



CHAPTER 6

**SOUTH AFRICA'S
MEDIA CURRENCIES:
SHAPING THE UNDERSTANDING OF
THE LOCAL MEDIA ENVIRONMENT**

BY MEGAN CHRONIS

Megan Chronis

Megan Chronis is a freelance writer and editor who has specialised in the marketing/advertising, media, and media research industries for the past fifteen years. She is the freelance 'staff writer' for the South African Audience Research Foundation (SAARF).



The South African Audience Research Foundation (SAARF)

Every day, South Africans come into contact with vast quantities of media. Spanning TV, radio, newspapers and magazines, cinema, outdoor, and digital and online media, South Africa's vibrant, choice-rich media environment means that consumers have myriad ways to access news and information, entertainment and education.

For marketers, it means that there are millions of opportunities to reach out and make a connection with these valuable target markets through marketing and advertising activities.

In any environment where money changes hands, people need to know what they are getting in return. This is where the media audience researcher's job begins. Media audience researchers are responsible for providing data that quantifies consumption of the different media and sheds light on the people who consume it. This information is vital to those in the media, marketing and advertising industries who use this data when making business decisions, such as where to position a brand, or which media to use to best reach a target market and achieve the highest returns on advertising.

1. UNDERSTANDING THE TASK OF THE MEDIA AUDIENCE RESEARCHER

THE SCOPE OF THE MEDIA AUDIENCE RESEARCHER'S TASK

South Africa has arguably one of the widest and most diverse media landscapes on the

African continent: reportedly 180 TV channels, 215 radio stations, 22 daily newspapers, 28 major weeklies, 600 consumer magazines and newspapers, 650 business-to-business print titles, and 480 local or community newspapers and magazines.¹ There are two cinema chains, and a wide range of out-of-home media types, from billboards and street pole posters to advertising on minibus taxis, trains and buses. Then there is the rapidly growing digital space, where consumers can access billions of web pages.

To this magnitude of media choice, add the complexity of the South African consumer market, diverse not only in terms of language and culture but also of economic status.

Spread out over some 1.2 million square kilometres are 34.9 million South African adults (aged 15+),² living in populous metropolitan cities, sprawling informal settlements, far-flung towns, and deeply rural villages. Their financial circumstances and standards of living vary widely, and they speak at least one of eleven official languages (making South Africa the country with the most official languages in the world).³

This is the vast and complex environment which media audience researchers must quantify and describe.


THE TASK OF THE MEDIA AUDIENCE RESEARCHER

Media audience researchers quantify media consumption by measuring people's behaviour: what media people read, watch, and listen to, and how they consume these media.

¹ According to IBIS Media Manager, October 2012, a media information database compiled by IBIS Data Services.

² SAARF AMPS June 2012, July 2011-June 2012.

³ According to Guinness World Records, www.guinnessworldrecords.com/records-11000/most-official-languages-per-cent28country-per-cent29/



Media consumption data would include: how often people consumed various media; how thoroughly they read a magazine; when and how they watched television and the programmes and genres they preferred; and what radio stations they listened to and for how long. The media audience researcher must also provide information on the demographic profile of consumers, or the statistical characteristics of a market. This information would include variables such as gender, age, race, geographic location, living standard and income.

Media audience research therefore provides information that allows marketers and advertisers to better understand their target markets and to identify marketing opportunities, while giving media owners data to facilitate their delivery of content that will maintain and grow their audiences.

2. BEYOND INFORMATION: WHEN MEDIA AUDIENCE RESEARCH BECOMES A CURRENCY

In any media environment, there are usually a number of sources of media consumption information, all of which differ in their focus and scope, and give various perspectives on the media landscape and consumer environment.

Some surveys, however, become accepted by an industry as the official source of information. Although users will continue to consult other sources for a well-rounded view of their markets, they will, by consensus, use one survey as the foundation for their knowledge. Such information is then termed a currency. Just as a monetary currency becomes the ac-

cepted form of trade in a market, so too can a source of information become a currency. A media audience currency is the accepted source of data used by media owners and marketers to underpin the commercial activities of the industry.

The South African Audience Research Foundation (SAARF) provides three of the local industry's media audience currencies:

- the All Media and Products Survey (AMPS), which provides the official media audience data for the print industry and is the currency for print readership;⁴
- the Radio Audience Measurement Survey (RAMS), which is the official currency for the radio industry; and
- the Television Audience Measurement Survey (TAMS), which is the official currency for television.

3. THE IMPORTANCE OF MEDIA AUDIENCE CURRENCY RESEARCH

Media audience research is not a 'nice-to-have' – it is a necessity. One can debate how media audience research should be conducted, but the need for media audience research itself is indisputable; commercial media industries cannot function without it. This is because the currencies produced by media audience research lie at the heart of the buying and selling of advertising space and time.

Advertising spend in South Africa amounted to R32 billion for 2011,⁵ representing a significant investment in media by marketers. In order to justify their advertising spend,

⁴ A print title's readership is the number of people who first read or paged through a copy of that title within its period of issue.

⁵ Nielsen AIS/AdEx, Jan-Dec 2011. This figure excludes self-promotion, and is calculated before volume discounts and agency commission.

An illustration at the top of the page shows a globe in the background with several white icons in the foreground representing different media devices: a laptop, a tablet, a smartphone, and two televisions. The background is a warm, golden-brown color.

marketers and advertising agencies must be able to quantify their markets, know who they are reaching, and be confident that the channels they have selected are the most likely to reach these markets. By providing these assurances, media audience research encourages adspend growth, safeguarding the lifeblood of media industries.

Media audience research also enables media owners to promote their specific media product over other similar products, and their media sector over competing media types (for instance, print versus television). Media audience research also provides media owners with the information they need to make editorial and programming decisions to ensure the retention and growth of their audiences.

4. HOW MEDIA AUDIENCE CURRENCY RESEARCH IS CONDUCTED

Media audience data can be collected in five different ways, some more reliable and credible than others.

RESEARCH DRIVEN BY A RESEARCH SUPPLIER

A private media research company takes the lead and conducts research in return for a fee. This can lead to private sector monopolies and divide the industry, thus weakening the media owners' bargaining power and pushing up the cost of research. It can also create barriers to access for small players and new entrants into the market, as the cost of private proprietary research can be prohibitively high.

PROPRIETARY MEDIA RESEARCH

Media owners commission their own research. Although this research can provide additional insight about the audiences of that media owner's brands, it does not have the credibility of a media currency, since it is not seen as impartial. This type of research can, however, be extremely beneficial if it is used by the media owner to better understand the audience.

MEDIA OWNER COMMITTEE (MOC) RESEARCH

Media owners within a particular media sector work together under one body (a media owner committee or MOC) to produce a research currency for their medium. In the United Kingdom, for example, rather than each radio station conducting its own research, the radio industry as a body has mandated RAJAR (Radio Joint Audience Research) to measure radio listening.

This approach is significantly better than proprietary media research because it is not biased towards any one media owner, and therefore delivers credible data. In addition, all media brands within the sector can be compared, which would not be possible if each brand conducted its own audience research. There is, however, a risk that media owner committee research could be conducted in such a way as to promote that medium as a whole over other media sectors, delivering results that are biased in that medium's favour. Inter-media comparisons are also not possible because of differences in sampling and methodology.



SINGLE-MEDIA JOINT INDUSTRY COMMITTEE (JIC) RESEARCH

Media owners within a particular media sector form a JIC with advertising agencies and marketers to produce a research currency for their specific medium. A joint industry committee or JIC is 'a non-profit-orientated, neutral organisation in which all key players of an advertising market, i.e. normally advertisers [or marketers], [advertising] agencies and media owners, are represented'.⁶

The single-media JIC approach is significantly better than the preceding approaches mentioned, as the research is conducted under the joint control of the three primary stakeholders and is not controlled by media owners alone. It is therefore credible, and perceived as being unbiased. As with MOC research, single-media JIC research runs the risk of being biased in favour of its specific medium, and inter-media comparisons are not possible.

MULTIMEDIA JOINT INDUSTRY COMMITTEE (JIC) RESEARCH

JICs can also involve multiple media sectors which, together with the advertising and marketing industries, conduct media research on behalf of the entire industry. Multimedia JICs are regarded as the best vehicle through which currency research can be conducted. Data collected is unbiased and impartial, and is credible and acceptable to all stakeholders as they have control and influence over this research.

Multimedia JIC-conducted research is also often more extensive and of a higher quality

than could possibly be afforded by an individual media owner or sector. Since the research covers multiple media sectors, these sectors can be compared, an important benefit in a world of increasing media convergence. Such research can, however, be hampered by slow decision-making processes owing to the need for wide consultation. A lack of funding can also be a complication – but this is true of all media audience research.

5. HOW SOUTH AFRICA CONDUCTS MEDIA CURRENCY RESEARCH


Media audience currency research in South Africa is conducted through a joint industry committee known as the South African Audience Research Foundation (SAARF), a recognised world leader in producing multi-industry-driven media audience currencies.

SAARF'S ROLE

Established in 1974, SAARF's industry-sanctioned mandate is:

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 multimedia and multi-product/brand usage information that reflect the totality and complexity of the South African society.

According to its Memorandum of Incorporation (MOI), SAARF is committed to providing these 'tools' in line with stakeholders' needs, within budget, on an ongoing basis, and en-



sureng that all industry stakeholders have full access to the information. The MOI underlines SAARF's role as the custodian of the industry's media audience and product usage currencies.

SAARF AND ITS RESEARCH SURVEYS

SAARF produces national, quantitative data on the behaviour and characteristics of South Africa's entire adult population (aged 15+), as well as their media consumption behaviour, through three major surveys:

- the All Media and Products Survey (AMPS);
- the Radio Audience Measurement Survey (RAMS); and
- the Television Audience Measurement Survey (TAMS).⁷

As the industry-accepted research currencies, these surveys facilitate the buying and selling of advertising space and time in South Africa. In addition, they provide media owners with data on their audiences in order to assist them to make content, editorial and programming decisions.

The JIC also produces the country's most widely used market segmentation tool, the SAARF Living Standards Measure, or LSM, and delivers data on the demographic profile of South Africa's adult population.

GOVERNANCE OF THE SAARF JIC

The SAARF Board oversees the running of SAARF. Board members are representatives of the marketing, media and advertising industries, and are nominated by the various

constituent bodies that make up the broader media, advertising and marketing industry. These bodies are:

- The Marketing Association of SA, or MA(SA);
- The Advertising Media Forum (AMF);
- The Association for Communication and Advertising (ACA);
- The National Association of Broadcasters (NAB);
- Print and Digital Media SA (PDMSA);
- Out-of-Home Media SA (OHMSA);
- Cinemark; and
- The Digital Media and Marketing Association of South Africa (DMMA).


FUNDING OF THE JIC

SAARF's research is funded in part by a one per cent levy raised on net advertising spend, collected by the Media and Marketing Collection Agency (MAMCA). The PDMSA funds its contribution directly, paying an annual fee based on a budget submitted by SAARF.

6. SOUTH AFRICA'S MULTIMEDIA JIC-CONDUCTED MEDIA AUDIENCE CURRENCIES

SAARF currently produces the media audience currencies for the mass media, namely the print, radio and television markets. This means that its data on print readership, radio listenership, and television viewing is accepted by the industry at large as the foundation for determining audience sizes and composition, and for setting the advertising rates for those print publications that meet the criteria for inclusion in the All Media and Products Survey, and for setting the rates for radio and

⁷ Unlike AMPS and RAMS which measure adult behaviour and characteristics, TAMS measures all South Africans aged 4+.



television airtime. SAARF will also produce the out-of-home media currency, which is still being planned.

Accessing the data

The databases relating to these currencies are freely available to the public, but are accessed by media houses, advertising agencies, and marketers through paid-for media planning software supplied by independent software suppliers. Some of the data is also available from SAARF in PDF format on CDs, where mass media usage is cross-tabulated with demographics, products and brands. SAARF also produces an annual Trends booklet covering trends over the past five years, and produces CDs with information on its segmentation tools.

Free online access includes topline media results for all media published on the SAARF website,⁸ and the AMPS Online tool and the Living Standards Measure (LSM) Dashboard, both of which are housed on the SAARF website.⁹

Legitimising the SAARF currencies

Media audience data only becomes a currency once users trust the information, and acknowledge and use it as the basis for the buying and selling of advertising space and time. The extent to which research is seen as credible and trustworthy depends to a large degree – although not exclusively – on the size of the sample, the manner in which that sample is designed, and the methodology employed.

All SAARF's media currencies employ samples which are drawn using nationally based, multi-stage area-stratified systematic probability sampling. Put simply, this type of sampling ensures

that all SAARF's research products are able to statistically represent the total adult population aged 15 and older. That the samples are large also ensures that the resultant data is robust and stable.

The surveys are conducted using internationally accepted best practice and methodologies, as well as technologies that ensure the delivery of high quality data. Since SAARF is an independent, unbiased joint industry body, it is also without vested interest, which further legitimises the research currencies produced.

SOUTH AFRICA'S PRINT CURRENCY: AMPS

The All Media and Products Survey (AMPS) is a quantitative, behavioural study, conducted twice a year. First conducted in 1975, it is the oldest media research survey in South Africa. With a sample of 25 000 adults, aged 15+, it is also one of the largest national surveys in South Africa, after the National Census and SAARF's own Radio Audience Measurement Survey (RAMS).


AMPS focuses on three main areas: media consumption; characteristics of consumers; and the purchase and consumption of products and brands. These three areas can all be cross-referenced, since the data is from a single respondent pool. Because AMPS focuses on a range of different media types, users can also track consumers across a variety of media, and can compare and evaluate these media types.

AMPS's MEDIA CONSUMPTION PILLAR

AMPS is the official readership currency for the print media. The survey focuses on the readership of all major commercial newspapers, most major consumer magazines, and some special-interest consumer magazines.

⁸ www.saarf.co.za, under the 'AMPS', 'RAMS' and 'TAMS' tabs.

⁹ www.saarf.co.za, under the 'Home' tab for AMPS Online, and under the 'Segmentation' tab for the LSM Dashboard.



Data gathered in respect of 55 daily/weekly newspapers and 146 consumer magazines formed the basis for the latest release of AMPS at the time of writing.¹⁰ Circulation¹¹, size and reach are some of the criteria that determine whether titles are included on the AMPS questionnaire.¹² (AMPS does not measure the community newspaper sector or the custom publishing sector.)

Consumption data for other media

As its name suggests, the All Media and Products Survey (AMPS) also researches the consumption of other media products such as television, radio, cinema, and outdoor or out-of-home media, although AMPS is only the official media audience currency for print. A battery of questions on Internet and cellphone usage is also included.

Readership data from AMPS June 2012 (July 2011–June 2012)

As the media audience currency for the print industry, AMPS provides a wealth of information on print readership. For example:

- Magazines and newspapers as a whole are read by 65.6 per cent of the adult population, about 22.9 million people.
- Magazine readership is the highest – 48.8 per cent of adults read magazines – while 32.8 per cent of adults read a weekly newspaper, and 30.9 per cent read a daily newspaper.
- The magazine with the highest readership in South Africa is the DStv guide, Dish/Skottel. It is read by 11.5 per cent of adults, or 4 million people. Second is Bona, with 3.4 million readers (9.6 per cent of the adult population). Drum places third with 2.9 million readers (8.3 per cent).
- The Daily Sun is the most-read newspaper, read by 16.2 per cent of the total market, or 5.7 million adults daily. The Sunday Times is the second most-read newspaper, with 3.7 million readers (10.6 per cent of all adults).

Media information from AMPS June 2012

While not the official media currency for these media, AMPS nonetheless provides information on television, radio, out-of-home, cinema, and online media. For example:

- Radio is the most consumed medium in South Africa, reaching 93.1 per cent of all adults each week.
- Weekly television viewing is rising, with 91.7 per cent of all adults now watching TV.
- Digital use is growing; 19.0 per cent of adults (6.6 million) accessing the Internet in an average week, up from 17.0 per cent in the previous AMPS release (AMPS December 2011).¹³
- Advertising on minibus taxis is the dominant form of out-of-home media in South Africa. Just under 77 per cent of adults are exposed to this type of advertising in an average week. Billboards, street pole ads and suburban signs come a close second, seen by 72.7 per cent of adults each week.
- In an average month, cinemas are attended by 4.1 per cent of the adult population – 1.4 million people.

¹⁰ AMPS June 2012, covering fieldwork done from July 2011 to June 2012.

¹¹ Circulation is not the same as readership, which is what AMPS measures. Circulation is the number of copies sold and/or distributed free by a publication; readership is the number of people who read or paged through a copy of that publication within its period of issue. A single copy of a newspaper or magazine may, therefore, have more than one reader, which is why readership figures are typically higher than circulation figures. The Audit Bureau of Circulations is responsible for producing circulation figures.

¹² A full list of criteria for inclusion in AMPS can be found at www.saarf.co.za/amps/guidelines/procedureandguidelines.asp.

¹³ AMPS December 2011, covering the period January to December 2011.



AMPS's CONSUMER CHARACTERISTICS PILLAR

Knowing what media are being consumed, and how, is only one piece of the puzzle. Users of media audience research also need to know who is consuming that media.

Different markets consume media – and, by extension, brands and products – differently. For example, a person's age, gender, life stage, living standard, level of education, and even place of residence, can have a significant impact on the media, brands and products which he or she buys and uses.

AMPS therefore provides extensive demographic information on individuals and households, covering demographics such as age, language, standard of living, income, and employment status. The survey includes questions on: vehicle ownership; what durables and appliances are owned; the household's access to amenities and services (for example, 50.6 per cent of South African adults have a flush toilet in the house);¹⁴ travelling patterns; leisure-time activities; financial services (35.5 per cent of adults have no bank accounts of any kind, and 68.9 per cent have no investment policies or insurance);¹⁵ and shopping patterns.

AMPS also produces four tools that add to the industry's understanding of consumers and help to segment the population into different target markets. These are the SAARF Living Standards Measure, SAARF Lifestages, SAARF Lifestyles, and SAARF Attitudes.

The SAARF Living Standards Measure (LSM)

The SAARF LSM is the most widely used segmentation tool in the local media, marketing and

advertising industry, with LSMs the common currency when segmenting a market or audience.

The LSM is constructed from 29 individual variables, making it a stronger differentiator of consumers than any one demographic. The LSM uses wealth and access indicators such as degree of urbanisation, ownership of cars and major appliances, and access to basic services to determine people's standard of living. It divides the adult population into 10 groups; LSM 1 is the group with the lowest standard of living and LSM 10 the highest.

LSM 7 to 10 are further split into 'low' and 'high' sub-groups, allowing for finer targeting.

The lowest living standards groups – LSM 1 to 4 – account for 25.2 per cent of the population. The emerging market of LSM 5 to 7 is the biggest, at 51.4 per cent, while the groups with the highest standard of living – LSM 8 to 10 – account for 23.4 per cent of the population.¹⁶

These groupings have different media habits. Where 75.4 per cent of LSM 8 to 10 reads a magazine, only 24.3 per cent of LSM 1 to 4 do the same. TV viewing is more egalitarian, however, with 74.5 per cent of LSM 1 to 4 and 97.7 per cent of LSM 8 to 10 consuming this medium in an average week.¹⁷

Individual media choices also vary across the LSM spectrum. For instance, the top three radio stations for the LSM 1 to 4 market are Ukhozi FM (with a listenership of 31.8 per cent of this market), Umhlobo Wenene FM (22.4 per cent) and Thobela FM (13.2 per cent). Compare this to the top stations for LSM 8 to 10: Metro FM (17.4 per cent), 5FM (12.2 per cent) and RSG (11.3 per cent).¹⁸

¹⁴ AMPS June 2012 (July 2011–June 2012).

¹⁵ AMPS June 2012 (July 2011–June 2012).

¹⁶ AMPS June 2012 (July 2011–June 2012).

¹⁷ AMPS June 2012 (July 2011–June 2012).

¹⁸ RAMS February 2013, which covers the period of late August to mid-December 2012.



SAARF Lifestages

This tool segments adults into eight groups, such as At-Home Singles, Young Couples, or Mature Families. These lifestage groups are determined by age, marital status, and whether dependent children in various age categories are living at home. The majority of South Africa's adults – 24 per cent – are at-home singles, while 17.6 per cent are Single-Parent Families. A further 15.7 per cent are Young Families.¹⁹

SAARF Lifestages is a useful market segmentation tool because a person's stage in life has a significant impact on his or her media and product consumption. Consider that only 16.5 per cent of single-parent families own a car, compared to 54.6 per cent of mature couples.

SAARF Lifestyles

SAARF Lifestyles is a segmentation tool based on responses to almost 90 lifestyle and activity questions. It shows the links between how people live their lives and the media and products they use, by segmenting the population into 12 groups that share similar behaviour with regard to sporting and other activities. For example, over a period of a year, the top activity for men (63 per cent) is reading a commercial newspaper containing local news. In contrast, the top activity for women in the course of a year (71.9 per cent) is cooking for pleasure.²⁰

SAARF Attitudes

SAARF Attitudes divides people into five groups based on their attitudes to approximately 100 statements ranging from topics on advertising and work to topics on crime and culture. For instance, 86.7 per cent of adults agree that both

men and women should work to provide for their families, and 80.5 per cent of adults say they would rather live in South Africa than anywhere else.²¹ Attitudes and opinions have been shown to have a significant influence on media and product usage.

Demographic information from AMPS June 2012

AMPS paints a picture of the South African population, giving marketers and media owners information on the composition of society in terms of variables such as age, gender, language, standard of living and income. For example:

- 13.1 per cent of households earn in excess of R20 000 per month, and 26.2 per cent of those aged 15+ work full-time.
- isiZulu is the home language of 23.1 per cent.
- Just over 36 per cent of adults live in metropolitan areas, and 23.5 per cent live in Gauteng.
- Just over 28 per cent of the adult population is aged between 15 and 24.

Linking media and demographics

All the demographic information on AMPS can be cross-referenced against media and product usage. For example:

- Bona is the most-read magazine in the 15-24-year-old market (read by 12 per cent), while the top magazine for the 50+ market is Dish/Skottel, read by 10.2 per cent of this age group.²²
- The Sunday Times is the most-read newspaper in the section of the population with the highest standard of living – LSM 8 to 10. It reaches 23.3 per cent of this market.²³
- In the emerging market – LSM 5 to 7 – the most-read newspaper is the Daily Sun, which reaches 21.1 per cent of this market.²⁴

¹⁹ AMPS June 2012 (July 2011-June 2012).

²⁰ AMPS June 2012 (July 2011-June 2012).

²¹ AMPS June 2012 (July 2011-June 2012).

²² AMPS June 2012 (July 2011-June 2012).

²³ AMPS June 2012 (July 2011-June 2012).

²⁴ AMPS June 2012 (July 2011-June 2012).



AMPS's PRODUCTS/BRANDS USAGE PILLAR

The third pillar of AMPS is a self-completion questionnaire that is left behind with respondents after the face-to-face interviews. It measures the consumption and usage of fast-moving consumer goods (FMCG). The data forms Branded AMPS, South Africa's only free source of data on the usage and purchase of nearly 120 product categories and over 1 500 brands.

Branded data adds another facet to users' understanding of their markets. For instance, the top five brands for women who read magazines are Coca-Cola²⁵ (consumed by 48.6 per cent), Sunlight dishwashing liquid²⁶ (44.4 per cent), Albany bread²⁷ (42.8 per cent), Handy Andy²⁸ (42.7 per cent) and Always Pads²⁹ (42.4 per cent), according to AMPS June 2012. Individual media products often have quite different brand profiles. Lucky Star canned fish, for example, is the top brand for female readers of Drum, Bona and Move!,³⁰ while Coca-Cola³¹ is the top brand for You magazine's female readers.

AMPS can also show users how brands' demographic profiles differ. For example, 18.6 per cent of LSM 10 bought John West canned fish in a four-week period, compared to only 2.7 per cent who bought Lucky Star canned fish. In LSM 5, however, this picture changes; 48 per cent of this market purchased Lucky Star over a four-week period, while 9.5 per cent bought John West.³²

AMPS's METHODOLOGY AND SAMPLE

Twice a year, 12 500 people aged 15 and older, from across the country, are interviewed for AMPS. Fieldwork covers the January to June and

the July to December periods. Every six months, the results from the two most recent fieldwork periods are published in the form of 12-month rolling data, providing information from a total respondent base of 25 000.

The AMPS questionnaire is completed through personal in-home interviews, conducted using the Double-Screen Computer Assisted Personal Interviewing method (DS-CAPI), a methodology which equips both the interviewer and the respondent with laptops that control the entire interview. The product and brand data, as well as data for SAARF Attitudes and SAARF Lifestyles, is collected using questionnaires that are left behind for respondents to complete, and which are collected seven days later.

SOUTH AFRICA'S RADIO CURRENCY: RAMS

SAARF's Radio Audience Measurement Survey (RAMS) is the currency that supports the buying and selling of radio time. All broadcasting stations in South Africa – commercial, public broadcast, or community stations – are measured. As at the middle of December 2012, RAMS measured 40 commercial radio stations and 188 community radio stations.

Released six times a year, bi-monthly, this national survey provides in-depth information on the radio listening habits of South African adults aged 15 years and older, delivering the equivalent of 455 000 days' worth of radio listening behaviour. It focuses on which radio stations people listen to over a seven-day period, providing listening data for each quarter-hour of the day from 00:00 to 24:00. For example, the radio station with the biggest audience is Ukhozi FM, to which 20.1 per cent of all adults listen – 7.0

²⁵ Personally consumed during an average week.

²⁶ Personally bought during an average four weeks.

²⁷ Personally bought in an average week.


²⁸ Personally bought during an average four weeks.

²⁹ Personally bought during an average four weeks.

³⁰ Personally bought during an average four weeks.

³¹ Personally consumed during an average week.

³² AMPS June 2012 (July 2011-June 2012).



million listeners per week. The second biggest station is Metro FM, with a listenership of 5.7 million.³³

RAMS is conducted using self-completion radio diaries, which are given to the 25 000 AMPS respondents, as well as all other adults aged 15+ in their household. The diaries are completed over a seven-day period.

Since the main 25 000 respondents also participate in AMPS, the RAMS data can be cross-referenced with media usage, product and brand consumption, and demographic data found on AMPS. Users can therefore track consumers across the different media. For example, if a marketer wanted to use radio to reach people who read the Sunday Times, the top five choices would be Metro FM, which is listened to by 35.8 per cent of the newspaper's audience, 5FM (19.5 per cent), Ukhozi FM (15 per cent), Kaya FM (14.1 per cent) and Lesedi FM (13.8 per cent).³⁴

Listenership data is, therefore, also coupled with in-depth demographic information. For example, a marketer wanting to reach women aged 15 to 24 living in Gauteng, would do well to choose Metro FM, which is listened to by 36.4 per cent of this market. This is followed by 99.2 YFM (22.6 per cent) and 94.7 Highveld Stereo (20.9 per cent).³⁵

An additional database, Branded RAMS, links the data from the 25 000 AMPS-sourced RAMS respondents to the product and brand information found in AMPS. Branded RAMS shows, for instance, how people who purchase different brands often consume different media; the station which most BMW drivers listen to is Metro FM (25.5 per cent), compared to Jacaranda 94.2 fm (16.8 per cent) for Mercedes-Benz drivers.³⁶

RAMS's METHOD AND SAMPLE

In addition to the 25 000 main respondents from AMPS, supplementary radio diaries are completed by all other members of the household aged 15 and older. Known as flooding, this produces a significantly more robust sample, currently standing at just over 65 000 diaries per annum.

THE TELEVISION CURRENCY: TAMS

The Television Audience Measurement Survey (TAMS) is the foundation for the buying and selling of television time. It provides second-by-second information on the viewing habits of 39.0 million TV viewers in South Africa, aged four and older.³⁷ Data is released daily (except over weekends) and is known as overnight or day-after reporting.

The survey also provides detailed demographic profiles of the television audience. For example, the majority of TV viewers are aged between 35 and 49 (25 per cent), with the 50+ age group coming in second at 22.9 per cent. Most TV viewers are in the middle classes: 21.9 per cent in LSM 5 and 26.8 per cent in LSM 6. The majority have some high school education (34.2 per cent) or matric (26.8 per cent). Only 7.4 per cent of viewers have a tertiary education qualification of some kind.³⁸

From the perspective of viewing habits, TAMS shows that most viewers tune in between 8 pm and 9 pm (32.1 per cent), with 31.1 per cent of the audience tuning in from 7 pm to 8 pm.³⁹ South Africa's top TV programme is 'Generations', watched by 18.9 per cent of the total TV audience. The top TV genre in the country is the soap opera.⁴⁰

³³ RAMS February 2013, which covers the period of late August to mid-December 2012.

³⁴ RAMS February 2013.

³⁵ RAMS February 2013.

³⁶ Branded RAMS July 2010-June 2011.

³⁷ TAMS 2012, age 4+.

³⁸ TAMS 2012, age 4+.

³⁹ TAMS October 2012, age 4+.

⁴⁰ TAMS October 2012, age 4+.



TAMS's METHOD AND SAMPLE

TAMS data is collected from a panel of TV-viewing households. TV sets, PVRs, VCRs, DVD players and M-Net, DSTv or Top TV decoders in the household are all connected to peoplemeters – electronic, semi-automatic meters used worldwide to measure television viewing behaviour. Viewers log in and out of the meter using a remote control device so that viewing and demographic information is accurately captured.

At the end of November 2012, the TAMS panel included approximately 1 800 installed homes. By the middle of 2013, it will have increased to approximately 3 000 homes.

SOUTH AFRICA'S OUT-OF-HOME CURRENCY: OHMS

SAARF, together with its research contractor Nielsen, initiated a pilot study in 2002 to provide site-specific data for outdoor campaign planning. The pilot project used GPS-enabled meters installed in panellists' cars to gather data, making SAARF the first joint industry committee in the world to embrace an electronic outdoor audience measurement system. Following the success of this study, SAARF launched the Out-of-Home Media Survey (OHMS), to provide independent demographic audience information as well as reach, frequency and outdoor ratings data.

Final data from the countrywide rollout was released at a macro level in 2009. Since then, the currency has been on hold while tendering and patent issues are dealt with.


7. OTHER NON-JIC MEDIA AUDIENCE CURRENCIES

Other media audience measurement products fall outside the ambit of the SAARF JIC. These studies shed light on those areas of the media industry currently not covered by the SAARF umbrella and include:

- Caxton's ROOTS survey, an urban geographic survey which has become the currency for community newspaper readership;
- Times Media Group's SABRE, which measures the media consumption habits of consumers in the business market; and
- Effective Measure, a digital media consumption survey commissioned by the Digital Media and Marketing Association (DMMA).

THE COMMUNITY NEWSPAPER CURRENCY: ROOTS

ROOTS is the currency for measuring community newspapers across the South African urban landscape, covering areas such as suburbs in major metros to country towns such as George and Nelspruit. Funded by Caxton, it is an urban retail and readership survey conducted every three years. The survey was first released in 2000, and targets urban purchasing decision makers (PDMs) who have direct access to buying power and live in formal housing within the footprint of urban community newspapers, or in regional towns. As a readership currency, it provides information on all types of newspaper consumption in the surveyed areas. For example, ROOTS 2010 showed that, on average, 70 per cent of all PDMs read their local community newspaper every week.



ROOTS is particularly well recognised and used by marketers, media planners, retailers, shopping mall owners and managers, and manufacturers for its provision of demographic and shopping information for over 100 urban areas. As a geographic survey, ROOTS is used to analyse area-by-area buyer behaviour and readership. For example, it can give a concise overview of the demographics of Dobsonville versus Diepkloof, Zola and Gugulethu, and can also describe how Pick n Pay shoppers in Constantia compare to Shoprite shoppers in the same area.

ROOTS is provided free of charge to users, and is supplied to most cross-tabulation software providers.

METHOD AND SAMPLE

The 2012 survey, conducted by TNS Research Surveys, interviewed almost 30 000 respondents, face-to-face, in 120 areas across South Africa. On average, 300 households per area are randomly selected. Areas are demarcated as either the footprint of a community newspaper (where the newspaper is freely distributed), or the municipal boundary in the case of regional towns. The respondent from each household must be 16 years or older and must be the purchasing key decision maker within that household. Since the ROOTS sample is pre-defined by multiple areas, it does not represent every area or household of the country, but only those that were researched. The large sample sizes in these areas ensure that the data is credible and relevant.

THE BUSINESS MEDIA CURRENCY: SABRE

SABRE (South African Business Research Evaluation) is a niche planning and marketing tool that helps to evaluate and define the business


market and caters specifically for the needs of business media. It targets middle to top management, professionals and entrepreneurs who work full-time, as well as retirees with a minimum personal monthly income of R20 000 living in Gauteng, Durban, East London, Port Elizabeth/Uitenhage, Knysna, George and Cape Town.

SABRE was first launched in 1986. The research, conducted every two years on behalf of Times Media Group (TMG), is available free of charge to ad agencies. The research focuses on the target market's media consumption habits across all platforms, but more specifically hones in on business media, including social networking sites and mobisites. For example, SABRE 2012 shows that 48 per cent of businesspeople are now getting more of their business information from the Internet than they did a year ago. Despite this, newspapers remain the primary source of business information for 45 per cent of businesspeople, as well as the 'most useful' (42 per cent) and the 'most trusted' (40 per cent) source. The Internet is the primary source of information for 21 per cent of this market, the 'most useful' for 25 per cent, and the 'most trusted' for 22 per cent.

SABRE also provides information on working life, travel (68 per cent of this market holidayed at the coast), financial habits, property portfolios, motoring, cellphones and technology, as well as spare time activities (watching TV is the top leisure activity, at 76 per cent), shopping habits, and attitudes (67 per cent feel optimistic about the current business environment).

METHOD AND SAMPLE

SABRE's sample of 2 106 business decision makers represents a business market of 760



000 people. Interviews are conducted face to face. Control data for the sampling procedure is sourced from SAARF AMPS.

THE INTERNET CURRENCY: EFFECTIVE MEASURE

The Effective Measure product⁴¹ is the official Internet currency, endorsed and funded by the DMMA. It is provided by audience measurement company, Effective Measure, and measures traffic to DMMA members' websites. It enables DMMA publishers to better understand their audiences, based on profiles and behaviour, and acts as a currency for buying and selling online advertising.

The data is accessed via several dashboards that are tailored to specific user groups, such as EM Audience for online publishers, and EM Enable for advertising agencies.

Effective Measure places tags on all DMMA-associated websites, measuring users' demographic profiles and providing these sites with Unique Browser figures. Data from January 2013 showed that 15.3 million people went online, viewing 562 million pages, 34.59 per cent of which were accessed from a mobile device.

Effective Measure collects site-centric information that picks up all devices and locations, as well as user-centric data collected from a panel, thus delivering both site-related metrics and demographic profiles of Internet users. User profiles incorporate behaviour, context, demographics and psychographics. Its demographic data is based on a sample of over 200 000 South Africans, and includes information such as sex, age, residence, household income, occupation and industry, household make-up, education,

languages, device ownership, Internet access, marital status, and purchase decisions.

METHOD AND SAMPLE

Effective Measure recruits an opt-in panel using random sampling based on a pre-selected rate – usually one in every 10 visitors to a tagged site. Panellists install a plug-in which sits on their browser and records and sends information to Effective Measure's servers about each page visited throughout the day. For January 2013, there were 6 840 active panel members with rich demographic profiles.


8. PROMOTING CURRENCY RESEARCH THROUGHOUT AFRICA

With a 38-year track record, currency research in South Africa is a well-established discipline. In the rest of Africa, however, currency research is scarce. In 1999, SAARF, in conjunction with eight other countries, set out to improve the state of media audience research in Africa by founding the Pan African Media Research Organisation (PAMRO).⁴² The organisation promotes intra-country communication and the exchange of ideas, holding an annual All Africa Media Research Conference and quarterly regional meetings where African researchers can learn from each other and establish best practice. Ultimately, PAMRO's goal is to contribute to the African Renaissance by fostering an environment of co-operation that will allow for the establishment of a harmonised, comprehensive media research database for the entire continent, essential for the development of a free media and the growth of economies across Africa.

Using expertise from SAARF, PAMRO has laid the foundation for the establishment of media

⁴¹ www.effectivemeasure.com

⁴² www.pamro.org



research on the continent by developing a core AMPS-like questionnaire. This questionnaire acts as a guide for countries wishing to adopt the AMPS model, as Zimbabwe, Namibia, Botswana and nine other African states have already done. Also based on the SAARF model is the PAMRO Living Standards Measure (PAMRO-LSM), which PAMRO is in the process of producing. This segmentation tool can be added to other studies to give marketers a better understanding of the African markets in which they operate.

9. FUTURE CHALLENGES AND POSSIBLE SOLUTIONS

The media industry in South Africa is not static. As media proliferation increases, making more and more media available, audiences are becoming increasingly fragmented. For some media, audience levels have become so low that any data obtained is off such small samples that only topline information can be used.

One of the more expensive ways to tackle media proliferation and the related fragmentation of audiences is to increase the sample size of research surveys. Another solution is to introduce new technologically based methodologies which could measure more people at less cost. Data fusion, in which various sources of information

are fused to make larger, more robust studies, is also possible.

Media convergence – such as reading a newspaper online, or streaming live radio – has also added complexity to the media audience research equation. New methodologies must be investigated to address this growing phenomenon, as it is becoming increasingly difficult to measure media outside their traditional platform boundaries using traditional research methods.

All solutions, however, come at a price, whether purely rands and cents, or the disruption of the trend lines established for the currencies, so no solution can be implemented lightly. SAARF is investigating these challenges through the SAARF Board, whose key objective currently is to make the necessary changes to ensure that the foundation and its research currencies remain relevant in a rapidly changing media world.

The Board has set up a special committee – the Future-proofing Committee – which is consulting the industry to determine what is required of the joint industry research in coming years. This investigation will also tackle funding issues (determining what will be funded, how it will be funded, and through what channels) and will consider possible changes to methodology.

