

**TO: PRINT AND DIGITAL MEDIA SA MEMBERS
INTERNAL COMMUNIQUE**

DATE: 10 MARCH 2014

The PDMSA's position on current Research issues

As you may be aware, there has been a fundamental shift in the media industry around audience measurement and media currencies – the tools that advertisers use to determine where to place their spend and to track return on investment.

Research issues have been top of the agenda since the National Association of Broadcasters (NAB) unexpectedly resigned from the South African Audience Research Foundation (SAARF) last year. The resignation is effective from December 2014.

SAARF was established as a tripartite agreement between the marketers, media agencies and the media owners. The exit of the broadcasters from SAARF has not only changed the dynamics of the strategic partnerships within the broader media industry but also directly impacted how, as the print media industry, we organise ourselves in terms of future research.

This split has raised important questions for the print media industry, namely around the ongoing relationship we have with SAARF, whether we remain an involved and contributing member of SAARF and cooperate with the remaining industry stakeholders within SAARF. The continued conservancy of SAARF has many benefits for the coalition of the research beneficiaries including the creation of an Establishment Survey (ES). While there is general agreement among key stakeholders that the ES should go ahead, there is further discussion to be had around ownership and scope.

The independent print media research survey – PAMS (Print Audience Measurement System) could also be implemented using SAARF's existing infrastructure and capacity.

We can confirm at this stage that despite the NAB's exit from SAARF, they have committed to collaborating with the rest of the industry on an ES. The planning and preparation for the ES is being coordinated through a SAARF task team, in which the print media is represented, and the NAB. The NAB will devise and manage its own broadcast industry-specific surveys.

PDMSA's Research Committee has had a series of workshops and meetings over the past few months. After the most recent meeting with representatives from SAARF also present, we can provide you with this initial feedback:

- SAARF has embarked on a re-organisation process and been involved in stakeholder engagements over the past few weeks to present its vision and the future research model moving forward.

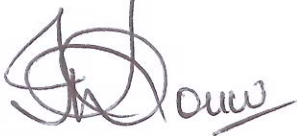
- In the coming few weeks, the print media industry will make a strategic decision on whether it will remain in SAARF or whether it will manage and co-ordinate its research needs through a print media industry JIC.
- Planning and preparation on the Establishment Survey and PAMS will occur simultaneously.
- In terms of the new Establishment Survey (the evolved AMPS), PDMSA will provide input to reflect print media's needs and expectations for the research.
- PAMS must be innovative and inclusive to ensure that it meets the needs and expectations of the print media industry both now and into the future i.e. it must accommodate the multiple content platforms.
- PDMSA is working with technical research experts and referencing international best practice to assist us in the development and design of the new PAMS research model and currency.
- A communication plan is being implemented – members, as well as broader stakeholders, will be updated on developments of the print media industry research processes.

In conclusion

The Research Committee has already conceived an Audience Measurement Plan for 2015. This will also be communicated to members in due course.

We can confirm that the print media industry's interests and needs are acknowledged by SAARF and PDMSA is actively engaging on the Establishment Survey and the PAMS project.

Kind regards,



Ingrid Louw
Chief Executive