

**Stakeholder online survey
Future scenarios
July 2013**

FUTURE PROOFING SCENARIOS

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INTRODUCTION

As part of the overall research AMPS proofing project a question on scenarios was included as part of the on-line questionnaire that was sent to a cross-section of SAARF Stakeholders.

Essentially a scenario is a viewpoint of the future. It has associations with the theatre and one can conceptualise SAARF and its stakeholders as the big actors on the media stage.

Whilst the time dimension of a scenario has inevitably a degree of uncertainty respondents were asked:

Q. "What do you think are the 3 most significant changes in your field that will occur during the next five years?"

A total of 536 responses were received (see Table 1).

Table 1 – Responses by Stakeholder

STAKEHOLDER	REPLIES
Advertising	87
Media independent/agency	102
Radio media owner/station	59
Print media/owner	44
TV media/owner	33
Research	68
Academic	6
Consultancy	30
Corporate/Client/Adv	10
Government department	3
Marketing organisation	13
Media sales	15
Online/Digital media owner	3
Out of home media owner	17
Other	
TOTAL	536

In order to understand the perspectives of key stakeholders, responses were analysed in two ways:

- By theme: a semantic map of each theme is provided. A semantic map is the product of the qualitative analysis software which maps themes and the codes which co-occur with these themes. Thus it diagrammatically depicts the themes which are spoken of together.
- By key stakeholder:

platforms. With the growth in digital comes the need to have integrated data, especially with regard to common target markets and metrics.

Digital will continue to grow as more and more people gain better internet access. Budgets will move away from other mediums towards digital, which will increase fragmentation of digital and mobile publishers and media owners. There will be less traditional print titles, as more will start digitally, with a corresponding shift in readership from actual magazines and newspapers to digital. Print media is particularly concerned about this, not surprisingly.

Media Independent/Agency

The growth and high uptake of digital media goes together with a decline in print. Digital will evolve and require more input, understanding and definition. Digital consumption and Adspend will keep increasing dramatically, some markets are seeing digital surpass traditional, particularly as broadband and mobile solutions become more widespread. There will be a growth of Out-of-Home networks – leading to convergent solutions. More integration of digital into traditional media usage.

There will be an increasing need to monitor and understand digital behaviour, as well as the ability to analyse and plan digital and mobile platforms. Digital experts and planners will be more and more essential in the media agency. Monitoring should be made easier through smart devices.

Consumers preferring to read digitally rather than the physical newspaper, and the move from analogue broadcasting to digital, will lead to extreme audience fragmentation.

Doing own “dip-stick” research using digital channels will feature. There is much debate as to the internalisation of previously outsourced functions across all suppliers.

Print

Digital revolution. Digitalisation of the print media and growth of digital editions with integration of digital and traditional media. The consequent movement of advertisers into digital spaces. Death of some publications as their audiences will only consume them in digital spheres. Digital magazine subscriptions and paid for news.

Radio

Radio goes digital. Radio streaming becoming very popular – increasingly so throughout the market – in smart and functional phones. Increase in digital and smart phones. Bigger integration of digital media and radio programming. Digital broadcasting with multi-media environment.

TV

Digital migration DTT etc.

Research

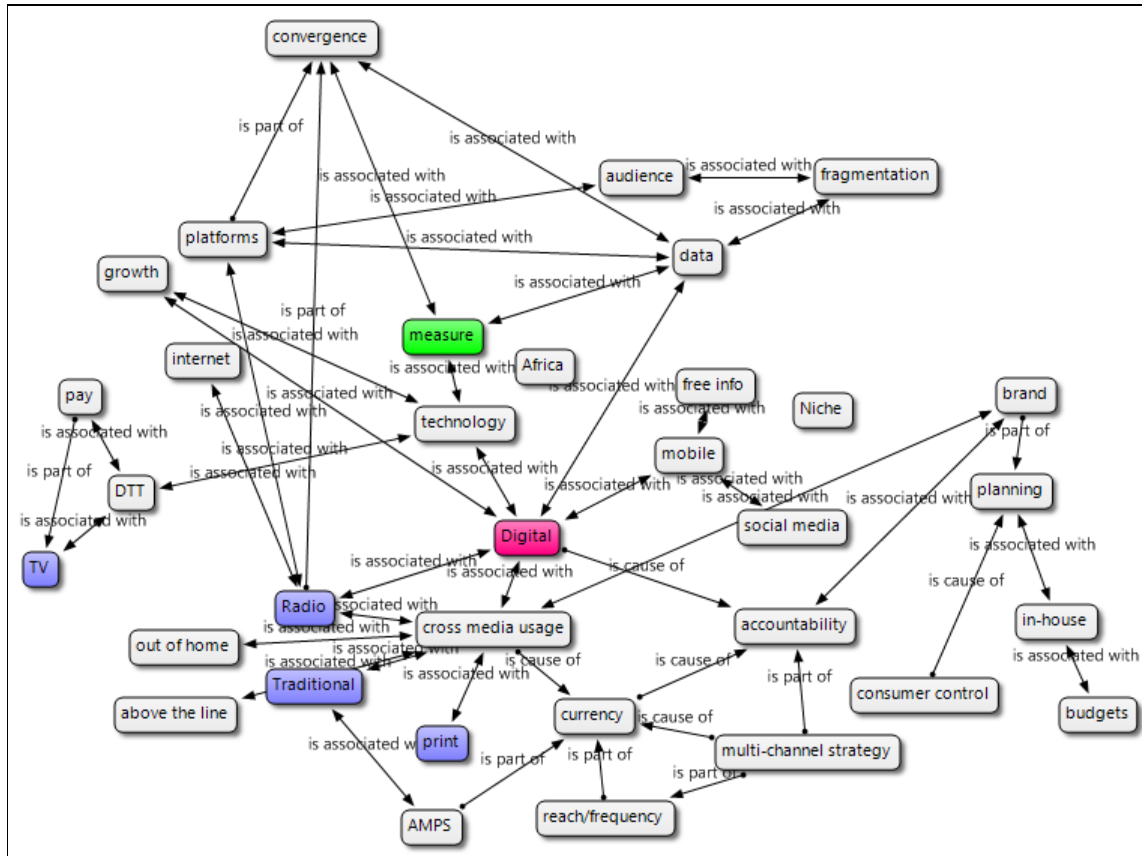
The digital media landscape and methods of consuming media will, and have already, changed the whole playing field in media.

Consumers' use of digital devices and improved measurement for digital media.

Migration to digital methodologies. Digital measurement of radio and media usage. Increase in the use of technology.

MEASUREMENT

Measurement was a great source of interest. Most stakeholders saw a large role for digital and offline data fusion. Digital enables greater accountability but also greater fragmentation which will present a challenge for media to reach a mass market. Generally consumers will follow content across platforms and so platform independent measurement (measures which can converse between streamed radio and DTT) will be demanded. AMPS by some is viewed as becoming more brand centred.



Advertising

Mobile devices will change the way we interact with traditional media channels. We must be able to measure audiences. Further media fragmentation leading to more unstable data for media measurement. Above the line media won't be able to be measured as we do now, as it will all be streamlined and viewing will be tailor-made. Data fusion between offline and online sources is foreseen through the use of Big Data.

Assessment of in-market response will relegate reach/frequency/GRPS to a post campaign measure.

More accountability/measurability/metrics required for ambient channels (activations/events) + CRM (*Customer Relationship Management*).

Media brands will not be equal to media channels. Industry surveys like AMPS will probably become more brand orientated.

There will be a standard media currency across the board. There is a great deal of demand for measures which transcend each medium as opposed to the medium specific measures of the past so that media can be compared.

Media Independent/Agency

Measurement will be even more important. Modelling and econometrics will be used for measurement and tracking. Fragmentation of Pay TV channels will need more top-end measurement. Growing measurement fragmentation and lack of comparison further strengthens the need for medium independent measures. Further demographic fragmentation i.e. more media options and smaller sample sizes. Media fragmentation needs a far greater sample base for stability.

Integration of data sources – client data etc.

Moving to broadcasters delivering guaranteed ratings. Trading using audience as currency – it had better be accurate and reliable.

Outdoor needs to be more measurable.

Print

Technological advanced ways of audience measurement

Radio

The convergence of radio and digital media is going to create different audiences with super users – how do we measure them?

TV

Introduction of DTT, and new pay TV licenses, meaning increased audience fragmentation with little means to measure audiences. Measurement of TV audiences across different platforms – TV anytime, anywhere.

TV measurement in Africa, not just SA.

Research

Improved measurement for digital media usage. Electronic measurement of radio. An increase in online measurement surveys. More online measurement due to the quest for improved turnaround time and smaller budgets. The combination of offline and online measurement.

Understanding sentiment and qualitative review of online data; there is also the potential for real time reviews here.

Face to face paper surveys will be replaced by CAPI (*Computer Assisted Personal Interviews*).
Passive measurement for radio through applications and automation.

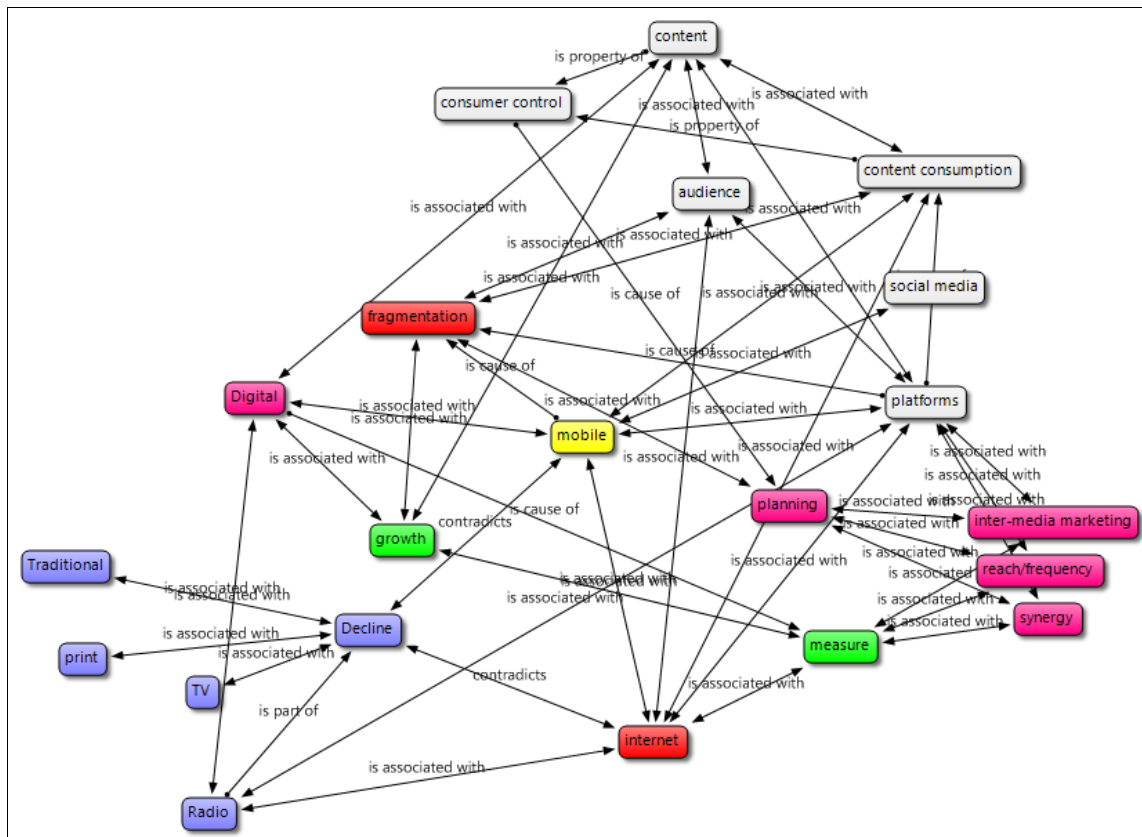
From a research perspective need to shorten questionnaires dramatically to be relevant.

Increasing difficulty in reaching a representative sample.

Basic information will be freely available.

MOBILE

The third most discussed point was the advent of mobile. Mobility has strong connections with consumer control, cross platform consumption and the role of social media in audience attraction and participation in content creation. Mobile media have close relations to the internet, digitalisation, media fragmentation and digital measurement. Digital measurement is believed to give rise to greater accountability and a sea change in planning. The theme of synergy in media planning arises again.



Advertising

Growth of mobile internet consumption. Increasing growth of mobile and multi-device advertising platforms, ad formats and reach. Huge reach into lower LSMs as more advanced phones penetrate the market. Opportunities for accurate measurement through software.

Inter media marketing i.e. TV that links to mobile that links to social media will grow. Greatest consumption via cell phone and mobile devices. Content consumption + changing consumer behaviour (apps/blogs/gaming/IPTV + devices). Rise of digital engagement – specifically in mobile. All things online/mobile/social.

Media Independent/Agency

Phone apps. Improvement of cell phones and increased penetration of smart phones

Print

Print usage will decline as news can be obtained from Twitter, the internet, apps etc. News more threatened than other content.

Radio

Increase in audio streaming/wider proliferation of radio choices = reduction in traditional radio.

People will access radio everywhere they are. [The geographic footprint of successful stations will exceed their broadcast footprint as digital is everywhere where the cellular network is.]

TV

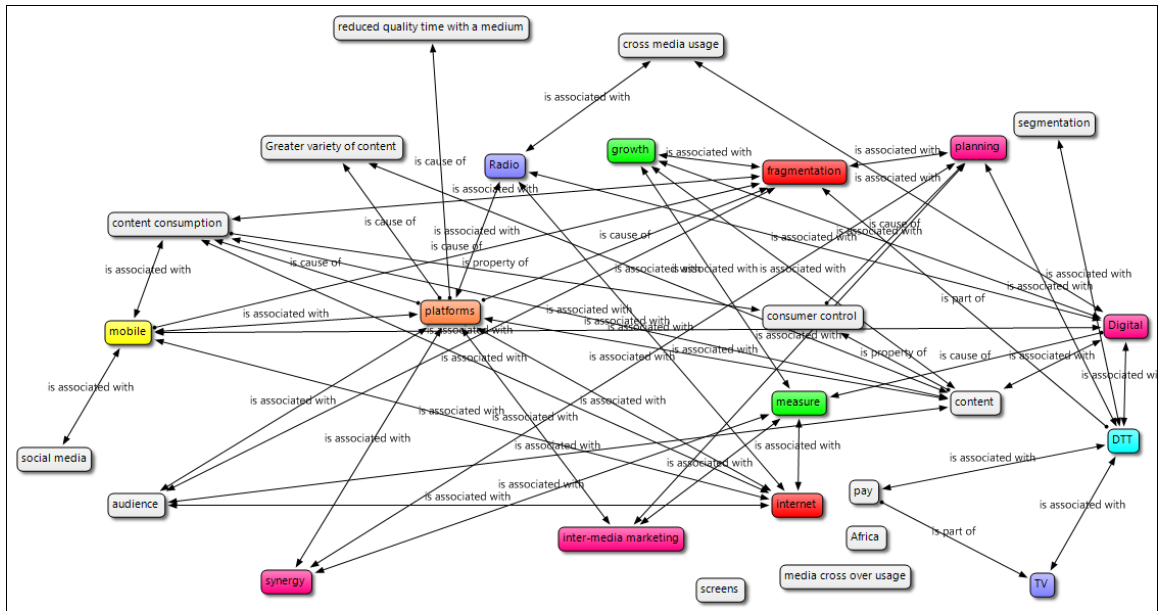
TV content moving to mobile devices/cell phones/on demand

Research

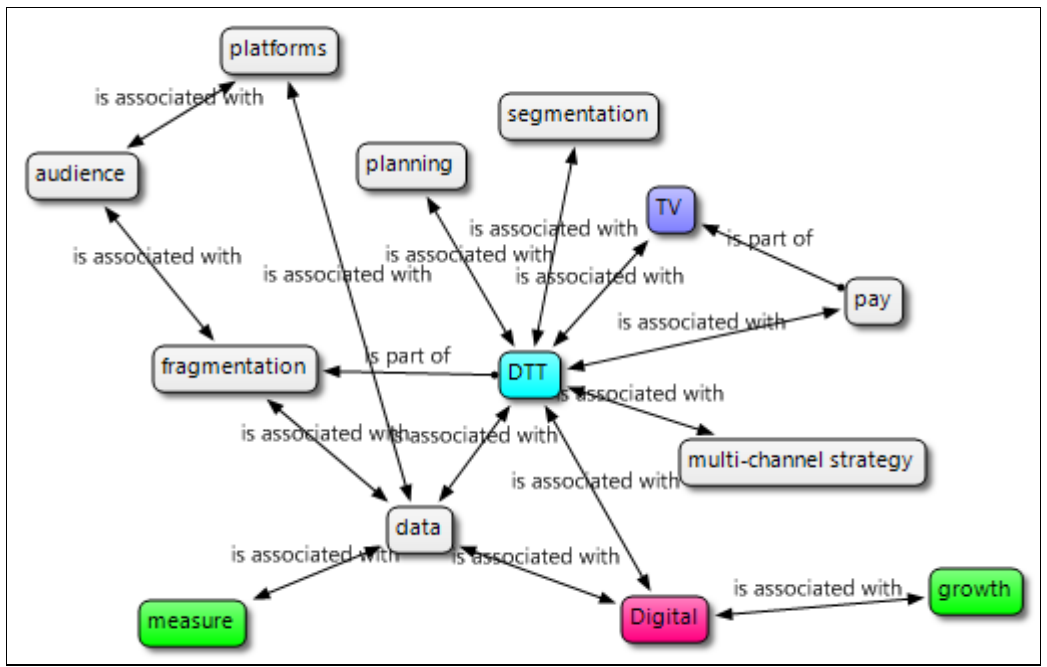
Growth of mobile phone research Move of most market research onto mobile devices. Market research will be online and mobile based. Greater reach of smart phones across all communities. Mobility of devices/access

TELEVISION

Television is seen to move towards DTT and paid consumption. It is strongly affected by digitisation and correspondingly consumption across multiple occasions and multiple platforms. Content choice will increase as will multiscreen consumption and cross media usage. The consequence of this is viewed by some to be decreased attention placed on any one medium as time is now divided across many. Greater segmentation will be possible. The move into the African continent will become more important.



DTT presents a simpler picture: it is directly affected by fragmentation, multiple platforms and digital measurement. Strategies will of necessity be multi-channel.



Advertising

TV environment will change. Explosion of Pay TV viewership and movement of audiences across and between Pay TV channels.

The rise of multi-screens will impact the quality of time we spend with a medium. When we watch TV we will also be busy.

Media Independent/Agency

More TVs and radios. Online television. Further fragmentation of TV audiences.
Increasing concerns/challenges with TV buying.

TV

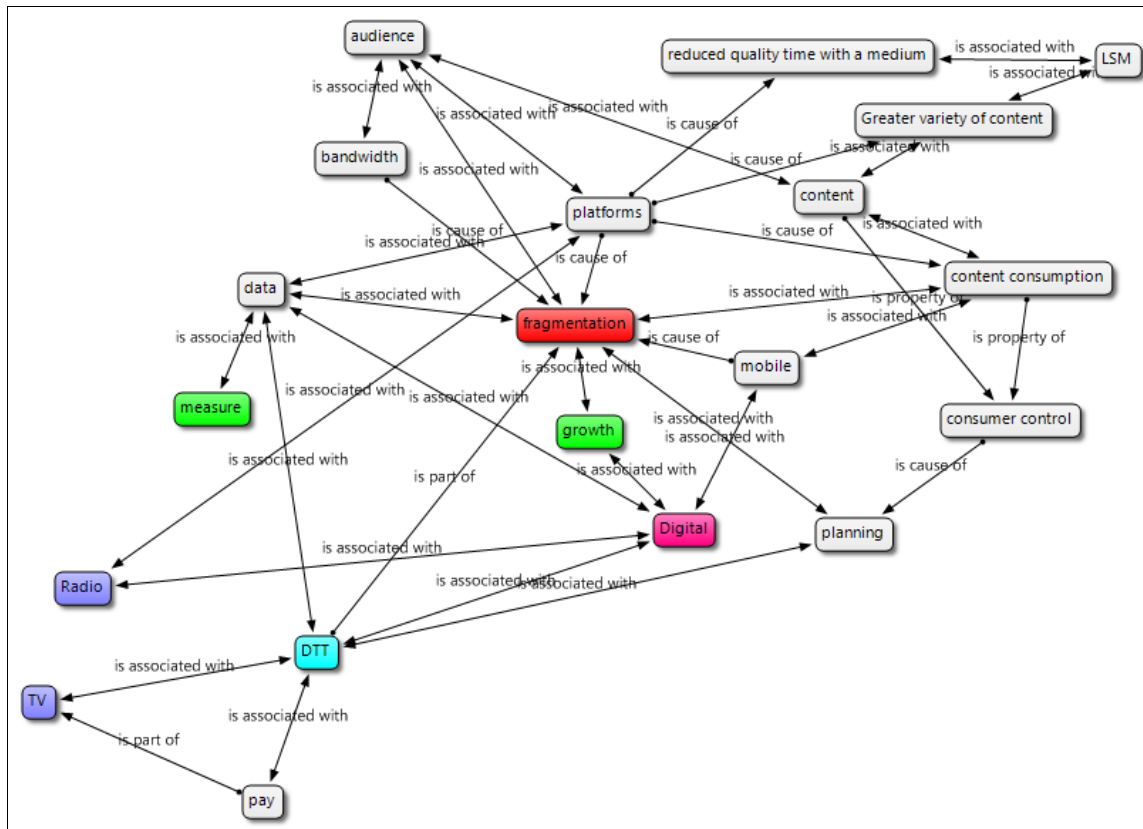
DTT may segment market as well as encourage new TV entrants. Television planning will be more challenging with DTT. Impact of DTT on listening and viewing platforms
Launch of multi-channel free-to-air television – DTT. More international content competition.

Research

Changes through Pay TV is way we access channels.

FRAGMENTATION

A core concept and the fifth most discussed, fragmentation is seen in the diversity of platforms, audiences, mobile and other digital content. It is enabled through increased bandwidth. It is the cause of greater consumer control as well as reduced quality time with any single medium. It has a large impact on planning and it will only grow over time. Respondents believed that fragmentation will be more marked in the higher LSM categories. Measurement will be digital but then linked to an offline accurate source such as AMPS.



Advertising

Increasing fragmentation of digital and mobile publishers and media owners. Lack of consumer time/attention – leads to further fragmentation of media. Fragmenting of the audience due to increased TV channels/Radio stations.

Media Independent/Agency

Fragmentation at the top end of the market. Greater diversity in population in LSMs – Rich becoming richer & poor becoming poorer.

Print

Exponential fragmentation of media. Fragmentation of media will influence how research is undertaken.

Radio

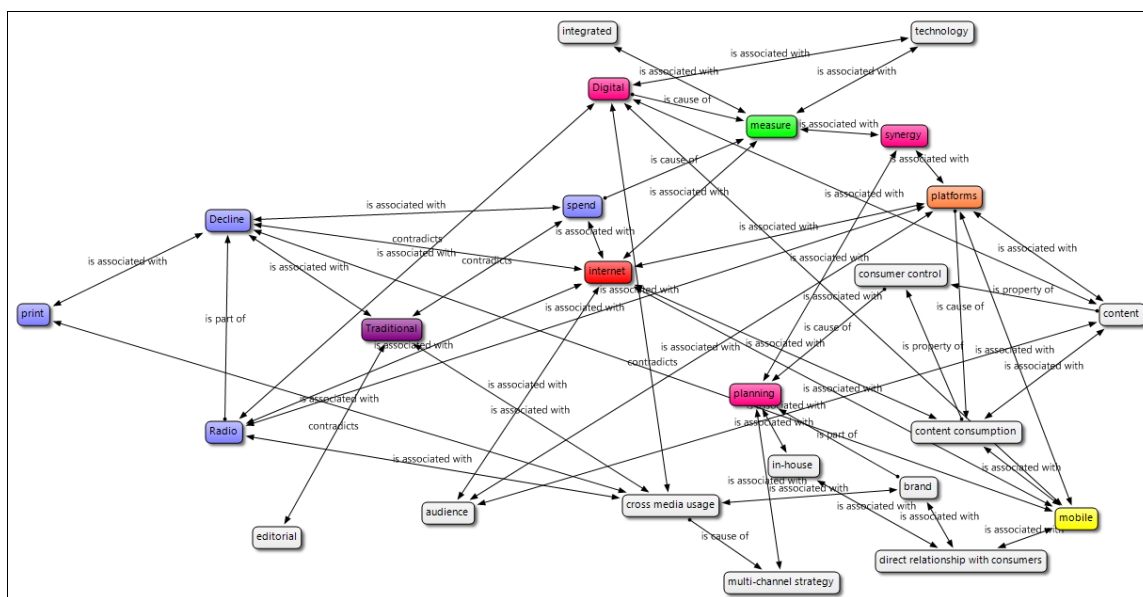
Greater bandwidth, higher speeds, cheaper accessibility = more fragmentation, wider choice, reduced loyalty.

Research

Fragmentation of media as a whole.

TRADITIONAL

Traditional media consumed in the traditional manner is viewed as on the decline as the internet and mobile media become the preferred ways of accessing these services. With greater consumer control over content consumption, traditional advertising also faces challenges. Some respondents believe that content and advertising messages will become increasingly interwoven through product placement and similar co-branding. Advertising spend in traditional media and on traditional forms will also decline and brands will seek to build a direct relationship with consumers.



Advertising

Media spend increasingly being moved from traditional to online/social mediums. The media landscape is changing faster than before – competitors are no longer just traditional mediums. Declining traditional media consumption to information on demand at consumers' pace. Increasing adoption of multi-channel strategies by traditional print, radio and television media owners. Greater integration of content and advertising.

Media Independent/Agency

Digital integration into traditional media usage. Increased meshing of traditional and digital media. Move to non-traditional means of advertising, for example branded content.

Print

Traditional Adspend will decline. Move of focus from a traditional editorial approach to a more informal one. Traditional advertisers (mostly retailers) link directly to the audience (mass media sidelined). Huge loss of revenue via traditional media.

TV

Technology is taking over media consumption and based on this, consumers will consume media out of traditional ways.

Radio

Proliferation of alternatives to traditional radio, including internet radio and content provision. Traditional media will take a back seat.

Research

Accessing content digitally rather than via traditional means. The reading phenomenon irrespective of device or traditional paper.

Non traditional research players entering the field.

GROWTH

Growth is strongly linked to everything digital and is highly dependent on the available bandwidth. Bandwidth, as it grows, will encourage media and platform proliferation and thereby increased consumer control. Brands will have to be very proactive and realign their advertising to either be more involved with content or to take advantage of convergence and media imperative and media synergy. They will also have to consider the role of social media carefully.

Radio

In the next five years digital broadcasting would be in a multi-platform environment with more focus on social media platforms. There would be increased competition between platforms though listeners would be content rather than platform driven.

TV

Convergence of technology platforms and the introduction of faster broadband will change the way consumers view programmes. Further fragmented audiences (more bouquet tiers, more channels, more TV platforms, different media devices)

Possible change in use of platform for TV consumption, e.g. IPTV (*Internet Protocol Television*).

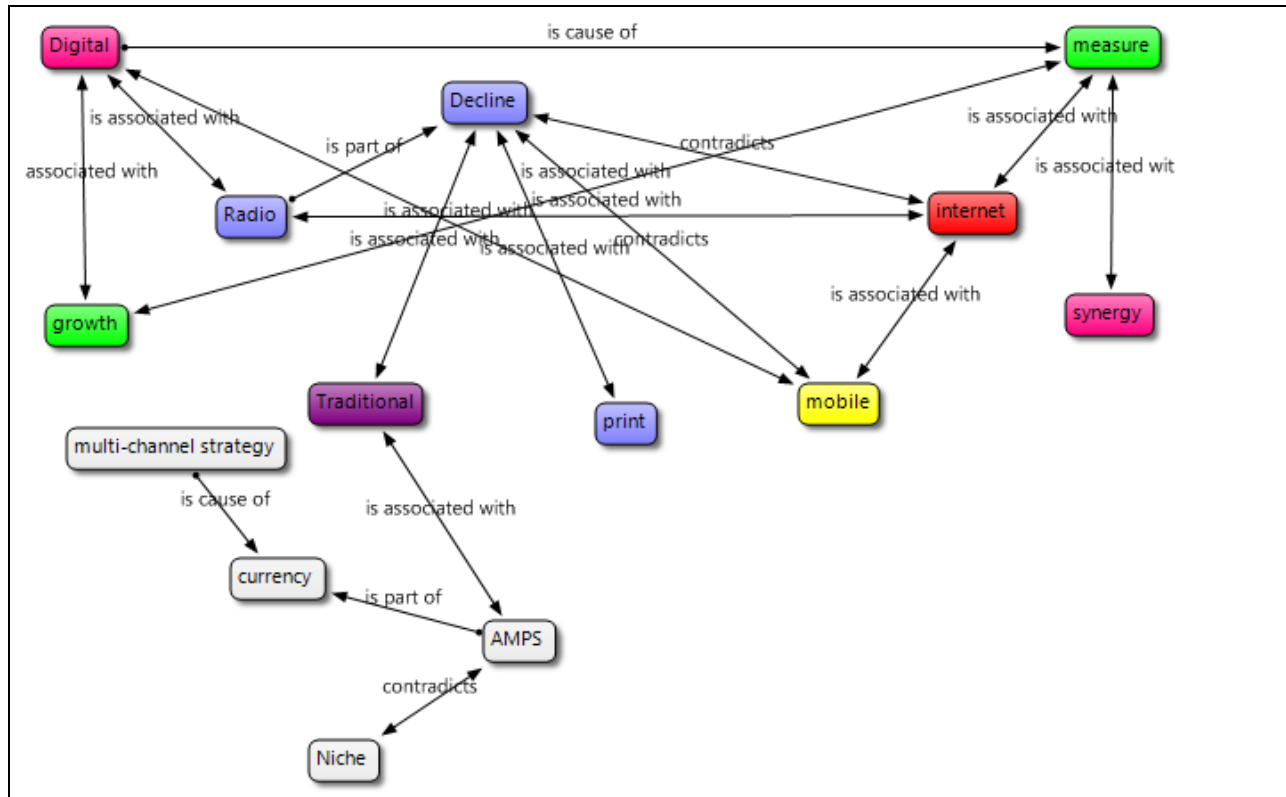
Media consumption will be on multiple platforms and the measurement of TV audiences will be across different platforms. Research will become harder to do as consumers won't know the platform on which they consumed a piece of content.

Research

Researchers predicted a growth in usage of new delivery platforms for surveys. Of interest would be the way different media are consumed on different platforms and how these aggregate. There would be an increase in the focus on the various platforms for media usage and also the use of multi-platforms at the same time

PRINT

Print's greatest challenge is the decline of its traditional format and it must map the migration of its content to other digital platforms. It must look to the digital sphere and become part of a mobile world where it will have to have a currency which speaks to other content providers so that planners can formulate a multi-channel strategy. Offline titles will become more niched.



Advertiser

Dwindling circulations in the print media. Shrinking use of printed media.

Media Independent/Agency

Print consumption is falling but is not showing in readership figures.

Decline of print and the increase of niche titles (which are never reflected in AMPS). Digitisation of the print medium. The impact of digital media on print. Currencies need to be standardised e.g. Print is mainly sold on circulation instead of readership. Print circulation together with readership makes up the print currency.

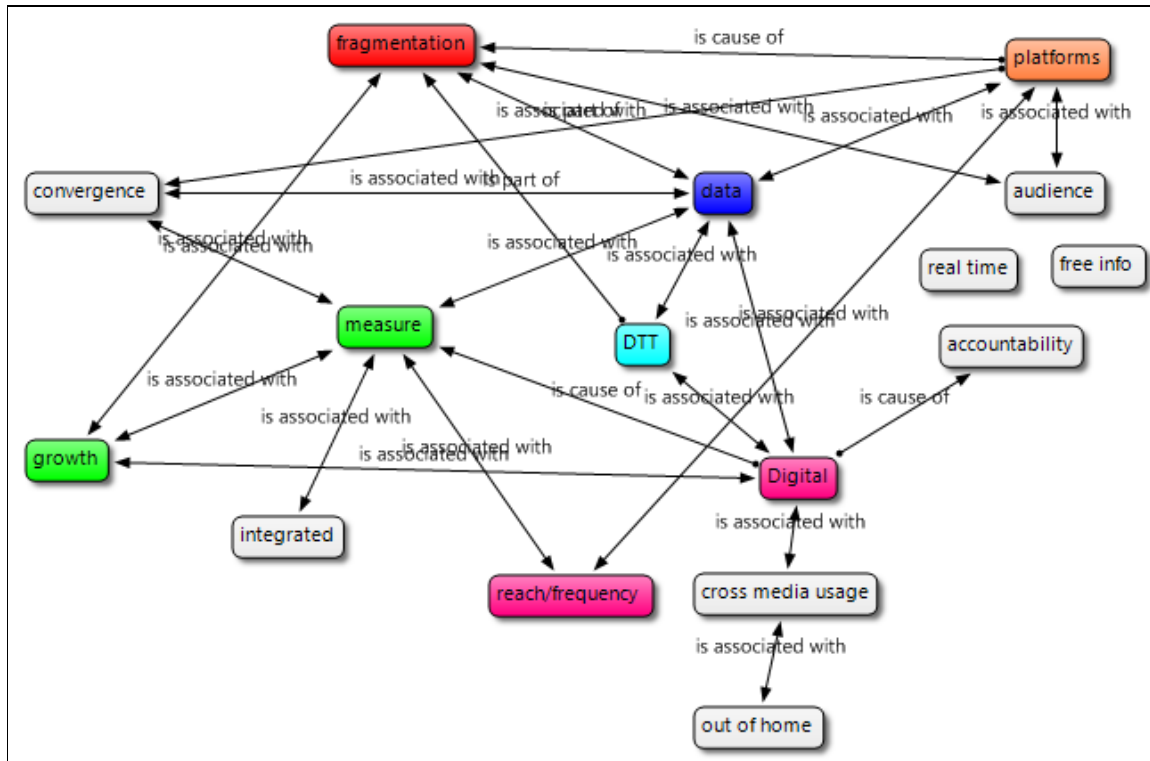
Newspaper and magazine readership will decrease.

Print

What newspapers are expected to be and deliver will change.

DATA

The research houses speak of “Big Data” and its management. Digitisation increases what can be measured, its variety and its speed. More activity will now be measured and in real time. Such a move will place greater demands on data mining capabilities and more accountability for effectiveness of media spend. Measurement will have to have a more integrated holistic view.



Print

Data mining

Radio

Increased relevance of community radio.

Usage of cell phones, etc. for listening to radio will increase.

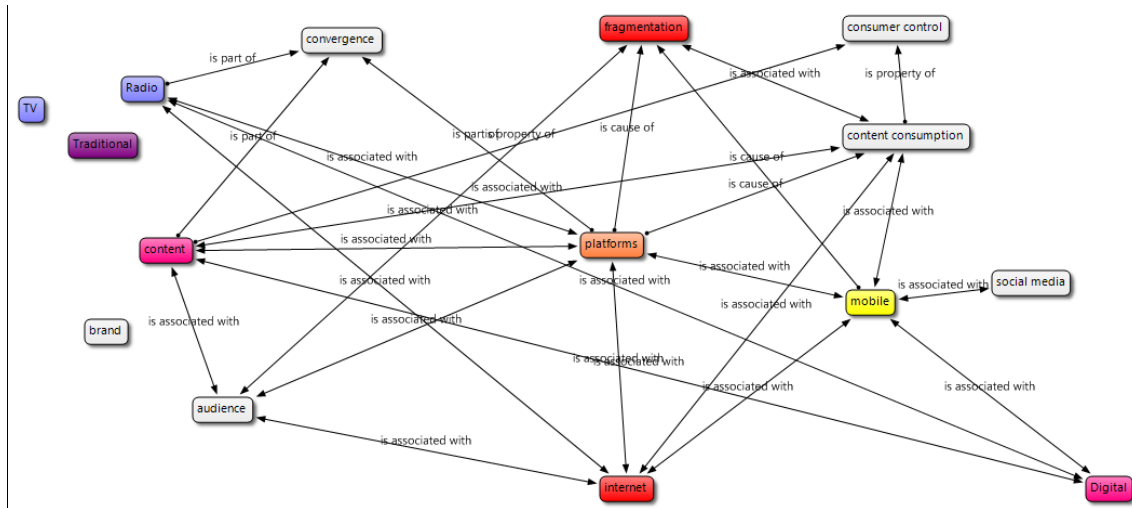
Research

Big Data – the management thereof.

More recent (monthly) data requirements become more prolific. Greater public availability of more data and less owned or proprietary data. Greater internet speed. Survey data turnaround and reporting will be faster. Use of more sophisticated models. Increasing reliance on statistics, modelling, advanced data analysis. Market research will be online and mobile based

CONTENT

At the heart of the content seismic shift is the growth and change to platforms. The number of platforms enabled by new media sees content become more fragmented, more diverse and increasingly in the control of consumers themselves. The battle will be for content rather than a medium and the opportunities to consume the same content will proliferate. Brand activation will be integrated with content and more experiential.



Advertising

Accessing content from multiple sources.

Media Independent/Agency

Greater demand for content on demand. Increased importance of content.

Print

News reading habits

Readers choose content over titles – jump around for those interests.

Radio

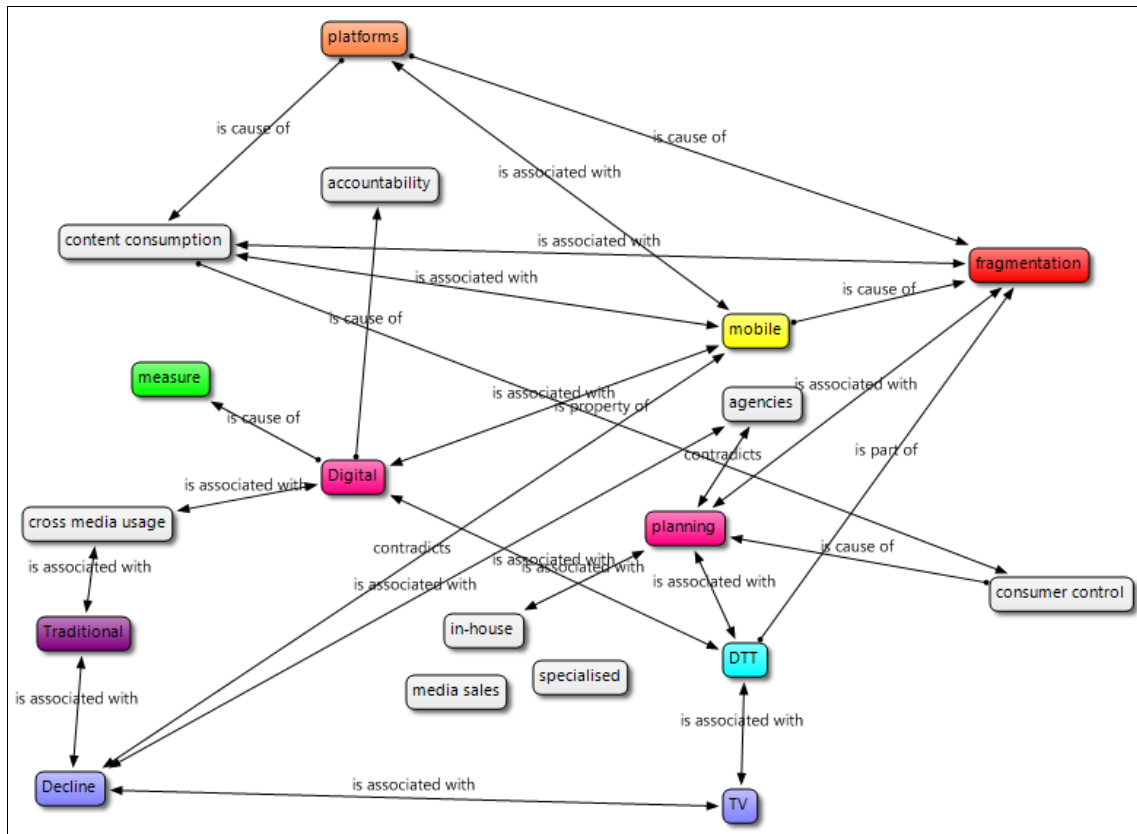
Content not platform driven. Content consumption by audiences. Convergence of listening devices and devices for obtaining content.

TV

Content is going to be key going forward because of the options that are going to be available for consumers.

PLANNING

Planning is greatly affected by new media. There is a shift towards in-house rather than agency based planning and planners themselves as agencies will become more rather than less specialised. Key is understanding cross media usage, audience fragmentation and consumer control of content on demand.



Advertisers

The way clients do business with advertising agencies, more in house planning will be done. Planners will become focussed on certain media channels, as collectively it's becoming increasingly difficult to be an expert.

Consumers will have even more control than they already do over how they consume media, making planning a bit of a challenge. Media planning and strategy will be much more of a savings/number game. We will have to be much more accountable.

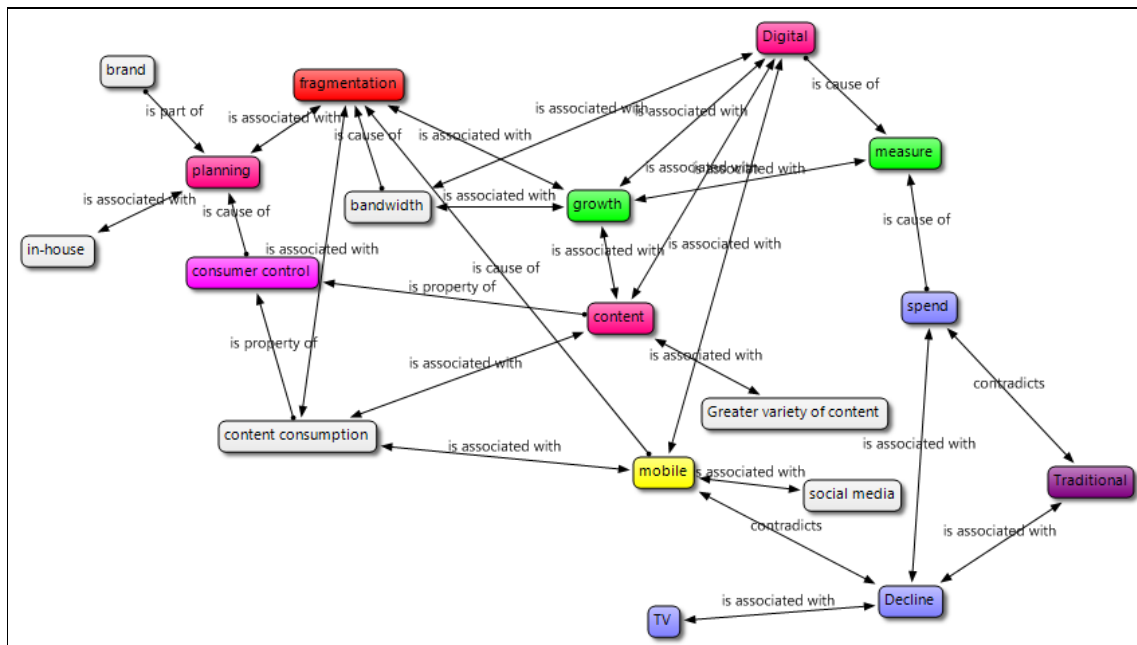
The way that media is sold i.e, via reps who do not have enough knowledge of their product or of the clients.

Media buying houses, they are working themselves out of business with low margins and unskilled workers.

Real time planning. TV planning will become more difficult. TV fragmentation, increasing concerns/challenges with TV buying.

CONSUMER CONTROL

Consumer control is closely associated with the growth in variety of content and the variety of opportunities for its consumption. Bandwidth remains the key factor in facilitating or hindering acceleration of this trend. Correspondingly, content providers will be across platforms and become more concerned with consumer engagement and similar “stickiness” measures. It is imperative to understand the consumer, their profiles and their content preferences rather than the product used. Some believe that brands will attempt to control media formats. Media sales representatives will have to know a lot more about consumers and their preferences. Consumers, through the means of social media and comment platforms, will be increasingly involved in content creation.



Advertiser

The consumption patterns of consumers will continue to change rapidly. Profiling and reader engagement/bonding.

Print

Readers choose content over titles – jump around for chosen interests

Radio

Consumer behaviour/patterns.

Consumer brands will attempt to control media formats.

Research

Need to understand the person using not the product usage.