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Thought Leader

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Radio Research trends in Europe

By Andrea Rademeyer, CEO of Ask Afrika

There is a lot of turmoil is in the global broadcast research industry. The old economic adage came to mind- if the US sneezes, we catch pneumonia; having said that, turmoil can be good. Researchers are very courageous in talking to measurement failures or experiments - all in the quest for improving research insights for advertisers ultimately. This turmoil is, however, not politicised, possibly because in Europe and the US the industries have been structured transparently and collaboratively through various bodies - decades ago already. In South Africa we have now reached this point, which still feels quite raw to some constituencies. Most joint industry committees (JICs) experience the confluence of money, politics and technical issues - hence the responsibility to research companies to drive transparency.

The global broadcast media research landscape is very dynamic, with tenders all over the world, particularly in emerging markets both in East Europe, as well as other continents. Traditionally the US and UK have dominated the research market. In a panel of CEO's at the latest ASI European Radio Symposium held in Venice, the various companies claimed their competitive advantage as follows: Kantar focuses on retaining client trust- they have recently won business in Romania, Turkey, UAE, Switzerland; Nielsen maintains its tradition of having the best scientists and owning the TV measurement space; GfK have a bursting pipeline from countries demanding an independent service having made big investments in hard- and software. The Scandinavians are highly innovative, attracting attention due to their appetite for trying new methodologies which is linked to their society having evolved to very high-tech households and individual application.

South African broadcasters are grappling with re-defining their research landscape so that both RAMS and TAMS are not only up to date with international standards, but so that the data accurately reflects audience behaviour. One of the big changes, as informed by the SAARFF Future-Proofing project could be that AMPS is housed in two surveys, namely an Establishment Survey and a PAMS. An Establishment survey is essentially a dedicated, bespoke sample survey that should be set at as high a standard as practicable to produce robust, accurate population data and to provide a representative pool of households for recruitment to, and maintenance of, a TAM panel - it importantly seldom focuses on product and brand research.

Globally, these are contained in a separate survey, such as TGi. When the ES and TGi dovetail, it could have huge cost benefit for the industry. *Ask Afrika* own the local licence for TGi (Target Group Index) and is thus ideally placed to conduct the Establishment Survey which will serve as the point of departure for inter-media comparison - and will soon go out for tender. TGi is globally renowned, regularly updated, has reliable, extensive samples and is able to deal with Big Data. With so many of the SAARFF measurements having been audited, Ask Afrika also had an independent audit of the TGi by UK expert Tony Wearn.

In his report, Wearn states the following, “The overall quality of the sampling frame is of a high standard. The immediate census-supplied criteria of population size and administrative geography (province) are deployed in a manner that ensures a suitable distribution of sampling points. As such it eminently qualifies as a high standard ‘stratified random sample’ that is, in itself, crucial to promote representativeness of the achieved sample.” He comments further that, “The weighting scheme is highly developed and ‘fit-for-purpose’. It has been informed by learned statistical papers on the subject and can be considered of a high standard relative to the design and construction of the survey.”

The conference looked at the significant changes that radio research is undergoing globally. Technological advances have facilitated the introduction of new types of content like digital stations and apps, as well as new ways of delivering content like DAB+ and streaming. Radio is going multi-platform- it’s not about a piece of furniture anymore. Personalised radio advertising is the future. Radio fights on content and digital fights on technology. Much experimenting is happening and the popular adage ‘watch this space’ applies. Apple radio is perceived as a real threat and GPS is key to signed-in audiences. In-dash digital radios increase car purchase intent by 14% - car manufacturers are working on a beautiful hybrid interface for cars.

The message to marketers is that social networks are the new gold. Twitter was listed in November 2013 and its market cap in one day was bigger than that of WPP. However, it's a pipedream to think of all radio listenership on the internet - the bandwidth even in the UK would not be sufficient. Internet will make radio unfashionable, but not kill it. Online radio in the US has tripled over the last 10 years to 15% now being exclusively online - mainly for more affluent listeners.

Some of the main take-outs for radio research were that the days of black boxes is over, there is a new quest for transparency across the industry- clients have smartened up and want to be part of the methodological discussions. A research solution suggested was to embed pilots in the measurement process, so as to continually get feedback on innovations. Online testing could make up at least 20% of the interviews. The radio research fraternity needs to agree on definitions for listenership with respondents - otherwise some of the findings will be wrong. Adspend is out of balance- simply because radio has an image problem. Radio ROI is highest in government and retail, and then entertainment, the exception is FMCG. Ultimate success lies in the audience ratio - radio share should be close to 20%, not 13% as it is in SA and 6% globally.

It is somewhat comforting to realise that it is not only our local media research that is going through change and seriously considering the best path forward, to navigate through the new world of the every changing media landscape. It was a great privilege to be able to attend this conference which was very professionally organised, with high calibre speakers, who were willing to share lessons learned.

ENDS

About TGi and Ask Afrika:

TGI research, for which Ask Afrika own the South African copyright, is a single source sample of 15 000 000, it has a global geographic coverage of 67 markets and measures services and products, media and brands. Ask Afrika's knowledge of brands is extensive and as owners of the local TGi license, they are the leaders in brand expertise in South Africa. TGi can provide a commercial alternative to industry media measurements and is the perfect vehicle for brand positioning.

Over a period of almost two decades, Ask Afrika has grown to be the largest independent South African market research company. The company focuses on local relevance, benchmarked against the global context. Ask Afrika is a member of WIN/Gallup International and ESOMAR. Apart from their large South African footprint, Ask Afrika also operates in a dozen African continental territories.

Ask Afrika is well known for delivering strategic and large scale field projects and for creating benchmarks for industry. With regards to service excellence Ask Afrika is the preferred research partner across industries to co-craft customer service strategies through meaningful research methodologies across the value chain and customer service touch points.

Their exclusive product suite includes the Ask Afrika Orange Index®, Trust Barometer™, Radio Moods™, TGi Icon Brands and TGi (the Target Group Index). Ask Afrika is proud of their exceptional service delivery with offices based in Pretoria, Stellenbosch and Austria. For more information please visit the website:

www.askafrika.co.za .

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For further information, please contact Daya Coetzee

daya@stonesoup.co.za, (011) 447 7241