

Rethinking TV audience measurement in Africa

By  Leigh Andrews

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Jennie Beck, CCO or chief client officer at Kantar Media Mena, spoke at this week's Pamro Conference on the challenges of TV audience measurement or TAMs in Africa and how the rapidly developing African TV infrastructure may turn this on its head, creating new measurement opportunities.

Beck began by admitting that while she predicted a recovery in Nigeria's market and in ad revenues across the board at the last Pamro conference, crashing commodity prices and continuing pressure on ad budgets have prompted a rethink on TAM in Africa.



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That said, Beck pointed out that while it is a specific continent market, we shouldn't speak of anything 'across Africa' as each country is separately run and tackled. There is no one-size-fits-all approach.

So, for the successful introduction of TAM measurement in any particular country, we need to remember that it would simply not be affordable without significant and growing TV revenue. That's why we need to make sure there's a cost-effective methodology, available and right for the market, along with industry commitment and buy-in from advertisers, media agencies and broadcasters alike.

Tackling the TV landscape

Beck says a good first step is identifying who has access to a TV set and who has one in their household. This alone is difficult as there are different ways of answering the question and some don't ask it at all. Their stats show the lowest penetration in Mozambique at 15%, going up to roughly 90% in SA.

“ Jennie Beck - going through TAM and it's development in Nigeria and the rest of Africa. Cc [@Kantar_Media](#) [#PAMRO2017](#) [pic.twitter.com/OSXHXREi5U](#)— Oresti Patricios (@Orestaki) [August 29, 2017](#) ”

Another key consideration is that the **digital switch-over** is making painfully slow progress at best in the largest markets in Africa. It's only been implemented in nine of those currently and completion in SA has been rescheduled yet again, now for the end of 2018. Beck pointed out the conflict here between either getting it done quickly through existing partners, or the slower route of wanting to control the process yourself. Ultimately, the digital switch will result in more channels, especially in the realm of free-to-air TV, while also increasing competition in the paid-for segment, resulting in better competition in the broadcast media overall.

Next, Beck pointed out that there is significant reach, but we need to look at how it is being monetised. A forecast of Kenya and Nigeria, for example, will highlight different trends, with Kenya's steady curve ideal for the TAM passive measure with Nigeria showing more bounce.

Looking at TV planning data then, Beck pointed out that it's not necessarily a case of starting from scratch. Some return path data or RPD exists, either through set-top boxes or panels, but this is largely proprietary data not available to the public.



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Taking this all into consideration, what's important in Africa? Beck says the answer lies in a cost-effective, flexible measurement system - especially given the current bounce in TV ad spend. In addition, it must be independent, transparent, high quality and cover as much of the market as possible. Keep in mind the big differences across the various markets - we need to respect those individual requirements and it must meet an unequivocal need within the industry so that it is paid for continuously. That's important because it's the main trending currency so it works universally and allows for even-handed buying, selling and planning.

Measuring live and time-shifted viewing

Beck called this an opportune time to introduce the set meter. It's low-cost and monitors content viewed 24 hours per day at device level, not at a person level. It is scalable as it's quite simply self-installed hardware that's plug-and-play in your TV's USB slot. As this is a passive form of measurement it means fewer operational challenges, as well as the ability to measure both live and time-shifted viewing, with the data processed overnight or in real-time. It's currently in beta testing and works with two main content detection techniques -

- **Audio detection**, which offers better granularity and matches to a reference library without broadcaster involvement, or
- **Audio watermarking** through software, which requires broadcaster commitment.

On the topic of **industry commitment**, Beck said many broadcasters say they want TAM measurement but are reluctant to put anything into practice. It needs to be a conversation held in each market and adapted to the state of each specific market. Even the most resistant broadcasters still need that competition data to stay alive.

So, are we there yet?

Not quite, says Beck. We need to hub all the data processing in one place across the multiple markets, work with pay-TV providers to collect the data and use RPD across the various markets, while also working together to find funding for a set-meter model and to watermark participating channels.



#Pamro2017: TV-viewing any time, anywhere, on any device

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"The collective is the only way to eradicate fragmentation," she ended. Without a joint industry committee and focus on audience instead of platform we are not going to get there, we need to pull together.

ABOUT LEIGH ANDREWS

Leigh Andrews AKA the #MilkshakeQueen, is former Editor-in-Chief: Marketing & Media at Bizcommunity.com, with a passion for issues of diversity, inclusion and equality, and of course, gourmet food and drinks! She can be reached on Twitter at @Leigh_Andrews.

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