

Insights Broadcasting Digital Migration

MEASURING DEVICES

Prepare for culture shock!

The change-over to digital is not a simple technical change, and will alter behaviour patterns

THE South African TV market is rocketing towards massive change. CEO of South African Advertising Research Foundation (SAARF) Paul Haupt says measuring TV audiences in SA over the next few years is going to create a lot of headaches for a lot of people.

"We have enormous challenges to deal with, and we need to come up with solutions now or risk being left behind by the change.

"Over the past 10 years we have made enormous progress in the way that we measure television audiences, using the tried and tested people-meter methodology in our TAMS (Television Audience Measurement Survey) panel. "It has become abundantly clear

only one facet of the problem. For media researchers, a more critical problem is the fragmentation which DTT will usher in.

"The change to DTT will introduce as many as 20 terrestrial channels, which will mean more fragmentation of audiences. And we're not even counting the fragmentation that will be caused by the licensing of new pay-TV operators, as well as the normal expansion of DStv."

Haupt contends that due to financial constraints, sample sizes will never allow all these smaller channels to be measured and reported on in a robust way using the current TV metering approach.

"We still have a little breathing space before these changes are fully upon us, since I do not see the analogue signal being switched off before 2012 at the earliest. But as an industry, we nonetheless need to move quickly to find solutions."

While the problems caused by DTT are not far off, there are other pressing challenges, according to Haupt, such as time-shifted viewing, a fast growing phenomenon which already affects all broadcasters. As the number of personal

various methods of watching".

Other future challenges will include the reporting of regional TV services, which will affect the design of the TV panel and the weighting, and the possible advent of interactive or transactional TV, where viewers will cherry-pick and pay for specific programmes.

"The time has come for a complete re-evaluation of current practice and the development of an industry strategy to meet the numerous problems facing us," warns Haupt. "While the TAMS panel has served us well for a decade, its days might be numbered.

"TAMS panels are failing to meet the needs of users in virtually all countries around the world. They are expensive, which limits sample size, and require active participation from respondents, which can irritate household members. Many people also don't like having the equipment in their homes, especially if malfunctions occur, and rates of refusals are reaching significant levels in some countries. And of course, these panels only measure in-home viewing."

However, some experts have estimated that it will take at least three years before better technology can replace the TAMS systems. For the short term at least, we will have to live with the current panel as a major part of our measurement system.

"In the meantime," says Haupt, "we at SAARF are looking to Europe and the UK in particular, to find ways to deal with this changing market. We are investigating what technologies are available, how to measure viewing, and what the cost to the market will be.

He argues that portable metering devices, and set-top box (return path) data must be considered for a future industry measurement system.

Even these technologies have their shortfalls, and present their own set of challenges. With return path data, for instance, the decoder itself feeds back information about what is being watched. It is a record of decoder activity however, rather than of people's viewing behaviour. Was the TV actually on, and if so, was anyone watching, or was the TV just playing to itself?

Whatever the solution, the new measurement system will have to service current industry needs while being adaptable to the changing demands of the next few years, and at a price the industry is able to fund in a sustainable way.



however, that current and future challenges will require new and inventive ways of measurement if we want to ensure that the currency for the buying and selling of television airtime reflects the real world."

Haupt says the most talked about challenge is the imminent arrival of digital terrestrial TV, which the SABC has already put out to pilot. "It will be no easy task to get the entire country to change over, especially considering the financial constraints facing most households.

"The challenge of actually converting every TV household to digital however, is

video recorders (PVR) increases, up to 25% of all viewing in certain important target markets will soon be time-shifted.

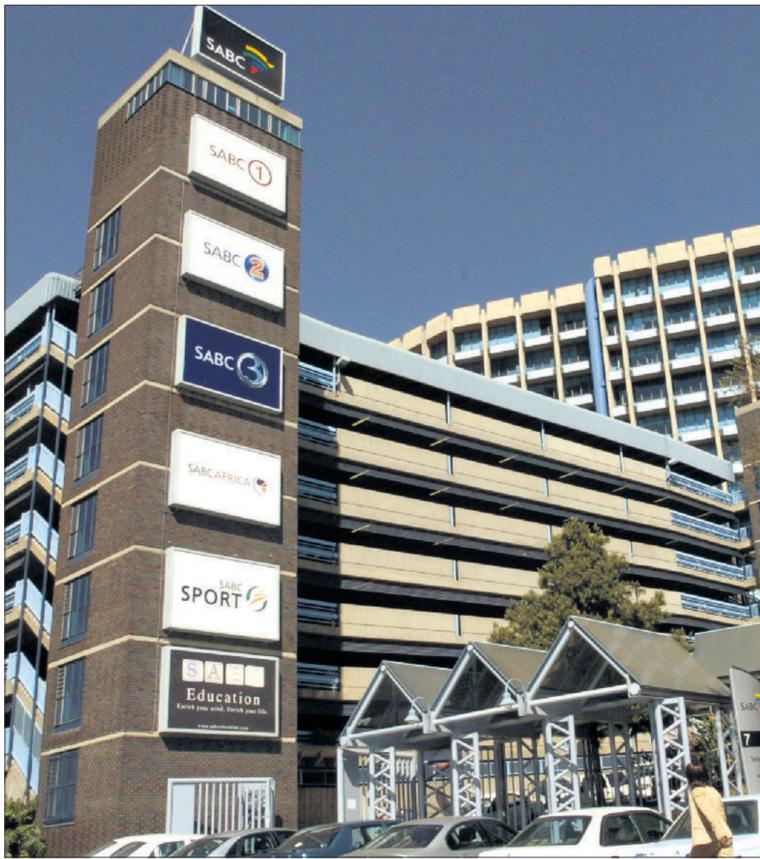
Another challenge is the increase of out-of-home viewing. Think mobile TV, viewing of the 2010 Soccer World Cup, portable TV sets, and viewing on PSPs, cellphones and laptops. A fixed in-home meter isn't going to be sufficient to capture this viewing.

Haupt says the industry may also find it needs to know about TV viewing behaviour for each platform, in which case "we will need to introduce platform identification to differentiate between the

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PARADIGM SHIFT



CHANNEL BANK: The South African Broadcasting Corporation (SABC) building in Auckland Park, Johannesburg. The SABC has been working on preparations for digital migration for over two years.

SABC lends a hand with migration

INTERNATIONAL experience shows that the public broadcaster plays a central role in ensuring a successful digital migration. The SABC recognises this and is ready to take on the challenge.

The SABC has been working on preparations for digital migration for over two years — even before the publication of the draft digital migration strategy by the Department of Communications in April 2007. "We recognised early that this is the future of terrestrial television, and we started planning for it immediately," says Yusuf Nabee, DTT project leader at the SABC.

This early planning has meant that the SABC was able to drive the process of migration from the start. Nabee says that as early as January last year, the SABC had a dedicated project team focusing on digital terrestrial television. Even before the final policy was published, the SABC had already started putting together plans to ensure the switch-on of the digital signal on November 1 last year.

"The SABC also realised that digital migration is an extremely complex process and requires the support and co-operation of many stakeholders. Most countries takeover seven years to complete the migration process — SA is planning to complete the process in three years.

"In order to stand a chance of achieving these aggressive timelines, someone needed to kick-start the process and bring all key stakeholders together. This is probably where the SABC has played its most important role to date."

In mid-2007 the SABC initiated planning for broadcaster trials and quickly gained the support of all critical stakeholders — government, other broadcasters, set-top box (STB) manufacturers, signal distributors, and Icasa.

"These trials are a crucial step in the process. Without proper testing of the technology and the service in general, it would be impossible to launch digital terrestrial television successfully. When we launch, consumers must receive a

service that works", says Nabee.

The trial service was launched on November 1 last year, with the SABC leading the free-to-air DTT trial. The SABC commissioned two local STB manufacturers to supply STBs.

Nabee says these STBs were developed to an SABC specification, which incorporates some of the latest DTT technology.

"It was important that we work with local manufacturers as the SABC is committed to supporting South African companies and products. It was also important that we start to develop a STB to our unique specification as it will ensure that we can have quality-tested STBs that meet the needs of the South African market available much quicker as we progress towards the launch.

"It also allowed us the opportunity to work with the latest technology, which we would have been unable to use if we

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Mediatech Africa expo to reap World Cup benefits

FROM major growth in staging and production equipment sales and high-definition broadcast technology to increased demand in roof systems, trussing and sound and audio services, the South African broadcast, media and entertainment industry is set to reap significant rewards from SA hosting the 2010 Fifa World Cup.

With less than 18 months to go until this global soccer showpiece opens in Johannesburg, Mediatech Africa 2009 — SA's only all-inclusive broadcast, media, entertainment and audio-visual trade fair — comes at a crucial time, as the industry prepares to capitalise on the multitude of opportunities the World Cup presents.

Taking place from July 23 to 25 at the Coca-Cola Dome at Northgate, Mediatech Africa 2009 showcases cutting edge technologies and services from industry leaders in television and broadcast, sound and audio, lighting and staging, animation and related fields.

Particular emphasis will be placed on the role these sectors can play in the successful staging of the World Cup, and the benefits thereof.

Simon Robinson, Mediatech Africa trade fair director, notes that aside from the World Cup, the industry is facing a number of other opportunities.

"Getting to grips with the introduction of high-definition (HD), Dolby E and 5.1 surround sound to television; DTT implementation and new players in the DTH space, as

well as training technically qualified personnel — who are well versed in these new technologies — are just some of the opportunities and challenges we face at the moment," he says.

These issues, along with the latest technology, will be explored at Mediatech Africa 2009.

Nick Matzukis, managing member of AVL Distribution, says he anticipates increased equipment sales and demand as a direct result of the World Cup. "We expect to see about a 25% growth in staging and production equipment sales and at least a 25% increase in demand for roof systems and trussing," he says.

Colin Wainer, general manager of Inala Broadcast, agrees. "I think increased product sales and system integration are some of the positive spin-offs we'll see coming out of this event," he says.

AVL Distribution and Inala Broadcast are just two of the many exhibitors participating in Mediatech Africa 2009.

The expo will cover the following sectors: broadcast, film and production; professional AV (sound, lighting, staging and rigging); DJ and professional music equipment; system integration; animation, new media and web; satellite and signal; and — two new sectors that have been introduced this year — computer music and production tools; and musical instruments.

The trade fair is a must for industry professionals working in these areas and attracts buyers, top decision makers and influential

visitors from across the spectrum. It offers unparalleled networking opportunities.

A host of industry leaders have already signed up as Mediatech Africa 2009 exhibitors, including Sony SA, Spescom, Altech UAE, Inala Technologies, AVL Productions, Touchvision, Concilium Technologies, Visual Impact, Zimele Broadcasting, Questek Broadcast Technologies, Academy of Sound, Matrix Sound, ProSound, The Camera Platform and Movie Vision, among others.

The last Mediatech Africa drew 4 170 trade visitors. The trade fair also sparked interest from around the world and a total of 233 foreign visitors from 26 countries attended, with the majority coming from Africa. "Substantial growth in visitor numbers is expected this year as the industry prepares for 2010 and seeks to investigate the plethora of new technologies," adds Robinson.

This, together with Mediatech Africa's increased sector profiles, necessitated the move from the Sandton Convention Centre to the Coca-Cola Dome at Northgate.

Mediatech Africa is organised by Thebe Exhibitions and Projects, which launched the show in 2001. Since then, it has grown into South Africa's most comprehensive industry trade fair, driving growth, research and development, networking, training, and business and sales on the show floor.

For further information contact Tel: (011) 549 8300 or visit www.mediatech.co.za.

Digital homes could be a reality — very soon

SA's DIGITAL technology landscape is changing fast. The imminent arrival of DTT and high speed broadband access, along with the investments being made in broadband infrastructure by local telecoms companies, presents massive growth opportunities for consumers, especially in the digital home environment.

Scenarios where the personal computer is the heart of the modern home and everything from your cellphone to your fridge and TV is linked to it, are now distinct possibilities that are expected to find their way into South African homes this year.

In pre-empting this upsurge in connected homes, DigitalLife Expo 09, taking place from March 27 to 29 at the Sandton Convention Centre, will feature a life-sized, walk-through Digital Home, complete with the endless networking possibilities this new technology will now facilitate.

"There's no doubt broadband has been an obstacle to South Africans effectively using new technology. I think when all the new broadband infrastructure is active, it's going to change things dramatically — not only in terms of making broadband more accessible, but also in the exciting new opportunities it will open for consumers," says Colin Erasmus, Windows business head at Microsoft SA, one of the participants in the creation of the DigitalLife Expo Digital Home.

Having access to new technology is one thing, but knowing what to do with it is quite another. Successfully integrating digital technology into the home is no mean feat, and one that Erasmus stresses should be undertaken by skilled professionals.

Zoran Paunovic, managing director of Tesla Automation, a company specialising in home automation that will be preparing the DigitalLife Expo Digital Home, agrees. "The most important factor in digitalising your home is choosing the

right company for the job. Start by researching the companies operating in this field and what they offer. Make sure they're able to make your house 'future ready' — designing the conduits and wiring your home for future installations. So if you don't want to install motorised curtain systems now, for instance, the house is already prepared for this technology when you're ready to do so. Also be sure to install technologies that operate from the same network and "talk" to each other — it makes integration easier," he says.

According to Telkom, sponsor of the Digital Home, it's these technologies that actually define the digital home, as digital products, hardware and software are nothing without supportive technology behind them.

The telecoms company maintains that broadband is the lifeline for the survival of any digital home, which should be designed around customers' specific needs and tailored to suit their budget.

DigitalLife Expo's Digital Home, sponsored by Do Broadband, powered by Telkom, will show exactly that — how to seamlessly integrate these technologies into your home to deliver the ultimate digital lifestyle experience.

The home will comprise a teenage pad, children's room, home office, home theatre room and entertainment room, each of which will feature the most current technology products, perfectly networked using broadband. Lighting and curtain control, for example, will be facilitated through the Microsoft Windows Media Centre and a networked smartphone.

All the rooms will be professionally designed and decorated by acclaimed decorator Lynne Blumberg. Catering for today's techno-savvy kids, the Digital Home children's room will feature an Asus Eee PC notebook; and a gaming PC with Logitech accessories.

The home's teenage pad will provide



Colin Erasmus

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the ultimate chill-out space with its cordless Dect Phone, iPhone as VOIP extension; digital photo frames; mVix multimedia digital player; Guitar Hero Xbox game with full drum kit; Microsoft Zune portable media player and Samsung 32" LCD TV.

The essential digital home office will be displayed, comprising a home server; wireless printer-fax-scanner; cordless Dect and HTC Windows Mobile phone; ITB NAS storage; security system and wireless cameras; Asus Lamorghini laptop; wireless 802.11n broadband modem; digital photo frames and external USB hard drive.

The home's state of the art home theatre room will feature a HD Microsoft Media Centre; mVix PVR multimedia recording and streaming device; BOSE home theatre system; digital camera and universal remote for home automation control.

Other technology that will be showcased in the Digital Home includes a complete Dyalite home automation system; VOIP home PBX system with a digital receptionist; wireless home

cleaning robot with auto dirt detection sensors; wireless signal amplifiers from Poynting; security software with motion detection and GSM capabilities.

One lucky DigitalLife Expo visitor stands the chance to kick-start their digital home journey by winning the entire contents of the home, worth R250 000. Visitors simply need to enter the Digital Home competition to stand in line to win the prize.

For more info visit www.digitallife.co.za