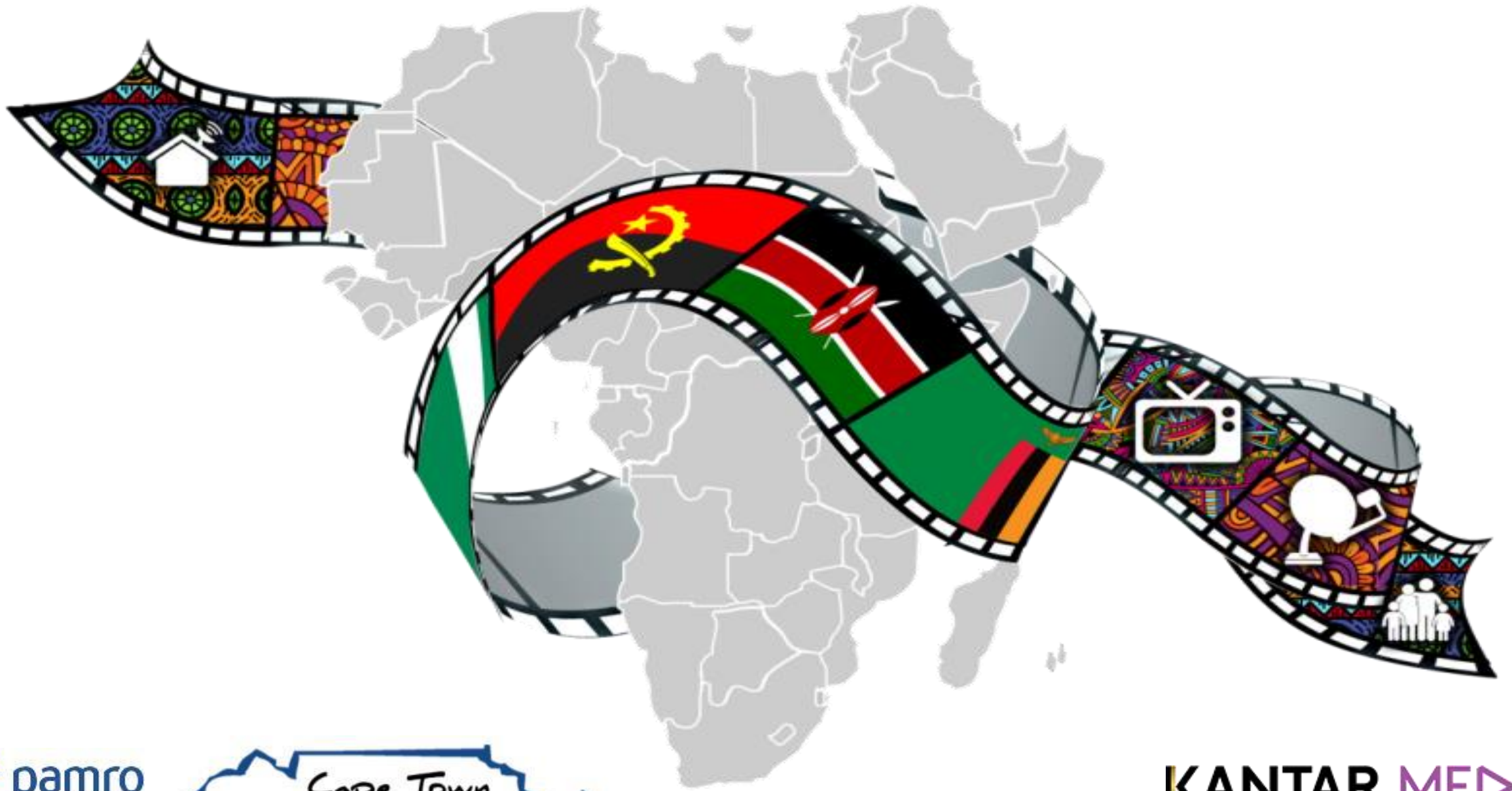


TV and Africa

Jennie Beck
29 August 2017





The 17th  pamro
All Africa Media Research Conference



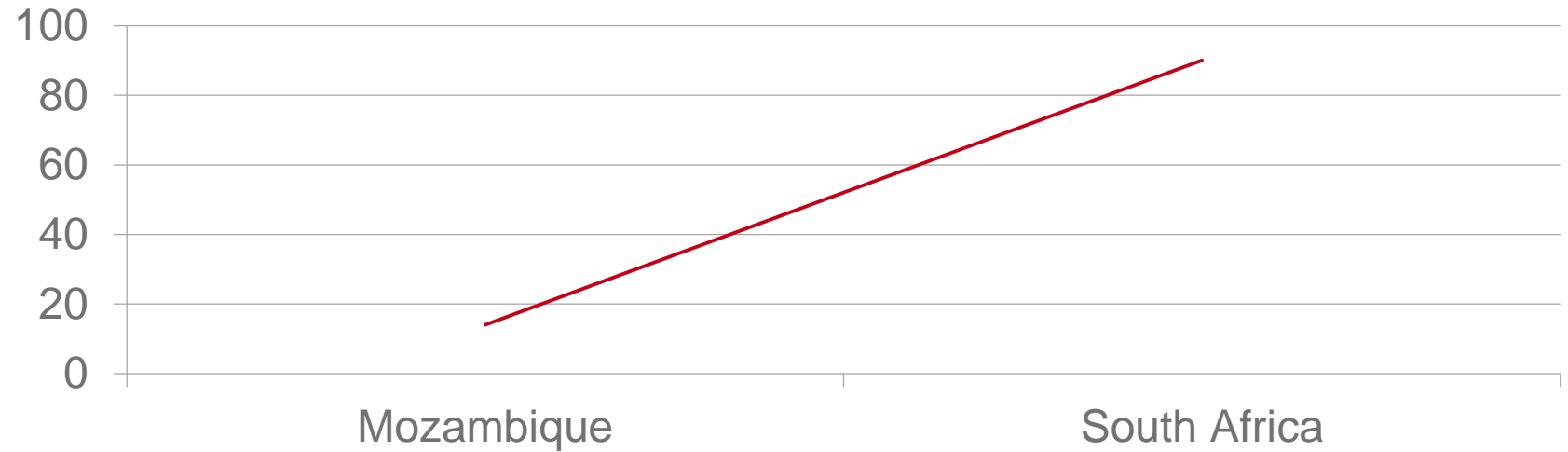
What needs to be in place?

- Strong (and growing) TV revenue
- A data collection methodology that is ...
 - Right for the market
 - Cost effective
- Industry commitment
 - Advertisers
 - Media agencies OR
 - Broadcasters
- Money

TV landscape



TV set penetration shows huge variation



Digital switchover making painfully slow progress in the largest markets



pamro

Cape Town

KANTAR MEDIA

TV channels



CANAL+
SPORT

NOVELAS TV
Votre coeur bat plus fort

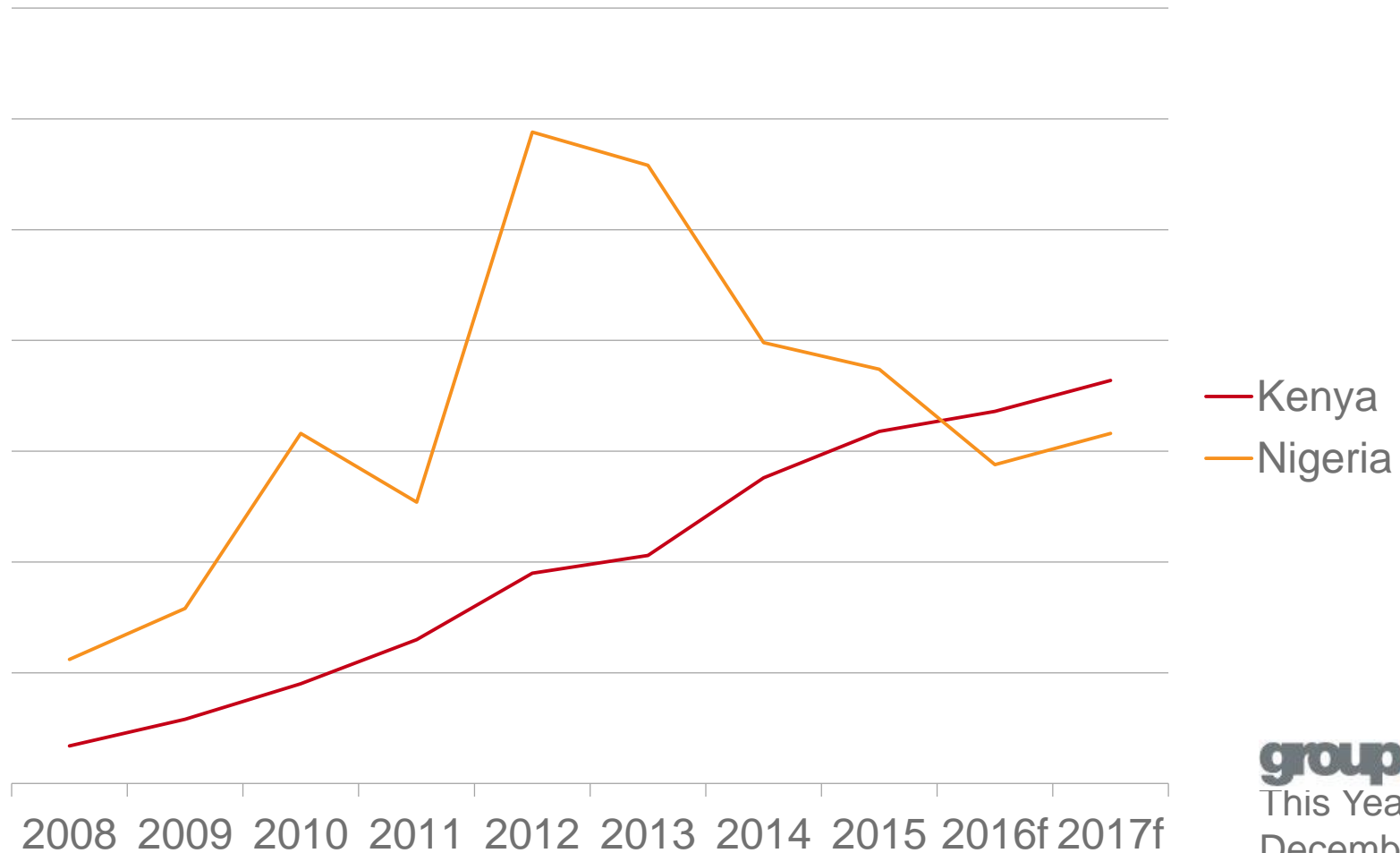
TRACE
AFRICA

NOLLYWOOD TV
LA CHAÎNE DE FICTION AFRICAINE
www.nollywoodtv.fr

FRANCE 24

TV5MONDE

Strong and growing TV ad revenue



groupm
This Year, Next Year.
December 2016



Cape Town



TV planning data



Only TAM service is in South Africa

Passive/Daily	Recall/Daily	Recall/less often
TAM		
RPD		
	KGMM	
		AMPS-style
		Africascope



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KANTAR MEDIA

What's important in Africa?

1. A cost-effective measurement system
2. Deploying the basic principles of measurement
3. Respecting the requirements of each market
4. An unequivocal need for measurement



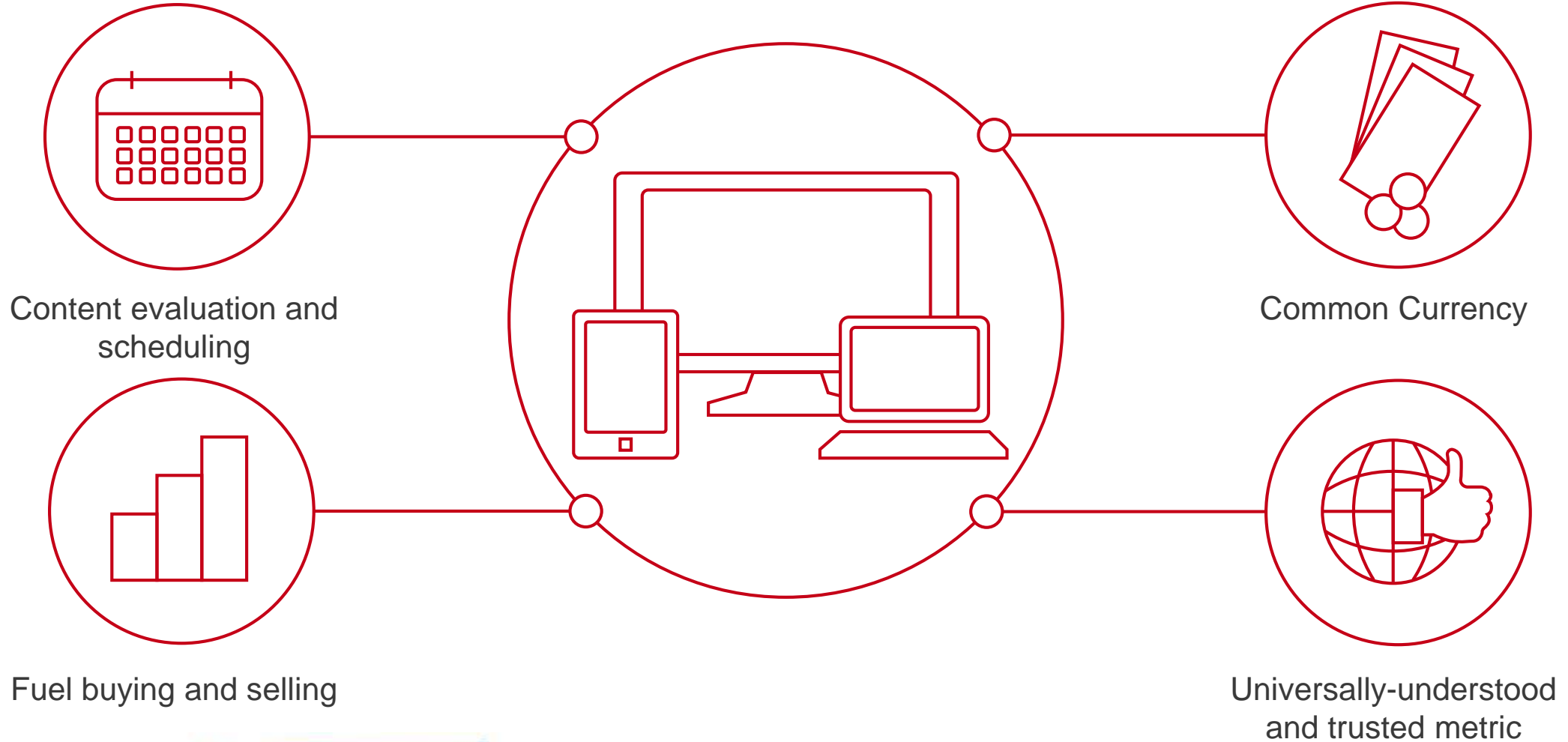
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KANTAR MEDIA

Television Audience Measurement

Accurate data drives growth



From

TeleMedTVision to TotalVideo



**RETURN
PATH DATA**

CORE PANEL

**ONLINE CENSUS
DATA**

**FIRST AND
THIRD PARTY
DEMOGRAPHICS**

**SET METER
PANEL**

RETURN PATH DATA

TV audience measurement using the return path from
19,000,000 households



sky



COMCAST

dish

CABLEVISION



Singtel

Google fiber

suddenlink

astro

ARMSTRONG

DIRECTV

frontier

MetroCast

PCCW



TATA (sky)

Mediacom

Charter

COX
COMMUNICATIONS

TIME WARNER
CABLE

FOXTEL



HARGRAY
Up Here. Live Down.

Midcontinent
TELEVISION



bright house

WOW!
INTERNET AND CABLE

SET METER PANEL

Introducing **SetMeter**

- Scalable, self-installed hardware
- Real-time reporting of viewing on the TV set to the second
- Passive measurement = less operational challenges

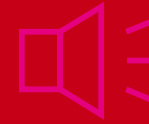


Cape Town



Future Proof Content Detection Technology

Kantar Media own the industry standards in watermarking and fingerprinting



Audio matching (fingerprinting)

- Acoustic pick up of the audio signal
- Better granularity



Audio watermarking

- Channel identification supplemented with Content identification
- Detection and identification of locally inserted Ads



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KANTAR MEDIA

What needs to be in place?

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Maybe ... if we could:

- Hub centrally – to cover multiple markets
- Work with pay TV providers to collect and use RPD across markets
- Work together to find funding for a set-meter panel
- Watermark participating channels
- Use KGMM to cover wider areas and provide demographics for set data



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