

PAMRO documents Africa's varied media landscape

The country reports from the members of the Pan African Media Research Organisation (PAMRO) shed some light on media in Africa.

While tempted by the lure of potential new markets, South African marketers may be understandably slow to take their brands beyond South Africa's borders into countries where they know little about the media environment.

"One of PAMRO's challenges is to alert cross-border marketers, media owners and advertising agencies to the differences in media usage around the continent," says Piet Smit, honorary president of PAMRO.

Enter Celia Collins, director: Africa at Starcomworldwide, and PAMRO's Achiever of the Year for 2007. Her self-proclaimed mission is to help advance media research on the continent, and to ensure that marketers know what is available in each country. "Marketers will often not put substantial budgets behind African campaigns because either the media research doesn't exist, or they don't know about the studies which are being conducted in these countries," she says.

In a bid to remedy this, Collins has collated the country reports from PAMRO's 20 member states from Africa and the Indian Ocean islands, highlighting topline results from a number of African countries, which now offer marketers a countrywide media research currency, based upon South Africa's AMPS® model. Collins compared the results of these surveys, and presented her findings at the 9th PAMRO All Africa Media Research Conference held recently in Malawi. The presentation revealed some interesting differences between media consumption in South Africa and in other African states.

As a comparison, SAARF AMPS(r) 2007 RA shows the following weekly viewing/listening and average circulation readership for the mainstream media in South Africa: TV - 81.4%; radio - 93.3%; newspapers - 44.4%; and magazines - 37.5%.

Angola's similarities to South Africa

Of the 20 African countries that are members of PAMRO, Luanda in Angola has the most similar mainstream media landscape to South Africa. Its media types enjoy similar levels of consumption: TV - 71%; radio - 89%; newspapers - 37%; and magazines - 33%. The big difference however, is that media choice is far more limited than it is at the bottom of the continent, where the population is about three times bigger. Angolans have 27 radio stations from which to choose, compared to over 140 in South Africa. They have 27 newspapers and eight magazines on the shelf, while South Africans have over 270 papers and over 650 magazines. Angola's government-controlled media are dominant with both advertisers and listeners/viewers.

Botswana is one of the few African states where radio is not all pervasive. According to BAMPS (Botswana AMPS survey), only 44% of the country's 1,8-million population can be reached each week via radio, and only 45% via television.

In the Democratic Republic of Congo, you'd be hard pressed to reach many of the country's 65,75-million people using newspapers. The 13 newspapers in the DRC reach only 6% of the population. It's the opposite in Tanzania however, where the country's 12 newspapers will get the message across to 91% of the 39,36

million populace (TAMPS 2007).

In Mauritius, papers are the dominant medium. With a reach of 86%, Mauritian print beats radio's 62% per week, TV's 72% per week, and even outdoor's 31% per week (Mauritius MAMPS 2006). Print is similarly strong in Malawi, where five newspaper and five magazine titles achieve 82% and 70% reach respectively (MAMPS 2006).

Outdoor is the one to beat in Nigeria

In Nigeria, outdoor is the major media force. Over 24 000 sites achieve 95% penetration each week into a population numbering over 140-million. Fragmentation is the name of the game in this country, which has 183 TV stations (with 83% reach according to Nigeria's AMPS 2007), 114 radio stations (70% reach), over 90 newspaper and over 40 magazine titles (although penetration is low, at 27% and 10% respectively). It is however, the most populous country on the continent, making fragmentation of this scale a lot easier to be than in South Africa, where hundreds of niche media choices have only 47,5-million potential targets. (On top of fragmentation, measuring media in SA is complicated by the need to translate questionnaires into so many official languages. Consider then the complexity of the Nigerian media research scene, in a country where over 500 languages are spoken.)

Ghana has similar fragmentation, but only in its radio arena, with 140 stations and new ones emerging. The medium reaches 99% of the population each week. Print consumption is also high, with newspapers reaching 65%, and magazines reaching 50% (GAMPS 2005, Ghana's AMPS). Ghana's 11 TV channels, which reach 83% of people, will be boosted by a new pay TV channel launching in late 2007.

In Kenya, most advertising spend goes to radio (over 45%), followed by TV with close to a third of adspend while spend on print is in steady decline. The country has over 60 magazine titles, which reach 22% of the population, and 10 newspaper titles reaching 44%. Despite dwindling spend, there has been continuous growth of print titles in Kenya, creating a buzz in reading. Radio reaches 89% of Kenyans each week, while TV is less dominant at 56%. Kenya's media research currency includes KAMPS, and quarterly media diaries for broadcast and print media consumption. The country is experimenting with electronic measurement of television and radio. Currently, South Africa is the only country on the continent to measure television audiences electronically.

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