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WE WELCOME YOUR CONTRIBUTION

Notes for contributors

Submission requirements
Author(s) should confirm that their article is original work and not under consideration elsewhere. Manuscripts should relate to the field of marketing research. A statement giving the author’s present position and address (postal and e-mail) should be provided on a separate page.

Presentation
Author(s) should submit three copies of their article on A4 paper together with an electronic file. The article should be typed in double spacing (including notes and references) on one side of the paper only in Times New Roman in 12-point font, and between 3000 and 4000 words in length. Because of limited space, only summarised tables, graphs and figures should be used. An abstract of 200 words in length should be included on a separate page.

The format of the article should conform to the accepted scientific requirements of articles, and guidelines of universities, or the Publication Manual of the American Psychological Association could be consulted. Chapter 21 of the recently published book: Marketing Research in Practice by the Bureau of Market Research at Unisa is also recommended. The format to be used applies specifically to style, method of referencing and use of tables, graphs and figures.

Where to send articles
All correspondence concerning articles should be directed to:

The Editors
Southern African Journal of Marketing Research
Southern African Marketing Research Association
PO Box 1713
Randburg
2125
email: info@samra.co.za

Deadline for submissions for the next edition: 14 December 2007
Ed’s Note

SAMRA membership signifies belonging to a very special group of people. These people are not only in the business of market analysis, but perhaps more so in the difficult area of trying to predict human behaviour. This means that market researchers should be both people people and objective analysts. To be both, is a rarity, and therefore successful market researchers are difficult to find: Ask any marketing research manager. Luckily, a selected group of universities are now selecting and training these special people.

The conference, held in May, was a huge success, and we report on this happening in this issue of the SAJMR. The papers read at the conference were of a high standard – as we expect of special people like market researchers.

We are including the overall winning paper of Mark Molenaar, as well as a shortened version of the paper of Nomsa Khanyile and Rudo Maponga, winners of the best contribution to research standards in Africa in this issue. These two papers represent the high quality and standard reached by a new young generation of South African market researchers. A third paper, also by a young researcher Tshiphiwa Mulaudzi, compares different methodologies in the media research field, emphasising the creativity used by local researchers.

Apparently the market research industry is running at full capacity at the present time and therefore we are honoured by two insightful and thought provoking contributions from two talented and absolutely professional people in our industry – doctors Nina de Klerk and Thomas Oosthuizen. We hope that these contributions will stir up some debate in the industry.

To be a professional market researcher, one has to have experience, know how and knowledge of one’s speciality – but also an intuitive understanding of people.

The Chairman’s Voice

With an increasing value placed on knowledge, and its integration and application not only for organisational and economic competitiveness, but also for the greater good of society, the Southern African Journal of Marketing Research is well placed to make tangible a significant body of knowledge for the market research industry. The Journal facilitates the creation of a knowledge sharing culture that can contribute to the conversion of tacit and explicit knowledge. It is through sharing knowledge and experiences that the quality of research improves, and that research can take its rightful place in South African society and the economy.

The Southern African Journal of Marketing Research provides each of us with the opportunity and space to share knowledge. The Journal allows for the intellectual scrutiny required to improve and grow our industry and its outputs. Research contributes to the overall body of knowledge when it is shared, and when it stands up to criticism. Criticism contributes significantly to learning – to acquiring new knowledge. As true researchers, we should embrace any opportunity to share our research, and to learn from others.

We are, after all, in the business of knowledge!
Outside Looking In

By Chris Moerdyk - Marketing Analyst

Chris Moerdyk is a marketing analyst, writer and commentator who is a great supporter of investing in meaningful market research. He is a Fellow of the IMM and former head of strategic planning and public affairs at BMW SA.

There seems to be little doubt that US consumers have become even more conservative than they were before 9/11 and research is now showing that more than half of the population is not only becoming increasingly intolerant of sex and violence on TV and the movies but fed up with all the gratuitous expletives and profanities that have become part and parcel of the mass media industry.

It would be fascinating, of course, to see similar research undertaken in SA. We don’t seem to be quite as conservative as the Americans but, on the other hand, it is a well known fact of life that when the United States sneezes the world catches a cold.

So far there have been a few minor indications that at least some South Africans are also becoming fed up with so liberal a use of expletives and profanity on our TV screens and in the movies given the increase in the number of complaints about this coming in to the Advertising Standards Authority. However, it could well be that these come from a tiny minority.

On the other hand a fairly convincing indicator that South Africans are not quite as twitchy as the Americans at this stage was the reaction of the US consumer to Janet Jackson “accidentally” baring her breast in a packed World Series stadium watched by hundred million TV viewers. While that incident caused an avalanche of moral indignation across America, I’m fairly confident that if that happened in SA at a rugby test, it would have raised more of a laugh than anything else.

Recent research in the US shows that more than half (52%) of adult Americans say the Federal Communications Commission (FCC) should have authority to fine any of the major broadcast TV networks, such as NBC, ABC, CBS and FOX, for airing a single expletive or “four letter word.” That is a huge number.

In a new poll conducted by Harris Interactive on behalf of Morality in Media, these were the question and results:

Q: To what extent do you agree or disagree with the following statement: “The Federal Communications Commission, or FCC, should have authority to fine any of the major broadcast TV networks, such as NBC, ABC, CBS and FOX, for airing a single expletive or ‘four letter word’?” Do you agree or disagree? And is that strongly [agree/disagree] or just somewhat [agree/disagree]?

<table>
<thead>
<tr>
<th>Agreement Level</th>
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<td>Agree (total strongly agree &amp; somewhat agree)</td>
<td>52%</td>
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<tr>
<td>Strongly agree</td>
<td>31%</td>
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<tr>
<td>Somewhat agree</td>
<td>21%</td>
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<tr>
<td>Disagree (total strongly disagree &amp; somewhat disagree)</td>
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</tr>
<tr>
<td>Strongly disagree</td>
<td>23%</td>
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<tr>
<td>Somewhat disagree</td>
<td>19%</td>
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<tr>
<td>Neither agree nor disagree</td>
<td>2%</td>
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<tr>
<td>Don’t know/Refused</td>
<td>3%</td>
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Among women who work and have children in the home, 69% agreed, 39% strongly so. Among those adults between the ages of 45 – 54, 62% agreed, 39% strongly so.

The survey was conducted by telephone by Harris Interactive on behalf of Morality in Media between 5 July 2007 and 9 July 2007, of 1,003 US adults ages 18 and over. Sampling error is ± 3.1 percentage points at the 95% confidence level.

Robert W. Peters, President of Morality in Media, said; “there is a perception on the part of many in the secular entertainment and news media that because they, along with many in their circle of friends or co-workers, curse with impunity, everyone else must do likewise, or at least not be bothered too much by it.

There is also a perception that our nation’s founding fathers put their lives, fortunes and sacred honour on the line so that those in the media could curse up a storm, not only in the workplace but also in front of microphones that send filthy language unsolicited into tens of millions of homes.

There is also a perception that many federal judges agree with them, which is why broadcast TV networks sued in federal court challenging various FCC determinations that the broadcasters violated the broadcast indecency law and challenging the constitutionality of the law itself, a law that has been on the books since 1927 and that has been upheld by the Supreme Court.

In one of those lawsuits, the TV networks argued that the FCC had no authority to fine a network for airing a ‘fleeting expletive’, and last month two federal Court of Appeals judges seemed to agree with them. Furthermore, the two judges seemed to think the FCC no longer has authority to fine a broadcaster, even if the broadcaster airs curse words continuously.

The truth is that while many Americans may on occasion utter an expletive, most adults also understand that cursing or swearing is not acceptable behaviour, especially around children. In other words, unlike TV networks, most adult Americans still have some standards. The truth also is that the First Amendment was never intended to endow the media with a right to curse whenever, wherever and however it wants, and as much as it wants.

This is not to say that the FCC should fine a broadcast licensee whenever an expletive is uttered over the airwaves. In the 1978 FCC v Pacifica case, the Supreme Court observed that the FCC’s decision in that case ‘rested entirely on a nuisance rationale under which context is all-important.’

It is to say that to give broadcasters a ‘right’ to curse at least once in every programme borders on madness, and to give broadcasters an unlimited right to curse crosses that border.”
Researchers always complain that marketing research is largely ignored by the managements of most organisations. Even within multinationals where large research departments exist, researchers complain about the lack of input they have at senior management level.

The responsibility of this lies with the attitude and competence of researchers themselves: management will not change, we have to change.

The reasons for this, for me, are threefold:
• Most researchers are researchers, not businesspeople;
• Most researchers are not great communicators;
• Most researchers are not creative in how they think and apply methodology.

Let me address these in turn.

1. Research is, and always will be, about reducing uncertainty in management decisions. Researchers are part of management – they are in “the business of business”, not in the business of research!

Research reduces uncertainty in management decisions: it cannot eliminate uncertainty, but it can guide decisions in the right direction. That places a huge responsibility upon the researcher. Often, he or she is the only consumer voice in a company.

In this he or she must ensure that the business uses consumer and market information to enable it to be competitive within its industry. It does that by informing management about changes within the market, the competitive environment, the industry and what consumers want and need. Research is a mirror to the context within which a brand operates. Research must illuminate management decisions and make management receptive to changes.

This is an important role, yet is often under-represented because of the way in which this task is fulfilled.

For research to be meaningful, it has to be interpreted within the business and brand context that is relevant. That means the researcher cannot focus solely on the research problem or methodology: he or she has to be a part of the management team and know the business so well that he or she naturally integrates and gets respected for the contribution he or she can make.

A purely academic researcher can get away with a pure quest for knowledge – in any company, the context dictates solutions. Your primary role is to be a part of management, not a researcher!

It also means we need to “frame” any research in a way that makes it engaging, interesting and easy for the users to understand.

2. Business is about communication and relationships.

Most researchers are not great communicators. We would often rather sit in our offices and write lengthy documents than talk to real people! To be a part of management, you need to use the simple principle of marketing: be visible!

To be able to play a vital role in any company, you must be a great communicator. If you are not a good communicator, you need to use the tools and training needed to become that. It also means that people must like you.

In most roles within most companies, relationships are more important than competence. I am not saying incompetence is good, I am simply saying the most competent people are often not good communicators and unable to have great relationships with those whose opinions they try and affect.

Always remember, as a researcher, your job is not completed until your results have been used: and that responsibility does not lie with other people – it lies with you!

Also remember – you need to assert yourself: no-one respects a push-over!
3. Creativity enables competitive advantage, not the strict adherence to methodologies.

Creativity enables one brand to out-smart another. It enables a management to use the same information in a different way that adds value to its brands and its business.

The job of a researcher is to be knowledgeable and competent about research methodology, yet, that is only needed to enter the race. It will not make you better than the rest.

To enable your brand to be more successful than those of your rivals, you need better information, obtained in more creative ways. To put it simply: once you know the rules, break them, as innovation only stems from thinking differently and anew. The best consumer insights often come from trying new things and thinking differently.

Simply put, if you only adhere to the figures, computers will shortly be able to do your job better!

When Akia Morita observed a man running with a transistor radio on his shoulder, the Sony Walkman was born – and all he used was his eyes. Traditional research often fails to see the obvious or the different.

To conclude

As a researcher, you are part of management – you have an opinion that at times may be more important than your ability as a researcher, you have to be liked and respected – people must want to listen to you and look forward to what you have to say!

Simple, yet our most serious shortcoming!

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Calendar of Upcoming Events

of Relevance to the Research Industry

<table>
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<tr>
<th>Date</th>
<th>Event</th>
<th>Company</th>
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<tr>
<td>May 2008</td>
<td>Congress</td>
<td>EMRO</td>
<td>France</td>
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<tr>
<td>27 – 28 May 2008</td>
<td>Conference</td>
<td>SAMRA</td>
<td>Royal Swazi Sun, Swaziland</td>
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<td>21 – 25 September 2008</td>
<td>Congress</td>
<td>ESOMAR</td>
<td>Montreal</td>
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The South African Advertising Research Foundation (SAARF®), a not for gain Section 21 Company registered under the South African Companies Act, was formed in 1974 with the main objective to conduct media audience, advertising, market and marketing research that can be used as a currency for buying and selling of advertising time and space in the media.

Serving an estimated more than R17 billion business, it is obvious that the research results must be of the highest possible standard. Consequently, developmental and validation research is a continuing high priority item on the SAARF Agenda.

This article deals with a pilot study conducted in March 2006 to establish the best way to measure radio audiences.

**Background**

Before peoplemeter technology arrived, television and radio audiences were measured together, by using a 7-day self-completion diary, the current Radio Audience Measurement Survey (RAMS) Diary. Respondents complete their radio listening, quarter hour by quarter hour, for seven consecutive days. This information is used to buy and sell advertising space by day of the week and time of the day.

The current SAARF package consists of a single source information for all media, except television. The Television Audience Measurement Survey (TAMS) is a stand alone survey, which is not part of the other SAARF products, including branded product information.

This resulted in all media, except television, having access to branded data. Towards the end of 2004, SAARF was requested to re-introduce television into the Radio Diary. TAMS users, including television media owners asked for this to provide linking variables for data integration with branded AMPS.

As it was clear that a double-medium diary negatively affected radio listening levels, radio media owners did not want television to be re-included in RAMS. This raised the question to SAARF, which of a single medium radio diary, or a double medium radio and television diary, is closest to the ‘truth’. This resulted in the pilot, which this article deals with the objectives as outlined below.

**Objectives**

The objectives of the study were both primary and secondary in nature.

**Primary objectives:**

1. To measure the radio listening levels when:
   - A combined Radio/TV diary, as in the era before peoplemeters arrived.
   - A separate TV diary in the week after the radio diary was completed.

2. To ascertain which methodology of the above method is closest to the “truth” at peak TV viewing times.

**Secondary objectives:**

1. To compare current diary methodology with levels obtained via recall,
2. To assess the consistency of first and last diary days compared to days in-between,
3. To ascertain when and how diaries are being completed and,
4. To obtain some understanding of communal listening.

**Methodology**

Matched samples were drawn, with RAMS as the control sample, and the study was done from mid-June to end-July 2005.

The RAMS design is based on an area-stratified, multi-stage probability sampling procedure. The sample is designed by province, community size, gender and age, and post-weighted by using the same variables and language, where necessary to the estimated media exposure and product usage of the adult (16+ years) population. In urban areas (large towns, cities and metropolitan areas) ‘flooding’ is applied. Flooding implies that all adults in the household are used, not only the principal respondent that is used for AMPS, is asked to complete a radio diary and the interviewer leaves extra diaries for other adults within the household. The principal respondent is briefed to assist other household members with completing their diaries. In rural areas, only the principal respondent is interviewed. This is based on the assumption that communal listening levels will be high in rural areas, due to fewer radios than people in rural households.
For the purpose of this pilot study two samples were drawn. Sample A kept a dual medium radio/television diary in urban areas, where flooding is used, and by the principal respondent in rural areas. For Sample B, the radio diary was kept during the first week, followed by a separate TV diary the following week. Flooding was used only in urban areas as in RAMS and Sample A.

In addition to Samples A and B, ¼ hour recall questions for both radio and TV were asked to provide a measure of:
- time(s) listened/viewed yesterday,
- time(s) listened/viewed last Saturday and
- time(s) listened/viewed last Sunday.

This only applied to principal respondents. This CAPI interview was conducted on diary pick-up with principal respondents’ samples A and B to ascertain when and how the diary was completed. The CAPI interview also asked questions regarding communal listening.

Furthermore, a Computer Assisted Telephone Interview (CATI) was conducted post diary pick up with principal respondents of Samples A/B and a RAMS Control sample. These interviews were conducted between 19h30 and 20h30, which is peak TV viewing time, with balanced samples from Monday to Sunday, to ascertain activities that took place during the ¼ hour prior to the telephone call.

**Sample**
Johannesburg and Pretoria were sampled as urban areas and included all population groups. Limpopo, Mpumalanga, North-West and the Eastern Cape were sampled in rural areas and with only black respondents.

Three hundred households were sampled for the control and samples A/B. Two hundred households were sampled for each sub-sample in rural areas. Sample A consisted of 797 diary keepers, sample B of 781 diary keepers, while the recall sample consisted of 928 respondents.

In terms of analysis, results were matched, using area, population group, age and gender.

**CATI interview procedure**
With the CATI interview conducted post diary pick up for the activity check comparisons, only respondents that had phone access were used.

The question was: “in the 15 minutes before you picked up the telephone, which, if any, of the following activities were you personally doing?”

1. Busy on the internet
2. Doing home duties like preparing food, homework and house chores
3. Watching television
4. Doing personal activities like eating, drinking and chatting to family or friends
5. Listening to the radio
6. Doing hobbies like needlework, DIY, etc.
7. Listening to music tapes or CDs
8. Watching a video tape or DVD
9. Reading a magazine
10. Reading a newspaper.

**Findings of the Primary objectives**
The current SAARF RAMS “radio only” diary produces accurate radio listening levels at peak TV viewing times. The inclusion of TV in the radio diary, results in significantly lower levels of radio listening across most of the day – time spent listening reduces by nearly a third and the station repertoire is also lower. The negative effect of the dual medium diary is larger at peak TV viewing times (19h30 to 20h30). Radio listening is under-read by 60% during this time.

Asking respondents to complete a separate TV diary in the week following the radio diary, resulted in radio listening levels that did not differ significantly from the RAMS across most of the day. However, the “TV only” diary reduced time spent listening by 8% and under-read radio listening at peak TV viewing time by 10%. With regard to TV viewing, the evening activity check also produced a match with SAARF TAMS for the period 19h30 to 20h30. In contrast to radio, TV diaries over-read peak TV viewing, irrespective of whether this is a dual medium or a “TV only” diary.

When comparing the results of samples A and B, the recall sample and the CATI sample with the control RAMS sample, there was no doubt that the RAMS single medium method is closest to the truth. Details of the analyses can be obtained from SAARF.

*continued on page 8*
Findings with regard to completing a diary and communal listening

1. How respondents complete their diaries:
The majority of respondents complete their diaries diligently and follow the instructions. Eighty-six percent (86%) complete the diary themselves and most of the others are illiterate or need help. Eighty-nine percent (89%) complete their diaries at least once a day.

2. Communal listening:
Over 50% of listening is at home and, while the highest incidence of communal listening takes place in motor vehicles, however, in most cases the respondent is involved in choosing the station. As expected, communal listening is higher where there is only one radio in the home. A small proportion of listening takes place elsewhere and is usually communal, with the station being chosen by the person to whom the radio belongs.

3. Recall Methodology
The recall methodology produces significantly lower radio listening levels than SAARF RAMS across most of the day and is far less sensitive to peak radio listening times. This is due to memory decay when going back further than “yesterday”. Recall reduces time spent listening by over 50%, while it also provides the lowest station repertoire and under-reads radio listening to the same extent as the dual medium diary at peak TV viewing times.

4. Diary Day Comparisons
There are no significant differences in radio listening levels for the first diary day, the last diary day and the days in-between. As the start day of the diary is spread evenly across the days of the week, any possible differences are smoothed out.

This paper was presented at the PAN AFRICAN MEDIA RESEARCH ORGANISATION Conference held in Cape Town from 29 October – 01 November 2006.
B eing thoroughly schooled in the dictum not to believe anything unless ‘empirically’ verified, I have always held research and especially market research in high esteem.

Of late, I am revisiting my own beliefs in this respect. While I still believe market research is necessary to collect the mass data of social, economic and business trends, and to poll opinions on issues important to society, I am beginning to question whether “the secret language of statistics, so appealing in a fact-minded culture, is employed to sensationalise, inflate, confuse and oversimplify” as Darrell Huff put it so eloquently in his book with the revealing name How to Lie with Statistics.

Having dealt with a fair amount of market research through the years, I am tempted to wonder if its raison d’etre is not predominantly for image management, and to bolster the brand equity of its client via nicely packaged round numbers, percentages and graphs. I am also beginning to fear that much of the data collection are left to the devices of “groupies” with little understanding or interest in what they are doing to earn extra income.

Some sources close to the industry who do not want to be named, question recruitment policies outright, and in the same breath place a huge question mark behind data control and processing, and – ultimately – reliability.

It is also being said that the big research houses have a virtual monopoly and charge exorbitant fees. Barriers to entry are still firmly in place, no doubt due to politics and other game playing, but also because users are wary to approach smaller, less well-known houses because they don’t understand the hallowed language of statistics and feel safer with the big names. This cycle is in turn further exacerbated by the branded, off-the-shelf and “one solution fits all” trend in research offerings by the bigger research houses. Some even invent target audiences, brand these, and thereby lay claim to exclusivity in “knowing” and researching this audience (eg. Black Diamonds).

Users (not excluding the media) are therefore to blame too. Facts and figures are bandied about on a daily basis, but go unchallenged and unquestioned. If the media makes politics out of, say, the decline in employment equity in top positions over the past year, does anybody ever think whether the sample size has also decreased in comparison with the previous year?

The same applies, for that matter, when a toothpaste manufacturer advertises a 25% decrease in cavities as a result of usage of its product. Make doubly sure that the bottom half of a graph depicting a ‘significantly upward’ trend in growth has not been chopped off in the annual report of a respected industrial company. And so forth. Not necessarily rocket science, but mostly user common sense is required.

The money that should be spent on research, is not for the box ticking of the huge databases, but for the understanding the research practitioner has of the field of study, the appropriateness of the research design and methodology that flow from it, the validity of the measuring instrument and the objectivity and honesty with which the research is conducted and the findings interpreted. (And that applies in both quantitative and qualitative research.)

The more I see of that, the more I will become a believer again.

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**SAMRA needs your contact details**

All SAMRA members are requested to update their particulars.

Email to: info@samra.co.za
The 2007 SAMRA Conference, which took place at the Spier Wine Estate in Stellenbosch recently, was one of SAMRA’s most successful conferences to date, with 170 delegates from all over Africa in attendance. This very successful event sets a new standard in terms of quality speakers, a spectacular venue and high supplier and user delegate attendance.

Guest speakers Steuart Pennington, Abey Mokgwatsane and Liesl Loubser enthralled the packed conference venue with their respective talks on the future of South Africa, the redefinition of experimental marketing and youth marketing, and set the tone for the high quality papers that were the focus of the conference.

Stellenbosch’s winter weather was not able to dampen the delegates’ spirits, and each evening of the conference was filled with delicious food, lots of Spier wine, roaring log fires and chances for delegates to catch up with old friends and make a few new ones.

The gala dinner on the final night of the conference was vividly decorated in both the earthy and bright colours of Southern Africa, and saw delegates being entertained by MC, Terry Murphy, and storyteller, Gcina Mhlope-Becker, before the awards ceremony.
Mark Molenaar (TNS Research Surveys) won the Best First Time Speaker award for his paper “Would you recommend this paper to your friends?”, and also scooped up the award for Best Overall Paper. Nomsa Khanyile and Rudo Maponga (both TNS Research Surveys) won the award for the Best Contribution to Research Standards in Africa, and the Best Research User Paper was awarded to Lea Theron (Eskom) for her paper, “Beyond the realms of fieldworkers – IVR based research: An Eskom Customer Care case study,” presented by Lea Theron (Eskom) and Peter Searll (Dashboard Fast Forward).

According to SAMRA Conference Head, Suzanne Broadley, “As in 2005, Spier provided the backdrop for a really successful conference. The combination of the venue, great weather, super guest speakers and well facilitated sessions, as well as the substantial number of delegates (up to and including even the very last paper!) really underpinned the clear passion that this industry has.”

Shirley Benney, past Chair of SAMRA, says “The professionalism of the selection and judging of the papers and the high standard of the papers presented has set the scene for future conferences. I hope this will create a buzz in the industry and so raise the standards even further going forward.”
Abstract

“Would you recommend this brand/company to your friends or colleagues?” is being promoted as the ‘Ultimate Question’ that (in the format of the Net Promoter Score) best predicts a company’s growth. This paper sets out to show that this question is in fact measuring the same dimension traditional customer satisfaction type questions measure, namely needs/values fit. It further goes on to demonstrate that the key limitation of the Net Promoter Score metric is that it only takes account of one dimension in the customer relationship and is therefore limited by its simplicity, in truly understanding behaviour.

Introduction and rationale for research paper:

Customer satisfaction measurement has traditionally been a cornerstone of measuring customer loyalty, with the premise that the more satisfied customers are, the more loyal they will be. What has become clear, however, is that measuring customer satisfaction alone is simply not enough and is poorly correlated with behaviour (Jones and Sasser, 1995; Hofmeyr & Rice, 2000; Reichheld, 2003). In response to the limitations of customer satisfaction metrics, Frederick Reichheld of Bain and Company claims to have found the ‘Ultimate Question’ that best predicts customers’ short-term purchase and referral behaviours (Satmetrix Systems White Paper, 2004). Reichheld further claims that the Net Promoter Score (NPS) is ‘the single most reliable predictor of a company’s growth’ (www.netpromoter.com).

This ultimate question is simply “would you recommend this product/service to a friend?” measured on a scale of 0 to 10. Reichheld takes the analysis further in producing a Net Promoter Score (NPS) that is arrived at by subtracting detractors from Promoters as defined by their response to the question as follows: NPS = P - D

Where:
• Promoters (P) = those scoring 9-10
• Neutral (N) = those scoring 7-8
• Detractors (D) = those scoring 0-6

This ‘Ultimate Question’ has struck a chord with clients, primarily because it takes something that has been considered complex and makes it astonishingly simple. What’s more, it holds the promise that companies just might be able to shed their sometimes cumbersome customer feedback systems in favour of a simple one consisting of just one question (Fleming, 2006). Simple one-number metrics are popular in the boardroom, where life is too short to have to learn how to interpret complex measures, and it has therefore become extremely popular with CEOs internationally, with companies such as General Electric, Microsoft and American Express adopting it as their key customer ‘loyalty’ metric (www.netpromoter.com).

The main claims of the Net Promoter Score are as follows:

• One question is all that is needed to grow your business
• The ‘Ultimate Question’ to measure an organisation’s performance among its customers is “would you recommend this company/brand to your friends or colleagues?”
• NPS is the single most reliable predictor of a company’s growth
• NPS predicts loyalty (share of wallet and repurchase behaviour, as well as the willingness to make an investment or personal sacrifice in order to strengthen a relationship)
• Promoters are your assets and detractors your liabilities (ignores the middle)
• Passives (Neutrals) are unenthusiastic customers who can easily be wooed by the competition
• Promoters bring in new customers
• Recommendation does not equate with customer satisfaction
• Satisfaction lacks a consistently demonstrable connection to actual customer behaviour and growth
• The truly loyal (Promoters) tend to buy more over time and devote a larger share of wallet to a company they feel good about
• Recommendation is one of the best indicators of loyalty
• In most companies, in most industries, getting customers enthusiastic enough to recommend a company appears to be crucial to growth (Reichheld, 2006; Reichheld, 2003)

Not surprisingly, the Net Promoter Score has generated a large amount of debate and criticism from customer satisfaction measurement practitioners and the research community.
The purpose of this paper is, however, not to criticise the “recommend to a friend” question per se.

Reichheld frequently states and implies that the “recommend to a friend” question doesn’t measure customer satisfaction and is indeed measuring some other dimension in customers’ willingness to recommend a product or service to someone else (Reichheld, 2003).

This paper contends that the “recommend to a friend” question is in fact measuring the same dimension as other customer satisfaction type questions, namely the extent to which the brand or product meets a customer’s needs and values. As such, it is measuring the same thing as customer satisfaction, which has been shown by Reichheld himself as not being very predictive of behaviour. The NPS is in effect, mutton dressed up as lamb.

The purpose of this paper is then to show that simply measuring this one dimension (correlating with satisfaction, recommendation, brand performance etc) isn’t enough to explain customer behaviour and identify the extent to which a brand may be at risk to competitors in the market. This is the main criticism of measuring customer satisfaction alone (Hofmeyr, 1995; Hofmeyr & Rice, 2000) and it is equally valid when considering the NPS.

**Research approach:**

This paper will set out to show that a multi-dimensional measure of brand relationships is more valid and consistent with behaviour than a single-dimension measure such as the NPS. The NPS is thus inherently a weak and misleading measure if used on its own. For this paper, I have drawn on a multi-dimensional model of commitment to demonstrate the shortcomings of the NPS and/or “recommend to a friend” question as a measure of brand health. The model employed is the Conversion Model™ – a proprietary model, but with the dimensions of the model and the underlying theory firmly in the public domain. My purpose isn’t to try to sell the merits of the Conversion Model, but merely to use it to show up the weaknesses of a single-dimension approach.

**The Conversion Model™ – A multi-dimensional framework of Commitment:**

We measure the strength of a company or a brand in people’s minds in a directly attitudinal way. There are 3 aspects to this measurement:

- Does it deliver against the needs and the values that a person has in a market? To the extent that it does, it will be considered.
- Is the choice important? If a person shrugs their shoulders and tells us they don’t care what they buy because they’re uninvolved, then they cannot become committed.
- How does the business or brand rate when compared with others? To be uniquely committed, a person has to believe that the business or brand is best.

Notice that brand performance is a key metric in the approach. In other words, how well someone feels a choice satisfies their needs and values is the starting point. But it isn’t enough. Single-minded commitment also requires involvement and relevant advantage. For one business or brand to be consistently chosen above all others, the customer must feel that the choice is important and they must feel that all others are inferior. If someone says, “This choice is perfect, it’s very important to me, and I’m not interested in anything else”, then we know that the company or brand concerned has achieved a position of unique attitudinal strength in that person’s mind.

The predictive ability of the Conversion Model™ has been extensively validated using scanner panel data with actual purchase behaviour. The data I have used for this paper is from proprietary studies, hence I have disguised the brands. The numbers shown are, however, from the actual data.

(Please note that for the remainder of this paper, where reference is made to Promoters, this will refer to a rating of 9 – 10 on the “recommend to a friend” scale. Where reference is made to Non-promoters, this will refer to a rating of 0 – 8 on the “recommend to a friend scale”).

**What is the Net Promoter Score measuring?**

Reichheld claims the Net Promoter Score is measuring something different from customer satisfaction, namely the extent to which a customer will make a personal sacrifice by risking their reputation in making a recommendation to someone else. Firstly, this assumes a high level of importance and risk in the decision – most buying decisions are not life and death situations and making a recommendation isn’t going to be such a big consideration. Secondly, there is a difference between actually making a recommendation and being asked merely to rate a company or brand on a recommendation scale. In the latter case, the rating is more likely just to reflect the extent to which the company or brand meets the needs and values of the person doing the rating.

Needs/values fit can be measured in a number of ways and is central to customer satisfaction measurement. “How satisfied are you with….”, “How likely would you be to recommend…to a friend or family member”, “…please rate each brand you are aware of on a 10-point scale where ‘10’ means you think it’s perfect and ‘1’ means you think it’s terrible”, etc…essentially all measure the same dimension.
Chart 2 illustrates this point with a number of charts from different studies in different categories which included both the brand performance measure above (terrible to perfect) and the “recommend to a friend” question. It is clear from these charts that there is a great deal of similarity in the responses to these two questions and that they are indeed measuring the same dimension.

The further purpose of this paper is to demonstrate, however, that a person’s relationship with a product or service is more complex than just needs/values fit and in order to obtain a valid and predictive measure of customer relationships, one needs to take into account other dimensions which influence the relationship as well.

There can be only one!...or not?
The intense loyalty of Promoters as described by Reichheld implies there is only one company or brand that I will recommend, but what about other brands I may feel strongly about?

In understanding customer relationships, a second key dimension is the attraction of alternatives in the market. Thus, while I may be very positive about a brand, I may be equally positive about other brands too. The more brands I find attractive, the less likely I am to be ‘loyal’. By the same token, I may not be very positive about any brands in the market, but I will still use them and still have a preference. If I rate my preferred brand 6 out of 10 and all other brands I use 3 out of 10, am I less loyal or valuable as a customer than someone who rates her preferred brand 9 out of 10 and all other brands used the same?

In Table 1, below, we see that overall, less than half of customers promote only one store, while 30% are not Promoters of any stores. This doesn’t mean, however, that they don’t have a preference, or are not ‘loyal’ to a particular store. In fact, we find that 61% of these customers (Non-promoters) are single-mindedly committed to one store in their repertoire.

<table>
<thead>
<tr>
<th>Store</th>
<th>Promoters of one store only</th>
<th>Promoters of more than one store</th>
<th>Promoters of no stores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store G</td>
<td>38</td>
<td>28</td>
<td>62</td>
</tr>
<tr>
<td>Store I</td>
<td>52</td>
<td>33</td>
<td>32</td>
</tr>
</tbody>
</table>

Table 1: Promoters of one store versus many, or none
In Table 2, we see a comparison of two stores with two very different customer profiles. Store G has a significantly lower Net Promoter Score than store I and according to Reichheld should therefore be performing well below it. We see, however, that Store I customers are less likely to be Promoters of only one store, and in particular are less likely to be Promoters of only Store I. Comparing their behaviour, Store G customers are almost four times more likely to spend most of their spend at store G, than Store I customers at Store I. Similarly, twice as many customers of Store G see it as their ideal store, compared to how Store I customers see their store. With a lower Net Promoter Score, Store G customers are clearly more loyal than Store I customers, both in terms of behaviour and perception of the store.

But, doesn’t the “recommend to a friend” question measure involvement?

A third key dimension to look at is the extent to which people are involved with the brand or category. Where involvement is high, people will tolerate dissatisfaction because the relationship is important to them. On the other hand, where involvement is low, it does not matter how satisfied people are, they will go with whatever is the easiest, cheapest or most convenient decision at the time.

Reichheld assumes that people who rate a brand as Promoters are more involved with the brand (they put their reputations on the line to recommend it) (Reichheld, 2003). This, however, is not always the case. In our retail store study, 17% of customers who rated Store D a 9 or 10 on the “recommend to a friend” question did not view the decision as to which store they shopped at as very important. We need to understand the extent to which choice is important to people to understand how strong customer relationships are. A better model would incorporate this dimension as well.

Tying it all together:

By combining needs/values fit, attraction of alternatives and importance of brand choice, we get a measure of customers’ relationships with brands which is significantly better at identifying strong or weak brand relationships than the NPS and is far more useful as it is measured at respondent level, and so can be used for profiling customers and other strategic analysis – answering the who, why, when, how and where type questions. It overcomes a key weakness of the NPS in that it is actionable.

In demonstrating that the NPS isn’t a sufficient measure to gauge the strength of customer relationships, the starting point is to compare it to a multi-dimensional measure such as the Conversion Model™ measure, which has a strong correlation with actual future behaviour.

Chart 4, clearly shows that there isn’t a consistent relationship between the two measures.

So, which is a better measure? Let’s look at some examples from a retail store study.

The NPS is merely a calculation made on aggregated data and therefore doesn’t allow for any respondent level analysis. In evaluating the validity of the ‘Ultimate Question’, comparisons will be made with Promoters, as defined by Reichheld. As these customers are claimed to be ‘truly loyal’, one would expect their behaviour and perceptions to reflect this.

Chart 4: Conversion Model™ Commitment measure versus Net Promoter Score for retail store brands

continued on page 16
How good is the ‘Ultimate Question’ at predicting behaviour?

One way to evaluate the strength of the relationship with a brand is to look at the share of spend it gets relative to other brands. The stronger the relationship, the higher the share of spend should be.

Chart 5a, shows the incidence of spending most of grocery spend at the store (Store I) when one looks at Commitment versus Promoters and Non-Promoters. Commitment is significantly better at identifying customers who are likely to spend most at the store.

In Chart 5b, looking at Promoters and Non-promoters in terms of commitment, we find that almost half of Promoters are classified...
as uncommitted. Looking at their likelihood to spend most at the store, only 3% claim to do so. Bearing in mind that these ‘Promoters’ are customers who are supposed to be ‘truly loyal’, the Non-promoters are almost three times as likely to spend most at the store. Similarly, when looking at Non-Promoters (dismissed by Reichheld (2006) as being unenthusiastic customers, easily wooed by the competition), we see that a quarter are in fact Committed and have a higher tendency than Promoters to spend most at the store.

But let’s look at actual (claimed) spend to see whether the Promoters are worth more to the store or not. The Net Promoter Score is touted as ‘the single most reliable predictor of a company’s growth’ (www.netpromoter.com), so one would expect some of this growth to be driven by Promoters spending more at the store and being more valuable customers.

Looking at claimed spend at the store, Chart 6, shows that Commitment is better at identifying valuable customers than just looking at Promoters or Non-promoters.

The analysis shows that 33% of Store I’s customers are Promoters and classified as Committed. These customers have the highest share of spend and are worth the most to the store. However, we can also see that 1 in 4 customers are Promoters, yet are classified as uncommitted. Looking at their share of spend and value to the store, they are less ‘loyal’ and less valuable. Similarly, 1 in 10 customers aren’t Promoters of the store, yet are committed and have a higher share of spend and value to the store than the uncommitted ‘Promoters’ even though they rate the store lower on the scale. Looking at uncommitted customers, their share of spend at the store is the same, whether they are Promoters or not. Clearly, when looking at share of spend, the “recommend to a friend” question on its own doesn’t have sufficient discriminating power to understand or explain customer relationships and behaviour fully.

**Conclusions:**

- The “recommend to a friend” question is in fact measuring just one dimension of the customer relationship, namely needs/values fit.
- This measure on its own is insufficient to understand behaviour and is unreliable, even within a category, as demonstrated by inconsistencies in Net Promoter Scores and purchase behaviour and attitudes.
- The measure doesn’t capture involvement with a brand, as claimed by Reichheld in explaining Promoters’ ‘true loyalty’ as going beyond repurchase behaviour and investing their personal reputation.
- The measure fails to take into account customers’ relationships with more than one brand or company and the extent to which these relationships will influence their ‘loyalty’.
- The measure fails to capture the potential commitment of customers who rate brands lower than 9 on the scale and therefore excludes a large proportion of valuable and ‘loyal’ customers.

*Chart 6: Classification of Promoters and Non-promoters using Commitment and showing customers’ spend at a retail store*

continued on page 18
• There is no evidence that the measure is indicative in any way of a brand’s attraction to non-customers. The ‘word of mouth’ value of recommendation as captured by the metric is not evident in having any impact on attraction of customers.

• The measure is limited in that it only focuses on customers and can be misleading. In order to fully understand a brand’s strength and potential in the market, a measure of the attraction of the brand or company to non-customers is essential, particularly where market or category changes could render a product or service obsolete or uncompetitive in a relatively short time period.

• The measure is inferior to a multi-dimensional measure of customer relationships in explaining purchase behaviour and attitudes towards a brand.

• While simple, the measure is simplistic and on its own is inadequate to explain customer relationships in a competitive environment fully.

• While this paper has not focused on the performance of the measure relative to company growth, it is evident from the limitations of the measure that it can’t claim to be the ‘Ultimate Question’ or the ‘best predictor of a company’s ability to grow’.

Bibliography


Introduction

There is increasing evidence, from academia as well as the business world that traditional ways of doing business might not be sufficient to deal with the complexities of the modern, global business world. If we accept that this is true, then it is appropriate to examine the role that market research could play in this world and how it might have to change. In particular, this article examines how market research could support strategic planning in a changing business environment.

The effects of business change on strategic planning

There are many different publications and papers that deal with business change and how it happens. For the purposes of this paper, I am focusing on the following implications of environmental complexity for strategic planning.

- Rather that strategic planning being a rational, structured and top down process, strategy is diverse, emergent (bottom-up rather than top-down) and complicated. Typically, strategic direction is at best semi-coherent, meaning that firms will try different things and then build on successful ideas.

- The above also suggests that experimentation (rather than elaborate market research) plays a key role in strategic planning.

- Reinvention (rather than continuous improvement) is the key, so firms in this position are constantly looking for new ways to create value.

- Strategic planning isn’t an efficient process – in many ways it is messy and relies on “trial and error”.

- The notion of strategic agility suggests that a firm should know its own strengths and how to use them in order to respond to environmental change quickly and appropriately. Therefore, market research supporting the process of change needs to move at the same speed that the business needs to move at.

- Clayton Christensen\(^2\) pointed out that being market focused is often the biggest barrier to innovation, since listening to customers won’t enable the firm to pick up on innovations that will be disruptive to its current business. In fact, customers will often be dead set against innovations that will later become dominant.

What are the implications for market research?

There are potentially many different implications for market research and how it supports decision-making, but I would like to focus on the following three aspects.

- Market research has traditionally been reactive rather than proactive, focusing on investigating and helping to find solutions to particular business issues or problems. For example, if a firm was considering investing in a new geographical market, market research would be used to determine the feasibility of such a decision. Given the need for businesses to be more agile, market research needs to be more proactive. For example, if geographical expansion is a known strategic option for the firm, market researchers could proactively determine feasible markets and their viability. This would of course require a much deeper understanding of the firm’s strategies, and more importantly, for market researchers to become part of the strategic conversations in the firm.

- The speed of market research needs to increase. In a world where strategic agility is key, and time is a competitive tool, long and extensive market research projects can be a hindrance rather than a help. Being proactive will help, and ongoing rather than ad hoc research could be a useful tool. However, it is also important for market researchers to develop a more extensive range of research tools – there is more to life than focus groups and quantitative surveys! In particular, qualitative research tools are becoming increasingly important (e.g. in academic business research) and this provides a rich field to explore and find new ways of doing market research.

- There is a need for market research to move up the value chain. Too often, in my experience, decision-makers are simply given the report or feedback and then expected to change their behaviour based on the results. This doesn’t happen (hence the multitude of dusty research reports on decision-makers’ shelves!) and we as market researchers are then aggrieved by the lack of action by our clients. In this regard it is important to seek integration with strategic decision-making tools like scenario planning, and most importantly for market researchers to really understand the business and the decision-makers that are their internal clients.

Conclusion

Traditional market research will increasingly be under pressure from their internal clients and under threat from competitors, unless there is a concerted effort to continuously move the profession forward. This will require innovative thinking, continuous improvement and above all a deep understanding of the organisations and clients we serve.

(Footnotes)

2 The Innovator’s Dilemma, 1997
SAMRA, the Southern African Marketing Research Association, held their Annual General Meeting on Monday the 6 August 2007 at the Inanda Club in Johannesburg. At the AGM the outgoing SAMRA Council reviewed the past year, and the new SAMRA Council assumed their portfolios.

The new SAMRA Council is as follows:

- **Chairman**: Leonie Vorster
- **Chair Elect**: Niel Victor
- **Immediate Past Chair**: Shirley Benney
- **SAMRA Corporate**: Lydia Rolando
- **Membership**: Mluleki Ncube
- **Fieldworkers Forum**: Lesego Sikwane
- **Accreditation**: Alison Ringer
- **Code of Conduct**: Leonie Vorster
- **Training & Education**: Hendrik van Vuuren
- **SSETA**: Jude James
- **RUF**: Grant van Niekerk
- **Communication**: Suzanne Broadley
- **Journal**: Dion van Zyl
- **Yearbook**: Alison Ringer
- **Conference**: Rosemary Henson
- **Cape Town Branch**: Beverley Buchanan
- **Johannesburg Branch**: Alexan Carrilho
- **KwaZulu Natal Branch**: Peter Highley
- **Pretoria Branch**: Jan Wegelin
- **Namibia Branch**: Tony Hoft

Says Leonie Vorster, the new Chairman of SAMRA, “It is high time that research takes its rightful place in South African society and the economy, with a renewed and sustained focus on adding value through professional, useful contributions as an industry.”

For more information about SAMRA, or contact details of the New Council, visit www.samra.co.za or call 011 886 3771.
The New SAMRA Council

Chairperson & Code of Conduct
Leonie Vorster

Chairperson Elect
Niel Victor

Immediate Past Chair
Shirley Benney

SAMRA Corporate
Lydia Rolando

Membership
Mluleki Ncube

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Fieldworkers Forum
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RUF
Grant van Niekerk
Extended Abstract

Against the backdrop of affirmative action (AA) and Black Economic Empowerment (BEE), job-hopping amongst black professionals is a problem commonly perceived to be faced by many companies in South Africa. Many companies feel that the pressure to meet BEE quotas, combined with a shortage of black talent, drive this behaviour. Therefore, the myth around this debate states that: Black professionals are more likely to job-hop than professionals of other ethnic groups.

There are two schools of thought which dominate the debate. One school of thought agrees with the myth, stating that BEE and AA exacerbate this behaviour. The other school of thought disagrees with the myth, suggesting that this is an ‘era of instant growth’ and that job-hopping is a cross racial trend – it is only South Africa’s history that causes the application of colour. This school of thought believes that it is up to the employer to make talent stay as talent will stay as long as it feels it is still adding value.

Whilst a lot of people have something to say on the subject matter, few statistics exist to substantiate or refute this myth. The primary objective of this paper was, therefore, to substantiate statistically whether this behaviour was unique to black professionals in South Africa.

Graph 1: Agree – statements about career path

Read: 43% of the professionals in South Africa have worked for the same company since they started their career, whilst 29% are currently looking for another job. The total sample was 2 000 adults aged 18+ living in metropolitan areas, of which 484 fell into a defined list of occupations.
Quantitative research concluded that, while a proportion of black professionals have changed jobs since they started their careers (48%), ‘white’ professionals were significantly more likely to have changed jobs (75%). We could therefore infer that black professionals are not more likely to job-hop than professionals of other ethnic groups. Note that the age distributions of the four population groups were very similar so this is not a function of “newness” in the job market.

However, and more worryingly, the second statement shows that black professionals are significantly more likely to be looking for another job compared with other race groups – a clear indication that they are unhappy with their current job. This prompted an analysis of how black professionals experience the workplace.

An employee commitment model that uses the Conversion Model™ to determine both commitment to one’s organisation and commitment to one’s job allowed a segmentation of this group to measure the number of black professionals who were committed to their current companies vs those who were committed to the work they do via an on-line panel survey:

From the diagram overleaf, it is apparent that black professionals (who can be accessed online) in South Africa are more likely to be committed to either only the work they did or only the company they work for. The balance of commitment to work and company is significantly lower (28%) than global norms (43%).

This further prompted the research to include a qualitative component, as the debate of job-hopping evidently is just a tip of the iceberg.

This shows that black professionals feel they face considerable challenges and frustrations in the work environment. Racial discrimination was cited as one of the key causes for unfair treatment. Many feel that, whilst companies have transformation strategies in place, attitudes and systems are yet to be transformed. Black professionals feel that companies need to reach out to them and recognise their efforts. They feel that they are the only ones going the extra mile, trying to impress their companies, yet these efforts are not fairly rewarded and recognised.

Another key concern that emerges from this qualitative research, which also contained in-depth interviews amongst HR specialist, is the disconnect in how black professionals experience the workplace and how HR specialists, especially white HR specialists, perceive the situation. This means that corporate South Africa does not yet have effective retention strategies for black talent.

On a more positive note, it is clear that majority black professionals are ambitious, and want to grow and add value to the companies for which they work.

For more information or the full paper, contact Nomsa Khanyile or Rudo Maponga on +27(11) 778 7500 or via email: Nomsa.Khanyile@tns-global.co.za or Rudo.Maponga@tns-global.co.za.
PAMRO is an organisation started nine years ago to establish a forum where media researchers on the continent of Africa could get together an exchange notes and views on research techniques and other professional issues. One of the cornerstones of the organisation is the implementation of a programme of effective harmonisation of the many tools of research and research data that exist throughout the continent. This initiative has grown to an annual conference in which developments in terms of media and market research have been exchanged, and new professional contacts have been established.

This year’s conference was held at Club Mococola, Mangochi, Malawi. It was attended by delegates from – countries on the continent. – papers were read on a wide variety of subjects – all of which especially relevant to Africa. Examples are the issue of vernacular language in marketing,

The President of PAMRO, George Waitito of Kenya reflected on the achievements of the organization the past nine years.

These included:

1. Harmonised audience measurement methodologies

2. Harmonisation a core audience measurement questionnaire

3. Published audience research user guidelines

4. Helped to establish, advocate and promote the formation of Joint Industry Committees (JICs) in many African countries

5. Shared considerable knowledge on audience media research through its annual conferences

6. Established a network of audience and media research practitioners and providers in Africa

7. Formulated a concept note on how audience measurement can be conducted on an on-going basis across Africa

8. Centralised the access of available audience and media research databases in Africa

Some of the interesting work that is considered at the conference every year, is

- Activity reports on research developments of each country represented at the conference (This year the reports of 20 countries were discussed)

- Progress in terms of harmonisation of research data and techniques used – a core questionnaire has been developed and piloted in ten countries

- The development of a Pan African Living Standards Measure has been completed

In research terms therefore, PAMRO as an organisation has an important role in the development of a unique African approach to understand the complexities and exciting developments of our continent. It already contributes to promote professional standards and co-operation between researchers as well as users of the information.

For more information contact Piet Smit 083 284 2586