DEMOCRACY IN MEDIA RESEARCH

POWER OF THE ‘MARKETS’

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THE MEDIA INDUSTRY LANDSCAPE DEMANDS INNOVATIVE AND RESILIENT RESEARCH APPROACHES

FIT-FOR-ALL stakeholders is the ideal method

- In developing a common and comparable media currency for every market

However, IDEAL is a MIRAGE

- The cheese keeps on moving
- Each African market has its share of cultural and marketing peculiarities to manage

Still, IRREDUCIBLE minimums are expected from any research work.

- MUST be scientific, verifiable and can answer basic questions on media access and consumption per market

- Mediocrates

MORE THAN 'GOOD ENOUGH'

On The Road to Best Practice

GLOBAL AUDIENCE MEASUREMENT STANDARDS & TRENDS

In developed markets, many barriers have been overcome through time

Western nations and some developed Asian Nations e.g. Japan are more homogenous

Makes it easier to agree on approaches and outcomes;

- JICs are functional.
- Budgets are available.
- Media currency is acceptable and respected.
- Continuity/tracking is assured.
- Data piracy not a threat.

IMPORTANT!

Industry bodies in developed markets do not seek to offer all solutions at once.

What Ipsos does across the 'other' world

- UK - Radio, digital, ooh
- Netherlands (JIC),
- Australia – OOH, digital
- South Africa – Radio audience measurement (BRC)

ACROSS SSA, CHALLENGES OF AUDIENCE MEASUREMENT ABOUND…

We need to overcome several barriers:

2000

Number of distinct languages

Africa cultural homogeneity is compromised

Scarcity of Financing reduces attraction and commitment to regular data production

Our diversity does complicate audience measurement

- Refusal to take calls from strangers – affects telephonic interviews e.g. in Ghana
- Self-filling e-diaries failed in Kenya – culture was partly to blame

45 Number of **indigenous languages** in Kenya, amplified across Nations

Non-functional or non-existent JICs

WHICH RESULTS IN…

Difficulty in adapting
western developed solutions into the African context

Lack of appreciation
for data value

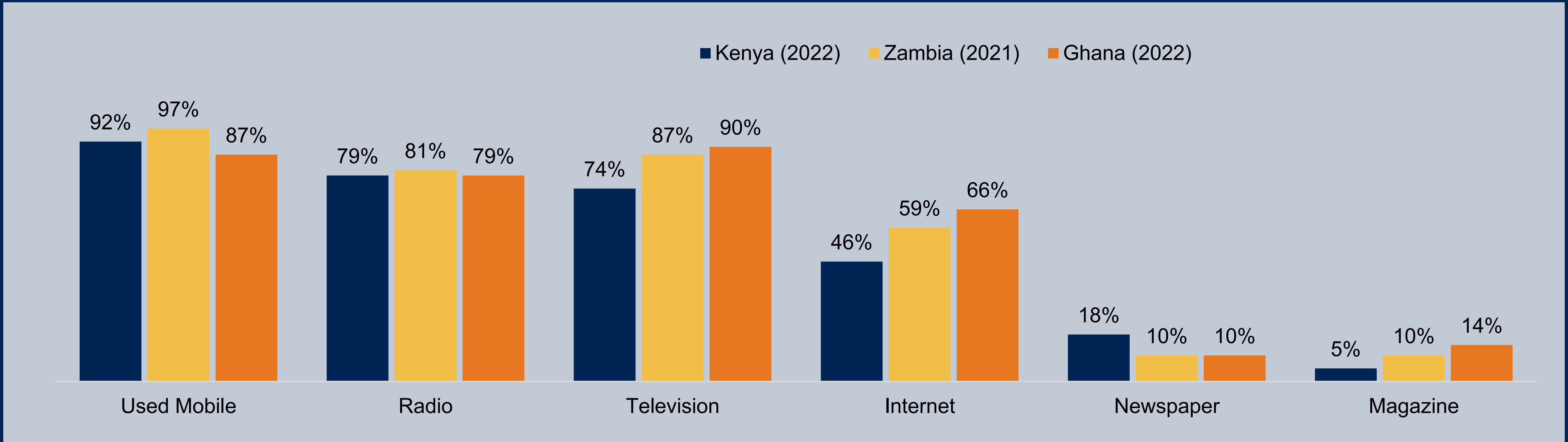
Lack of consistency
Some markets have outdated information; or none at all

Because of that, audience researchers **seek to offer all solutions** at once when chance avails – TV/Radio/Print/Online

Data Piracy
is real and rampant – aggravated through social media

THE LANDSCAPE IS SIMILAR, EAST, WEST OR SOUTH: DIGITAL IS HOT ON THE HEELS OF TRADITIONAL MEDIA

Tools and approaches are not identical most of the time; hence a challenge when trying to compare across markets e.g. Kenya Internet penetration is higher than either Zambia or Ghana but the different approaches give varying results, meaning that inter-market comparisons must be interpreted within context



Media Touchpoints access levels per market

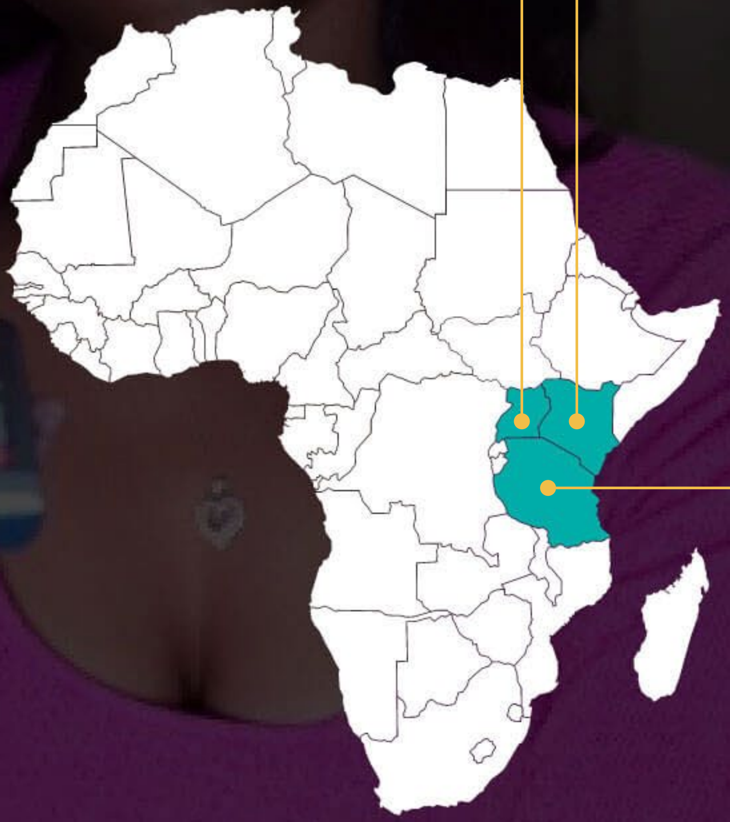
UNIQUENESS IN OUR MARKETS...

Similar methodologies adopting different approaches in the same region

UGANDA - NAMS

n = 3,000

- Bi-annual now
- CATI cross- sectional study
- Starting biannual from 2022
- Detailed content with a day after recall component
- Started dashboard application



KENYA - IKAT

n = 2,500

- Quarterly tracker
- CATI weekly panels – short longitudinal study
- Transformation from Self-filling mobile app survey
- Experimented with pure longitudinal surveys before
- Collect continuously from 2023

TANZANIA - TOUCHPOINT

n = 2,000

- Quarterly tracker
- CATI
- Mainly Focused on radio and TV
- Always cross-sectional

WE KNOW WHERE THE PROBLEM LIES

CHANGING **NEEDS!**

Emerging data needs

- Overnight data
- Planning need is now beyond TV & Radio (includes digital & OOH)
- More granular/ detailed
- Big data synchronization (Adspend + audience + social listening + insights)

Challenges to overcome

- Best method and technology
- Weak/non-existent JICS
- Cultural diversity
- Syndicated practice must make business sense
- Break data silos

Next steps in evolution

- Adopt to new ways - MediaCell
- Increase uptake to curb data piracy
- Adopt reasonable approaches
- Apply large samples
- Utilize merging technologies suitable for SSA e.g. dashboards

IMPORTANTLY, EVEN WITH FREEDOM, WE ARE NOT IGNORING THE EVOLVING CONSUMER SPACE AROUND 3A'S

AVAILABILITY

There is a wide array of media touchpoints that are available to the consumer

- Radio
- TV
- Newspapers
- Magazines
- Internet access
- Mobile phone (basic, smart, etc)
- Tablet

OPPORTUNITIES IN TARGETING / GROWING NEW STREAMS

ACCESSIBILITY

- While availability may not be the problem, accessibility is determined by factors beyond
- Power connections
- Engagements
- Social / societal norms
- Bandwidths / geo-coverage
- Cost

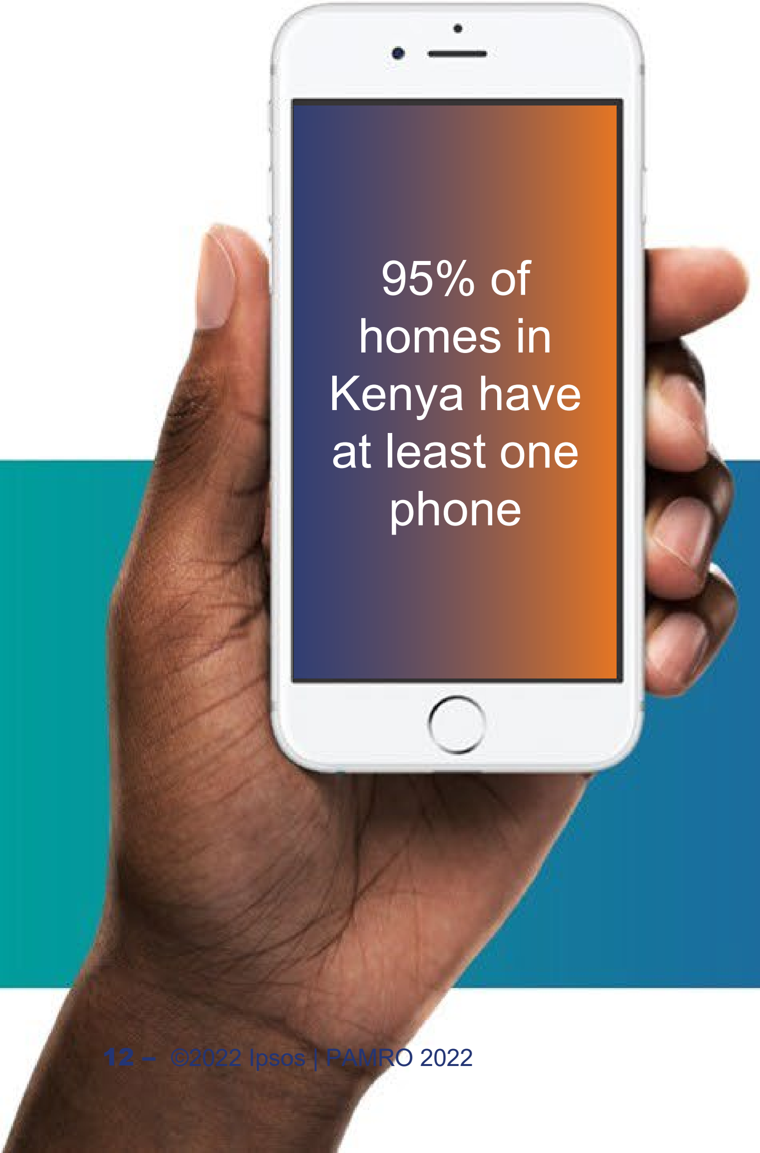
OPPORTUNITIES IN GROWING THE PIE OF AUDIENCE

AFFINITY

- A consumer may have no challenges with availability or accessibility of a media platform. However, they will always have preferences based on convenience, ease of use,
- Mobile phone over TV
- VOD over telenovela,
- Channel A over channel B etc!

OPPORTUNITIES IN PLATFORMS

CELL PHONE USAGE HAS NEARLY ATTAINED UNIVERSAL LEVELS IN SOME MARKETS…EXAMPLE, KENYA



CHANGED

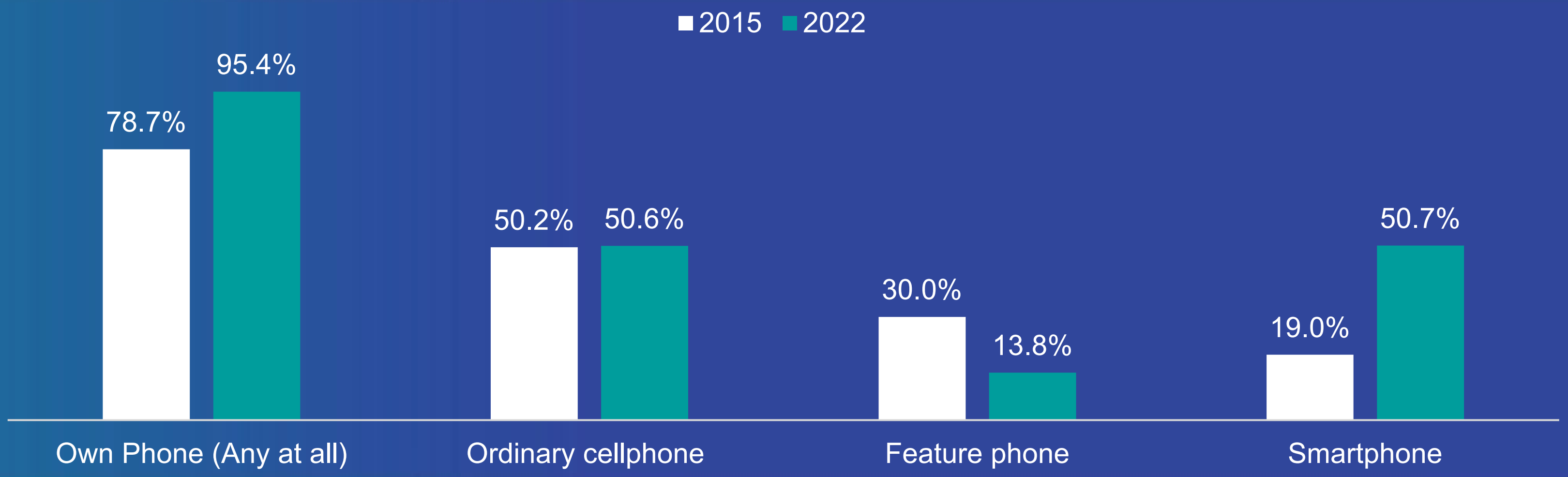
- Increase in mobile device ownership (from 79% to 95%)
- Growth of smartphone from 19% to 51%

UNCHANGED

- Ownership of ordinary/basic phone (maintains at 50%)

OUTLOOK

- Evolution of phone devices as technology advances
- Price sensitivity in the marketplace that leads to segmentation and unequal distribution of information



IN CONCLUSION,

FOR NOW, WE CONTINUE DOING IT OUR WAY…

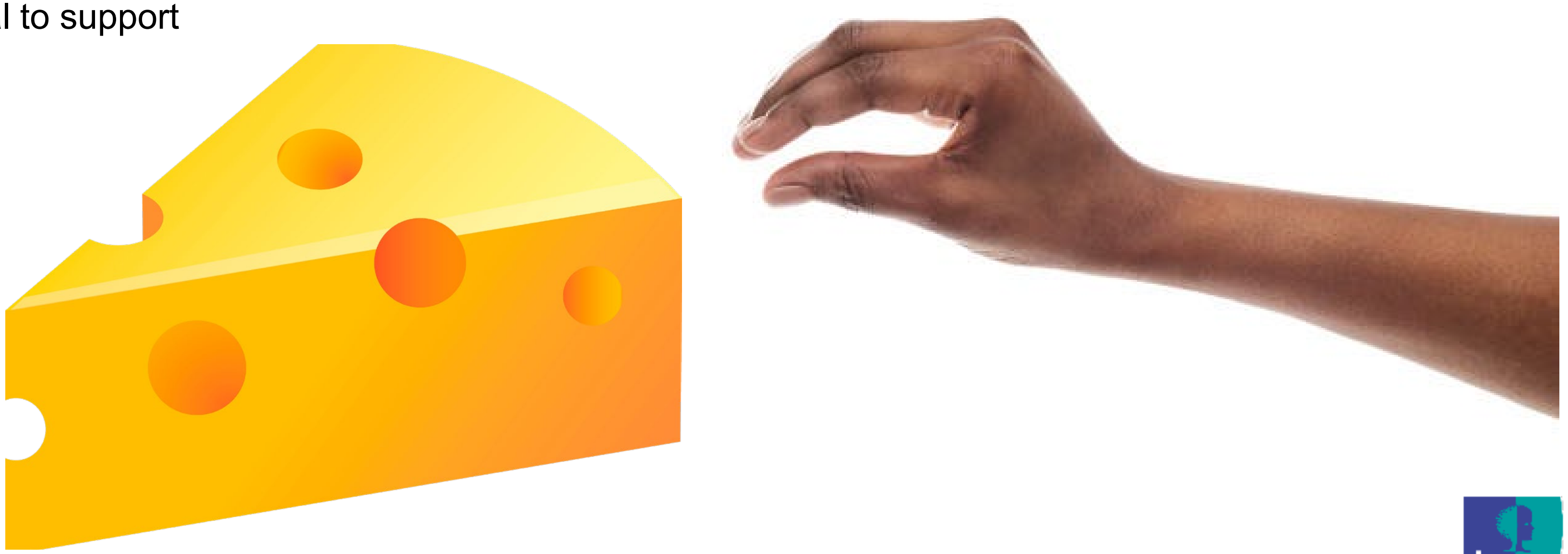
THE AFRICAN WAY

FOCUSING ON CHANGE

While change is inevitable, the key choice weapons in this continent that will help deliver globally acceptable and resilient solutions include availability of affordable data solutions and the deepening access of the smartphone gadget

Taming the **MOVING** cheese!

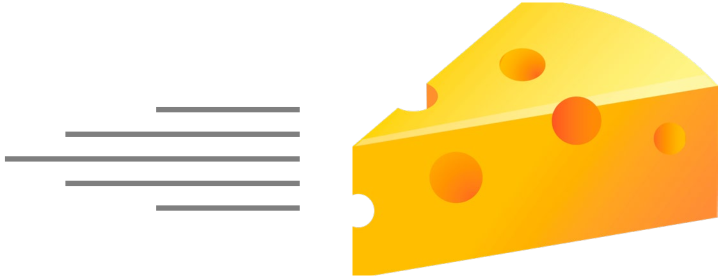
- Technological changes in measurement, new Apps will continue coming up and will keep shifting the measurement game
- Managing the low client spending on media data that sometimes lead to dishonest data trading and piracy
- Industry expectation does not equal to support



CHALLENGE: WHO WILL MOVE OUR CHEESE?

WE WILL!

In our market place but also innovatively. We MUST continue delivering home made solutions that are competitive and comparable



CHASING the cheese

- We continue eyeing and adapting to technological changes through new approaches, Apps, dashboards etc!
- Discouraging piracy by creating longer partnerships and growing trust in our markets;
- Emphasizing the need for data driven solutions

AFFILIATIONS & CERTIFICATION

- Ipsos Kenya is a key members the Market and Social Research Association of Kenya
- MSRA is an industry regulating organization that was forged to drive quality assurance.

- The world association for market, social and opinion research, unites a global membership of 4900 members from 130 countries
- The ESOMAR Membership mark signals an endorsement of ethical standards and provides a valued means of recognition within the wider marketing and research industries.

- We are ISO 20252 Certified
- Our methods & practices are as per ISO.
- We are in compliance with ISO 20152.

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

BE SURE. GO FURTHER.

GAME CHANGERS

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THANK YOU

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