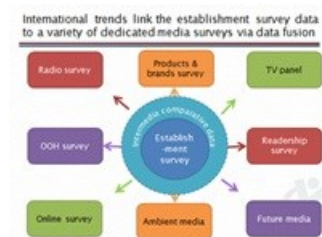


Recommendation for audience measurement in South Africa

The results of the Future Proofing Survey (FPS) project have been released. This was undertaken by the task team of Jos Kuper and Lauren Shapiro of Kuper Research, Peter McKenzie and Clive Corder, who were commissioned by industry through SAARF (South African Audience Research Foundation) to look into the best way forward for South African media audience measurement.

As part of the five phase research project, the team evaluated the best international Joint Industry Committee (JIC) structures and operations during April and May 2013 and then gave their recommendations for a model that could work in the South African media research landscape. This was before the withdrawal of the NAB from SAARF.



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'Car' ready to drive industry

The best way to picture the recommendations for audience measurement in South Africa is to imagine a car. The chassis is a media industry establishment survey and the wheels are currency surveys conducted JIC structures. The wheels are television, radio, print and out-of-home (OOH) currency surveys and, when properly aligned to the chassis, South African media research can drive industry into the future with confidence.

The establishment survey provides the means to link all industry research through data fusion and offers a holistic solution to marketers and media agencies. In other words, the media industry establishment survey allows for a common point of departure and comparison of inter-media audience measurement. The audience research is conducted independently by each media sector JIC and the establishment survey ensures that all industry research uses the same population numbers, demographics, etc., through the establishment survey. The currency surveys (eg. television's TAMS, radio's RAMS, and print's PAMS etc) use the establishment survey to draw samples which then are weighted correctly to the population.

This collaborative approach provides the means, at a macro level, for inter-media comparisons and budget allocation, bringing other media stakeholders, the marketers and industry associations, together. It is the most cost effective approach, providing for bigger sample sizes or greater frequency.

All media types need to participate in the establishment survey for it to be beneficial to the agencies for inter-media comparison. Those that don't participate may well be prejudiced, as the agencies will be unlikely to use a multitude of sources. It will be essential to have extensive consultation with all stakeholders and users of the research when setting up the new JIC structure paradigm. In other words, the end user will need to be part of the new audience research frame.

International model

Kuper commented, "The value of an establishment survey was based on a model from the Netherlands where all the JICs collaborate to commission a joint establishment survey. The survey is used as a source of census information on demographics and to monitor changes in media equipment ownership and media usage. This allows for a common currency and weighting parameters for all media. It also simplifies the process for agencies when doing inter-media comparisons.

"Experienced fusion experts in the audience field should be consulted to find out exactly what is required for fusion links. The industry needs an intensive examination of the kinds of questions that are required on the inter-media front if we are to avoid one medium receiving a disproportionate advantage over another.

"Given the NAB decision to commission future audience measurement research directly, it is hoped that the project's findings will assist the NAB and other prospective JICs (such as a PDMSA/PAMS) to establish the necessary structures and research framework based on recognised international best practice." The TAMS contract is already up and running and will continue to do so for the next five years, TAMS will continue and the NAB JIC will manage it from 2015 onwards."

Relationships must be defined

Internationally, different elements of the audience research measurement process are often contracted to different suppliers. Relationships between JICs and with contractors must be well defined and carefully monitored. There are often strong interrelationships between different JICs in sharing components of the survey mix, to ensure a common point of departure, whatever the media type, as well as to lower costs.

A JIC is any structure, organisation or association responsible for the commissioning or control of industry audience research. Such entities, chiefly comprising media-owners, advertisers and agencies, operate in a myriad of different ways across the assessed markets. The FPS international investigation did not set out to recommend one preferred model, as in each case, the JIC structure has evolved to accommodate local markets and requirements.

Project scope

The project scope was agreed with the FPS committee in 2012 and usage and perceptions of SAARF's current products and processes across a wide ranging spectrum of stakeholders was assessed. In addition, perceptions of future needs in terms of the changing media landscape and technology developments were identified.

Local and international precedent, trends, technical opportunities and industry research models were investigated. The pros and cons of each was explored and the extent to which they represent an opportunity in the South African context was articulated. Recommendations on potential solutions that could be developed into an implementation plan were then provided.

The task team visited WEMF in Switzerland, AGMA in Germany, the Broadcasters Audience Research Board (BARB), the UK Online Measurement Company (UKOM), Route UK (the trade associations for the buyers and sellers of outdoor media), the National Readership Survey (NRS) and the Radio Joint Audience Research (RAJAR) in the UK.

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