



In a series of monthly columns, *AdVantage* will look at the landmark changes which have been made to SAARF's media audience research currencies over the past decade, how these changes have added value, and what issues still need to be resolved to future-proof the local media currencies. SAARF welcome any feedback, comments or questions. Please send these to news@advantgemagazine.co.za

MEDIA RESEARCH



South African
Advertising Research Foundation

CURRENCIES THAT UNDERPIN OUR INDUSTRY

THE PAST 10 YEARS have been some of the most turbulent in the history of media. The rise and rise of digital, the emergence of new media platforms like iPads, portable TV devices and smartphones, and the mushrooming of social media have seen the world becoming a much smaller place, a place where consumers have more power than ever before, a world where consumers want their media content on their own terms.

And just as media owners are having to scramble to keep up with this tumultuous change, so too

must the people who measure these media. For the SA Advertising Research Foundation (SAARF), custodian of the marketing, media and advertising industries' media audience currencies, the period since the turn of the millennium has been more eventful than any time in its almost 40-year history.

What is SAARF and what is its function?

SAARF is the joint-industry committee (JIC) that directs South Africa's media audience

currencies. In 1974, stakeholders from the marketing, media and advertising industries came together to meet one, clearly defined goal: to provide a common, pre-competitive currency to facilitate the buying and selling of advertising space and time.

Funded by the industries it serves, SAARF provides single source, pre-competitive, comprehensive, un-biased, reliable and regular research currency.

It provides the currencies for print, radio and TV: AMPS (the All Media and Products Survey),





RAMS (the Radio Audience Measurement Survey), and TAMS (the Television Audience Measurement Survey).

Then, from AMPS comes the Living Standards Measure (LSM), demographic information on all South Africans aged 15+, and information on products and brands, again off the same pool of respondents.

By producing 'single source' data, all the SAARF media audience currencies and databases work together, unlike in the UK and the US where the currencies of individual media are produced by independent parties, and therefore exist in discrete silos.

This is especially important in a world where

the traditional demarcations between print, radio and TV are becoming ever fainter, thanks to the rise of platforms such as e-readers, tablets, online streaming, and mobile viewing devices.

Providing these currencies however, is getting more and more difficult as media proliferation drives ever-worsening audience fragmentation. The major achievements of the SAARF currencies over the past decade have gone a long way towards addressing this shifting media world, but there is still much to be done.

In the coming months, we will look at how far our joint-industry research has come, while examining how much further we still have to go.



ADDING VALUE TO PRINT

The new millennium brought with it a flood of changes to SAARF's media audience currencies. One of the most impactful was the move to Double-Screen Computer-Assisted Personal Interviewing technology (DS-CAPI) in AMPS 2009BA (July 2008-June 2009)

DS-CAPI DISPLAYS all prompt material needed for an AMPS interview digitally, removing the need for physical showcards and prompts. While it might not sound that ground-breaking, DS-CAPI delivered significant improvements to the AMPS survey in general, but also notably to the measurement of print readership, and set AMPS up to better meet the growing needs of the print sector.

One of the greatest benefits to come from DS-CAPI was a significant reduction in title confusion. Respondents see print mastheads in full colour. These mastheads are carefully grouped to reduce title confusion, keeping together similar titles with high potential for confusion, such as the house and home or motoring sectors. Daily newspaper titles and their related weekend editions,

once measured in separate newspaper sectors, are now displayed together, which also reduces title confusion.

And without showcards, there's no more manual shuffling by interviewers. DS-CAPI automatically rotates print titles, giving each one an equal opportunity of being seen and removing the impact of position in the survey on a title's results. This methodology change was therefore a significant step forward for AMPS, further improving the quality and reliability of the data in general, and setting AMPS up to better handle increasingly complicated readership questions in the future.

LOOKING TO THE FUTURE

The task which media audience researchers around the world are now faced with is how to measure audiences across



platforms. As the digital revolution changes the traditional face of print, how do we measure the digital consumption of print, whether online or on other devices?

Currently in South Africa, the need for this is less pressing than it is in a number of developed countries. Readership on digital and mobile platforms in 2011 may have grown significantly over 2010, but it still accounts for only a fraction of total readership. AMPS Dec 11 (Jan-Dec 2011) showed that only 3.8% of adults claimed to have read a print title online, while a mere 1.8% said they read a title on a cellphone.

Internet access is also still relatively low compared to many developed markets. Infomart GfK shows that in the Netherlands for example, 90% of people aged 13+ have

access to the internet. Locally, despite a continued upward climb, only 17% of South Africans aged 15+ access the internet in any given week (AMPS Dec 11).

Devices like tablets, which also help drive the uptake of digital print reading, still have a very low penetration in South Africa. In a recent study done by BMI-TechKnowledge that sampled early adopters of technology, only 13% of this market claimed to have a tablet.

Sometime in the future however, SAARF and its stakeholders will need to decide how best to measure reading on tablets and online reading: either through AMPS, or through a new internet currency.

In the meantime though, with DS-CAPI, AMPS is at the top of its game.



THE NEW-MILLENNIUM LSMS

SINCE THE DAWN of the new millennium, rapid change has been a constant factor in the media arena. But change is not just the preserve of SA's media platforms. From 1994 on, the face of South African society has also been in constant flux, with a steadily declining lower class and a burgeoning middle class.

Measuring the living standards of SA's population has always fallen to SAARF's Living Standards Measure (LSM). This segmentation tool measures affluence (but not income) by using multiple demographic and other variables such as 'having airconditioning' and 'living in a metropolitan area' to divide society into relatively homogeneous groups based on living standards.

Since its development in the late 80s, the LSM has been changed a number of times to ensure that it keeps pace with societal growth. In the early 2000s however, a major overhaul of the LSM tool made it infinitely

better equipped to deal with change, while effectively future-proofing it.

The older LSM scale with its eight groups was not sufficiently sensitive to societal changes, and used a number of personal variables which introduced certain biases. For example, the 'supermarket shopper' variable at times put a husband and wife into different LSM categories.

The new SAARF Universal LSM (SU-LSM), launched with AMPS 2001A, would change all that.

The SAARF Universal LSM used only those variables which were universally applicable to all adults aged 16+. Fifteen of the former 20 variables were retained, while 14 new variables were added, increasing the basket of variables to 29 to give finer definition.

While similar to the older LSM, the SU-LSM now had 10 groups, with a built-in ability to extend beyond this number if societal development demanded it.

In AMPS 2008A, another improvement was

introduced: the LSM Extensions. Ever-increasing interest in the upper end of the SA market, coupled with strong competition in this sector, made it increasingly important for marketers to be able to look at the upper segments of society in more detail.

By splitting each of the top four LSM groups into two roughly equal sub-groups – a 'low' and 'high' group – users could do finer target marketing, particularly in LSM 10. For example, only 22.4% of LSM 10 Low households have dishwashers, while 59.6% of LSM 10 High households own this appliance (SAARF AMPS 2011 Dec).

The LSM Extensions also proved invaluable for media planning, highlighting intra-group differences in media consumption.

Now, with annual updates of its variables to ensure that only those with the strongest differentiating ability are used, the LSM has been honed to the point where it is able to absorb and reflect all future developmental changes in society.

Flooding the **radio market** with data

WHILE THE adage 'less is more' might hold true if you're talking Mies van der Rohe and the Bauhaus movement, when you're talking data in the world of audience media research, less is always less. Which is why the radio sector put its foot down in 2002 when the Print industry cut its SAARF funding and reduced the bi-annual AMPS and the piggy-backing RAMS, to one survey a year.

Making their needs known, radio owners insisted that even two RAMS releases per year were too few. Six was the absolute minimum, and on top of that, they wanted bigger sample sizes.

After an 18-month investigation, a solution was found: a model of radio research called flooding.

With flooding, instead of only giving a radio diary to the household's primary AMPS respondent, every adult in the household is given a radio diary to complete. (Adults were defined as those

aged 16+ and since 2009, 15+).

In 2004, the first RAMS to use a flooded urban sample were released. With little extra effort, RAMS immediately saw its sample size almost double, making for significantly more stable and robust data.

From 25 000 diaries pre-flooding, the RAMS sample grew to about 48 000 a year, giving RAMS the largest annual sample ever in SA. The sample size was further boosted when flooding was introduced to the rural component in 2009, growing the sample size for this market by almost 6 000, an increase of 34%.

Today, about 65 000 radio diaries are completed per year, the equivalent of 455 000 days of radio listening behaviour.

On top of more robust data, the cost-effectiveness of flooding also meant more frequent surveys could be run. Six RAMS releases a year make audience movements and trends that much easier

to pick up, and allow radio owners to quickly see the effects of changes to line-up and programming.

RAMS INTO THE FUTURE

As it stands today, the SAARF RAMS diary is well-equipped to measure radio listening into the future, even across platforms.

SAARF has, however, been bringing the topic of passive, electronic radio measurement to the industry table for over a decade. While benefits like the increased detail of data made possible with personal 'peplemeters' have never been in question, the costs of the meters and resultant sample downsizing kept it a mere pipe dream. A new smartphone app being tested by Ipsos MORI however, might hold the answer.

Ultimately, industry needs will dictate the direction of RAMS' growth, determining what sort of animal RAMS will be used in the coming decades.

As TV changes, so does **TAMS**

SINCE THE beginning of the new millennium, SAARF's media audience currencies have benefited from a number of significant changes. AMPS had a move to DS-CAPI while RAMS benefited from the introduction of flooding. TAMS too has enjoyed its share of post-millennial improvements.

The 2000s saw TAMS going digital. An augmented panel of satellite households delivered the first data on digital satellite viewing by early 2001.

With the new panel in place and all television platforms included in the TAMS fold, SAARF turned its attention to improving how the TAMS results were weighted, in order to best represent SA's viewing public.

The new weighting, known as random iterative method or rim weighting, was in line with a worldwide move and was a definite



improvement on the old methodology. It also equipped TAMS to measure regional broadcasting in the future.

The most ground-breaking changes however, rolled out with the 2005 TAMS tender. The first was the introduction of 'Overnights', the biggest change made to TAMS since the inception of the service more than 15 years ago.

The move to overnight ratings ushered in a new trading paradigm for advertising on television. For the first time, television media owners, advertisers and their agencies were able to follow and manage advertising campaigns on a daily basis.

Another important TAMS improvement that came with the 2005 tender was the expansion of the TAMS panel to include virtually all rural households, making TAMS more representative of the whole population while giving users the benefit of more robust data overall.

The TAMS universe expanded even further when some 1.6-million new viewers added four-six year olds to the TAMS viewing pool,

augmenting the total TV universe.

As the end of the nineties approached, one more significant change waited in the wings: measuring of viewing done through Personal Video Recording (PVR) devices. By the end of 2011, SAARF released the first and much-anticipated time-shifted viewing data, giving the industry its first comprehensive picture of TV watching in SA, both live and time-shifted.

LOOKING TO THE FUTURE

With the box next to time-shifted viewing now ticked, the next challenge for TAMS is how to measure SA's increasingly fragmented viewing. To provide robust data on the audiences of smaller channels and reduce zero ratings, especially after the advent of DTT, the TAMS sample size must be increased. Providing a bigger TAMS sample is written into the latest TAMS tender, and the size of the TAMS panel will be increased to nearly 3 000 installed homes during 2013 when the new TAMS agreement kicks in.



Expanding consumer **insight**

SINCE THE start of the 2000s, SAARF has implemented changes which have added value and depth by expanding the scope of the industry's media audience research currencies...from the move to DS-CAPI and flooding RAMS, to lowering the respondent age limit to 15 and measuring time-shifted viewing.

SAARF also added to the industry's understanding of the SA population by introducing two new segmentation tools. The industry already had two powerful segmentation tools at its disposal. The oldest, the Living Standards Measure (LSM), segmented the population according to wealth indicators. SAARF Lifestages, introduced in the late 90s, grouped people according to their stage in life, from singletons living at home with their parents, to mature couples.

The newcomers, SAARF Lifestyles and SAARF Attitudes, would add in two new dimensions: people's activities, interests and lifestyles, and their beliefs and attitudes.

LIFESTYLES

SAARF Lifestyles was launched in AMPS 2002B (Jan-Dec 2002). Forming part of the AMPS self-completion questionnaire, the Lifestyles section contains almost 90 lifestyle and activity questions. These cover four areas: people's interest and participation in sport, from adventure sports to mainstream sports; their frequency of participation in a number of leisure and entertainment activities such as attending burial society meetings or gambling at a casino; their preferred music genres; and whether they attend

certain cultural events.

Users can segment this lifestyle information to suit their own needs, cross-referencing various activities against media and product consumption. They can also make use of the twelve Lifestyle groups – such as the 'Cell Sophisticates' group, or 'Homebodies' – which show the links between how people live their lives, the media and products they use, and their demographics.

For example, Homebodies' main interests are baking, cooking, knitting, crochet, needlework, tapestry, sewing and dressmaking. They care about the appearance of their homes, and spend time gardening, doing DIY activities and decorating their homes. They're more likely to be mature females and many are divorced, widowed or separated.

Few work full-time.

ATTITUDES

SAARF Attitudes was added to SAARF's basket of segmentation tools in AMPS 2007B (Feb-Dec 2007). Attitudes are an important means of segmenting markets, since people's attitudes and opinions can have a significant influence on their media and product usage.

There are approximately 100 attitudinal statements in this tool, aimed at pinpointing people's views on issues such as advertising, job security and crime. Marketers can use these statements individually, or as 28 topic groups (people who score, for instance, above the mean on branding, or community or education opinions). They can also segment their market according to the five attitudinal groups: the Now Generation; Nation Builders; Distant; Rooted; and Global Citizens.

For example, the defining characteristic of the Now Generation is that they are interested in owning overt symbols of material success, and show strong

attitudes around status, materialism, entertainment, finance, shopping, branding, and advertising.

"The industry's desire for consumer information is insatiable," says Dr Paul

Haupt, CEO of SAARF. "Where-ever feasible, and within our budget, SAARF will continue to respond to stakeholders' needs for a deeper understanding of their target markets."

