

APPENDIX 9 - What is 'SAARF' and what does it do?

SAARF is the name by which the **South African Advertising Research Foundation** is familiarly known. SAARF's main objective is to direct and publish media and product research for the benefit of its stakeholders, thereby providing a common currency for the buying and selling of media space and time.

What are SAARF 'AMPS, RAMS and TAMS'?

The acronyms 'AMPS, RAMS and TAMS' are the names of the major research surveys conducted by SAARF.

AMPS stands for the **All Media and Products Survey**, RAMS for the **Radio Audience Measurement Survey**, and TAMS for the **Television Audience Measurement Survey**.

Our reports are branded as SAARF AMPS, SAARF RAMS and SAARF TAMS.

SAARF AMPS, RAMS and TAMS provide the "common trading currency" for advertisers and their agencies to select and buy appropriate media space and time. Media owners on the other hand use them to market their media as well as for strategic editorial and/or programme planning.

Why and how was SAARF formed?

In the early seventies, a small group of far-sighted persons from the marketing, media and advertising community realized the need for a comprehensive, unbiased, reliable, regular and technically excellent survey. Its purpose would be to provide data about the use of the mass media, and about the consumption of products and services by users of the mass media. The data should be such that it could be used for target marketing and aid advertisers and their advertising agencies in taking decisions about the selection of media for their advertising campaigns. Media owners had to be able to use it for selling media space or airtime, and for strategic editorial and/or programme planning.

At that time there had been a few sporadic attempts to report on the readership of newspapers and magazines, by way of surveys, which were commissioned by the publishers themselves. These included some National Readership Surveys. The SABC had been producing, at its own cost, regular reports on radio audiences ever since South Africa's first commercial radio station, Springbok Radio, was launched in 1951.

In order to best meet the requirements of users, it was realized that the research should be jointly controlled by the advertisers, the advertising agencies and media owners. Therefore, a joint industry body would be ideal. Such joint control would, it was felt, ensure complete acceptance of the survey data because its planning would be conducted impartially, and the fieldwork and report production would be supervised by all the interested parties.

This idea fell on receptive ears: not without much lobbying and persuasion though. The advent of television was imminent at that time, and the knowledge that research into TV audiences would be indispensable, might have contributed to its success. The mass media agreed to participate. They were the Newspaper Press Union now Print Media SA (PMSA), the South African Broadcasting Corporation (SABC), the Outdoor Advertising Association of South Africa (OAASA), and Cinemark representing cinema advertising. Similarly, the advertisers through their collective body, now the Association of Marketers (ASOM), and the advertising agencies through their industry body, now the Association of Advertising Agencies (AAA), were willing to join.

When was SAARF established?

The proposed formation of SAARF was announced on 24 October 1973. SAARF was formally established on 4 December 1974 and commenced operations in January 1975. The first research report was SAARF AMPS 1975, a joint venture project with the National Readership Survey.

How is SAARF financed?

SAARF receives an annual endowment from the Marketing Industry Trust (MIT). The Marketing Industry Trust also supports two other important industry bodies, the Advertising Standards Authority (ASA) and Freedom of Commercial Speech Trust.

The Marketing Industry Trust (MIT) is financed via an industry levy on advertising expenditure. The collection of the levy is a relatively straightforward process, as it is collected by media owners on behalf of the industry. The MIT levy is calculated after all discounts and agency commissions have been deducted.

How is SAARF Managed?

SAARF's highest authority is its Board of Directors and these Directors, through their respective industry bodies, represent the marketing, media and advertising industries.

SAARF Board representation is currently as follows:

AAA	8 directors, of which 4 directors are allocated to the AMF
ASOM	10 directors
Cinemark	2 directors
NAB	8 directors, of which 3 directors are allocated to the SABC
OAASA	2 directors
PMSA	8 directors

(NAB is the National Association of Broadcasters and AMF is the Advertising Media Forum).

In addition to these Directors there is an independent Board Chairman as well as the two full-time directors of SAARF, Paul Haupt, the Managing Director, and Piet Smit, the Technical Director. These Directors each have a seat on the Board but do not vote. All other Directors have one vote each.

SAARF operates through a series of councils and the large numbers of people, who serve and have served on these councils, play an indispensable and highly appreciated role in ensuring that the needs of SAARF members and of other users of research data, are met. Council members represent the interests of their members except for those who are invited to serve in their personal capacity due to the contribution that they can make to the functioning of SAARF and its councils.

Ad hoc committees are appointed from time to time for specific tasks, while the Managing and Technical Directors attend meetings of the various members as well as user groups when and if necessary. All these activities are aimed at determining the requirements of the stakeholders, and to ascertain whether the research which is conducted, succeeds in its aims.

Because all actual research work is contracted out to independent marketing research companies, SAARF operates with a very small permanent staff. In addition to Mluleke Ncube who supports the Managing and Technical Directors on the technical side, Fiona Lister and Luanne Rheeder between them handle accounting and administration ably supported by Beau Mabuza. The Technical Director's functions include the supervision of the research contractors, dealing with user queries, and providing the necessary input and recommendations to all SAARF councils.

What is the SAARF AMPS survey?

The SAARF AMPS survey covers the adult population of South Africa, with a few small exceptions. Adults are considered to be persons 16 years and older.

The survey uses personal in-home interviews of thousands of persons representative of the total population. The questions ask about the use of the mass media including all available radio and television stations, all the major sold newspapers and suburban "free sheets", and most major consumer magazines. Special interest consumer magazines are also included. "Outdoor", e.g. billboards and trailer advertising, as well as cinemas are covered.

In addition, there is a host of questions about the ownership of motor vehicles, a variety of large and small durable items, the use of dozens of personal and household products, and personal and household details. The use of financial services and personal activities such as holidays and shopping patterns are covered and basic questions on Internet usage are also included.

From 2001 the measurement of product data is done via a self-completion questionnaire which is left behind so that the respondent can fill it in, in his own time. The new methodology is not only a vast improvement on the old one, it has also enabled SAARF to measure more than double the number of product categories than it did before. In addition, the 155 product categories are now measured on the basis of units used or purchased, compared to the self-classification system that was used in the past. The SAARF Teen AMPS survey which is done periodically, is similar to the adult survey and also measures mass media consumption, product usage and activities among South African teenagers aged 12 to 15 years.

A simplified study of children of 7 to 11 years is carried out from time to time.

How are the results of SAARF AMPS published?

The complete SAARF AMPS database is made available on CD, which makes it possible to do custom analyses. Users are encouraged to familiarize themselves with the AMPS Technical Report and specifically to read the questionnaire, in order to get a better understanding of the methodology behind the information which can be accessed via the electronic database.

Some of the data from the SAARF AMPS surveys are also published in printed format and the printed reports consist of volumes in which the use of the mass media is cross tabulated with other variables such as demographics as well as the use of services and products.

The SAARF AMPS Condensed Pocket Edition contains a comparative summary of adult data for the most recent five years. Demographic profiles of the users of products are available separately.

When is the SAARF AMPS research done and when are the results available?

As part of SAARF's Strategy for the future there are now two adult surveys per year. The first survey is conducted during the first half of the year and the second during the second half of the year. Results of the A survey, are available in August of the year and the results of the B survey are published in February of the following year. From August 2001 the data is released in the form of 12-month rolling data consisting of the data of the latest two surveys.

This has resulted in a double and thus much more robust sample allowing the measurement of smaller titles and specialist consumer magazines.

What are the SAARF RAMS diaries?

The Adult and teen SAARF AMPS surveys can only ask about radio listening in very general terms. The users of audience data want to know, for each station, for each day of the week, and for each quarter hour of the day, how many people were listening and what their demographics are. The SAARF RAMS diaries are designed to provide this information. Place of listening is also collected for every quarter hour listened, which is of huge value to all users.

SAARF RAMS diaries are placed in a large number of representative homes, in communities of all sizes across the country. Respondents enter details of their radio listening behaviour into a diary which is kept for a period of seven consecutive days. The diaries are placed at the homes of all AMPS respondents and fieldworkers give required guidance. All the SAARF RAMS diary keepers answer the full SAARF AMPS questionnaire when the diaries are placed. After a period of 7 days, the diaries and product questionnaires are collected, again by personal visits.

How often is the SAARF RAMS conducted?

SAARF's strategy for the future makes provision for two SAARF RAMS per year and the results are published every 6-months based on a 12-month rolling sample.

How and when are the SAARF RAMS results published?

The SAARF RAMS electronic databases are normally released about six weeks after the relevant period of fieldwork. The results cover national, regional and community radio stations. As is the case with the SAARF AMPS results, the data are also simultaneously made available in printed format.

What is SAARF TAMS?

The SAARF TAMS is able to measure the second-by-second television audience in a representative sample of homes with TV and mains electricity in which TAMS meters are installed. The 'peplemeter'

as it is called is an electronic, semi-automatic system used to measure television-viewing patterns worldwide.

The SAARF TAMS meters automatically register everything which occurs on one or more TV sets and other equipment, such as VCR's or M-Net decoders which may be attached to them in metered homes. From 2001 digital satellite transmissions are also being metered.

To register details of persons' television viewing, a remote control device is provided. By pushing the appropriate buttons, members of the household, as well as their visitors, can log in when they start viewing and log out at the end of a session.

The data are automatically transferred from panel homes to a central computer every 24-hours.

How are the SAARF TAMS results published?

The data are published weekly on Fridays for the broadcasting week ending 02:00 on the previous Monday morning.

Like our other research reports the SAARF TAMS data are available in the form of an electronic database and are also reported in printed format.

The data contained in SAARF TAMS weekly reports reflect the in-home viewing of those living in private households with TV sets and mains electricity, including their visitors.

What does the SAARF UNIVERSAL LSM stand for?

The SAARF Universal LSM (Living Standards Measure) has become the most widely used marketing research tool in Southern Africa. It divides the population into 10 LSM groups, 10 (highest) to 1 (lowest).

The SAARF Universal LSM is a unique means of segmenting the South African market. It cuts across race and other outmoded techniques of categorizing people, and instead groups people according to their living standards using criteria such as degree of urbanization and ownership of cars and major appliances. Because it is a multivariate segmentation tool constructed from 29 individual variables, it is a stronger differentiator than any other single demographic.

SAARF was awarded the prestigious AAA "Media Innovator of the Year" award in 1993 for its contribution in helping marketers, advertising agencies and media owners to define their target markets more precisely using the SAARF LSM groupings.

How can I gain access to the SAARF AMPS, SAARF RAMS and SAARF TAMS data?

Most leading advertising agencies, many large marketers and nearly all media owners subscribe to the services of computer bureaux which have the SAARF databases on line as well as to some or all of the SAARF printed reports.

SAARF makes copies of all its printed reports available to the Library of Parliament and the South African Library in Cape Town, the Bloemfontein Library and the State Library in Pretoria. The libraries of some universities and technikons subscribe to the printed reports. All the reports since the inception of SAARF are available in the SAARF library. The current publications are available for purchase by anyone. They are:

SAARF AMPS Technical Report (volume 1)

SAARF AMPS Reference Volume (volume 2)

SAARF AMPS Adult Population Report (volume 3)

SAARF AMPS by LSM Reports (7 volumes)

SAARF Teen AMPS Report

SAARF Child AMPS Report

SAARF AMPS Condensed booklet

SAARF AMPS Product Profiles

SAARF RAMS Technical Report

SAARF RAMS Radio Services Trend Data Report (volume A)

SAARF RAMS National Stations Report (volume B)

SAARF RAMS Gauteng Based Stations Report (volume C)

SAARF RAMS Northern Province/Mpumalanga/North West Based Stations Report (volume D)

SAARF RAMS Kwazulu Natal/Free State Based Stations Report (volume E)

SAARF RAMS Eastern Cape/Western Cape Based Stations Report (volume F)

SAARF RAMS Community Radio Stations Report (volume G)

SAARF TAMS Reports (weekly)

SAARF TAMS Technical Report

SAARF LSM All you need to know about LSM's

How can I learn to use the SAARF AMPS data?

SAARF conducts seminars in Cape Town, Durban and Johannesburg each year. Information about the dates is widely disseminated and is also available on our website.

In addition, it is possible to arrange custom in-house seminars at relatively low cost by contacting SAARF.

What else does SAARF do?

Reliable, up to date information on the population size and structure is crucial to SAARF. Consequently, it helped to establish a demographic research unit at the UNISA Bureau of Market Research. In addition, the SAARF directorate also serves on the Census Advisory Committee of Statistics South Africa.

As it is important to SAARF to stay abreast of international developments, SAARF is a member of the European Media Research Organisation (the only member outside Europe) and SAARF's Technical Director is the EMRO country representative. SAARF is also a member of the Advertising Research Foundation of the USA and SAARF's Technical Director is a member of one of their technical committees. One or more of the staff are members of the Southern African Marketing Research Association (SAMRA) and the European Society for Media and Opinion Research (ESOMAR). International symposia dealing with media research in particular, are attended when possible to make improvements to the research.

SAARF recently became actively involved in the establishment of industry media and product surveys in some sub-Saharan African countries. In conjunction with these countries, SAARF has formed the Pan Africa Media Research Organization (PAMRO) to promote media and product research in Africa. The SAARF Technical Director is currently the Vice-President of PAMRO.

It goes without saying that SAARF cannot be complacent about its research tools. Every year's budget contains some provision for validator and developmental research to check that data are valid and where possible, to improve the tools.

What is SAARF's Strategy for the future?

The structure of the media industry in South Africa has changed enormously over time, as it has in most parts of the world. Generally, these changes have resulted in the introduction of new media such as TV, suburban "free sheets" and the Internet and in addition, fragmentation and proliferation of established media types have taken place. Interactive media, like the Internet and its World Wide Web, have also added new media dimensions to an increasingly complex, multi-media environment. The end result is a bewildering array of media choices for both the consumer and for the advertiser. Naturally this changing media scenario has presented a further research challenge to SAARF.

During 1996 and again in 2000 SAARF conducted strategic reviews of what the Industry wanted SAARF to produce.

These strategic reviews, resulted in SAARF increasing the scope of its activities to encompass two separate adult SAARF AMPS per year and to include the measurement of “free sheets” and special interest consumer magazines; the measurement of all radio stations, including community radio stations; more regular SAARF Teen AMPS reports and the measurement of psychographics and quality of media contact. As part of the strategy the SAARF TAMS panel is also now being increased in size and now also makes provision for the measurement of satellite TV.

How can I make contact with SAARF?

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For ordering or order forms, please contact Fiona Lister or Luanne Rheeder or visit our website.

Each of SAARF's member organizations has representatives on the Board of Directors as well as on one or more Councils. Contact details of all of these Council members can be found on our website.

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