MEDIA RESEARCH IN AFRICA, TODAY AND TOMORROW

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1.   History

Although Media Audience Research in South Africa started with a radio survey that was done in 1948, readership research in South Africa really only started in 1962 with the first National Readership Survey (NRS).

Right from the outset an All Media and Products approach was followed and this later became the SAARF All Media and Products Survey (AMPS). Unfortunately, no details of the questionnaire and methodology could be obtained, as only the printed report could be found that showed limited cross tabulations of readership against demographics and limited general information on housing, access to services (electricity, water, telephone) and ownership of radio sets and cars.

The NRS was repeated in 1967 and again in 1972. Both these surveys used a 3-month filter for all publications and shuffle cards. The Average issue readership or AIR was calculated as reading in issue period using just recency of reading.

Apart from readership, the use of financial services, ownership of motor vehicles and durable items and the use of only 12 FMCG personal product categories (cigarettes, pipe tobacco, alcoholic beverages and chocolates among them) were recorded. Twelve household product categories were also included and the questionnaire in total was only 4 pages long.

The late Wally Langschmidt, who will still be remembered by the older delegates to Prague, was the driving force behind this research. Readership measurement was Wally's passion as is evident from his book "Reliability of Response in Readership Research" (March 1978). SAARF sponsored this book as it was concerned that most of the methodological research done up to then was not properly written up.

Casper Venter, the General Manager of SAARF at that stage, acknowledged in the Foreword "… three AMPS studies were completed and published (referring to AMPS 75; AMPS 76 and AMPS 77). In addition to the official surveys, several interesting surveys were also conducted during the past few years on readership measurement methods. Details and results of these studies were, however, never fully written up and as Wally Langschmidt was intimately involved with all this work, he was asked to produce a booklet, giving details in summarized form"

As can be expected, Wally Langschmidt was also the leader in the movement which led to the formation of SAARF in 1974.

2.   Operation Of SAARF

SAARF is an organization not-for-gain (a Section 21 Company under South African Company Law), funded by a levy on ad spend. The levy initially was 0,5% of the net-net advertising revenue of media owners and was a SAARF-only levy.

Since its inception, SAARF has been a tripartite Joint Industry Committee (JIC). It was agreed right from the start that media owners, advertisers and advertising agencies would be represented in the SAARF structures via their respective associations. These associations nominate members to serve on the SAARF Board and operational committees.

The SAARF Board operates similarly to other boards of directors in formulating policy and approving and controlling budgets.

The SAARF Advisory Council (Adcom) monitors the research requirements of different media groups and decides on what/how these requirements should be best met. As it is the Adcom's responsibility to decide on methodological aspects, it also includes technical experts who are not necessarily members of SAARF.

A series of media specific councils deal with the detailed requirements and complexities of each medium. In addition, the Bureau of Market Research (BMR) of the University of South Africa (Unisa), sponsored by SAARF, is responsible for annual population adjustments based on the national census as well as other demographic research.

Only six full time staff members – 3 line functionaries and 3 supporting members are responsible for the SAARF operation.

3.   Developments Since SAARF Was Formed

The first SAARF AMPS was published in 1975 and since then AMPS was published at least once or twice a year depending on the availability of funds. The SAARF Radio Audience Measurement Diary (RAMS) followed in 1976, the year in which television arrived in South Africa. Initially television was also included in RAMS as the SAARF Television Audience Measurement Survey (TAMS) or as it is also known as, the SAARF peoplemeter panel, was only introduced in 1989.

As common industry activities, other than media audience and product consumption research, developed over the years, the levy was increased in 1996 to 0,65% to also meet these new funding needs. Consequently, SAARF was no longer the only beneficiary of the levy. The other beneficiaries were the Advertising Standards Authority (ASA) and the Freedom of Commercial Speech Trust (FOCST). Up to this point, the levy was collected and administered by SAARF, but after this change, a separate body dedicated to the collection of the levy was created to collect and administer the funds. The levy was again increased in 1997 to 1,0%, and has remained at this level ever since. However, Print Media South Africa (PMSA) has over the last few years reduced its contribution to research and now pays a fixed amount rather than the levy as is still done by all other media.

4.   The SAARF AMPS Survey Design

SAARF AMPS has been the vehicle used to measure readership in South Africa for the past 31 years and during this period has developed and changed way beyond the dreams of those who were there in 1975. The AMPS interview always was (and still is) a personal, face-to-face interview, although Computer Assisted Personal Interviewing (CAPI) was introduced during 2001.

A multi-stage area-stratified probability sampling method is used. South Africa consists of nine provinces, which form the first stratification level. A second area stratification level is created by dividing each province into four community size groupings. These are:
Metropolitan areas (those with 250 000 and more total inhabitants)
Cities & large towns (100 000 – 249 999)
Small towns and villages (40 000 – 100 000)
Settlements and rural areas (less than 40 000)

Within each of the above geographic strata, clusters of two per sampling point are used and one address in each cluster is used for a male and one for a female respondent.

Finally, a Politz Grid is used to sample by age using 4 age groups namely, 16 - 24, 25 – 34, 35 – 49 and 50+. This gives a total of 288 cells.

Post weighting is done using all of the above stratification variables and additionally, where necessary, also language. Up to now, cell weightings have been used but we are currently investigating the possibility of switching to RIM weightings.

Since its inception, the SAARF Radio Audience Measurement Survey (RAMS) which is a 7-day diary, was (and still is) piggybacked onto AMPS. The advantages of this are that it saves costs as the diary placement is done at the end of the AMPS interview. In addition, all the AMPS readership and product/brand consumption information can be directly linked to detailed radio listening and television viewing, and vice versa, thus creating a single source database.

The SAARF AMPS questionnaire is translated into 9 of the 11 official languages of South Africa to ensure better respondent cooperation as well as better quality data.

5.   Developments In The Readership Measurement Methodology

When AMPS was introduced in 1975, a 12-month filter question was used for all publications, with single title shuffle cards as were used in the earlier NRS surveys. The shuffle cards that were used were one of the many innovative creations of Wally Langschmidt, namely the so-called double sided shuffle cards. The front side of the cards showed the masthead as normal, while the answering options to all the readership questions were shown on the back. By using a sorting board for each question, the interviewers would take the different pack of cards at each position on the sorting board and mark the edge of the cards at the corresponding position to the answering option at the back. The answers were then transferred back at the office resulting in a shortening of the interview time.

Recent reading in issue period was used to calculate the average issue readership (AIR) for newspapers. The Monte Carlo-model was used to calculate the AIR for magazines based on the frequency claim. This model uses the number of issues read within the corresponding number of most recent issue periods covered by the total frequency scale. For example, if you ask the number of issues for a weekly out of six, only the number of issues read in the past 6-weeks would qualify to calculate the AIR.

Unacceptably high AIR and readers per copy (rpc) figures however resulted in extensive piloting being done in the mid-eighties leading to the following changes:

o   In AMPS 85, the 12-month filter was replaced with a 6-month filter for all publication groups, but asked separately for each group before asking the other questions of the titles that came through the filter. The sequence of sections was rotated between interviews.

Hindsight showed that this introduced a learning effect as respondents knew that they would only be asked additional questions for a section if they claimed to have read in the filter period. Analysis of the results confirmed that under claiming on the number of titles read in the filter period occurred from the second position in the rotation onwards.

o   The single titled masthead cards were replaced with prompt pages showing up to 8 titles per page in colour.

o   Questions after the filter questions were asked vertically from longest to shortest publication interval.

However, the double sided cards were back in AMPS 86, followed again in AMPS 87/8 by prompt sheets. The whole search for credible AIR's finally led to the introduction of the **First Reading in Period of Issue** (FRIPI) methodology, which is still used today. Although FRIPI reduced the very high AIR's to more credible levels, it is clear that these are normal in developing countries as the socioeconomic and other conditions are vastly different to first world economies. Strangely enough we still find researchers who find it difficult to accept this phenomenon.

6.   Developing A Multivariate Segmentation Tool

The SAARF Living Standards Measure (LSM) was launched in 1990, as a segmentation/targeting tool. It is now called the SAARF Universal LSM or SU-LSM and is well known and used in many countries. With the development of this unique tool, the basic R*aison D'être* was to ***develop an index which differentiates better than any single demographic.*** SAARF's brief thus was to find the best combination of variables to group people with similar behaviour together and to distinguish between people with different behaviour thus giving us the strengths of a *multivariate* differentiator.

In addition, it was envisaged that the LSM index would be developed out of the best combination of variables **from AMPS** so that no extra expense would be required for this exercise and finally, it must have broad application across the total market, be simple to use and easy to link to other surveys and stable over time, but sensitive enough to register changes.

The LSM has also undergone continuous change and development over the past 15 years and today consists of 29 variables.

1. Hot running water
2. Fridge/freezer (combination)
3. Microwave oven

4. Flush toilet in house or on plot
5. VCR in household
6. Vacuum cleaner/floor polisher

7. Have a washing machine
8. Have a computer at home
9. Have an electric stove
10. Have TV set(s)
11. Have a tumble dryer
12. Have a Telkom telephone
13. Hi-fi or music center
14. Built-in kitchen sink
15. Home security service
16. Have a deep freeze
17. Water in home or on stand
18. Have MNet and/or DStv
19. Have a dishwasher
20. Metropolitan dweller
21. Have a sewing machine
22. DVD player
23. House/cluster/ town house
24. 1/more motor vehicles
25. No domestic worker
26. No cell phone in household
27. 1 Cell phone in household
28. None or only one radio
29. Living in a non-urban area

The SAARF Universal LSM provides an index of the population from LSM 1 to LSM 10 where LSM 1 is the lowest and LSM 10 is the highest. The LSM is an indicator of wealth rather than income and as can be seen, it also contains variables that reflect the status of the household with reference to access to services. There are currently two types of LSM in use in Africa, namely a household LSM in the case of South Africa and personal LSM's in certain other countries.

7.   **Further Developments**

Until 1996, only one AMPS survey was conducted every year, but as from 1997, two surveys per year were introduced with much larger samples and published on a rolling basis using 12-month samples. This provided the opportunity to introduce more titles, including community papers and free-sheets (CP/Fs). AMPS 98 saw the re-introduction of single title masthead cards, which are still used in the current CAPI interview.

Some publishers of CP/Fs were not happy with the readership levels of their CP/Fs and blamed the fact that these titles were shuffled into the weekly newspaper section for the lower levels. They argued that the CP/Fs should be handled separately. The re-introduction of shuffle cards intensified these concerns as they were now shuffled into all titles, not only weekly newspapers.

This resulted in extensive testing of different methodologies during which time the affected publisher's titles were not published. Unfortunately, by the time a new methodology was accepted, CP/Fs had to be taken off due to financial constraints resulting from the need for sample boosting in most of the distribution areas.

Computer Assisted Personal Interviewing (CAPI) using a single screen was introduced in AMPS 2001, after intensive piloting in 1999 and 2000 and is still used today.

An Industry Task Team investigation took place in 2002/3 with the brief to investigate whether the industry still needed SAARF and the other beneficiaries of the levy. After investigating how industry research is conducted in many other countries, the team was convinced that Joint Industry Committee (JIC) research was the best model.

As part of this exercise, the task team also recommended the deletion of all "nice to have" questions, as well as a reduction in readership questions. The thoroughness question was deleted as it was felt that there were other quality of reading indicators that were sufficient. The most important impact of this exercise was that the number of AMPS surveys was reduced back to one per year as from 2004, and also with a smaller sample.

However, on the positive side, the branded product questions that have been done via a self-completion questionnaire for a number of years now, have been included in AMPS 2005 and will be provided free of charge to the entire industry. This includes 122 product categories consisting of more than 1 200 brands. An enormous effort was put into the translation of the lengthy self-completion questionnaire into 9 languages as well as the collection of the logos of the more than a thousand brands. However, the use of logos is regarded as essential when working within an environment where functional literacy is a problem. The logos are used as valuable additional prompts, as is evident in the following example for chocolate slabs:

CHOCOLATE SLABS	PERSONALLY EATEN PAST 7 DAYS	EATEN MOST OFTEN PAST 7 DAYS	CONSIDER IN THE FUTURE
Beacon	12) 1	14) 1	16) 1
Cadbury's	2	2	2
Nestlé	3	3	3
St Chocolat	4	4	4
Another brand (just tick block)	13) 8	15) 8	17) 8
No brand most often (just tick block)		9	

8.   High readers per copy (rpc) figures

High rpc's is a common problem of readership research in developing countries and rpc's of up to and even larger than 20 for magazines is not uncommon. However, it puts a question mark over the credibility of the research.

The above prompted SAARF to do a qualitative validity check on the number of readers of our leading soccer magazine, "Kick Off", some years ago. Soccer is a very popular sport amongst South Africans at all levels of society. A sample of points where "Kick Off" readers were picked up in AMPS was selected and interviewers were send back to these points with the following instructions:

- o   To determine how many people within the previously interviewed household has read "Kick Off"
- o   To determine the origin of the copy and if it was a 'pass along' copy, to identify and visit the address from whence it came.
- o   To determine disposal of the copy and if it was passed on to other households, to visit those households and similar to the original household, determine the number of readers and disposal for all other households.

This procedure was followed until the purchaser was reached in one direction, and until the copy could be produced in the other direction (or the trail petered out). Due to cost considerations, this procedure was only followed within the community where the AMPS "Kick Off" reader was originally picked up, although further distribution to rural areas is quite prevalent and if followed up, would have added even more readers per copy.

The results confirmed that more than 20 readers per copy were not only possible, but that the copy was often still in good condition!

9.   Future plans

The following matters were being debated at the time of writing of this paper:

- o   Data integration of SAARF AMPS data with the SAARF TAMS data. This will provide television media owners and their clients' access to branded data.

     As the Levy Collecting Agency (LCA) has agreed to pay for branded data in 2005 from the levy, and Print Media South Africa does not contribute to the levy, it was decided to give free access to the print industry for 2005 but to request print to contribute from 2006 onwards if they wanted future access to SAARF Branded AMPS. This would be of enormous benefit to print and ensure an even playing field for all media.

- o   Ways and means to obtain additional funding to re-introduce two (or even more) AMPS surveys per year, with increased samples, are currently being investigated.

     The above is regarded by SAARF as extremely important, as the current status quo rules out 12-months rolling reporting and, due to smaller samples, also limits the number of titles that can be reported on.

10.   Developments in Audience Research in other African countries

Other African countries and some of the Indian Ocean Islands adjacent to the African continent started consulting SAARF for help during the early nineties. All of them accepted the basic AMPS methodology with adjustments for local conditions, which will make the future harmonization of multi-country African data an achievable objective. With SAARF's help, AMPS type research was initiated in the following countries:

- o   Cameroon (Cameroon AMPS)
- o   Ghana (GAMS)
- o   Kenya (KAMPS)
- o   Mauritius (Mauritius AMPS)
- o   Namibia (NAMPS)
- o   Nigeria (Nigeria AMPS)
- o   Tanzania (TAMPS)
- o   Uganda (UAMPS)
- o   Zimbabwe (ZAMPS)

Ghana, Kenya and Zimbabwe also formed JICs and, while Kenya is currently still sorting out a suitable funding model, Ghana and Zimbabwe are using a model similar to the SAARF levy.

The further rolling out of AMPS-type research is currently being considered by Angola, Mozambique, Senegal and Zambia.

As far as Sub Saharan Africa in general is concerned, the following are the most important obstacles:

o   A lack of accurate and updated population statistics for purposes of sampling and grossing up the results.

o   A lack of sufficient funding to do proper area stratification and to implement general probability methods.

11.   Examples Of Readership Survey Details In Some Countries

Ghana

A random national sample of 3 000 biennually is used, but the intention is to go annual. A paper and pen face to face interview with radio and television diary placement afterwards is used.

The following readership questions are asked:

o   Availability of the publication on sale in the area
o   Evaluation of the quality of printing of the publication
o   3-month filter
o   They use the exact SAARF readership definition
o   Frequency
o   Recency
o   Reading days, but not used in calculation the AIR
o   Thoroughness
o   Origin of copy
o   Title preference: "If you are restricted to reading one title only, which one would you prefer?"

It is also an All Media and Product Survey similar to the South African AMPS.

Namibia

The universe from which the NAMPS sample is drawn comprises adults aged 16 years and older at date of the interview, resident in private households, hostels and similar accommodation in Namibia. Excluded from the universe are residents and staff of such institutions as prisons, hospitals and residential hotels.

A sample of 2 728 adults stratified by geographic area (Windhoek, Towns, Caprivi, Kavango, Owambo, Kaokaland/Hereroland, Namaland/Damaraland, Commercial Farms, Farm workers) is used. A multistage, stratified, quasi-probability design was employed.

As the surveys were sponsored by the Namibian Broadcasting Corporation (NBC), the sample was stratified by broadcasting area. These broadcasting areas comprised geographical areas as classified in the 1991 Namibian Census Data.

Each address was pre-designated as one which was to provide a male or female respondent, in equal proportions. The individual to be interviewed was determined by means of an adaptation of the Politz selection grid. One respondent per household was interviewed

In order to provide adequate analysis bases in the coverage areas of certain broadcasting regions, purposive disproportional sampling was applied. The imbalance was corrected in the weighting prior to analysis

NAMPS surveys were conducted in 1982, 1984, 1986 and 1988 and again in 1996, 1998, 1999 and 2001.

The following readership questions were asked:

o   6-month filter (same definition as for AMPS)
o   Frequency
o   Recency
o   Reading days
o   First reading
o   Origin
o   Thoroughness

Readership was estimated by the use of the "first reading within issue period" method.

Other media covered:

- o   Cinema
- o   Radio
- o   Television
- o   Outdoor

The product and activities questions were similar to those of the SA AMPS. The questionnaire was translated into 10 languages.

Kenya

The universe represents adults 15 years and older, and an area stratified sample of 2007 respondents (in 2004) was used. The sample was stratified by urban/rural and households were selected at random. A Kish Grid was used to select the respondent (one per household). Over-sampling was done in urban areas. Clusters of 4 were used.

The following readership questions were asked:

- o   Awareness of publications (un-aided followed by aided recall)
- o   Ever read filter
- o   Frequency
- o   Recency
- o   Origin of copy
- o   Current or old copy
- o   Which publication would you like to subscribe to?
- o   Thoroughness

A 7-day readership diary was also been placed with the radio and television diary at the end of the interview. The dairy asked about titles read each day, section readership, and origin.

Other media covered:

- o   Cinema
- o   Television
- o   Telephone directory
- o   Internet
- o   Outdoor

The rest of the questionnaire contains information on the use of financial services, product usage and purchase, durable items in home, branded cell (mobile) phone questions, activities and lifestyle questions, television viewing and radio listening via call-ins, sms or e-mail. They intend to also include branded product information in future.

Tanzania

The universe represents adults 15 years and older, and an area stratified sample of **2039** respondents (in 2005) was used. The sample was stratified by urban/rural and households were selected at random. A Kish Grid was used to select the respondent (one per household). Over-sampling was done in urban areas.

The following readership questions were asked:
- o   Awareness of publications (un-aided followed by aided recall)
- o   Ever read filter
- o   Frequency
- o   Recency
- o   Origin of copy
- o   Current or old copy
- o   Which publication would you like to subscribe to?
- o   Thoroughness

A 7-day readership diary was also placed with the radio and television diary at the end of the interview. The dairy asked about titles read each day, section readership, and origin.

Other media covered:
- o   Cinema
- o   Television
- o   Telephone directory
- o   Internet
- o   Outdoor

The rest of the questionnaire contains information on the use of financial services, product usage and purchase, durable items in home, branded cell (mobile) phone questions, activities and lifestyle questions, television viewing and radio listening via call-ins, sms or e-mail. They intend to also include branded product information in future.

Uganda

The universe represents adults 15 years and older, and an area stratified sample of **1811** respondents (in 2004) was used. The sample was stratified by urban/rural and households were selected at random. A Kish Grid was used to select the respondent (one per household). Over-sampling was done in urban areas.

The following readership questions were asked:
- o   Awareness of publications (un-aided followed by aided recall)
- o   Ever read filter
- o   Frequency
- o   Recency
- o   Origin of copy
- o   Current or old copy
- o   Which publication would you like to subscribe to?
- o   Thoroughness

A 7-day readership diary was also placed with the radio and television diary at the end of the interview. The dairy asked about titles read each day, section readership, and origin.

Other media covered:
- o   Cinema
- o   Television
- o   Telephone directory
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The rest of the questionnaire contains information on the use of financial services, product usage and purchase, durable items in home, branded cell (mobile) phone questions, activities and lifestyle questions, television viewing and radio listening via call-ins, sms or e-mail. They intend to also include branded product information in future.

12.   Pan African Media Research Organization (PAMRO)

PAMRO was formed in 1999 in Johannesburg, with the following objectives in mind:

The creation of a forum for industry organizations, media research providers, media owners, marketers and advertising agencies in different African countries to exchange knowledge and to learn from one-another's successes and failures, and to ensure the highest quality of research and to harmonize African research methodologies so that we will eventually have a continental media research database.

The latter will make Africa the leader in the world in providing a continental research database for the growing number of global media owners, marketers and agencies that operate across borders. The Indian Ocean Islands adjacent to Africa (Mauritius, Madagascar, Seychelles etc.) are included in all PAMRO activities and PAMRO members subscribe to the rules of market research bodies such as those of the World Organization for Research Professionals (ESOMAR).

At its 5th anniversary in Douala in Cameroon the following achievements of PAMRO were evident:

- o   Only eight countries and 27 delegates participated in the founding meeting in 1999.

- o   The only item on the programme that year was the activity reports from each country.

- o   The founding meeting was also the only event for the year 1999.

  o Since then a partly bilingual Website (English and French) has been developed with amongst others the annual meeting report, country activities and presentations included.

  o A three category membership structure has been introduced to provide for corporate, individual and student members.

  o A message from the President and regular newsletters are used to communicate with members.

Measured against the objectives set in 1999, the following progress was reported:

  o The annual meeting, the PAMRO Website and the growing number of one-on-one communications, the latter mostly sourced from the Website and then followed up by e-mail, were regarded as progress with **the creation of an effective forum for communication within Africa**.

  o The acceptance of the highly regarded AMPS methodology that has been developed for African conditions over a period of many years can be regarded as an indication that African countries are striving for **high quality media audience and products/brands research.**

  o Regarding the third objective namely **harmonization of African media audience and product research,** a paper was presented at PAMRO that not only suggested using the same questions but also the same answer categories. We are currently working towards this ideal and it was also agreed to develop a core questionnaire that can be used in multi country research.

  o As far as **professionalism** is concerned, the meeting reconfirmed that the confidentially of data must be respected and undertook to protect the interests of all parties. It was already agreed at the founding meeting to subscribe to the ESOMAR code of ethics.

  o During 2005, PAMRO was registered as a not-for-gain Section 21 company in terms of the South African Companies Act. The Memorandum and Articles of Association were tabled for approval during August 2005 at our 7th annual PAMRO meeting in Zanzibar, Tanzania.

13. Future Challenges For Media Audience Research In Africa

Unsurprisingly, the problems of Africa are not that dissimilar to those found in other parts of the world. Maybe the complexity of research in developing countries is often more daunting then in those countries with fewer or only one language. Maybe research is more difficult because of the greater variety (cultural and other) often encountered in these countries. The fact of the matter is however, that we have started to develop our own unique solutions for our continent and all indications are that we will see better and better research conducted in Africa in future.

The most important issues facing us are:

  1. <u>Funding</u>

  The levy system is currently under threat as Print Media South Africa has decided to pay a fixed amount which is about half of the levy that was previously paid. Obviously, as the other media are still paying the 1% levy, this can also be regarded as a threat to the SAARF JIC system as some members are paying less than others. However, the SAARF management is currently negotiating with the leading print media owners to convince them to contribute more.

  Funding in most other African countries is even a larger challenge than in South Africa.

  2. <u>Sample Size</u>

  The funding issue discussed above directly resulted in a reduction of the AMPS sample, and the sample for AMPS 2005 has been reduced from 24 800 for AMPS 2004 to 12 400. Apart from the normal implications of a smaller sample, this will lead to less titles being published as the sample for relatively smaller titles will not qualify for reporting. SAARF will also have to reconsider the minimum qualification level on circulation to be required for inclusion of a title in AMPS.

  None of the other African countries can afford samples of similar size to AMPS, while many of them have more variety in their universe as a result of many languages, some of them far more than the 11 of South Africa.

3. <u>Frequency Of Publication</u>

AMPS was published twice a year from 1997 until 2003, but since 2004 the fieldwork has been reduced to the first half of the year and frequency of publication was reduced to once a year. Until AMPS 2004 the results were published on a 12-month rolling basis, which will now be extended to 24-months. The negative implication of such a longer waiting period for a new title before it gets published and the age of the data is evident.

Only a few other countries publish once a year and there are even some that publish less frequently.

4<u>. Fragmentation</u>

The South African media market is becoming more and more fragmented which increases the demand for larger sample sizes. Unfortunately, no information on this trend in other countries is available.

5<u>. Globalization</u>

Digital Satellite television (DStv) and the Internet are not alien to Africa. MultiChoice, the provider of satellite television in South Africa is active in the entire sub Saharan Africa. Regarding Internet, many of the people on the PAMRO mailing list in the early days did not have an e-mail address. E-mail is now the accepted way of communication.

6. <u>Utilitarian Approach To Research</u>

Unfortunately, at least in South Africa, when bottom lines are getting thin, the research budget is the first to be cut as many decision makers do not believe in the value of research. As there is a lag effect in the impact that research can make, the lack of research is only experienced when the damage has been done. SAARF is concerned that the reduction in the AMPS sample will be detrimental to print as other competing media are spending much more on research.

7. <u>Change From Traditional Media To Direct Marketing, Sponsorships, Etc</u>

Below the line media in South Africa is growing, including alternative media such as television screens carrying advertising at petrol filling stations and post card racks at sport bars, restaurants, etc. Together with media fragmentation, this obviously, is placing strain on the traditional mass media

8<u>. Response Rates & Quality Of Data</u>

The growing refusal rate is a global phenomenon, but in many African countries there are also contributing factors such as security measurers (e.g. electric fencing, security walls). We have evidence from two occasions that a high substitution level are biasing results as this increases the number of 'easy to contact' respondents in your sample.

9.   <u>Exploitation Of Data</u>

As access to data using an increasing number of platforms (internet, websites, and software packages) are increasing, the ability to utilize the results better also increases, provided that potential users are aware of the results. The secret is in good marketing. As the SAARF data are in the public domain, SAARF gets more and more requests for AMPS data from outside the advertising, media and marketing industry. The largest part of these enquiries is students using it for study purposes.

In most other African countries, the results are proprietary and not accessible by non-subscribers.

For more details about SAARF and PAMRO visit us at www.saarf.co.za or the PAMRO Website at www.pamro.org

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