the currency and a clearinghouse for industry research

(From new Memorandum of Association of SAARF as adopted by the Board of Directors during 2004)



Main Business Of SAARF - 2

To carry out this mandate, SAARF must keep track of local and international developments, ensure that new approaches are explored and developed, and that the necessary joint industry research programs are implemented, managed, and monitored

(From new Memorandum of Association of SAARF as adopted by the Board of Directors during 2004)



Main Object Of SAARF

To provide tools for targeting and segmentation of markets as well as to establish, commission and manage comprehensive, valid, reliable, continuous media audience and product usage research, surveys, investigations and reports, that provide comparable multi-media and multi-product/brand usage information that reflect the totality and complexity of the South African society.

(From new Memorandum of Association of SAARF as adopted by the Board of Directors during 2004)



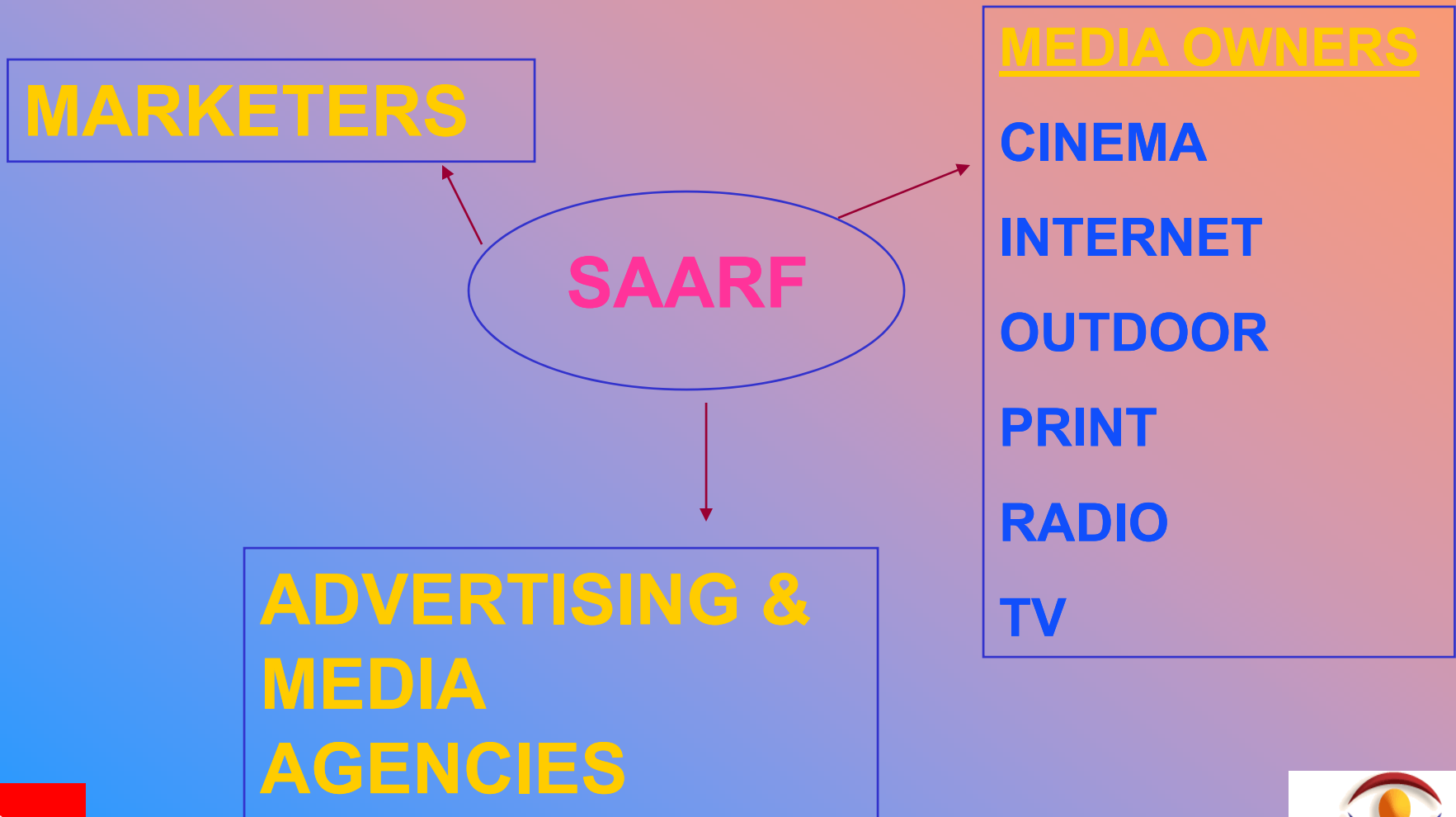
Ancillary Objects Of SAARF

- To co-ordinate joint industry research amongst the advertising, marketing and media industries.
- To investigate any research technique and establish the degree of validity and reliability of the results obtained thereby
- To seek improved methods in media audience and product/brand usage research
- To provide improved tools for targeting and segmentation of markets

(From new Memorandum of Association of SAARF as adopted by the Board of Directors during 2004)



The Tripartite Nature Of SAARF



Advantages Of Having A Multi-media JIC

- **Currencies are established by pre-competitive research**
- **Only one organization to fund**
- **Economies of scale and synergies**
- **Dynamic interaction because of involvement of all parties**
- **Fair National Currencies**



SAARF Board Of Directors

- Advertising Media Forum 1
- Association for Communication and Advertising 1
- CINEmark 1
- Marketing Association of South Africa 2
- National Association of Broadcasters including SABC 2
- Online Publishers Association of S.A. 0
- Out of Home Media South Africa 1
- Print Media South Africa 2
- Chairperson 1
- CEO 1



SAARF Operation

Board of Directors

Directors nominated by members

- Policy
- Budget

SAARF Advisory Council

Representatives nominated by members plus Technical experts

- What research should be done
- How it should be done



Specialised Councils

- **SAARF AMPS Council**
- **SAARF RAMS Council**
- **SAARF TAMS Council**
- **SAARF Outdoor Council**
- **SAARF Print Council**
- **SAARF Products & Brands Council**



BOARD

ADVISORY COUNCIL

**AMPS
COUNCIL**

**RAMS
COUNCIL**

**TAMS
COUNCIL**

**OUTDOOR
COUNCIL**

**PRINT
COUNCIL**

**PRODUCTS
& BRANDS
COUNCIL**

**SAARF
STAFF**

CONTRACTORS

**BMR
DEMOGRAPHIC
RESEARCH
COMMITTEE**

**NATIONAL
CENSUS**



SAARF Staff

Chief Executive Officer

Technical Manager

Technical Support Executive x 2

Administrator

Executive Secretary

Office Assistant



Funding - 1

Issues

- **Who must collect it?**
- **Just for currency research?**
- **Add-in or Add-on?**
- **Whose money is it?**
- **Rate**



Funding - 2

Until 1996: SAARF levy: 0,5%

Beneficiary: SAARF

**From 1997: Marketing Industry Trust (MIT)
levy:**

1997: 0,65% & From 1998: 1.0%

Beneficiaries: SAARF, ASA, FOCST

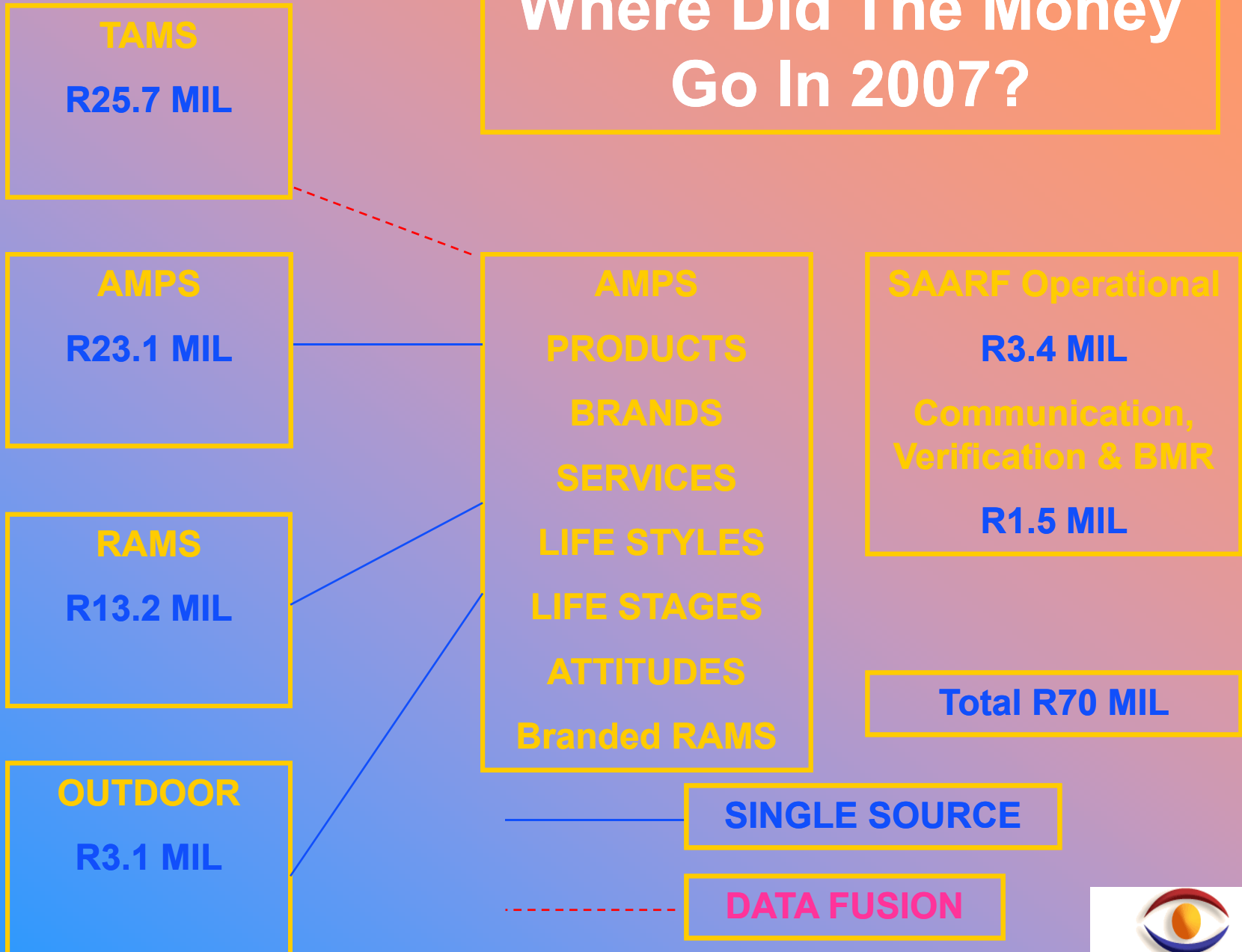
From 2005: LCA levy: 1.0%

Beneficiaries: SAARF & ASA

**Levy on advertising expenditure collected by the
media on behalf of the industry**



Where Did The Money Go In 2007?



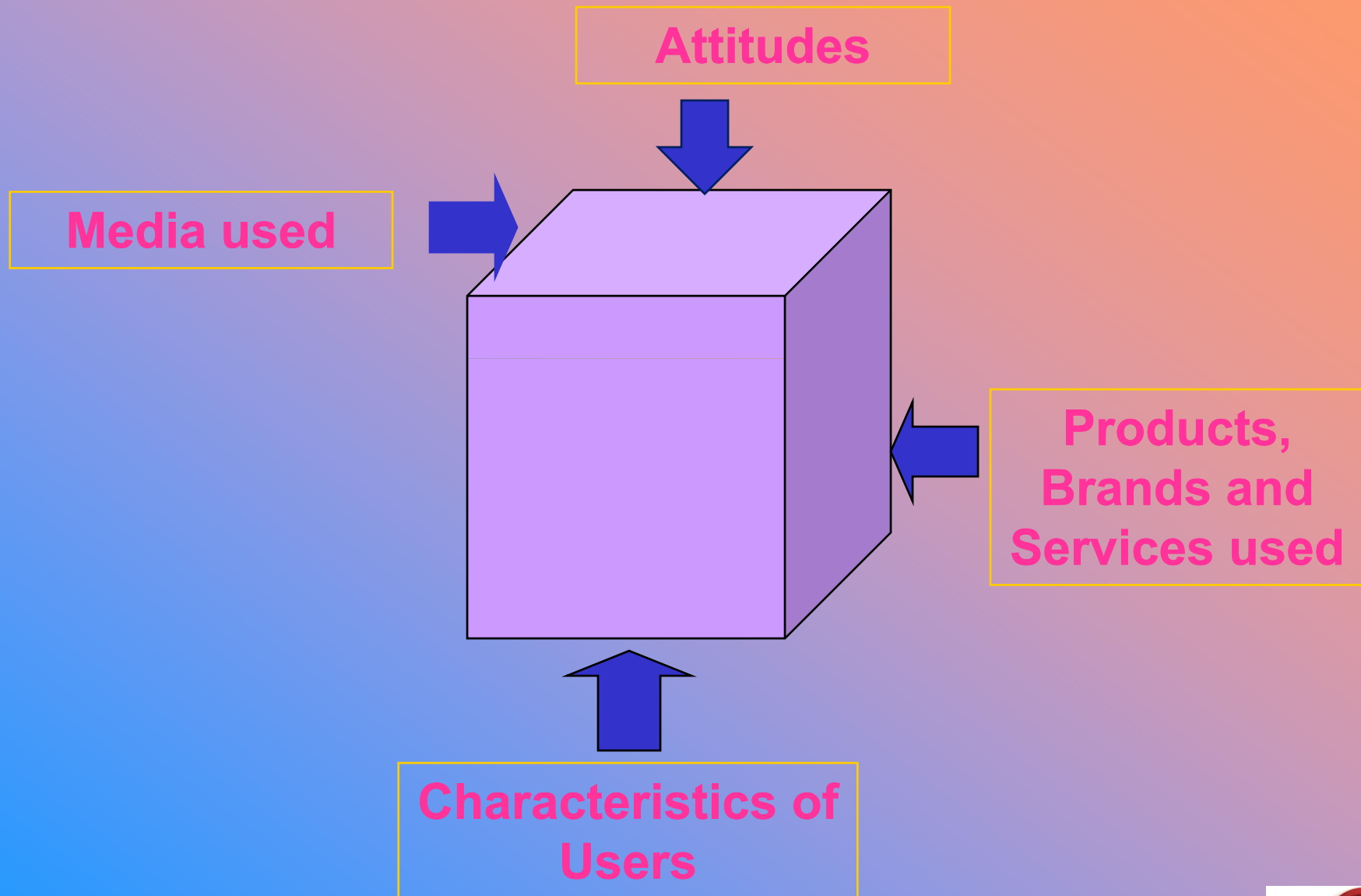
Contents – Part 2

- **The Currency Surveys**
 - **The All Media and Products Survey (AMPS®)**
 - **The Radio Audience Measurement Survey (RAMS®)**
 - **Television Audience Measurement Survey (TAMS®)**
 - **Out Of Home Media Survey (OHMS)**

“Common trading currencies”



Single Source **AMPS**[®] Data



Advantages Of Single Source Data

- Media consumption can be studied, and **directly linked** to product and brand consumption as well as to the use of services
- Audience movement between media can be tracked over time
- Reach comparisons can be made for different media for the same target markets using single source data



Strategic Level

Inter-media comparisons for specific target markets (4w; 7d; y)

- **Cinema**
- **Internet**
- **Outdoor**
- **Print**
- **Radio**
- **TV**

Information From The Same Respondents, i.e. Single Source



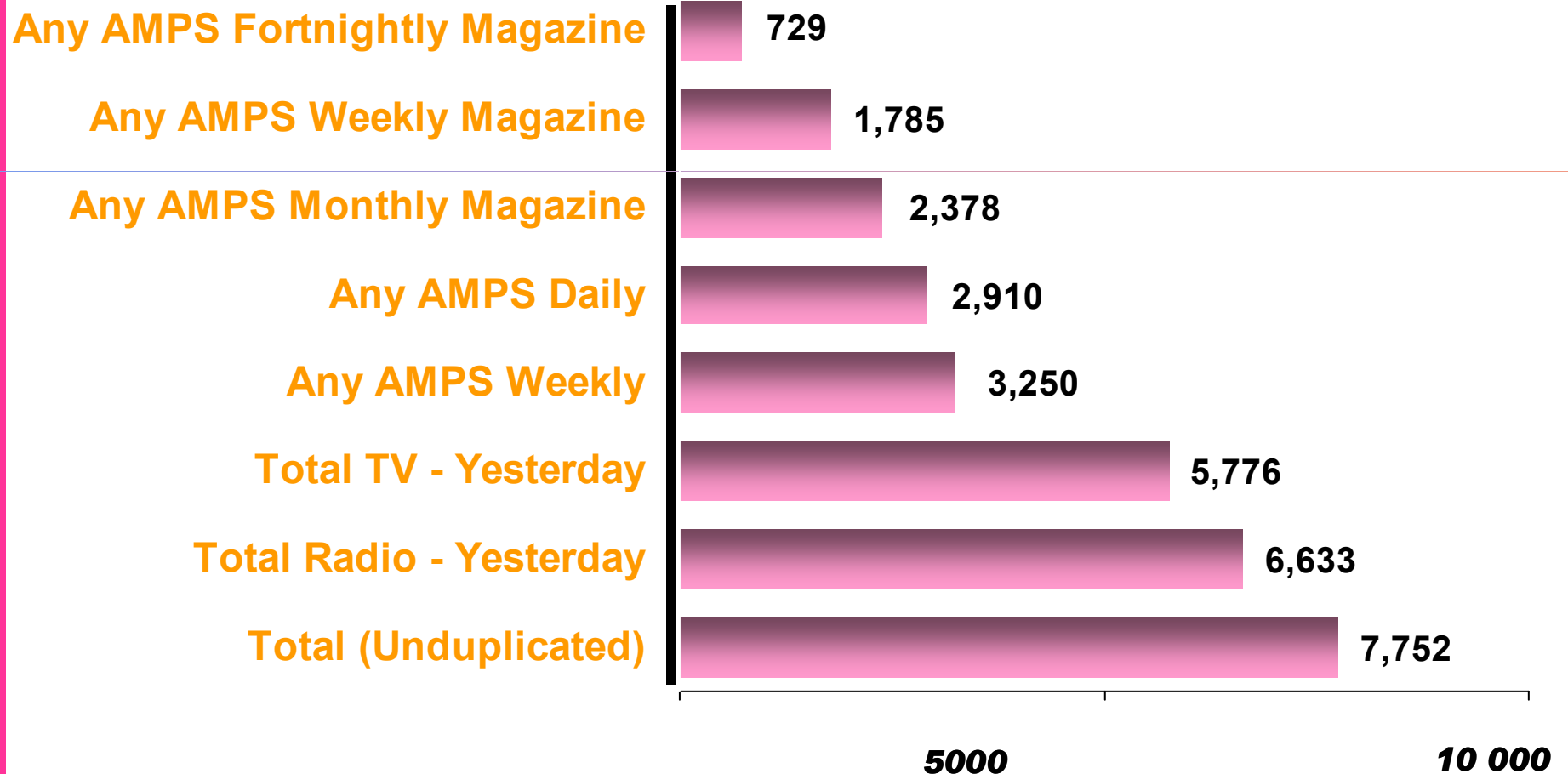
Tactical Level

Intra-media comparisons
Specific currencies for the
following media types:

- **Cinema**
- **Internet (near future)**
- **Outdoor**
- **Print**
- **Radio**
- **TV**

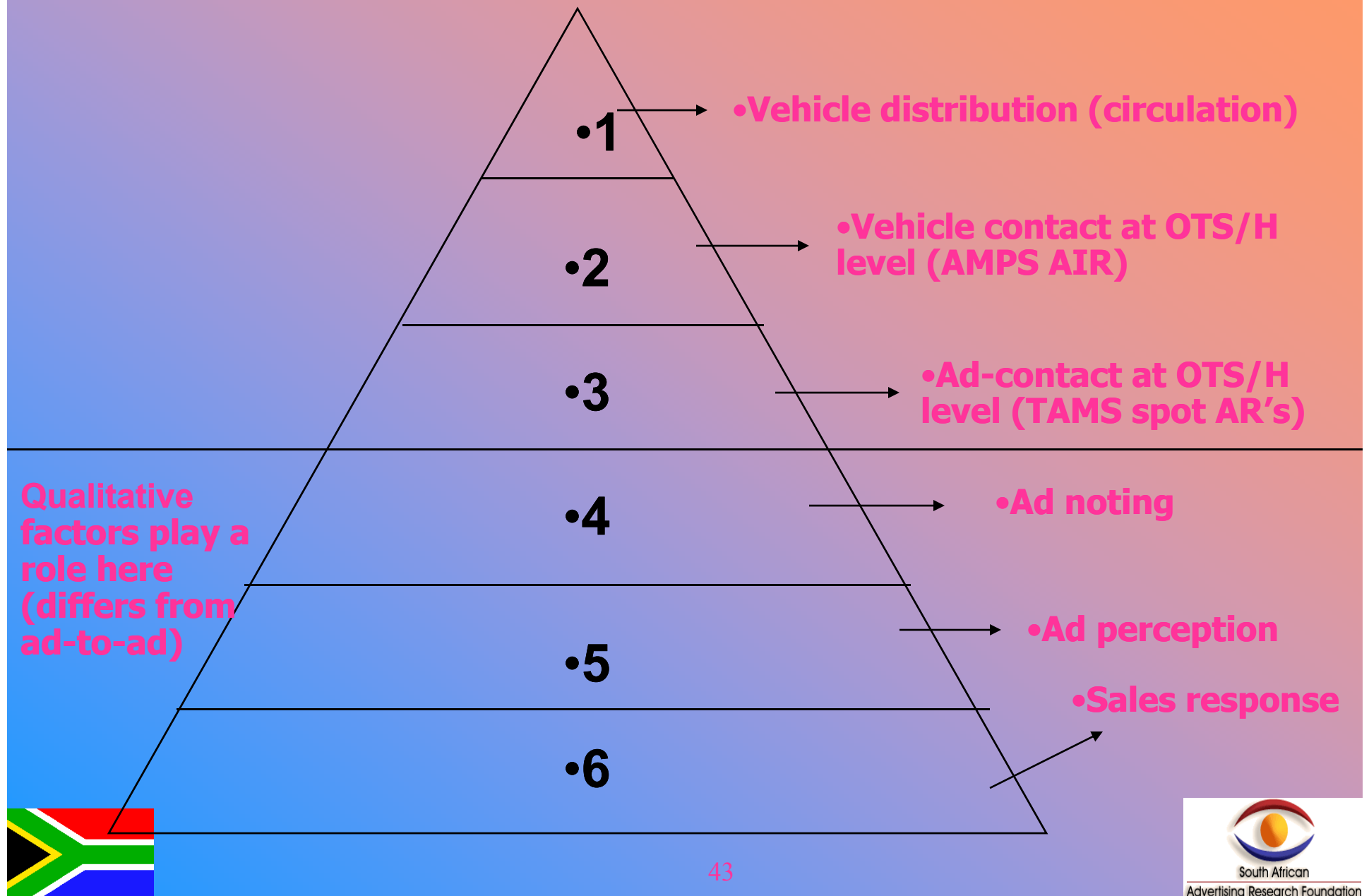


Beer Drinking South Africans **Reach** Potential By medium



(000) – AMPS 2008A 12 Months

ARF Model For Evaluating Media



SAARF[®] Demographic Research

- SAARF[®] sponsors the Demographic Research Unit at UNISA's Bureau of Market Research (BMR)

Main Function:

- Annual population updates

Adjusted for

Fertility

Mortality

External/internal migration

HIV/AIDS (from 2002)



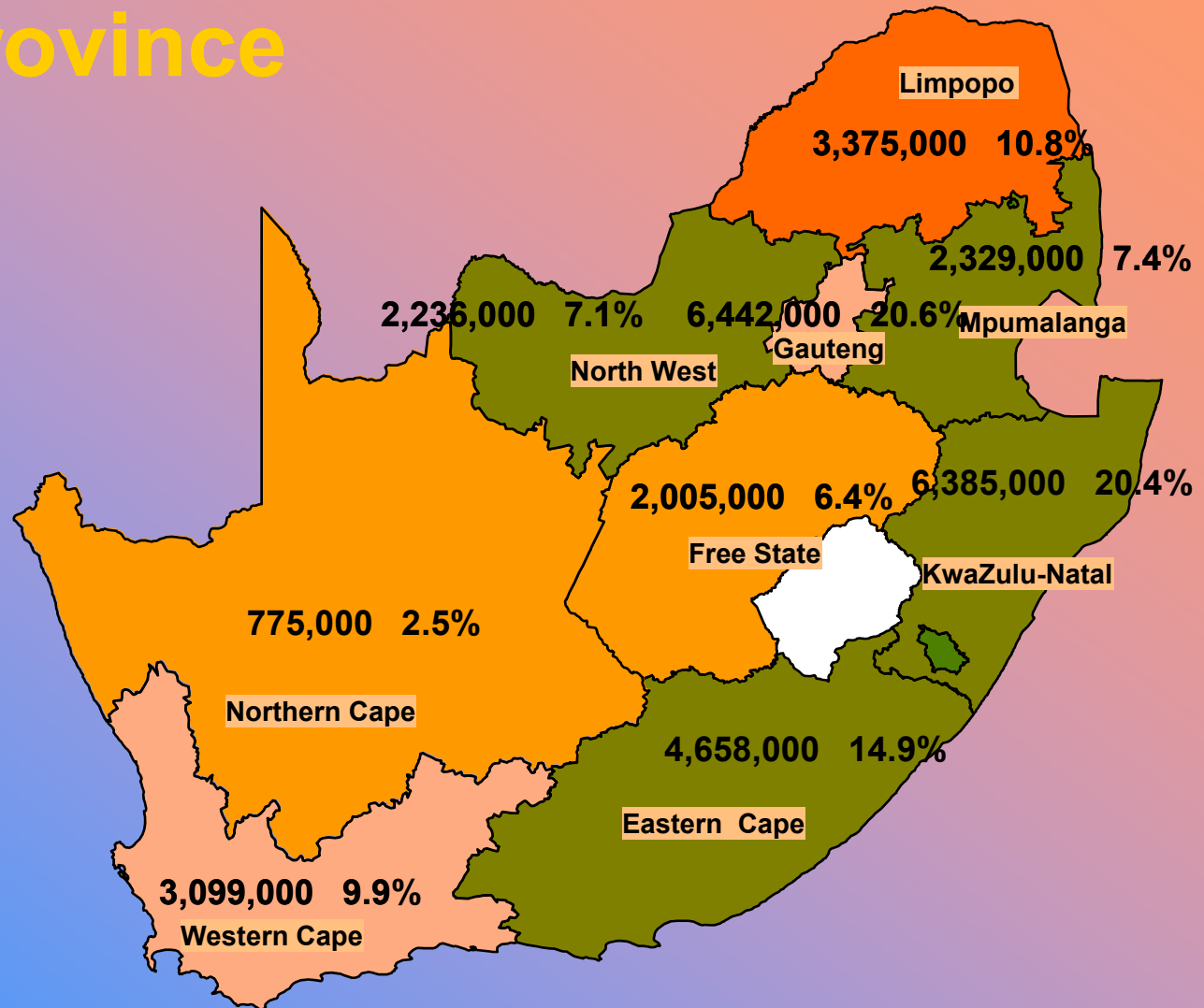
Our Population

Total: 47,912m

Adult: 31,303m



Adult Population By Province



Source: AMPS 2008A

Population

Total: 47,912 million

Adults (16+): ± 31,303 million

Growth p/a: 2% until 2005

**Only 0,8% 2005 – 2006 , Only 0,6% 2006 – 2008
(HIV/AIDS)**

Profile (Adults)

± 39.6% rural

± 50.2% female

± 75.4% black

Population structure stable



Source: SAARF AMPS 2008A

SA Population By Home Language

	Adult Population	%
• Total Adults	31 303 000	100
• Zulu	6 954 000	22.3
• Xhosa	4 983 000	15.9
• Afrikaans	4 661 000	14.9
• English	3 569 000	11.4
• North Sotho	3 077 000	9.8
• Tswana	2 699 000	8.6
• South Sotho	2 510 000	8.0
• Tsonga	1 029 000	3.3
• Swazi	664 000	2.1
• Venda	636 000	2.0
• Ndebele	358 000	1.1
• Other	163 000	0.7

Source: SAARF AMPS 2008A



SAMPLE DESIGN 1



*SCALE MODEL
(SAMPLE)*

FULL SIZE (UNIVERSE)



SAARF AMPS® Sample Design 2

Multi-stage area-stratified probability sampling

Pre-stratified by:

- Province 9 strata
- Community size 4 strata
- Gender 2 categories
- Age (Poltiz grid) 4 categories

TOTAL

288 CELLS

Over-sampling in catchment area of some media



Sample Design 3

Urban address selection

Calculate sampling interval

Number of addresses ÷ required sample

E.g. 1000 addresses ÷ 100 = 10

Select random starting point (from 1 –10)

Say 7, then address no 7, 17, 27, ...997

will be included in the sample



Sample Design - 4

Urban address Selection (cont)

Nielsen Geo Frame: Arranged within each geographic stratum by:

City/town

Suburb within city/town

Street name within suburb

Street number within street

Flat/unit number where applicable

Select every Nth Address



Sample Design - 5

Rural address selection

A sample of rural areas are selected

Using a GIS system, sampling points are selected (coordinates)

Using a Global Positioning system (GPS) the interviewers select the households

Closest dwelling to selected point is used



Sampling Error

Caution !!!

Types of error:

- 1. Respondent errors*
- 2. Questionnaire errors*
- 3. Interviewer errors*
- 4. Incidental errors*
- 5. Sampling/standard error*



SAARF AMPS® Survey – Current Scenario 1

Up to 2003: 2 Waves per year

Jan/Jun & Jul/Dec: Sample 2 X 13 000

From 2004: 1 Wave per year

Jan – Jun: 1 Sample 12 400

From 2007: 1 National (Jan – Jun) and 1 Large urban (Jul – Dec) wave per year

- Sample 21 000



SAARF AMPS® Survey – Current 2

- **In-home Face-to-Face interviews using CAPI**
- **Adults 16+**
- **Average interview time 50 minutes, plus**
- **Self-completion Questionnaire**
- **Truly National Survey**



Changes To SAARF AMPS® for 2009

Change from CAPI to DS-CAPI

Sample size increased from 21 000 to 25 000

Two full national AMPS waves (urban and rural twice a year)

Two releases per year

Definition of adult changed from 16+ to 15+



SAARF AMPS[®] Survey - 1

Cinema

Internet

Outdoor

Print media

Radio

Television

Demographics

Clothing/shoes/cosmetics



SAARF AMPS® Survey - 2

Financial services

Food & grocery shopping habits

Furniture & appliances

Large & small durable items

Motor vehicles

Personal & household products

Personal / household details



SAARF AMPS® Survey - 3

Pets

Travel

Your home

Activities

Attitudes

Interests

Life stages

Life styles



AMPS[®] Data Validation

External

- M-Net & DSTV decoders
- Cellular phones
- New electricity connections

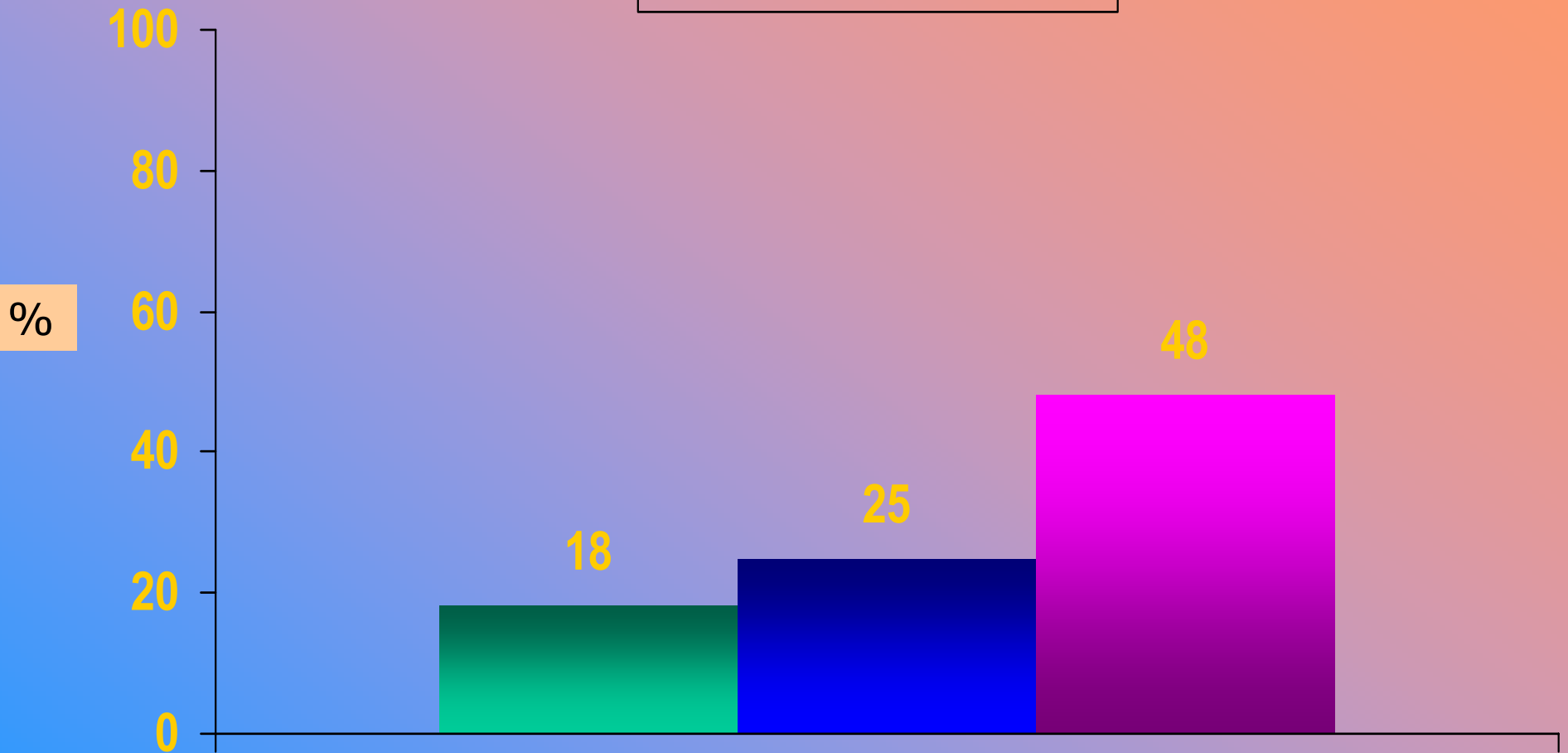
Internal

- Durable items:
Incidence in previous AMPS[®] + Purchases
last 12 months =
New AMPS[®] incidence



Microwave Oven

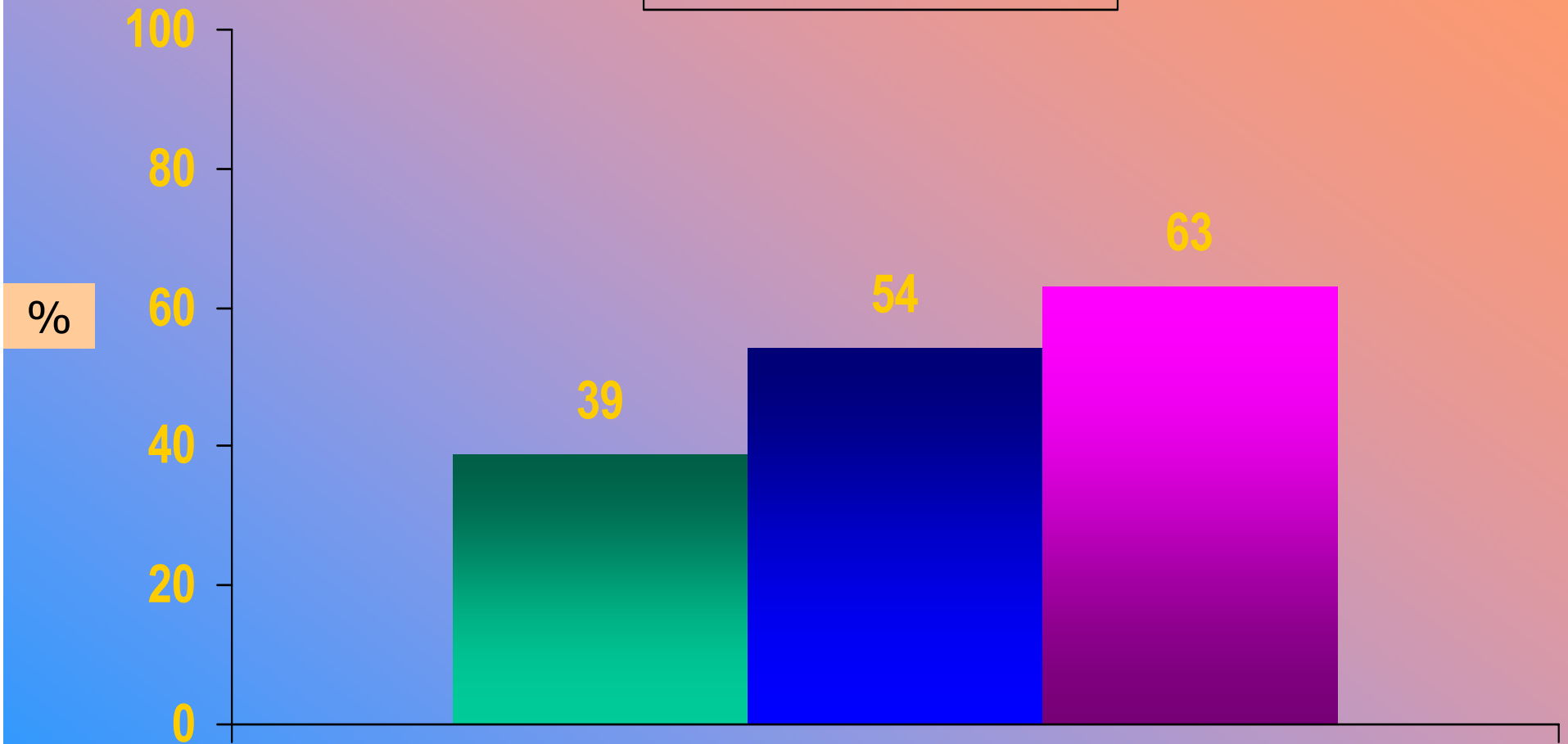
1994 2000 2007



Sample size: 14 498 ('94), 35 069 ('00), 21 068 ('07)
Population, all SA Households: 8 000 000 ('94), 8 9 449 000 ('00), 11 124 000 ('07)

Hi-Fi / Music Centre

■ 1994 ■ 2000 ■ 2007

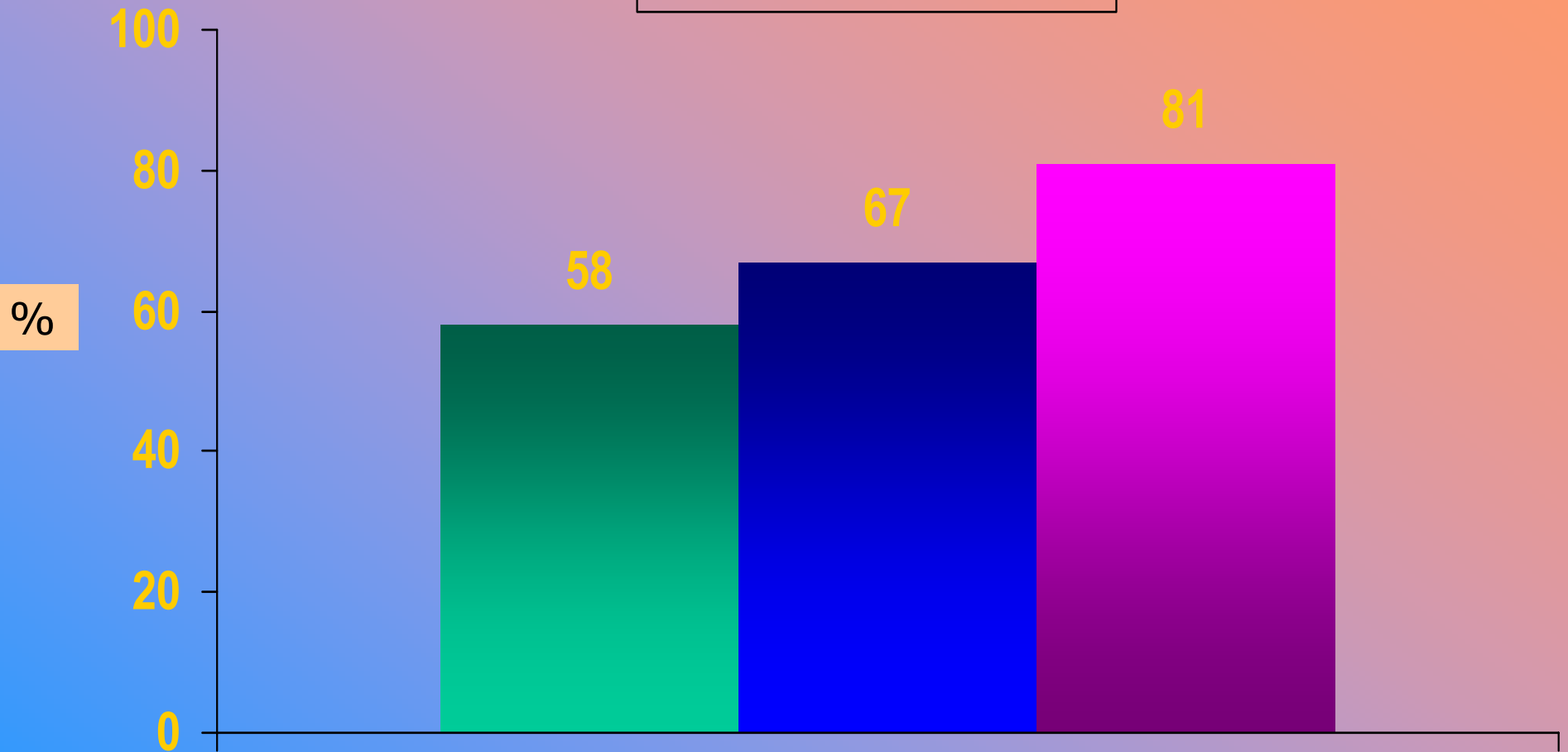


Sample size: 14 498 ('94), 35 069 ('00), 21 068 ('07)
Population, all SA Households: 8 000 000 ('94), 8 9 449 000 ('00), 11 124 000 ('07)

63

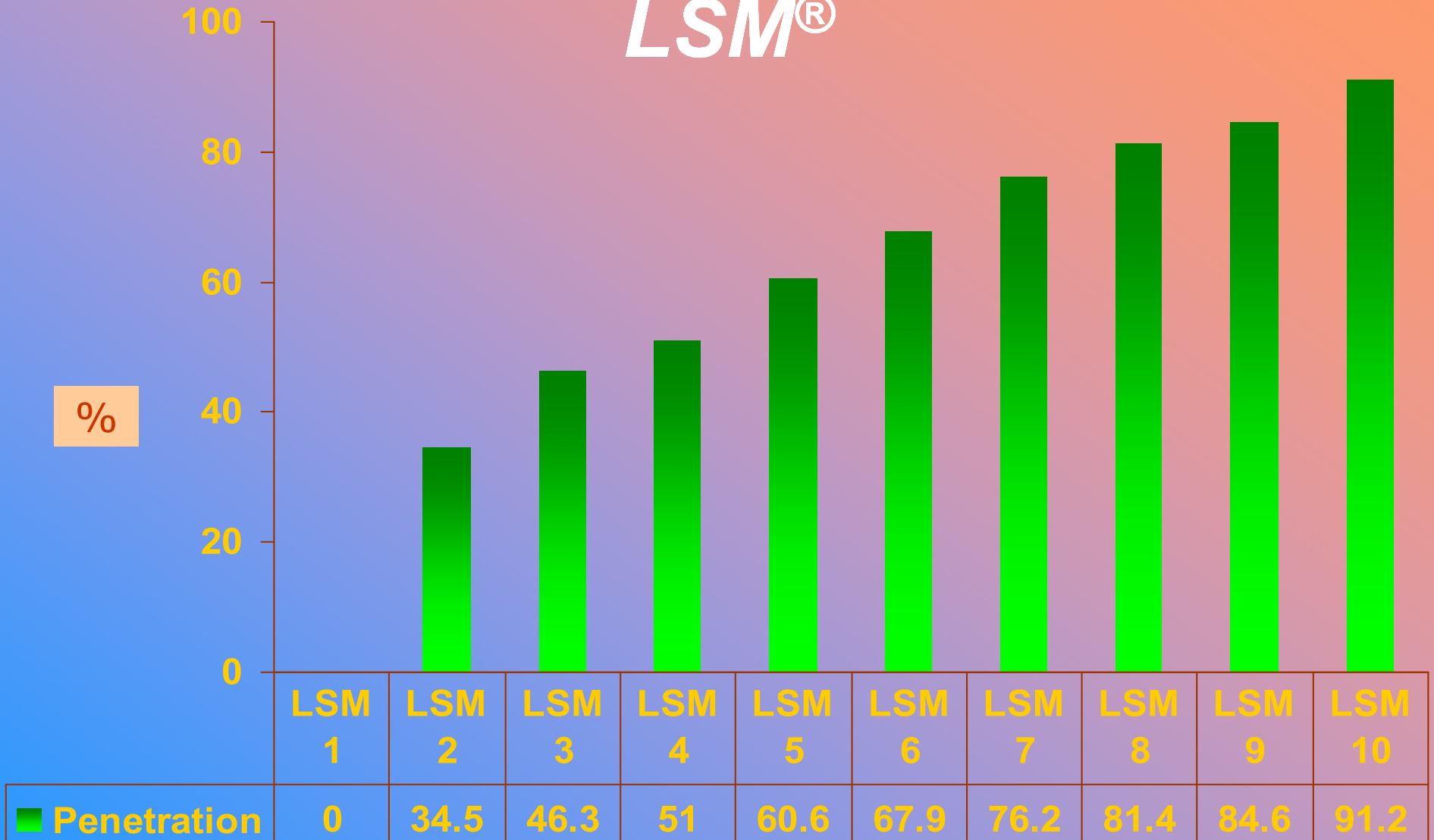
Television Set

■ 1994 ■ 2000 ■ 2007



Sample size: 14 498 ('94), 35 069 ('00), 21 068 ('07)
Population, all SA Households: 8 000 000 ('94), 8 9 449 000 ('00), 11 124 000 ('07)

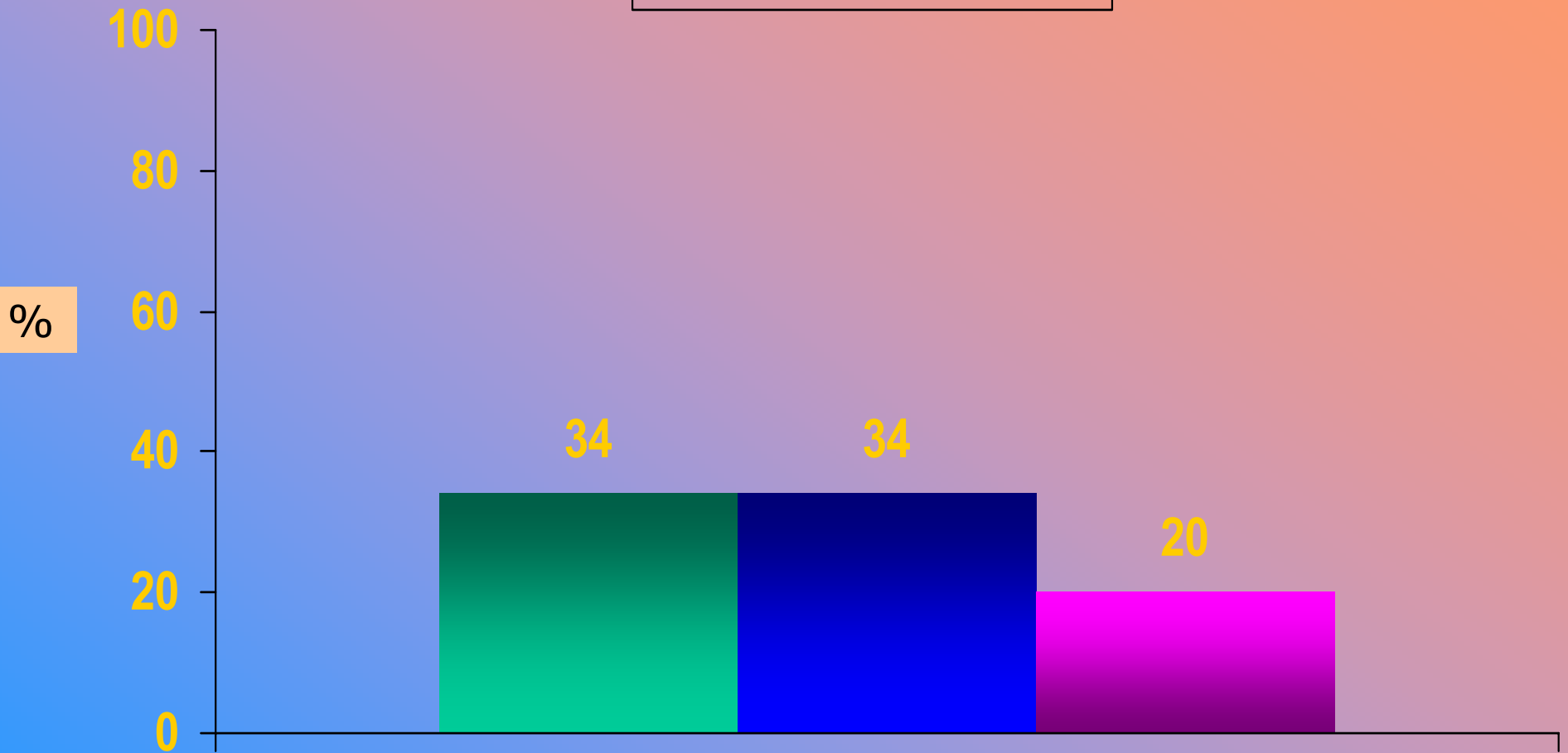
Cell phone Penetration Within SU-LSM[®]



SAARF AMPS 2007AB

Land Line Telephone

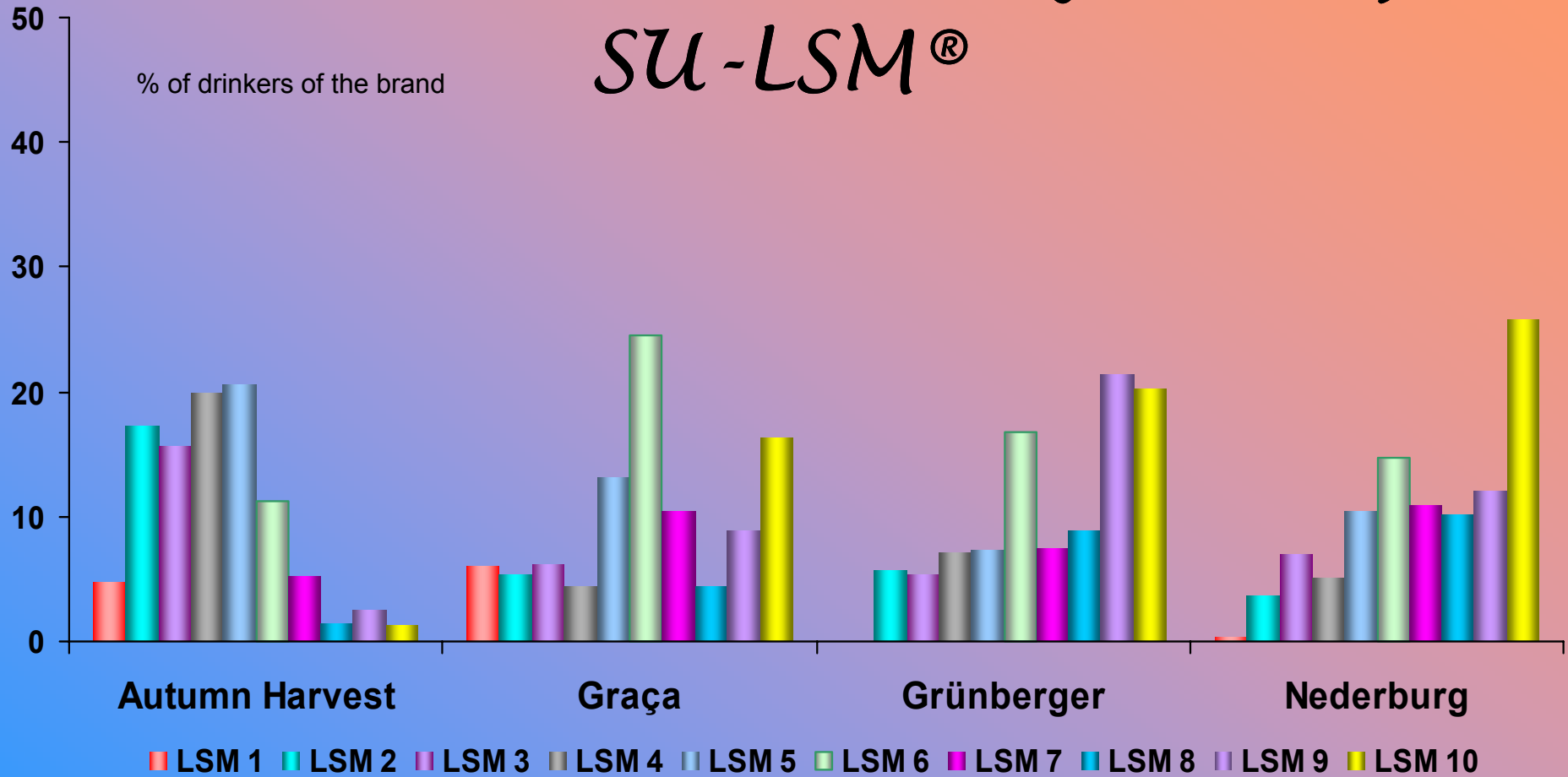
■ 1994 ■ 2000 ■ 2007



Sample size: 14 498 ('94), 35 069 ('00), 21 068 ('07)

Population, all SA Households: 8 000 000 ('94), 8 9 449 000 ('00), 11 124 000 ('07)

Branded AMPS® Natural Table Wine (bottles) - SU-LSM®



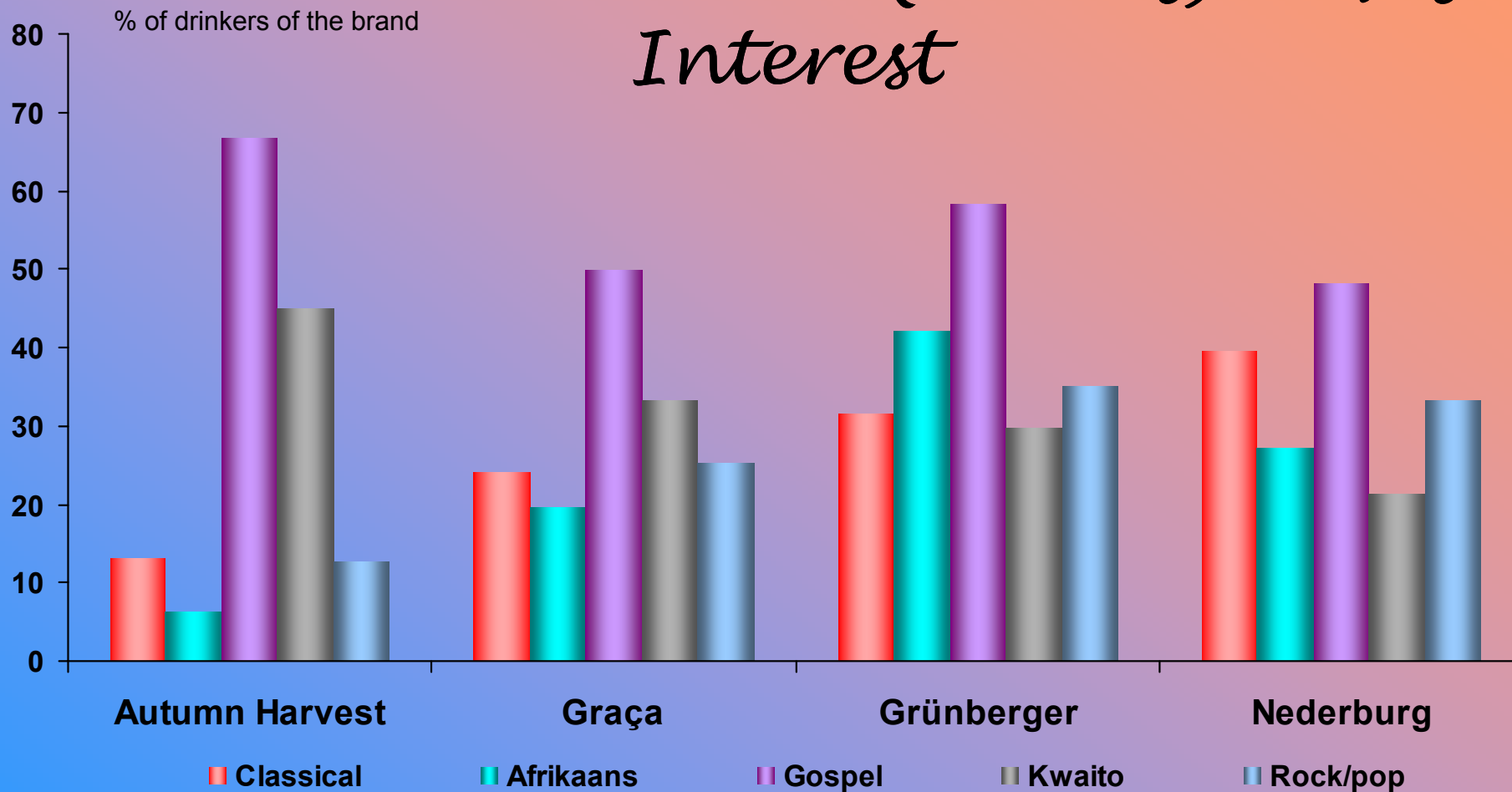
Source: Branded AMPS® March-Sep 2005 + Jan-Jun 2006, Courtesy Distell

This information is classified



Branded AMPS®

Natural Table Wine (bottles) - Music Interest



Source: Branded AMPS® March-Sep 2005 + Jan-Jun 2006, Courtesy Distell

This information is classified



The Future Of SAARF AMPS® - 1

-  Over the past 30 years South Africa played an important part in the development of readership research
-  However, internationally, in comparison to other media, the measurement of print media stagnated
-  In South Africa the last major change in readership methodology happened in 2001
-  The change to DS-CAPI is long overdue



The Future Of SAARF AMPS® - 2

-  **Specific Issue Readership is making a comeback**
-  **AMPS and other NRS studies will still provide the basic currencies for print media**
-  **These studies may be augmented by additional surveys to measure the Daily reach of print media**



SAARF RAMS® Sample And Methodology

Same respondents as AMPS®

Same sample design and weighting procedures

Leave behind 7-day diary, kept for seven consecutive days

Diary placement spread over week

Record by quarter hour by station

Flooding in urban areas from 2004



SAARF RAMS[®] DIARIES

More detailed radio listening data than AMPS

SAARF AMPS[®]:

Average yesterday across entire fieldwork period
No distinction between Monday, Tuesday, etc.
audiences

No quarter hour data

SAARF RAMS[®] Diaries:

Average audiences, separately for each day of
the week including ¼-hour data

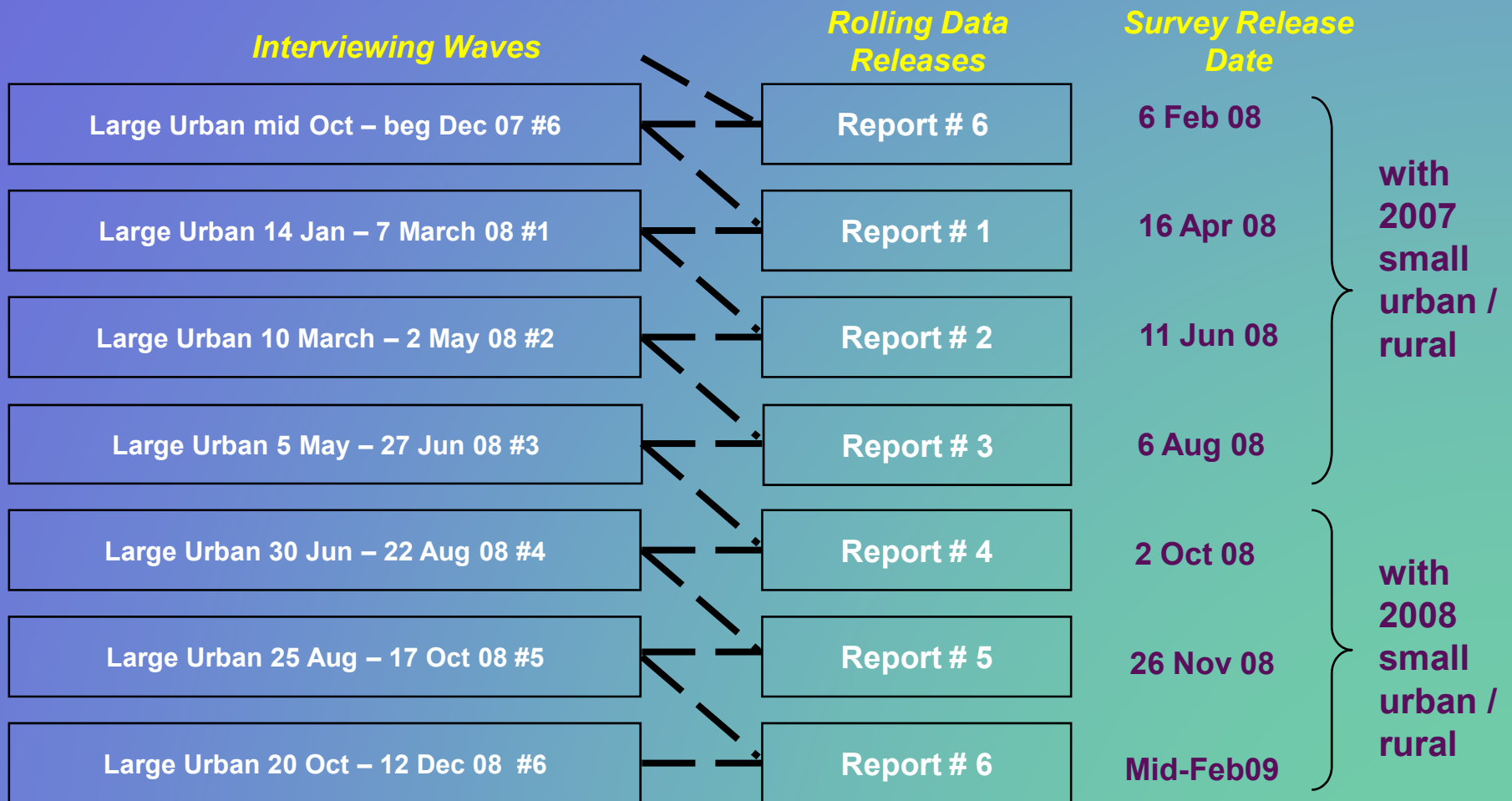


SAARF RAMS[®] Fieldwork and Reporting

- 6 fieldwork waves / year (about 8 weeks each)
- 6 reporting waves based on \pm 18 000 diaries each
- Reporting on a rolling basis after every 2 fieldwork waves
- 3 fieldwork waves national (12 400)
- 3 waves urban (8 600)



2008 RAMS[®] Schedule



Changes To SAARF RAMS® for 2009

Sample increased to 25 000 households

Rural sample measured during the whole year

Flooding extended to rural areas

Expected number of diaries between 55 and 60 000

Definition of adult changed to 15+

Reduction of respondent age from 15 to 13 may be considered



What is SAARF Branded RAMS®?

SAARF Branded RAMS® combines the information that is collected through SAARF RAMS® and SAARF AMPS®

In addition to radio information, SAARF Branded RAMS® includes information regarding cinema, readership, electronic media, TV viewership, internet, cell phones, outdoor, motor vehicles, household information, financial services, furniture & appliances, food & groceries, travel, clothing & shoes, cosmetics, life stages, durables, consumer products, activities and attitudes



What are the benefits of SAARF Branded RAMS®?

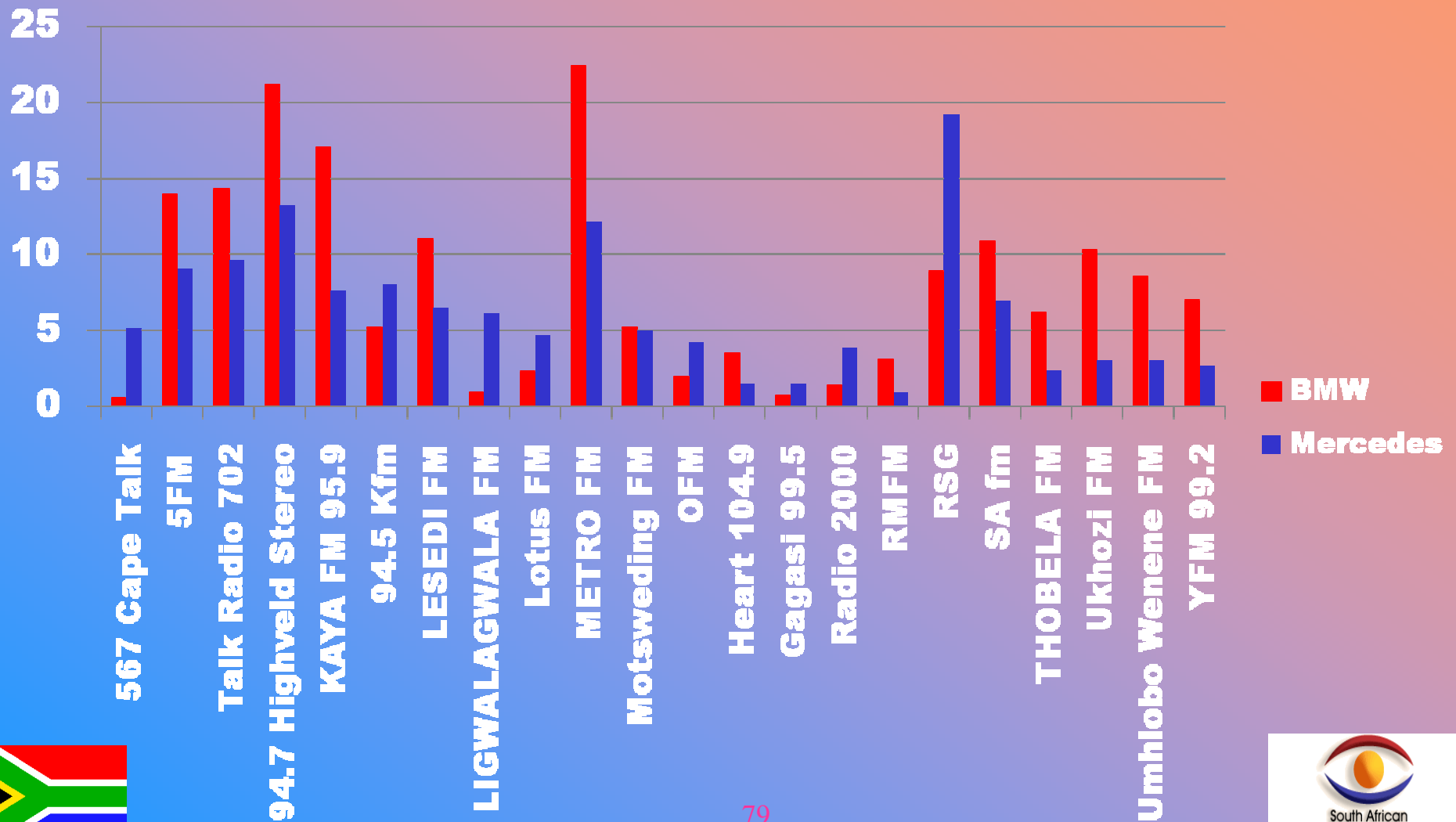
- Match target markets with radio stations
Segment markets
- Identifying characteristics of radio station listeners and their brand usage
- Approximately 21,000 respondents interviewed over the period of a year may allow certain radio stations to achieve the minimum 40 respondents required for the release of detailed listenership data



**Do BMW and Mercedes
owners listen to different
stations?**



Radio Station listened to by BMW & Mercedes Owners (one week cume)



The Future Of SAARF RAMS®

No doubt that future measurement of radio will be electronic.

Currently very expensive

Technology still in early stages of commercialisation

New developments i.e. the cell phone meter might replace the current ones

SAARF has been monitoring this since 1998 and will work with radio industry to switch to electronic as soon as it becomes viable



SAARF TAMS[®] Panel

- 1. In place since late 80's**
- 2. State of the Art People Meters**
- 3. ± 1 606 installed Homes, including 389 DSTV > 5 000 people**
- 4. Utilization of radio communication, landlines and Cell phone technology**
- 5. Measurement of Digital Satellite TV**
- 6. Overnight ratings from mid 2006**
- 7. Fully national**



SAARF TAMS[®] Panel

Name given to the SA version of a People meter panel

- * Semi-automatic electronic equipment**
- * Connected to panel households' television equipment**
- * Records TV set events automatically**



SAARF TAMS® Panel

Set Events

E.g.

On/off

Station tuned to

Status of M-Net decoder

DStv decoder

Status of VCR/DVD/PVR

Satellite tuning

Second/further sets



SAARF TAMS[®] Panel

Viewer Events

Viewers log-in/out by pushing buttons on a remote control unit or on the set-top unit

Visitors to panel homes are included

One of a few systems which records visitor demographics



TAMS People Meter





How it works

Meter

- On each TV Set
- Record date, time and Channel
- Record who is watching
- Generate statements

Transmission Unit

- One per each HH
- Retrieve data from meters
- Transfer HH data to central office



Communication to the central office via land line, GSM or internet

Communication between TU and Base Unit is via RF



Measures specific (not average) audiences

Second-by-second audiences, not limited to ¼-hours

Consequently:

Can measure audiences of:

Programmes

Breaks

Spots

Campaigns

Makes post broadcast campaign *analysis possible*



AMPS Meter Universe

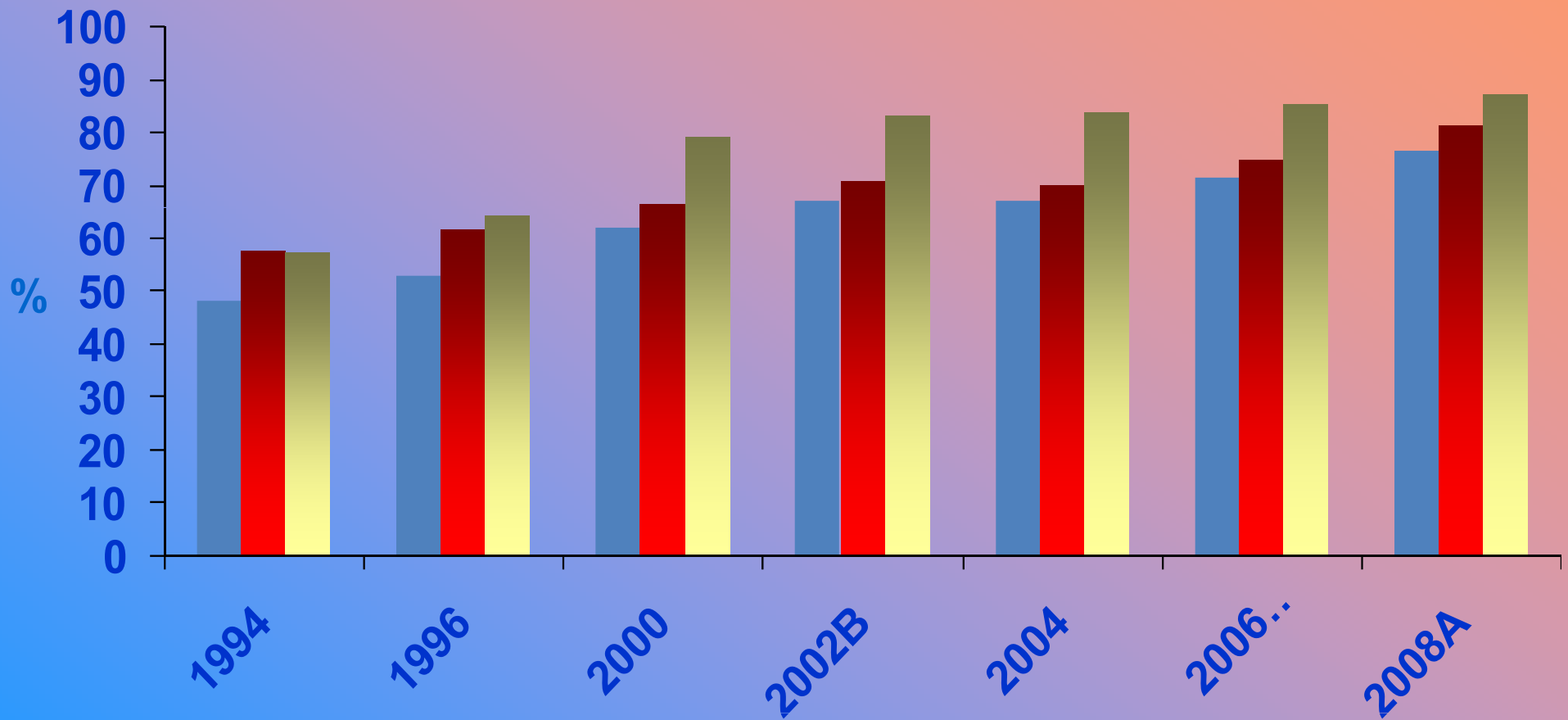
Households with television

- With mains electricity supply
- Hostel dwellers are excluded



AMPS METER UNIVERSE

■ TV & MAINS ELEC ■ WITH TV ■ MAINS ELECTRICITY



AMPS



*EXCLUDES HOSTELS

RIM Household Weights

RIM 1	LSM 1-4	5-6	7-10
RIM 2	Eng/Other	by HH size [1-3,4-5,6+]	by non Satellite
	“	“	by Satellite
	Afrik/Both	by HH size [1-3,4-5,6+]	by non Satellite
	“	“	by Satellite
	Nguni	by HH size [1-2,4-6,6+]	by non Satellite
	Sotho	by HH size [1-2,4-6,6+]	by non Satellite
	Nguni	“	by Satellite
	Sotho	“	by Satellite
RIM 3	Provinces	All 9	
RIM 4	Community Size	[Metro, city/L.town, S.town/Vil,	
	Rural		
RIM 5	Platform (Non Pay-TV + Satellite + M-Net		
	Analogue)		



RIM Weights Personal

RIM's

RIM 1

Language + age

RIM 2

Language + gender

RIM 3

Non-PayTV + PayTV Analogue
+ PayTV Digital [split "Both" & "Only"]

RIM 4

LSM + "Homebound" + "Out & About"
[LSM design: 1-5 grouped, 7-8 grouped]
[6, 9, 10 separate]

RIM 5

All 9 provinces

RIM 6

Community Size



Future Of SAARF TAMS®

1. Significant challenges ahead – fragmentation, technological and funding.
2. Inadequate sample size
3. New pay-TV operators
4. DTT
5. PVR
6. 2010 – out of home viewing
7. Measurement of HDTV



SAARF Out Of Home Media Survey (OHMS)

- 1. In place since 2006**
- 2. State of the Art portable GPS devices**
- 3. Overlay GPS travel information and GIS site data**
- 4. National sample over a 3 year period
– Sub-sample of AMPS**



Contents – Part 3

- **Coping with Media Diversity and Fragmentation**
- **SAARF Liaison**
- **PAMRO**
- **Future Challenges & New Developments**



Coping With Media Diversity 1

AMPS	1975	1995	2000	2005	2008
<u>Newspapers:</u>					
Daily	22	17	17	19	21
Bi-Weekly	-	-	-	1	2³
Weekly	23¹	24¹	148¹	23	27
Community	-	-	-	0	0
Monthly	-	-	-	1	0
Supplements	Nil	40	85	93	127
	45	81	250	137	177
<u>Magazines:</u>					
Weekly/Fortnightly	-	-	-	18	19
Monthly	34²	44²	81²	74	95
Alternate Monthly	-	-	-	10	24
Quarterly	-	-	-	11	7
				113	145
<u>Total Print</u>	79	125	331	250	322
Sample Size	16 634	14 643	35 069	12 400	21 000

¹Weekly | Community combined ³Including 4 per week

²Weekly | Fortnightly | Monthly combined



Coping With Media Diversity 2

AMPS	1975	1995	2000	2005	2008
<u>Radio Stations:</u>					
Commercial				37	38
Community				102	115
Total Radio	9	28	132	139	153
<u>TV Channels:</u>					
<u>Terrestrial:</u>					
Free	Nil	6	7	7	5
Pay-TV	Nil	2	2	2	2
Satellite	Nil	Nil	53¹	77¹	48¹
Total TV	Nil	8	62	86	55
Cinema (Q)	3	3	3	5	5
Internet (Q)	Nil	Nil	5	4	10
Outdoor (C)	Nil	Nil	7	8	9
Sample Size	16 634	14 643	35 069	12 400	21 000

¹ Includes terrestrial stations also available on DStv

Q = Questions C = Categories



SAARF Liaison

**Pan African Media Research
Organisation (PAMRO)**

**European Media Research Organisation
(EMRO)**

**Advertising Research Foundation (ARF
USA)**

**World Association for Research
Professionals (ESOMAR)**

Worldwide Readership Symposia



Pan African Media Research Organisation (PAMRO)

Founding meeting JHB 1999

Short term objective to assist other African states to do their own media audience research

Long term objective to have harmonised data for Africa based on the tried and tested AMPS and RAMS methodologies

www.pamro.org



PAMRO - African Involvement - 1

Angola

Botswana

Ghana

Kenya

Lesotho

Mauritius

Namibia

Nigeria

Senegal

Tanzania

Uganda

Zimbabwe



PAMRO - African Involvement - 2

1999: Founding of PAMRO in Jhb

2000: Accra, Ghana

2001: Nairobi, Kenya

2002: Vic Falls, Zimbabwe

2003: Grand Baie, Mauritius

2004: Douala, Cameroon

2005: Stone City, Zanzibar

2006: Cape Town, SA

2007: Malawi

2008: Nigeria

Harmonization committee formed in 2005









Current Issues & Future Challenges

- 1. Funding**
- 2. Media Fragmentation**
- 3. Sample Size**
- 4. Technology Revolution**
- 5. Adapting to new requirements due to increased complexity of markets**
- 6. Frequency of publication**
- 7. Response rates & Quality of data**
- 8. Access to and exploitation of data**



So What can we expect? - 1

-  Significant improvements in the way we measure media audiences can be expected
-  These changes will be largely technology driven
-  There will be an impetus to switch to computer assisted interviewing (CAPI, DS-CAPI, CASI, CAWI)
-  Greater use of on-line interviewing
-  An accelerated development of passive electronic measurement systems
-  Techniques that employ very large samples will be exploited



So What can we expect? - 2

-  **Techniques that employ very large samples will be exploited**
-  **Modelling of data more important**
-  **Greater demands for accountability will also influence what and how we measure**
-  **South Africa may fall behind due to infrastructural deficiencies as well as funding constraints**
-  **It is clear that the fast changing media landscape demands new approaches in measurement**



“Too many marketing executives are reluctant to use judgement. They rely too much on research and use it as a drunkard uses a lamp-post - for support, rather than illumination”

- David Ogilvy



**"YOUR
WINDOW TO
THE WORLD
OF
RESEARCH"**

THANK YOU

Visit us at

www.saarf.co.za

