

Is SA entering a research wasteland?

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Key broadcasters quit the South African Audience Research Foundation - the independent research body mandated to find common currency for audience measurement in SA's media landscape. The exit will happen in December 2014. My plea is for the decision to be reversed, and for marketing industry decision makers to keep this debate alive.

The marketing industry body charged with creating a common currency for this country's media marketplace has been in the news again, this time because of a spat that resulted in a walk out by the broadcasting industry.

Broadcasters resign

The National Association of Broadcasters (NAB) together with the public broadcaster (SABC) and this country's only free to air TV station (eTV) resigned from the South African Audience Research Foundation (Saarf) in June 2013, after the broadcaster's demands for greater representation on the panel that deals with television audience measurement figures was not agreed to. The move will see the broadcasters leaving SA's research body in December 2014 - a move that heralds the fragmentation of audience research in this country.

Saarf oversees research on broadcast viewership (amongst other media measures), and this audience measurement is called TAMS, which is short for the Television Audience Measurement Survey. This survey collects three types of measurement data on television - the live viewing of television; viewing on the same day as live; as well as a seven-day measure of consolidated viewing. In its communication with Saarf outlining broadcasters' concerns, the SABC, NAB and eTV stated that they had "concern for the integrity of the RAMS (Radio Audience Measurement Survey) and TAMS audience research" and called for an audit of RAMS. An audit of TAMS is already underway.

The nature of TV

The challenge for Saarf and the research industry is the changing nature of television. Like the news and other print media, broadcast content is migrating to digital platforms which means the nature of how audiences are measured will be forever changed. The very nature of the broadcast model itself is fragmenting.

At the beginning of 2013 the TAMS panel for the viewership research was subject to an international audit with a view to improving any shortcomings that the survey may have had, given that the foundation wanted to expand the TAMS panel to some 3,000 households.

An independent, international body was appointed to do the audit and the results were presented to the board in April 2013. The independent auditor is a French measurement body, and its finding was:

"Based on its auditing verifications and analysis, the CESP considers that the methodology of the South African Television Measurement System corresponds to the international best practices on both Establishment Survey and TAM Panel and that they are comparable to similar TAMS in other countries, but recommends certain improvements to both surveys."

The auditors also stated that *"...in the case of the South African panel, we believe that the problems encountered are not exceptional. We found all of these kinds of issues in many audits we have conducted abroad. These problems can be improved, step by step, by following our recommendations."*

Ratings drop, crisis ensues

eTV and the SABC's gripe is that they experienced an unexplained drop in ratings - more particularly in the low to middle income groupings which is very much those broadcast channel's staple audience.

The 2012/2013 financial summary published by Saarf shows that the investment in the TAMS or TV audience measures is well over R40 million for the past fiscal year. Saarf is financed by the industry through an endowment that is given to it by the Media and Marketing Collection Agency (MAMCA) and Print Media South Africa, and last year its total income and expenditure was set at just over R90 million.

This isn't the first time that Saarf or the industry body that collects money from media partners to fund it, have lurched into crisis. In 2009 NAB conducted research that revealed that with TV's new shifting digital platforms a new funding model would be required for research. In 2010 the instability of the SABC put funding under threat; whilst the next year there was another funding crisis. As 2011 rolled into 2012 there was yet another crisis - that time the threat was about outdoor, broadcast print media representation pulling out of the Media and Marketing Collection Agency (MAMCA) - the body that is used to collect levies to fund Saarf.

Self-interest trumps common cause

What has largely underwritten all these problems is the inability of the SA media and marketing sector to unify and find consensus. As recessionary environments have bitten deep self-interest in this industry has trumped common cause.

At its heart, the type of research that Saarf does is all about underscoring the effectiveness and efficiency of the media that advertisers invest in, by finding a common currency that enables the comparison of disparate mediums. Although one has to concede that Saarf hasn't been without its problems, exiting the foundation at a time when the organisation is implementing wide scale improvements doesn't make sense.

Digital age or dinosaur age?

The challenge for Saarf has been the splintering of platforms following the digital revolution, which has challenged the foundation. At one time Saarf was the dominant and de facto measurement for media in South Africa, but the rise of digital has weakened this position.

The question is, do we accept that Saarf is a dinosaur and that the fragmentation that will ultimately weaken the foundation's influence is a natural progression? My answer is a clear and very adamant no. Although Saarf has its challenges, fragmenting to the point where there is no foundation that oversees a uniform or holistic view of market measurement is a bad move, and will have dire long term consequences.

The broadcasters going into their own cartel to do their own research doesn't make any sense either. What advertisers need is independent research that is credible and that offers a global view of the media landscape - which is exactly what Saarf does.

Regardless of the digital television revolution, TAM remains a standardised global measure, and a common currency to measure the effectiveness of investments made in TV campaigns. This should obviously remain an independent measure to insure the credibility and reliability of the measure. Further the fragmentation of Saarf would likely see the loss of specialised TAMs skills at an independent industry body level.

Fragmenting audience measurement won't help

Instead of fragmenting research, the marketing, media and advertising industries should be hard at work to unify and create a common currency for audience measurement that expands to integrate digital and mobile platforms.

The exit of broadcasters from Saarf is incredibly self-interested and short sighted. How will the industry and the brands that the industry serves be able to trust data that isn't recognised as objective, but instead is generated from a source that

serves broadcasters?

Credible research houses the world over have thrown their weight behind neutral and independent industry solutions to the measurement of television audiences. Nielsen - a global giant in the sector states: "As consolidation continues to sweep through the television advertising industry, and more and more companies establish a global footprint, the need for homogeneous multinational audience research will continue to grow."

The shame for South Africa is that fragmenting audience measurement won't help the industry at all. Let's put self-interest aside for the common cause of growing South Africa's media sector together. Let's work through the challenges we have without abandoning Saarf, which would have serious, long-term consequences on SA's advertising landscape.

The fragmentation of SA's media measurement will ultimately hurt brands the most - the very clients that advertising agencies, research houses and media owners and bodies are meant to serve. The result could be the creation of a research wasteland where independence and data integrity may be lost.

ABOUT ORESTI PATRICIOS

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