

# PAMRO 2012

## From local to global: Media research in a developing world: Country activity reports

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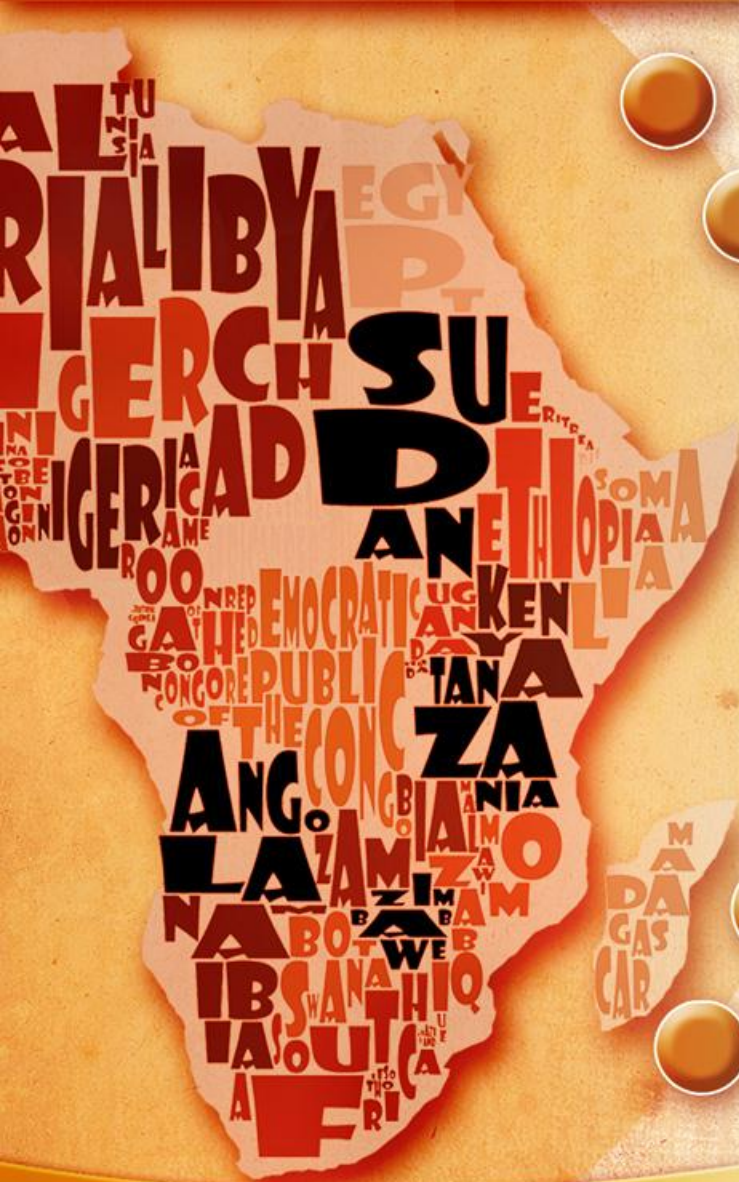
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# Points for discussion



Country reports

Socio Economic Variables

The African consumer

Media audiences in Africa

Conclusion

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PAMRO 2012: Country activity reports

# Country reports




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# Country reports for largest markets



- 11 Country activity reports are available

- Content:

- Country overview
- Demographic profile
- Media consumption trends across the different channels

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# Socio Economic Variables



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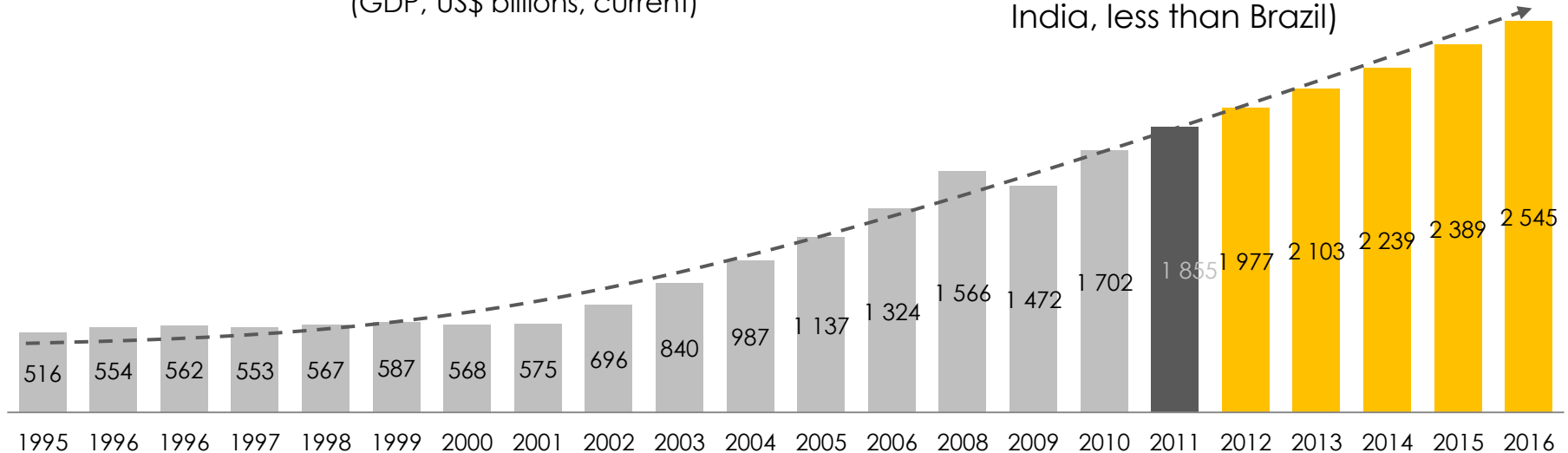
# The amazing African growth story (GDP)-exceeds growth in Asia



Over the past decade, African economic output has more than tripled. According to "The Hopeful Continent", The Economist, December 2011, in eight out of the 10 years, Africa has grown faster than East Asia.

Africa's economic output  
(GDP, US\$ billions, current)

**US\$2** trillion Africa's collective GDP (more than India, less than Brazil)



Source: IMF, WEO Database; expected 2011; forecasts 2012-2016






# The African growth story drives global economic growth






According to research done, **six African countries have been among the 10 fastest growing economies in the world over the past decade**; and **seven African countries are forecast to be among the 10 fastest growing economies over the next five years**.

Given recent growth, it should perhaps be unsurprising that returns on investment in Africa have been among the highest (if not the highest) in the world.

World's ten fastest-growing economies  
Annual average GDP growth, %

Country	2001-10
Angola	11.1
China	10.5
Myanmar	10.3
Nigeria	8.9 
Ethiopia	8.4 
Kazakhstan	8.2
Chad	7.9
Mozambique	7.9 
Cambodia	7.7
Rwanda	7.6

Country	2011-15
China	9.5
India	8.2
Ethiopia	8.1 
Mozambique	7.7 
Tanzania	7.2
Vietnam	7.2
Congo	7.0
Ghana	7.0
Zambia	6.9
Nigeria	6.8 

Source: The Economists, IMF



Countries on both lists

# The African growth story

## Global competitive Index (GCI)



The GCI compares countries' **productivity** and **efficiency** and highlights their **comparative advantages and the advisability** of investing in them. The index examines the efficiency of different sectors of the national economies and their contributions to the country's productivity.

GCI explicitly takes into account the fact that countries around the world are at different stages of economic development.

The Global Competitiveness Index has varied uses:

- It provides a **comparative overview** of the **economic and business potential** of the included countries.
- It estimates the **productivity of individual sectors** and the **economy** as a whole.
- It provides an assessment of the **value of investing** in the listed countries based on the identification of comparative advantages.
- It highlights the **strengths and weaknesses** of national **economies**, and identifies elements of the economy that stimulate or inhibit growth.

The GCI is published annually by the World Economic Forum, an independent group whose goal is to promote economic growth and social development.



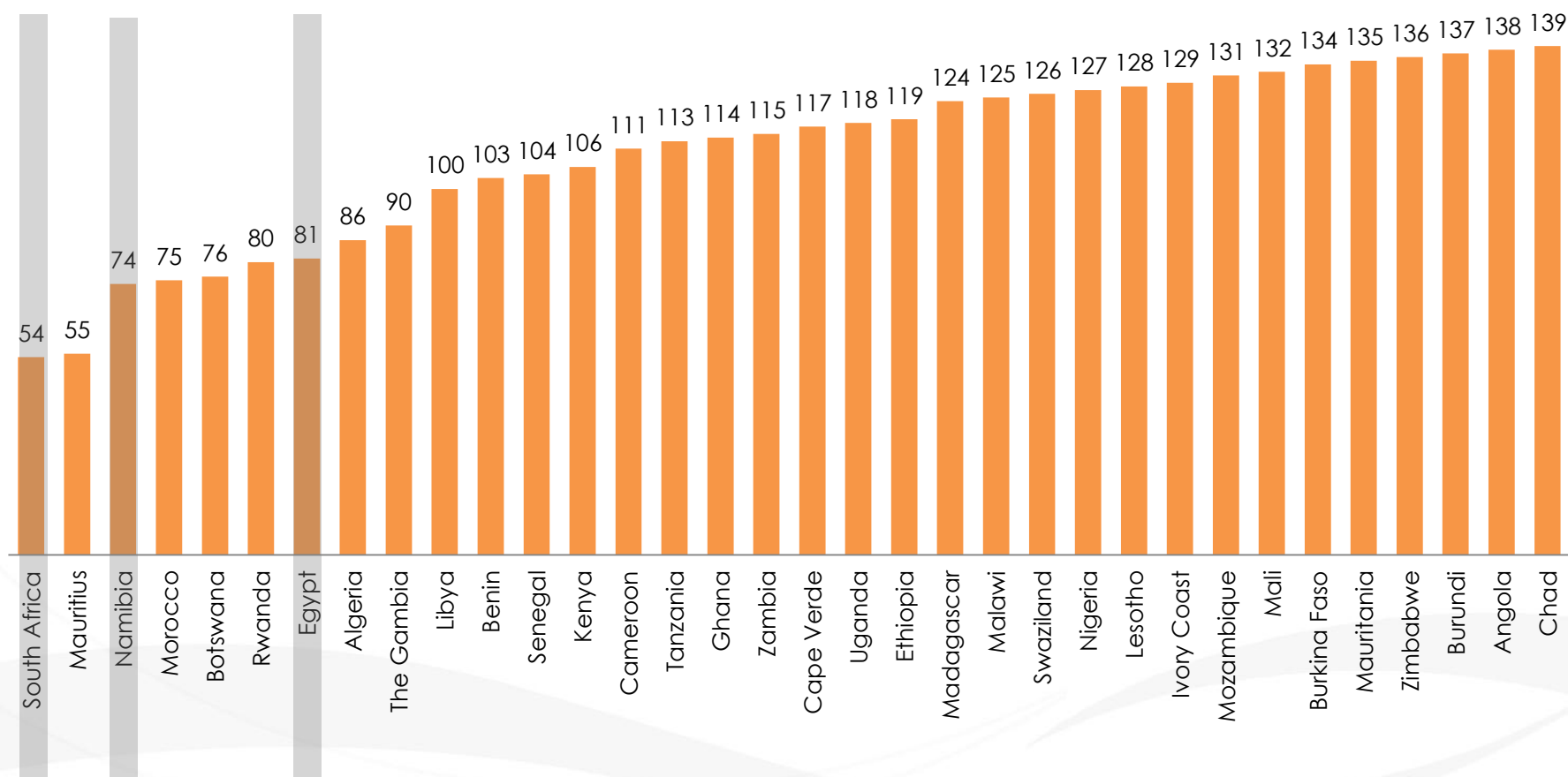
# The African growth story

Global competitive Index (GCI)

Countries by GCI Ranking out of 139 countries.



## Overall





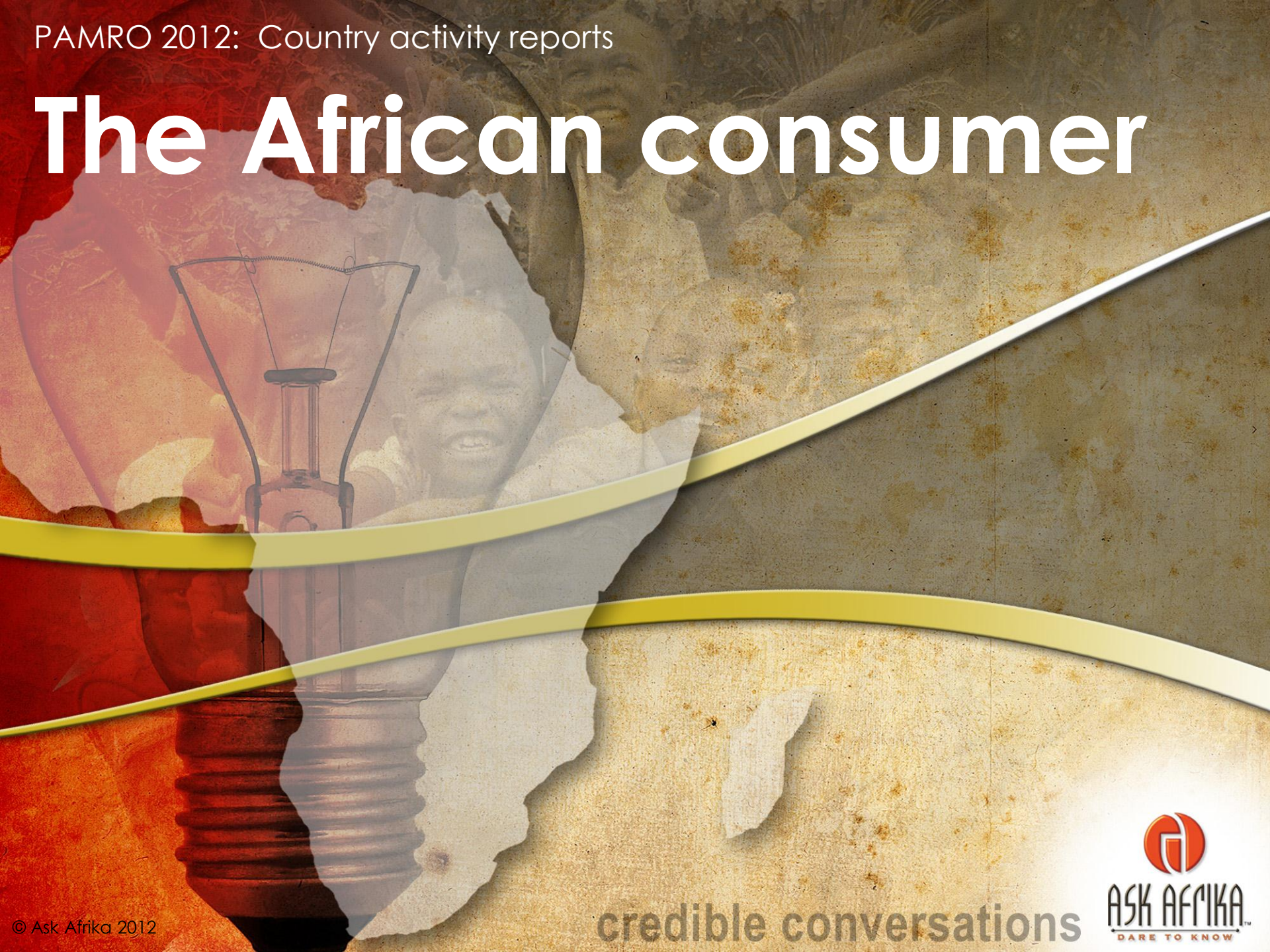
# Socio Economic Variables indicate massive investment into a huge workforce and society

- **54** Sovereign states
- **1** billion people
- **7** African countries among the 10 fastest growing economies in the world 2012-15
- **3** of the top 5 fastest growing investors into new projects in Africa are African
- **20%** compound growth in Foreign Direct Investment (FDI) projects 2007-11
- **US\$2** trillion Africa's collective GDP (more than India, less than Brazil)
- **US\$85** billion funding for African infrastructure in 2010



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# The African consumer

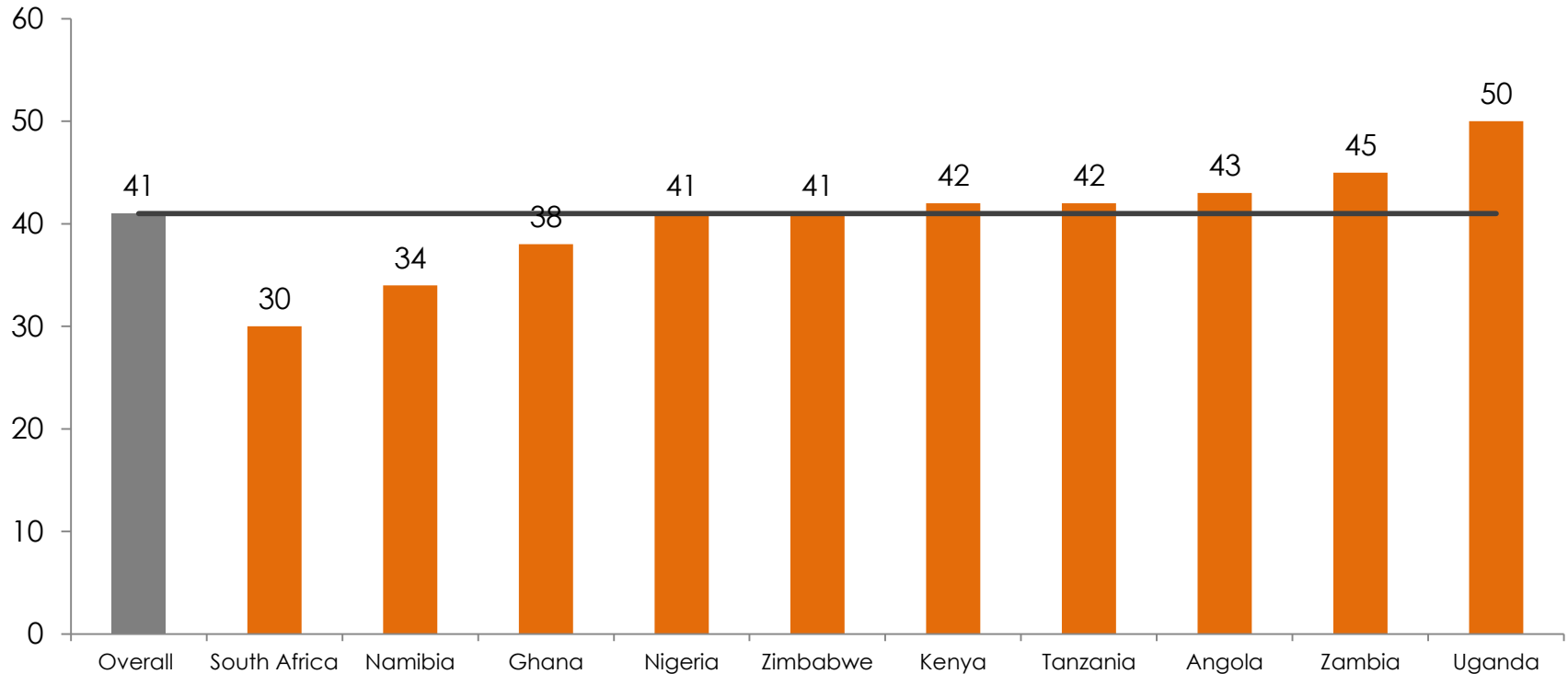


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# The African consumer: % of population below 15 years



Source: PAMRO 2012 Country Reports

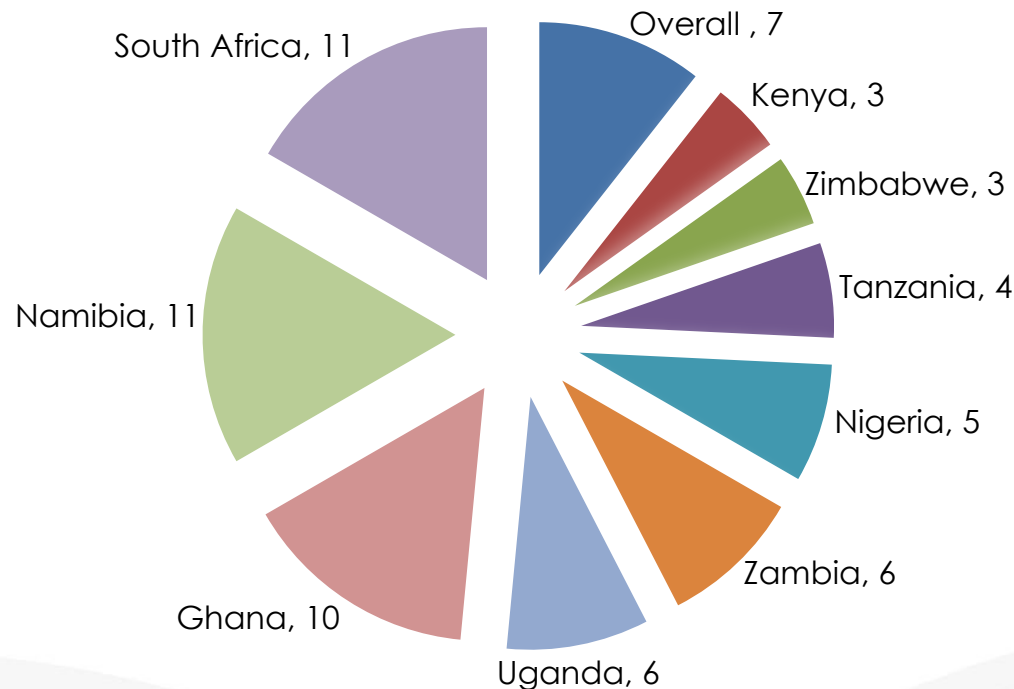


# The African consumer:

## Literacy / Urbanisation / Number of official languages




	Average	Namibia	Ghana	RSA	Zambia	Uganda	Kenya	Nigeria	Tanzania	Zimbabwe
Literacy	78	89	58	98	71	67	87	70	69	97
Urbanisation	37	42	51	62	39	20	22	32	26	39



Source: PAMRO 2012 Country Reports



# The African consumer

- 
- The African consumer is still a young and aspirational consumer with 41% of these countries serving consumers < 15 years
  - Overall literacy levels averages at 78%
  - With an average of 37% urbanisation, research teams often travel vast distances to cover rural areas
  - With a minimum of 59 vernacular languages across the 12 countries, invest in recruiting local interviewers

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# Media audiences in Africa



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# Media audiences in Africa

Number of media channels available per country



Country	Total number of channels	n = TV channels (580)	n = Radio channels (956)	n = newspapers (280)	n = magazines (382)
Nigeria	525	180	200	80	65
South Africa	577	171	205	53	148
Namibia	214	100	24	10	80
Uganda	402	72	276	26	28
Kenya	208	20	173	15	* -
Zambia	83	13	47	6	17
Zimbabwe	63	2	7	24	30
Tanzania	53	8	6	39	* -
Angola	47	3	13	17	14
Egypt	26	11	5	10	* -

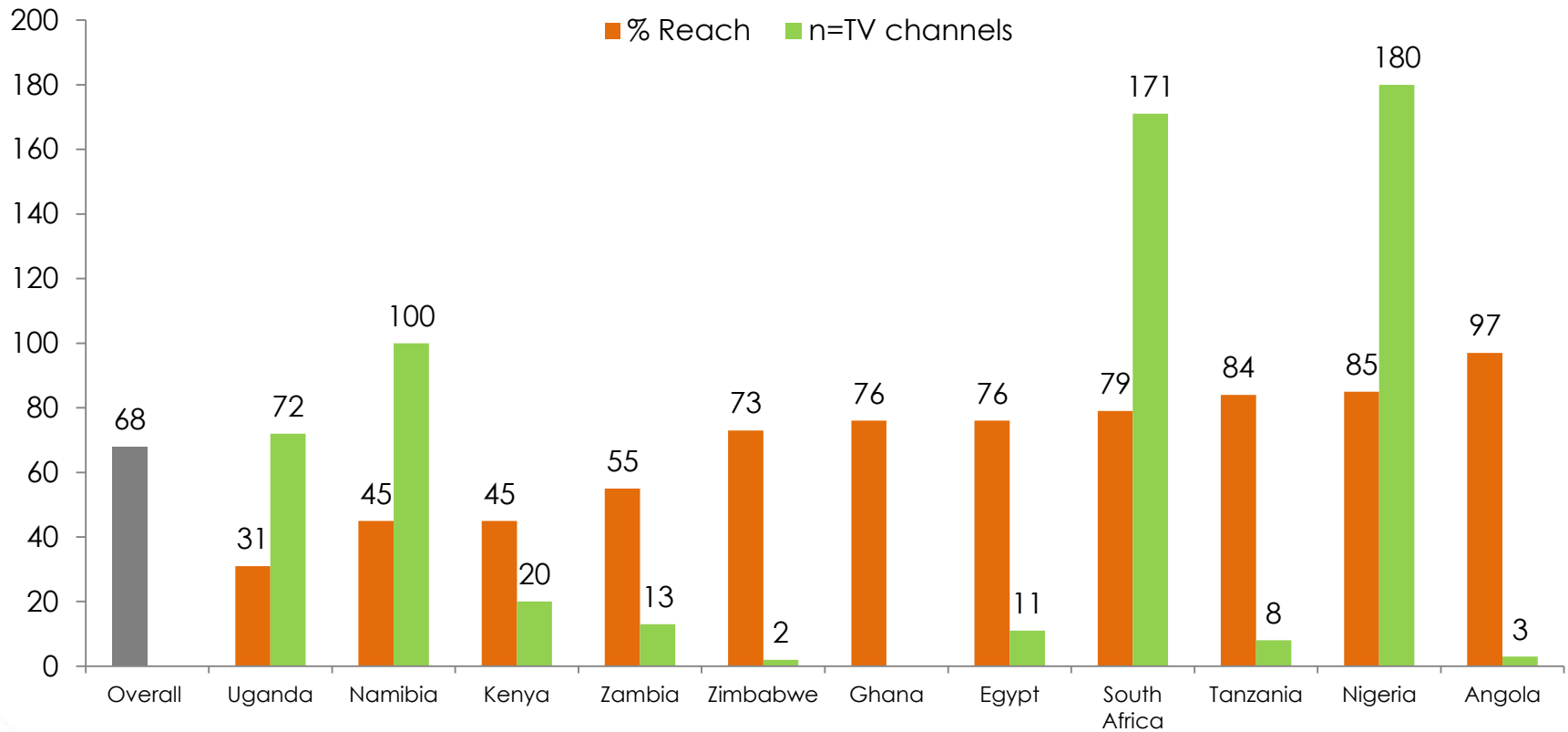
Source: PAMRO 2012 Country Reports

Please note: \*- not available



# Media audiences in Africa:

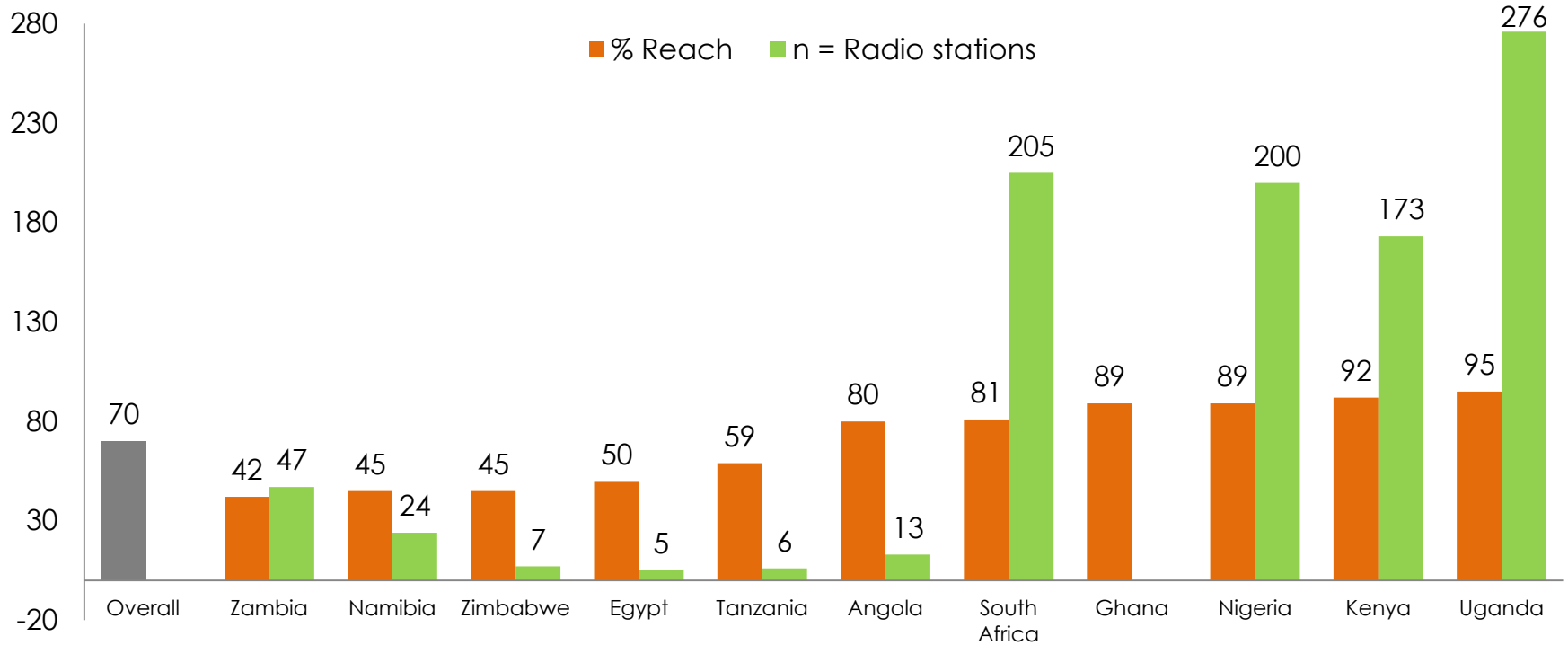
## % Reach of television across countries



Source: PAMRO 2012 Country Reports



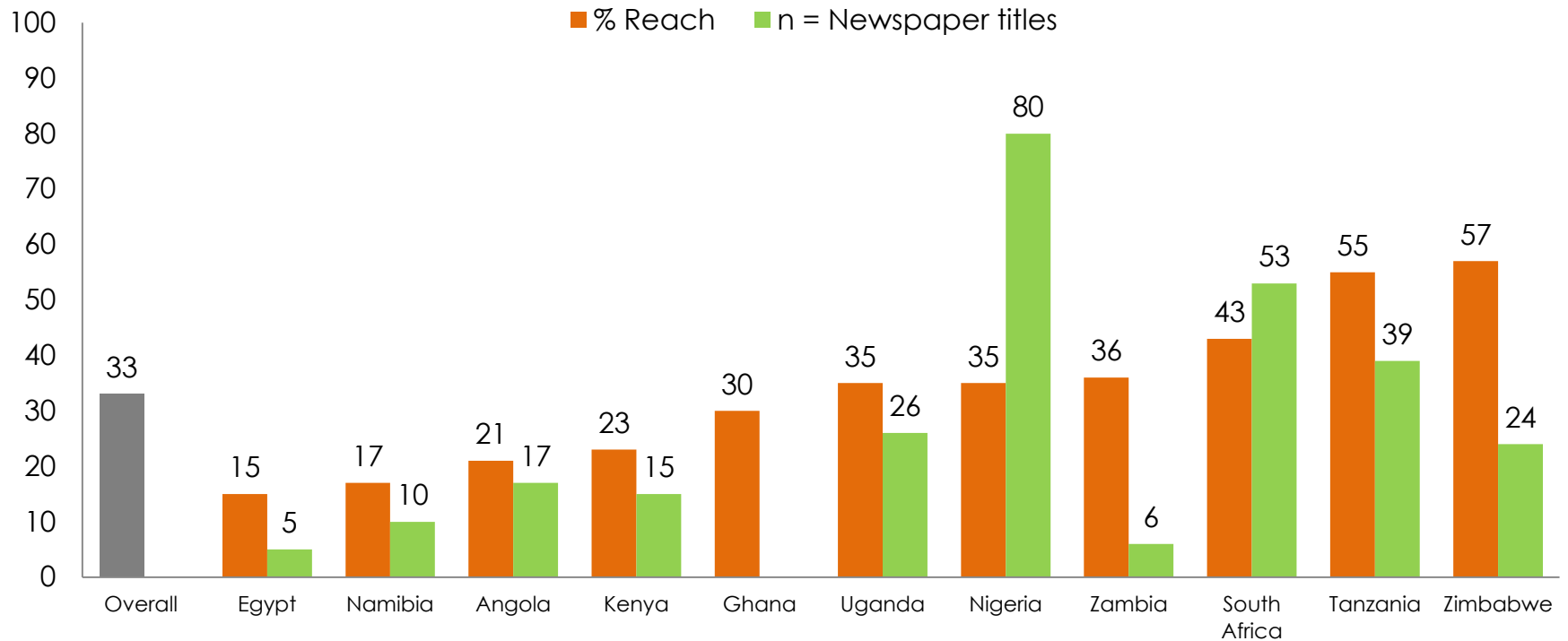
# Media audiences in Africa: % Reach of radio across countries



Source: PAMRO 2012 Country Reports

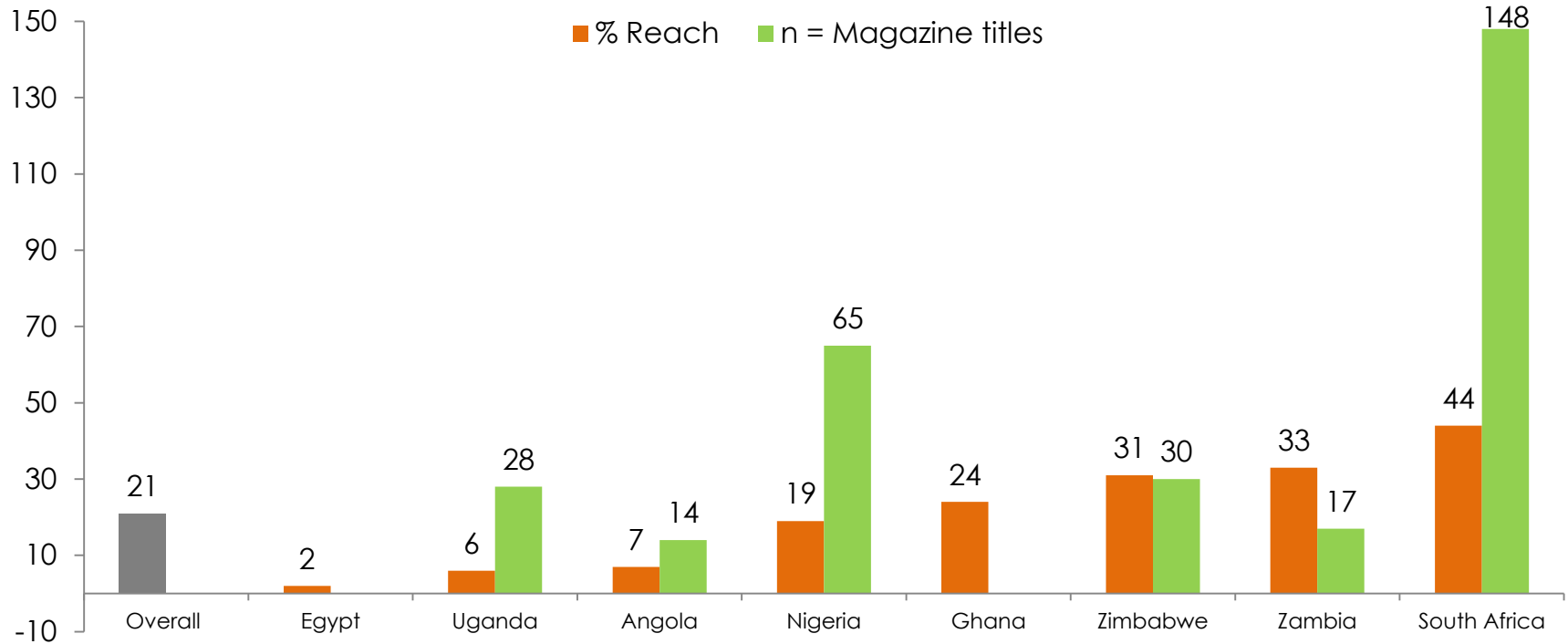


# Media audiences in Africa: % Reach of newspapers across countries



Source: PAMRO 2012 Country Reports

# Media audiences in Africa: % Reach of magazines across countries



Source: PAMRO 2012 Country Reports



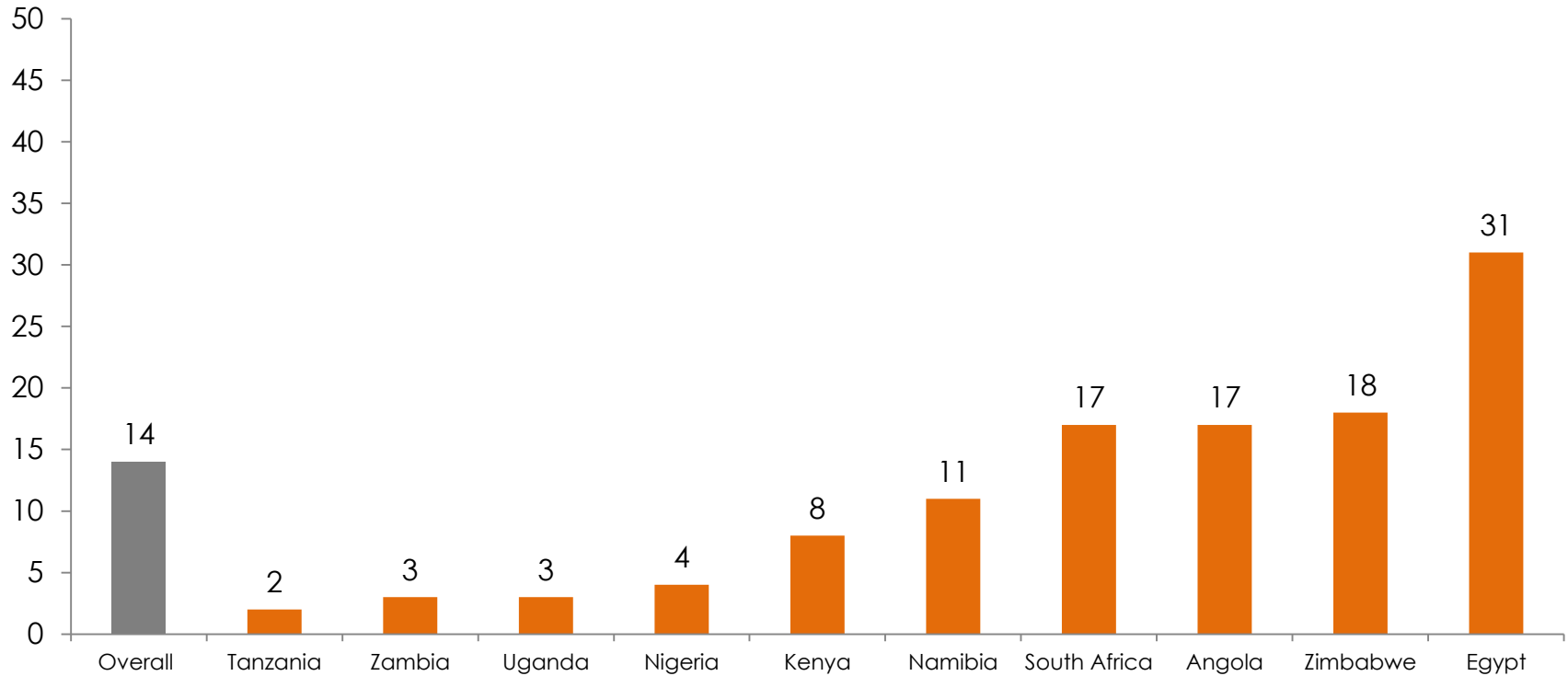
# Media audiences in Africa

n = Cellular phones



Country	n = Cell phones
Nigeria	101 mil
Kenya	29 mil
South Africa	27 mil
Tanzania	18 mil
Angola	15 mil
Uganda	13 mil
Zambia	6 mil
Zimbabwe	5 mil
Namibia	2 mil
<b>TOTAL</b>	<b>216 million</b>

# Media audiences in Africa: % Internet penetration across countries



Source: PAMRO 2012 Country Reports



# Media audiences in Africa

- Coupled with the growth in media opportunities across the continent comes fragmentation with:
  - 580 different television channels
  - 956 radio stations
  - 280 newspaper titles
  - 382 magazine titles
- Television and Radio remains popular media channels with the widest reach
- Television: Namibia, Angola, Egypt, Zambia, Tanzania and Zimbabwe
- Radio: Namibia, Uganda, Kenya, Nigeria, Ghana and South Africa
- Internet penetration is growing from a small base
- Mobile communication is very popular across the continent with an average of 216,000,000 mobile phones in use



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# In conclusion



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# In conclusion

- The African continent is an attractive destination for economic investment
- 41% of African consumers are still younger than 15 years
- Infrastructure remains an area for potential growth with only 37% urban areas across the 11 countries
- Brand and media owners should gain insight into the uniqueness of language and cultural diversity in each country
- Despite the growth in media opportunities across the continent it remains a fragmented market
- Traditional mediums i.e. radio and television most effective in terms of reach
- Internet penetration is growing, although from a small base
- Mobile Internet access is a powerful injection for growth in the online channel





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