Day 1: Ways of measuring media audiences

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The 14th Pan African Media Research Organisation (PAMRO) and All Africa Media Research Conference is currently going on in Uganda's capital, Kampala. Day 1 of the conference involved engaging discussions on ways of measuring media audiences. While appreciating the dynamic landscape of media audiences in the African continent, research experts and media managers present acknowledged that media consumption in Africa is evolving fast and social media has further complicated media consumption patterns. The meeting has attracted over 100 delegates from around the world who are looking at various aspects of media research under the theme: 'From Local to Global: Media research in a developing world.'

The PAMRO conference kicked off with a challenge from Godfrey Mutabazi, executive director of Uganda's Communications Commission, who noted that although a lot of research is being done in Africa, it is not being implemented because of lack of collaboration among the key stakeholders. "Research should be taken to the next level of implementation," he said, adding that research experts should develop solutions and applications to serve the growing needs of the people.

Media consumption is changing

The key highlight of Monday's presentations was the rapidly changing media consumption habits and the various methodologies being used by research companies and media houses to measure media audiences. Audiences around the world now enjoy access to a wide variety of media that they can consume and through various platforms.

In Africa, the mobile phone was noted as the fasted growing media. It is worth noting that for every 10% of mobile penetration in a country, its Gross Domestic Product (GDP) registers a 1.5% growth. In Uganda, confirmed Mutabazi, mobile penetration has been growing steadily in the last five years.

Seeing Africa differently

In his presentation titled: 'How to see Africa like you have never seen it before', Chris Maroleng, Africa editor: Head of Department eNews Africa, South Africa, noted that for a long time, Africa has been presented in a very stereotypical fashion.

"This stereotype paints Africa as a place that is ravaged by famine, disease and conflict but when you look at the 54 African countries, that is not the case."

Maroleng set the stage for the important role research plays. "Let us stop generalise. People see Africa and only talk about resources, oil..." Indeed, Africa's image is no longer about doom and gloom. While countries in Europe are registering negative growth, many African countries are growing. "Foreign Direct Investment has overtaken Aid. Remittances are increasing as more Africans overseas believe that Africa is the place to send money to."

Looking at Africa, the picture of media consumption keeps changing. This is mainly driven by the internet and mobile. "The investment in communication infrastructure has seen an increase in the use of smart phones, tablets and even 'pay as you go' TV mainly facilitated by mobile payment services like MPesa," noted Laurence Chausson, international marketing director, Kantar Media Audiences in the UK.

Amalgamation of traditional and new media

Arguably, we are seeing the intertwining of traditional media and new media. Television content is now being accessed online by more people. In Kenya for example, all TV stations stream their news online and also have a YouTube channel where broadcasts can be accessed real time or long after the broadcast was done.

While the digital migration 2015 deadline is fast approaching, media researchers have placed their bet on mobile as a major factor that is influencing how media content is being consumed.

"Although the TV will remain the 'main' screen, expect a great leap frog with mobile devices like the tablet. Be ready to start measuring their consumption," noted Chausson.

Audience measurement technology

As the landscape changes, media managers and researchers now have to deal with new challenges as the traditional instruments of research are put to test. While before most households had one TV set, now many homes have more than one.

How do you measure who is watching what and when? How do you measure media content out of home, mobile, digital, on-demand, and the blend of different types of media on a variety of platforms? These are the questions delegates found themselves deliberating over.

"One of the main challenges facing TV research is the switch over from analogue to digital," noted Romi Hofer, manager of Global Business Development TV, GfK, Switzerland. The company has had to come up with new technologies of capturing media consumption. One of them is a digital watch that the respondent wears and is able to pick signals of the different TV stations. "TV research must now provide intelligent data," she said.

Various data collection methods like the diaries have to be supplemented by new audience measurement technology as programmers and advertisers are now demanding real time data on who is watching their content. Because of the complexity of how audiences are consuming media, Nielsen South Africa is using people metre panels and installing in homes. "For big events like the Olympics, clients want to know the viewership numbers instantly and with the metres the data can be captured very easily."

Solutions by broadcasters

Broadcasters like DStv have developed their own audience measurement technology - the DStv-i Return Path that is able to tell what subscribers are watching real time. According to Brenda Wortley, director of Strategy & Research at DStv Media Sales, South Africa, the new technology is being rolled out to Kenya and Nigeria in the coming months. "Broadcasters now have to be accountable to advertisers and be able to programme content based on needs," noted Wortley.

While broadcasters like DStv have developed their own audience measurement technology, SABC (South African Broadcasting Corporation) has taken a different approach and is segmenting audiences using attitude segmentation. According to Angy Hammond, head of Market Intelligence at SABC, through the SAARF Attitude segmentation model, the broadcaster has been able to segment its audiences into six groups namely: Nation Builders, Now Generation, Established, Global Citizens, The Rooted and the Survivors.

"Through this, you are able to understand what motivates your audiences and hence give them the right content."

While technology is helping media managers and researchers understand consumption habits and trends, there are still limitations like cost. It is very expensive to invest in technology and secondly, power outages in many parts of Africa make it difficult for certain technology to be employed effectively.

Understanding media impact

Although it is important to know who is consuming what media, measuring the impact of messages is a challenge researchers have to contend with. "You have to incorporate multiple data inputs like quantitative and qualitative research methods," noted Vivien Marles, managing director of InterMedia Kenya.

There is often confusion between media exposure and media engagement. While media messages may be received by a mass audience, what they do with the message is what is important to researchers and content developers. According to Marles, components of media impact include: understanding of motivation and awareness, exposure, experience - how audiences respond to content either negatively or positively, and impact. She says the key is to understand the influencers in a media eco system. For example, influencers online are people with a large following, who modify media messages and talk about you.

Understanding social media

Measuring the impact of messages on social media is a nut that researchers are still trying to crack. A presentation from Coca-Cola on their online brand engagement strategy revolves around storytelling and creating an experience.

"We want the consumers to hear the stories, experience and go ahead and share them with their friends and family," says Judy Kairo, integrated marketing communications manager, Coca-Cola Central East & West Africa Business Unit, Kenya.

In her presentation, Kairo acknowledge the power of social media, 70% of their advertising budget still goes to traditional media. "Technology is impacting brands and we have to play in that space," she says, noting that while the Coca-Cola Facebook fan page has 46 million likes, only one percent engage or contribute to the page.

"What this means is you have to make your stories purposeful so that people engage with it more."

There are seismic shifts in media and news consumption due to technology. For researchers, the challenge is how to keep track of consumption and impact. Indeed, the future of audience measurement won't be a revolution, but an evolution.

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