



18TH PAN AFRICAN MEDIA RESEARCH CONFERENCE
Sun 27 August 2017 – Wed 30th August 2017

Vineyard Hotel, Cape Town, South Africa
The theme for this year's PAMRO conference is

“Content is king and he is one of us”

PROGRAMME

SUNDAY 27 AUGUST 2017

16H00 – 17H30 Registration
17H30– 19H30 **Ipsos Speed Networking evening**

MONDAY 28 AUGUST 2017

Chair: Joe Otin

09H00 **Official Opening – Joe Otin President of PAMRO**

09H30 **Data is becoming the oil of consumer marketing**

Data is becoming the oil of consumer marketing, yet despite the fact that enterprises can store 80% of data, only 0.5% is actively analysed. Data comes with significant challenges, but is increasingly important. Early indicators show that the advertising industry investment globally is starting to leverage this. Leana Less explores the benefits of agile marketing if done correctly.

Leana Less

VP Global Connections and Media at the Coca-Cola Company USA

10H00 **Content is king and he is one of us – or is he?**

The eve of digital migration spiked excitement around the changes we expected in television viewership in Kenya. But has it happened? Clients and agencies are abuzz with the notion of “going digital”, but how informed are they about the implications of moving advertising dollars from traditional ATL media to an evolving digital space? Kui Kariuki explores the influence of content, using research findings as a case study.

Kui Kariuki,

Audience Research Manager, Ipsos, Kenya

10h30 **Tea**

- 11H00 **Pay for content? Me? Never...**
Based on qualitative research into the under-25 market in South Africa, Samantha Loggenberg explores changes in media behavior and the impact of access to digital technology as well as the changing relationship with TV. Additionally, with the rise of VOD, we need to understand the evolution of content. This changing media environment has complex and even counter-intuitive implications for current media suppliers.
Samantha Loggenberg
Research Director, Qualitative Intelligence SA
- 11H30 **The next normal: Rise of resilience**
While modern life is challenging, music, humour and the quest for shared experiences bring us together in positive ways. Guiliana Dias reveals findings from a study in 30 countries.
Giuliana Dias
Head Research & Insights VIMNA SA
- 12H00 **Is media perceived as fake news?**
Content is being thrown at us faster than we can digest it. Multi-screening and 'snacking' behaviour have become the norm when consuming media and news, while social -media has resulted in content being spread to users without third-party fact-checking or editorial approval. As a result, unscrupulous operators use these platforms to distribute fake news and studies show the majority of people don't recognize when news is fake.
Bernice Gaum Research Executive, Ask Afrika SA
Monique Pienaar Senior Key Account Manager, Ask Afrika SA
Zerildi Pieterse Editor: Production, supplement, and features, DailySun, Media24
- 12H30 Lunch
- Chair Sifiso Falala**
- 14H00 **The African middle class**
With 54 diverse countries, Africa offers massive opportunity to marketers from a range of industries. But, it will only yield dividends if it has a strong, sizable middle class with disposable income to purchase goods and services. A middle class is evidence of an economy that has transformed from reliance on subsistence agriculture to workers in the urban-wage market. The fundamental questions are: Is there a middle class in Africa, how big is it, and how can marketers reach this group?
Nanzala Mwaura,
Director Connect, Ipsos SA
- 14H30 **How engaging are international media for the Affluent?**
International media are finding new ways to survive in the highly competitive media landscape of today, especially for those targeting the affluent population. The Ipsos Affluent Study Europe, introduces a broad set of engagement scores to show how international media are still finding ways to engage with their audiences. Some media want to excel in closeness, others want to be perceived as trustworthy, influential, inspiring or informative. Besides the more attitudinal measures we also look at more behavioral aspects as recommendation, word of mouth (on social media).
Nathalie Sodeike, Director
MediaCT, Holland

- 15H00 Tea
- 15H30 **Multimedia selection – Getting rid of ‘fuzz’ to make the media strategy “king”**
Most quantitative research is inefficient and wasteful. In this paper, Mike Broom demonstrates why this is, and what we can do about it. He defines ‘fuzz’ and explains how it can be measured, removed and harnessed to synergise media strategies. Using specially developed software, Broom shows how we can collect key data and make the deployment of new studies fast and efficient.
Mike Broom
Managing director Marketing Science
CEO – Infotools SA
- 16H00 **AGM**
- 18H30 **Nielsen Dinner at the Vineyard 18h30 Dress Code Smart Casual**
- TUESDAY 29 AUGUST 2017**
- Chair: Jennifer Daniel**
- 09H00 **TV and Africa**
TAM is developing around the world but hasn’t reached key African markets. What are the challenges, and how might the rapidly developing African TV infrastructure create new measurement opportunities?
Jennie Beck
CCO, Kantar Media (EMEA)
- 09H30 **Return Path Data (RPD) and TV Audience Measurement (TAM) integration evolving measurement to reflect consumer behaviour:**
By unlocking the promise of RPD using high-quality panels, viewing fragmentation, market economics and emerging technologies are driving opportunities for media measurement. The key is to preserve quality while increasing stability and consistency. This talk covers the pros, cons and potential risks associated with creating hybrid measurement. It also looks at the impact of Netflix and how the industry is evolving to deal with it.
Brian Fuhrer
SVP Product Leadership, National Television Audience Measurement, Nielsen, USA
- 10H00 **The total video currency for TV and online video: An advanced hybrid model**
MMS – the TV and online video Joint Industry Committee in Sweden – was tasked with launching and developing a TV currency; an online video currency; and a total video currency, covering all TV and video content across devices. Magnus Anshelm looks at the synergies between TV and online video for different target groups and evaluates the relevance for countries in Africa.
Magnus Anshelm, Managing Director.
MMS the Joint Industry Committee Sweden

- 10H30 **Tea**
- 11H00 **Views from a French Broadcaster on digital Africa**
TV5MONDE, the nr 1 satellite channel in French speaking Africa is undergoing a digital transformation. Opportunities arise with the uptake in Internet usage, yet countries are moving at different speed. How can on-the-ground research help global players optimize their digital offerings in Africa ?
Franck Buge
Research Director TV5monde France
- 11H30 **Customer Expectations in a Digital World”**
Consumer expectations are transcending traditional industry boundaries. People’s experiences are benchmarked against industry peers as well as those offered in other parts of their lives. This means that we are no longer simply competing with our direct competitors - customers are comparing their banking experiences to the ease in which you use Google or the seamless way in which you can do cardless transacting with Uber. In the customer’s mind, your business is now competing with some of the leading businesses in the world, and expects you to not only keep up - but be just as excellent! Are you ready for these new customer expectations?
Wayne L. Hull
Managing Director/ Head of Accenture Digital SA
- 12H00 **Fusion of Industry Media Data – Case Study**
Using a case study from New Zealand, Hank J Bento demonstrates how Nielsen and MediaWorks used fragmented industry research to allow MediaWorks to demonstrate their footprint across television, radio and digital. The accurate fusion of industry data can provide a complete overview of media penetration and total audience view of any given market. The result allows for better planning and strategic decisions to be made to illustrate the true performance of a campaign and not just individual medium performances.
Hank J. Bento
Assoc. Director: Analysis Software Nielsen SA
- 12H30 **PANEL discussion**
Celia Collins
Managing Director, Carat SA
- 13H00 **Lunch**
- 15H30 **Networking outing to V&A Waterfront. Buses leave the Vineyard at 15H30**
- 18H30 **Geopoll Welcome drinks at the Aquarium**
- 19H30 **Kantar Gala Dinner at the Aquarium. Dress code Smart Casual**
- 22H30 **Transport departs back to The Vineyard Hotel from the Waterfront**

WEDNESDAY 30 AUGUST 2015

Chair: Oresti Patricios

- 09H00 The new South African ESTABLISHMENT SURVEY SEGMENTATION MODEL (SEM – Socio-Economic Measure)
- Exploring the new segmentation model and the way forward with the Establishment Survey, BRC RAM and BRC TAMS.
Learnings from the Broadcast Research Council of South Africa
- Clare O’Neil**
CEO – Broadcast Research Council SA
- 09H30 Buy two get one free: Multi-country measurement and JICS
Industry groups and measurement systems have traditionally operated on a country-by-country basis, but as content becomes widely available across borders, shouldn't measurement follow? It could offer significant economies of scale and be a useful resource for broadcasters and advertisers, but requires a high-level of commitment and coordination. Christopher O’Hearn and Robert Ruud look at: conditions for multi-country measurement and offer a potential road-map forward.
Christopher O’Hearn UAE, and Robert Ruud Norway
3M3A
- 10H00 **The reading revolution: react, reposition, recalibrate**
After 40 years of a single Super JIC SAARF and a single source study AMPS, the South African media measurement research industry was turned on its head in 2015. This presentation examines how publishers reacted; formed their own JIC and began conducting more relevant research. Peter Langschmidt shares the PRC’s journey in the new multi-JIC, multi-study hub and donor research environment to reposition reading based on the quality of readers and the inherent cognitive strengths of reading vs. transitory broadcast media.
Peter Langschmidt
Publisher Research Council SA

10H30 **Tea**

Chair: Sifiso Falala

11H00 **The SA Outdoor Measurement Council's journey**

The best way to learn something is to look outside – do something, see something, read something that has nothing to do with what you know. The SA OMC journey over the past three years has yielded unexpected obstacles down the road and many lessons were learnt along the way. The presentation will shed light on some of the biggest challenges and learnings from the OMC project.

Sanna Fourie

Currencies and Field Quality, Ask Afrika SA

11h30 **Audience Wars: OOH Media Takes a Stand**

In the battle for the African consumer's attention, OOH has had one major weakness putting pressure on its prominence in advertising budgets. Last year, Max Richman (GeoPoll) and Daniel Cuende (Cuende Infometrics) presented an audience measurement solution using ESOMAR-specified best practice and placing it in a modern African context. Through the use of satellite and mobile phone technology, OOH audience measurement data, using the same units of currency (reach, frequency, GRP's etc.) is now available in South Africa and Kenya, and will soon arrive in Uganda, Tanzania and other markets. But an important question remains: What does the data tell us?

Matt Angus-Hammond SA and Akinyi Okullo Kenya

GeoPoll

12H00 **Country Reports**

Invaluable one-stop-shop for information on Media Research across the Continent

Amelia Richards

Client Service Director: Media

Ask Africa SA

12H30 **Closing Address/ Best Paper Award** Sifiso Falala, Vice President, PAMRO

13H00 **Lunch**

Speakers

Akinyi Okullo	Geopoll (Kenya)
Amelia Richards	Client Service Director: Media, Ask Afrika (SA)
Bernice Gaum	Research Executive, Ask Afrika (SA)
Brian Fuhrer	SVP Product Leadership, National Television Audience Measurement (USA)
Celia Collins	Moderator Panel Discussion: Managing Director, Carat (SA)
Christopher O'Hearn	Project Director of the consultancy 3M3A (UAE)
Clare O'Neil	CEO – Broadcast Research Council (SA)
Franck Buge	Research Director TV5monde (France)
Giuliana Dias	Head Research & Insights VIMNA (SA)

Hank J. Bento	Assoc. Director: Analysis Software Nielsen (SA)
Jennie Beck	CCO, Kantar Media (EMEA)
Kui Kariuki	Audience Research Manager, Ipsos, (Kenya)
Leana Less	VP Global Connections and Media at the Coca-Cola Company (USA)
Magnus Anshelm	CEO @ MMS AB which is the JIC for TV and online video in Sweden (Sweden)
Matt Angus-Hammond	GeoPoll (SA)
Mike Broom	MD Marketing Science/ CEO Infotoools (SA)
Monique Pienaar	Senior Key Account Manager, Ask Afrika (SA)
Nanzala Mwaura	Director, Ipsos Connect, South Africa (SA)
Nathalie Sodeike	Director MediaCT (Holland)
Peter Langschmidt	Publisher Research Council, South Africa (SA)
Robert Ruud	3M3A (Norway)
Samantha Loggenberg	Research Director, Qualitative Intelligence (SA)
Sanna Fourie	Currencies and Field Quality, Ask Afrika (SA)
Wayne L. Hull	Managing Director/ Head of Accenture Digital (SA)
Zerildi Pieterse	Editor: Production, supplement, and features, Daily Sun, Media24 (SA)

For information about previous conferences please log onto www.pamro.org for further details.

There will be sufficient time for questions and one-on-one discussions with all speakers during breaks.

- Thank you to all our sponsors for helping to make this conference possible
- We look forward to seeing you in Cape Town 😊

Regards

Jennifer Daniel
Executive Director PAMRO

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The objectives of PAMRO entail the creation of a forum for industry organisations, media research providers, media owners, marketers and advertising agencies in different African countries to exchange knowledge and to learn from one-another's successes and failures, to ensure the highest quality and to harmonize our research methodologies so that we will eventually have a continental media research database. The latter will make Africa the leader in the world in providing a research database for the growing number of global media owners, marketers and agencies. We include the Indian Ocean Islands in all our activities and underwrite the rules of market research bodies such as those of the World Organization for Research Professionals (ESOMAR)

NOTE: PAMRO reserves the right to make changes to the programme as dictated by the availability of speakers or due to any other circumstances.