

INTRODUCING THE ESTABLISHMENT SURVEY

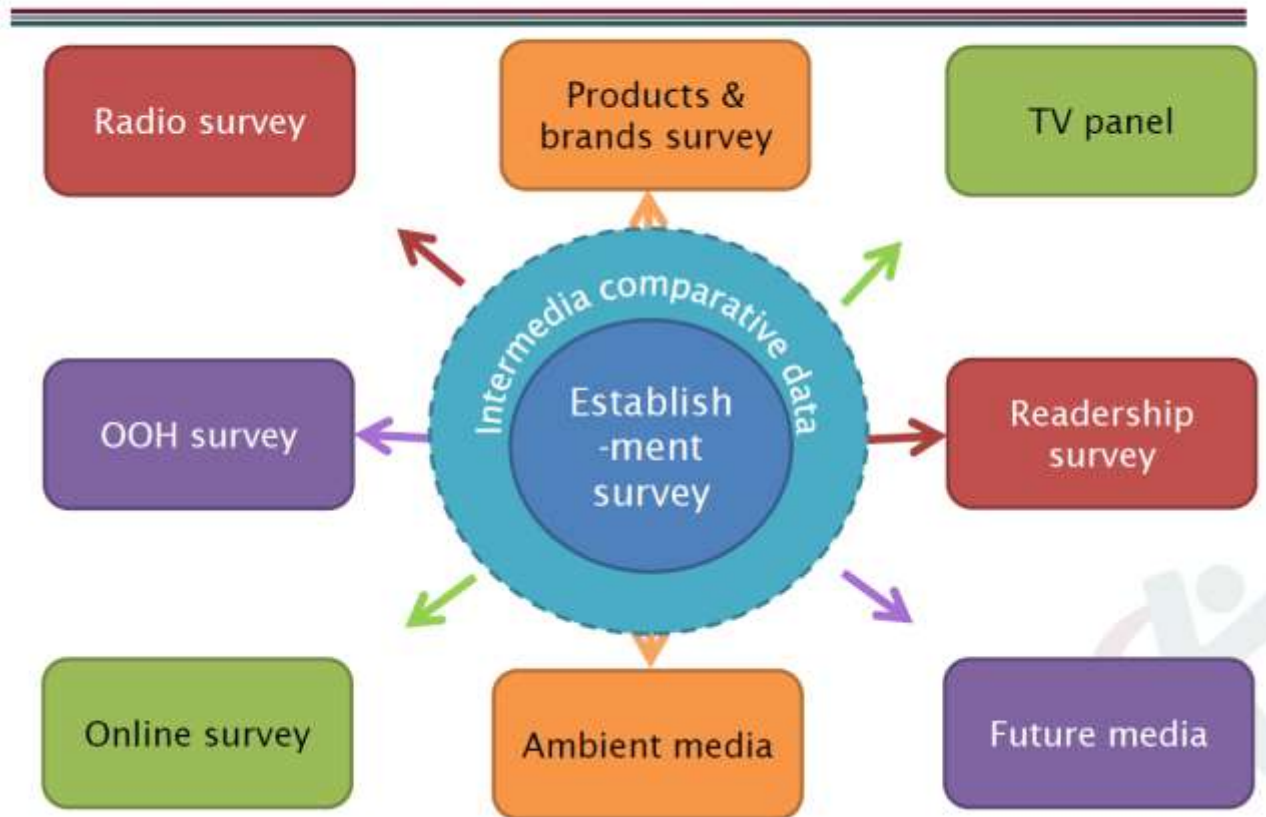


THE ES JOURNEY...



FUTURE PROOFING MODEL...

International trends link establishment survey data to a variety of dedicated media surveys via data fusion



GORDON PATTERSON

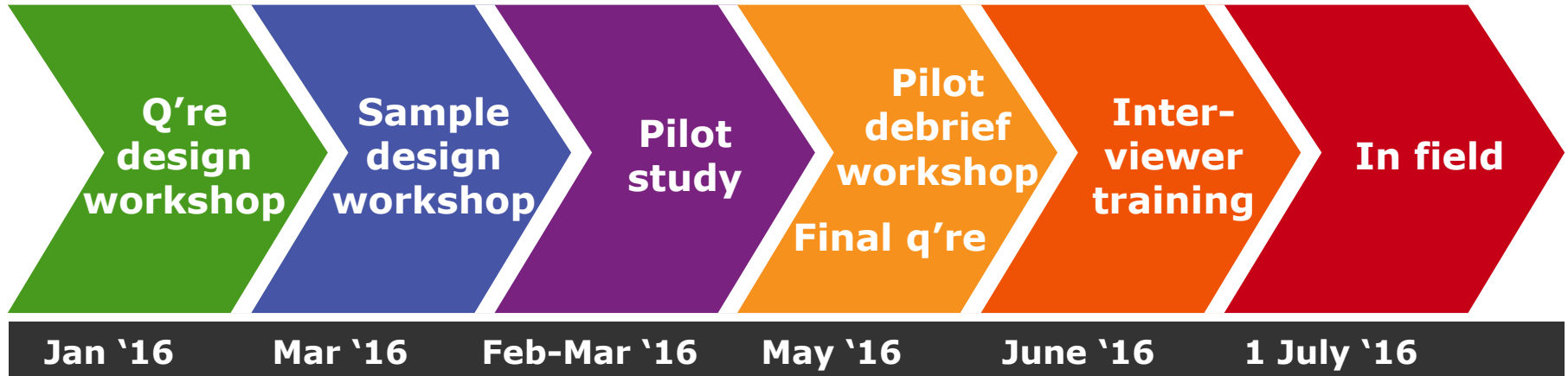


5 Oct 1960 - 22 July 2016

THE ES JOURNEY...



THE ES JOURNEY CONTINUED...




Today

THE ES...

REPRESENTATIVE OF THE SA POPULATION

**DEMOGRAPHIC / GEOGRAPHIC / LIFESTYLE /
PRODUCTS & MULTI-MEDIA LANDSCAPE**

CROSS PLATFORM / CROSS DEVICE MEDIA CONSUMPTION

SINGLE SOURCE (IHS POPULATION DATA)

HUB & DONOR

NEW SEGMENTATION MODEL



HUB&DONOR = SINGLE SOURCE







ES SAMPLE...

CLOSELY REFLECTS THE SA POPULATION

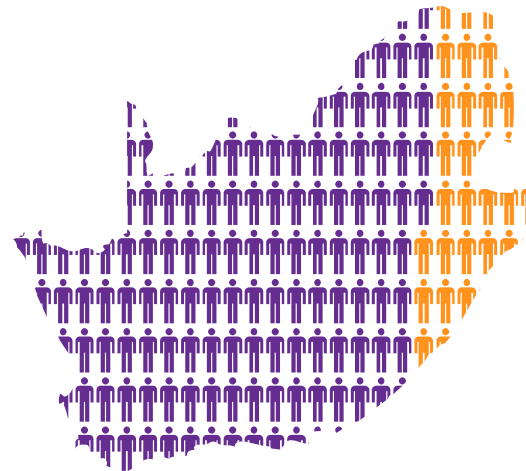
ES (unweighted)







 Black	81%
 Coloured	10%
 Indian / Asian	2%
 White	7%

Source: ES July-Dec 2016 (n=12,464)

IHS Population



 Black	78%
 Coloured	9%
 Indian / Asian	3%
 White	10%

Source: IHS Individual Population estimates Dec 2015

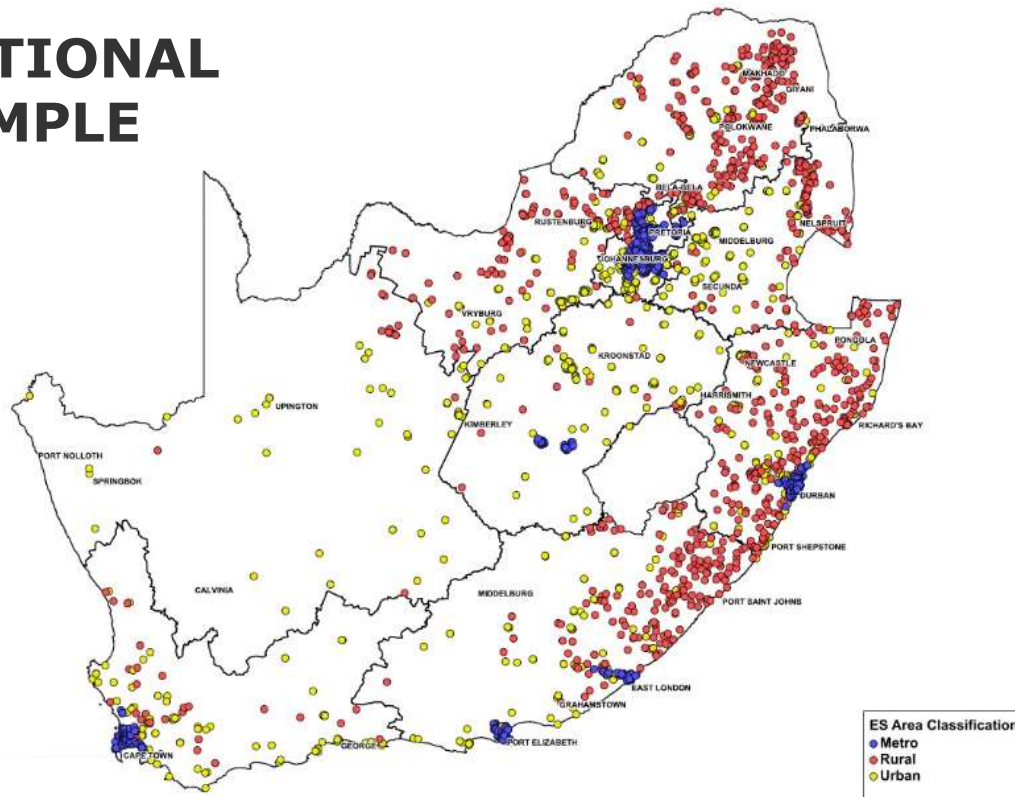
WEIGHTING EFFICIENCY...

HOUSEHOLD 92%
INDIVIDUAL 80%



ES – VITAL SIGNS...

NATIONAL SAMPLE



12,464 sample

JUL-DEC 2016



41% Metro



29% Urban



30% Rural

Universe: Population age 15+

38.8 million

CURRENCY – VITAL SIGNS...

ES SAMPLE

BRC RAM

BRC TAMS

PAMS



41% Metro

60% Metro

46% Metro

50% Metro



29% Urban

20% Urban

30% Urban

30% Urban



30% Rural

20% Rural

24% Rural

20% Rural

DEMOGRAPHIC LANDSCAPE...



DEMOGRAPHIC LANDSCAPE...

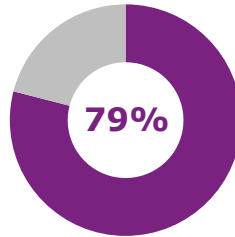


16 million
HOUSEHOLDS

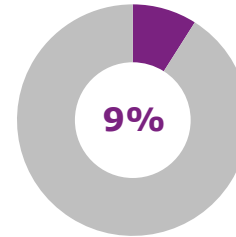


38.8 million
ADULTS 15 YEARS+

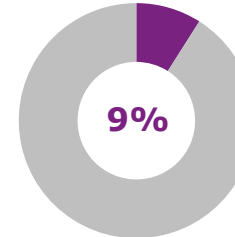
BLACK



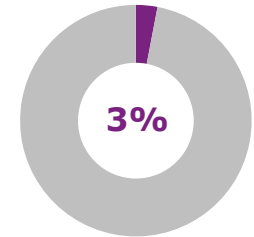
WHITE



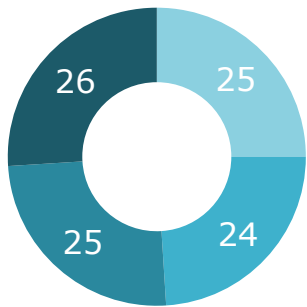
COLOURED



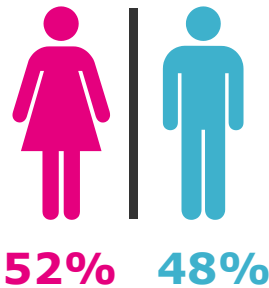
INDIAN



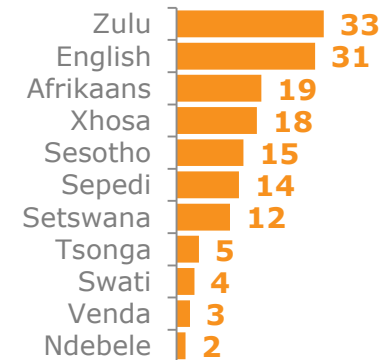
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 +

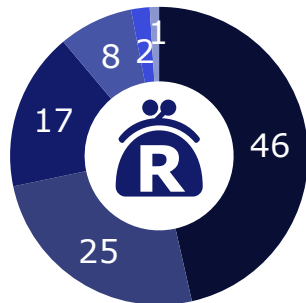


SPOKEN LANGUAGES %



DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME % AVERAGE: R9,885



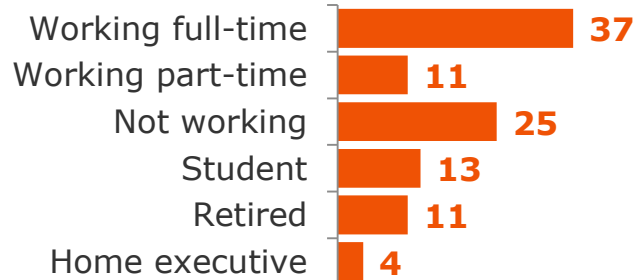
- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



CHILDREN UNDER 15 YEARS LIVING AT HOME %



48% WORKING
52% NOT WORKING



47%
CHILDREN



53%
NONE

GEOGRAPHIC LANDSCAPE...



GEOGRAPHIC LANDSCAPE...

PROVINCE % AND POPULATION FIGURES



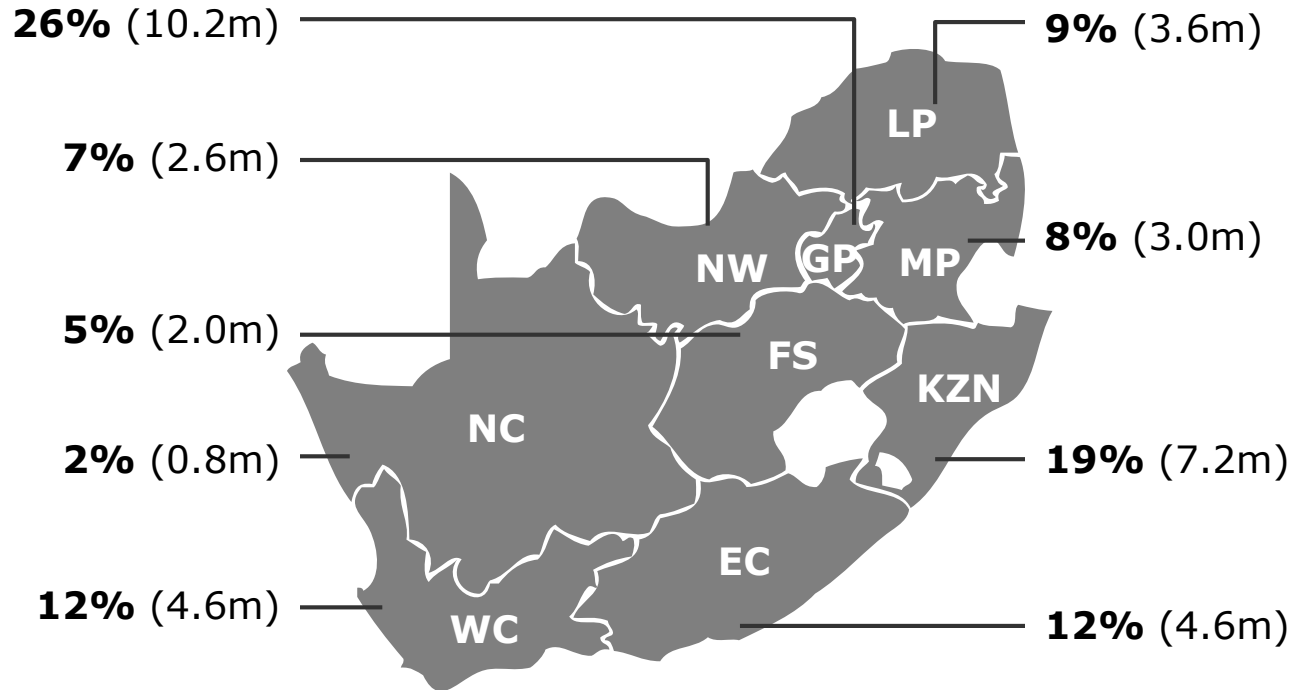
41%
(15.9m)



29%
(11.1m)



30%
(11.8m)



PRODUCTS AND LIFESTYLES...



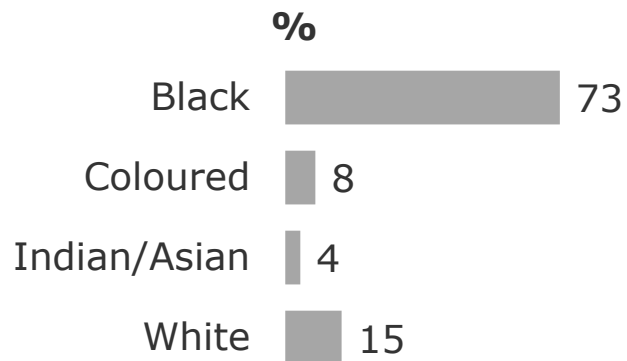
LIFESTYLES...

Past week destinations



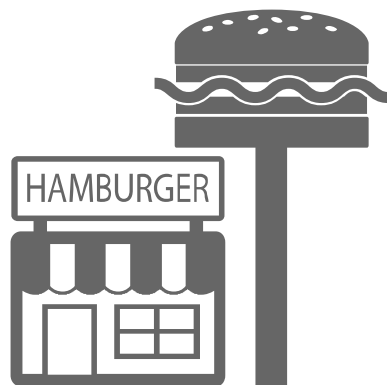
46%

Shopping mall

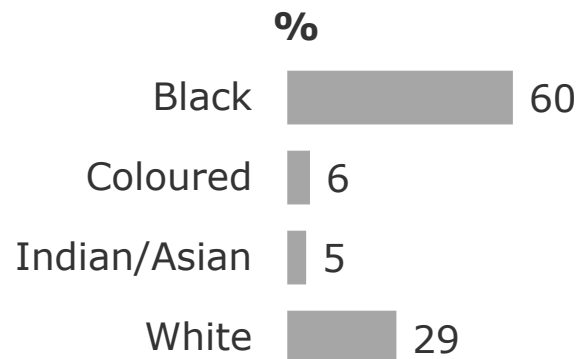


LIFESTYLES...

Past week destinations



10%
Restaurant



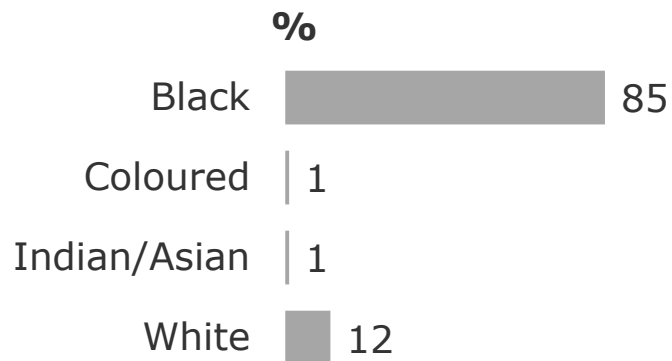
LIFESTYLES...

Past week destinations

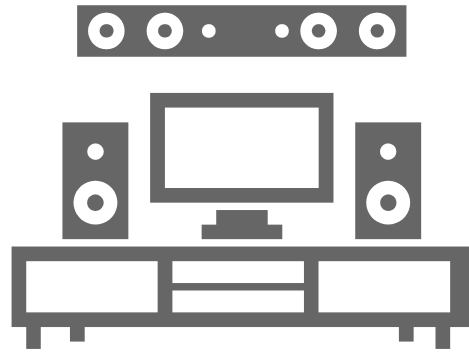


2%

Stadium

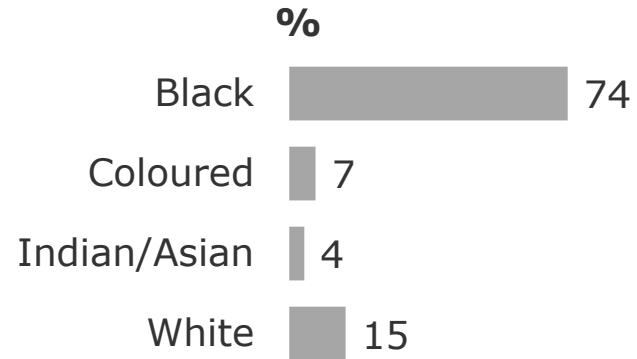


PRODUCT...

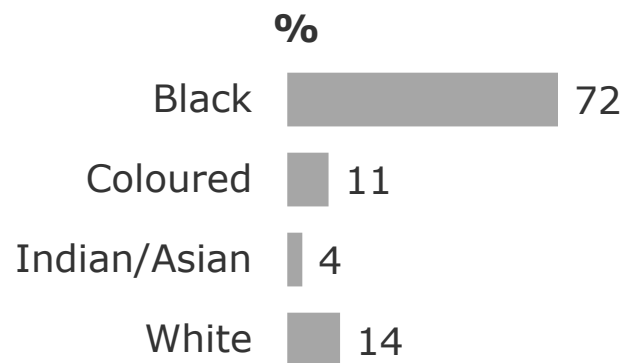


37%

Home theatre
system
in home

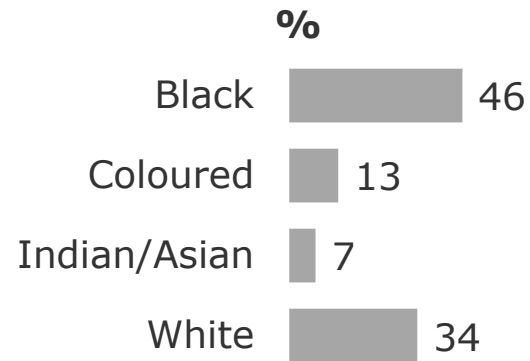


PRODUCT...



68%
Microwave oven
in home

PRODUCT...



26%

Motor car
in home

MEDIA LANDSCAPE...



QUESTIONNAIRE...

DESIGNED BY INDUSTRY THOUGHT LEADERS AND USES A 'TOP-DOWN' STRUCTURE

Questionnaire introduction



- Literacy test
- Multi-media screener
- Equipment in home

Media sections



- Common questions for all media
- Number of days used in average week
- Time spent per weekday/Sat/Sun
- Devices/platforms
- Media-specific questions
- On the go

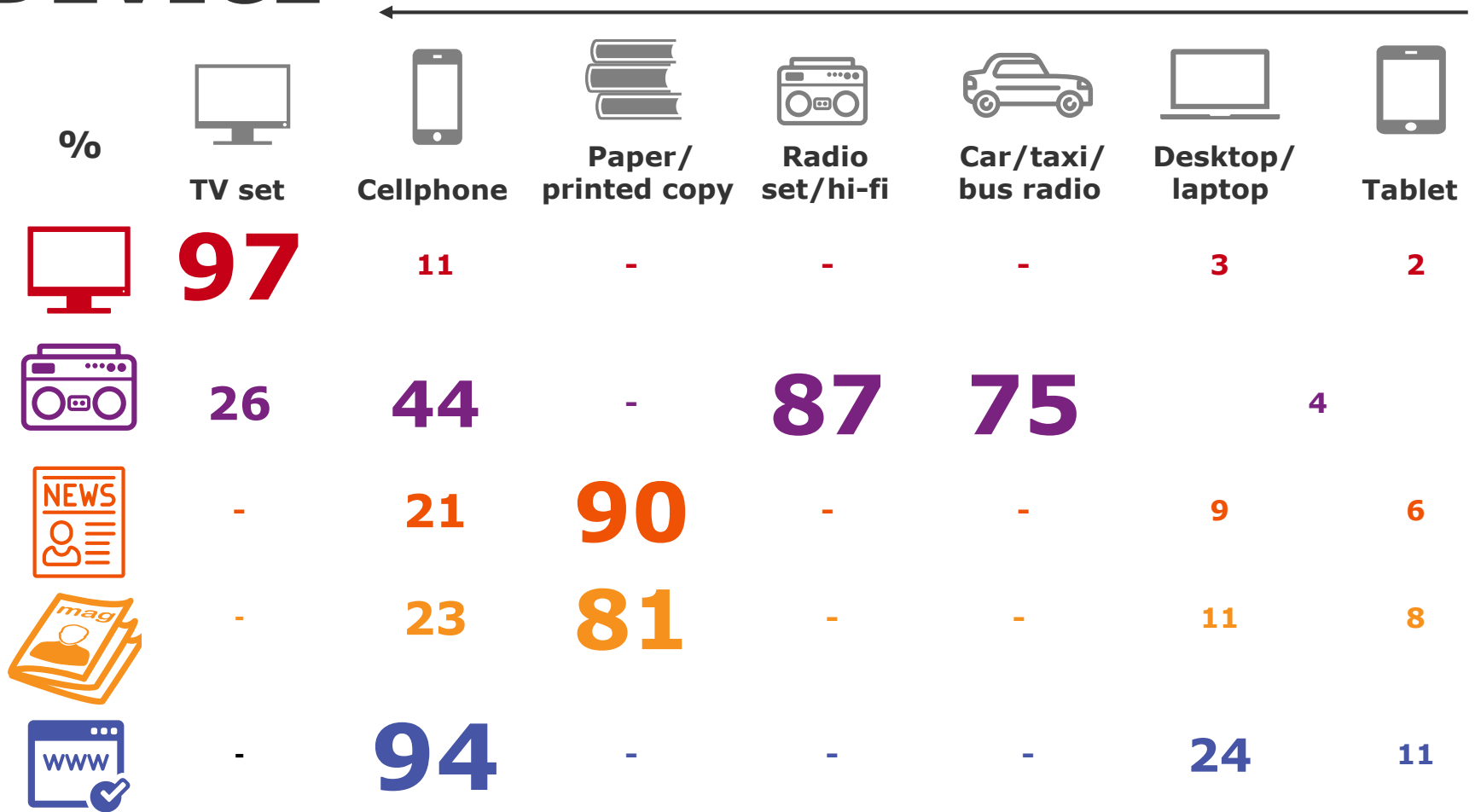


Profiling

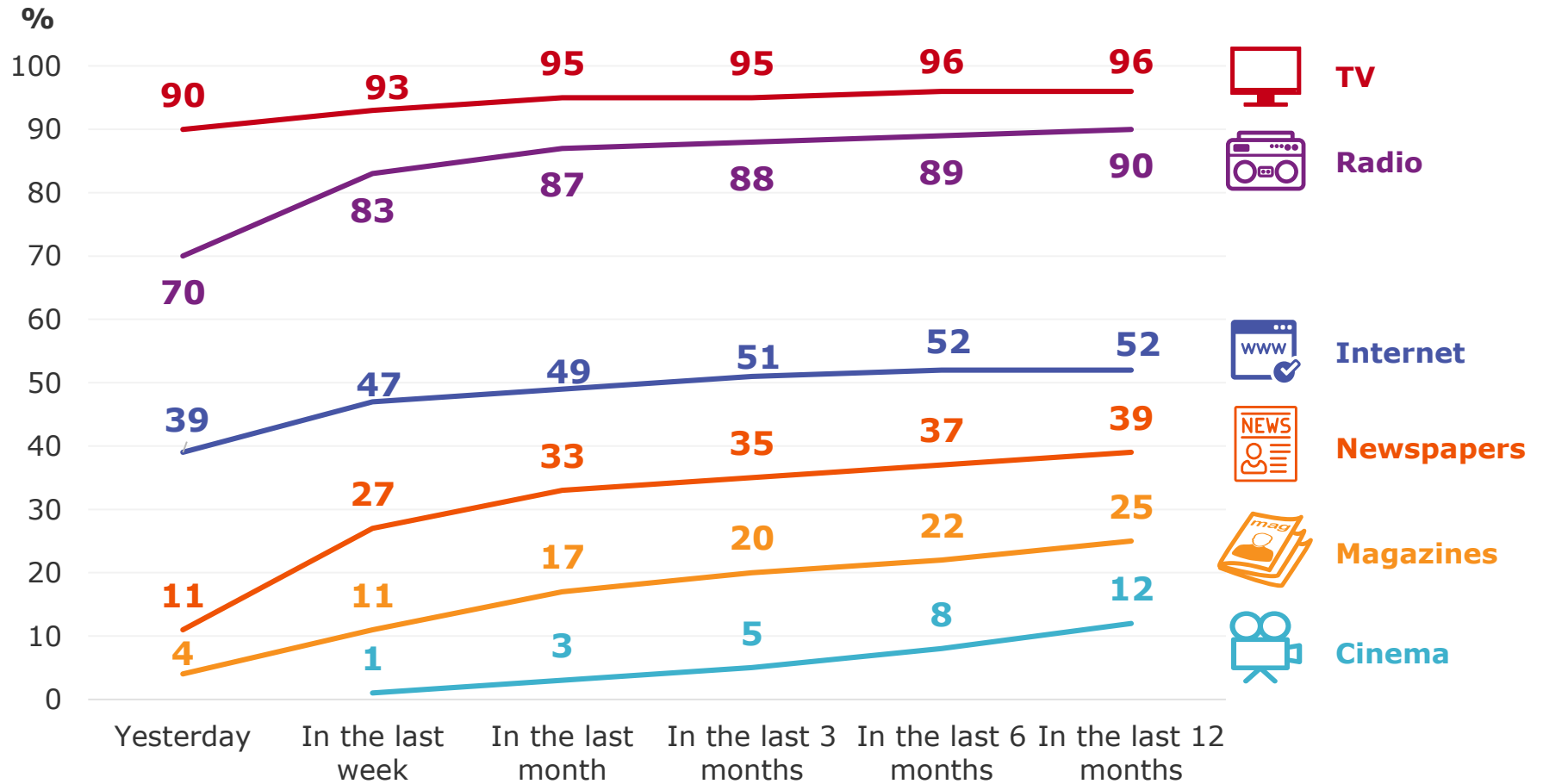
- Demographics
- Geographics
- Lifestyles
- Products
- SEM variables

PM MEDIA LANDSCAPE...

DEVICE



MEDIA LANDSCAPE... REACH

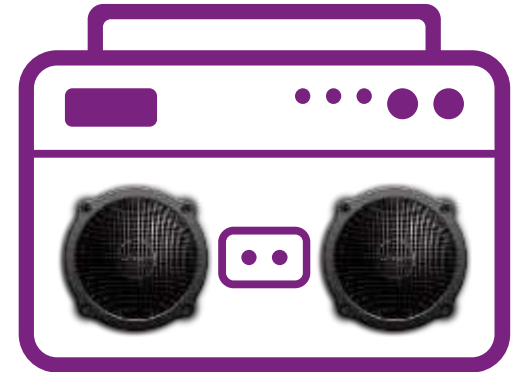


SNAPSHOTS BY MEDIA TYPE...



LISTENING...

Past 7 days



LISTENING REACH...



70%

of the population
in a **day**



83%

of the population
in a **week**



87%

of the population
in a **month**

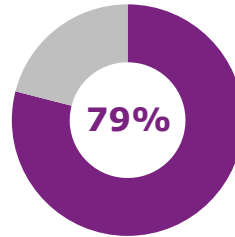


P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...

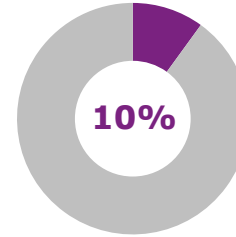


32.3 million
ADULTS 15 YEARS+

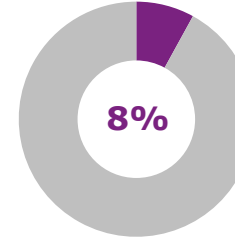
BLACK



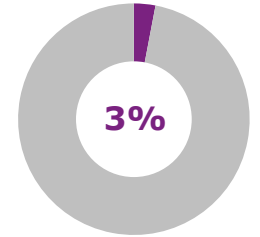
WHITE



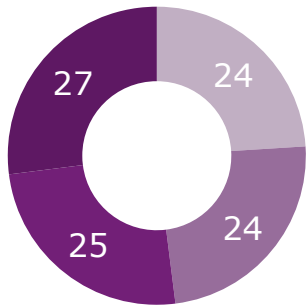
COLOURED



INDIAN



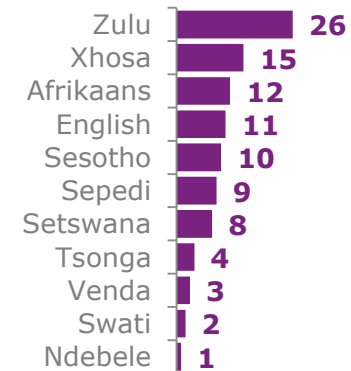
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 +



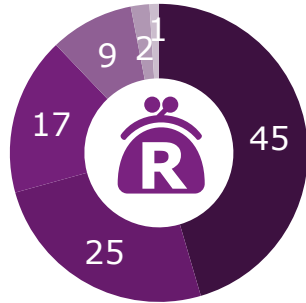
HOME LANGUAGE %





P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,115



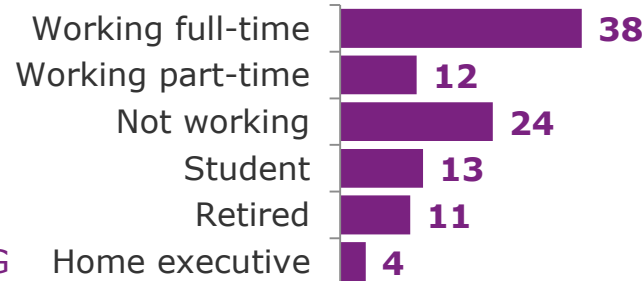
- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



CHILDREN UNDER 15 YEARS LIVING AT HOME %



50% WORKING
50% NOT WORKING



46%
CHILDREN



54%
NONE



P7D RADIO LISTENERS GEOGRAPHIC LANDSCAPE...

PROVINCE % AND POPULATION FIGURES



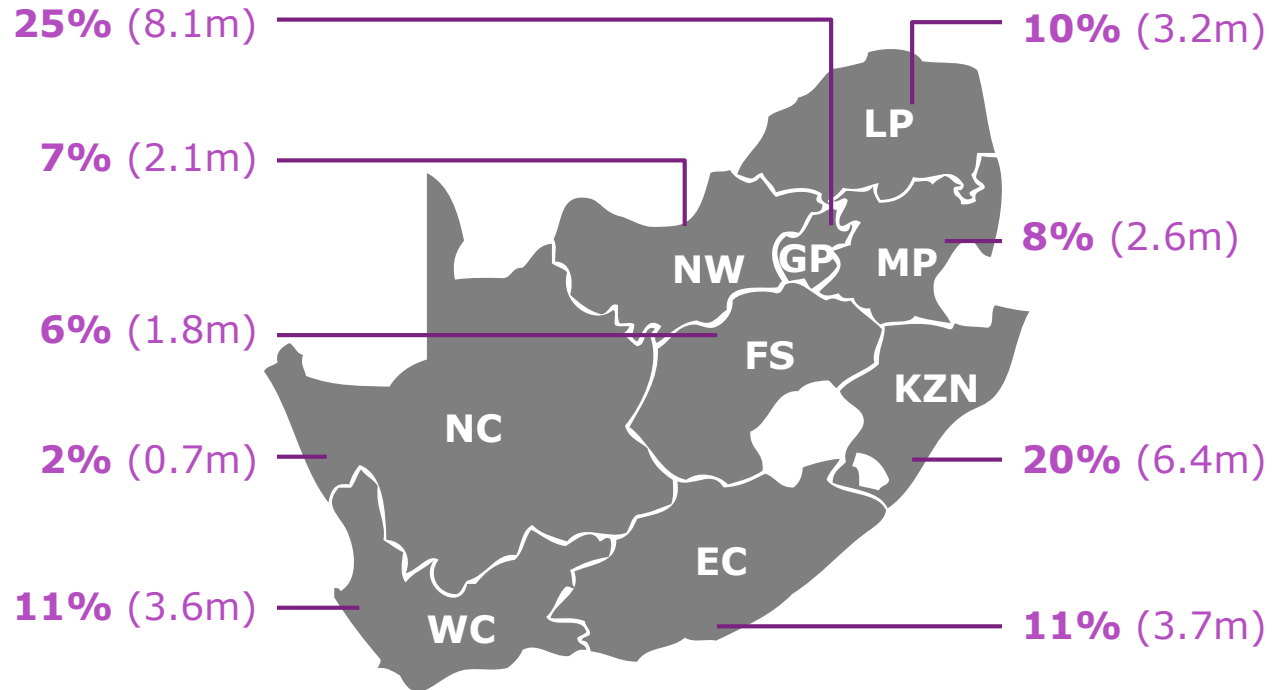
40%
METRO



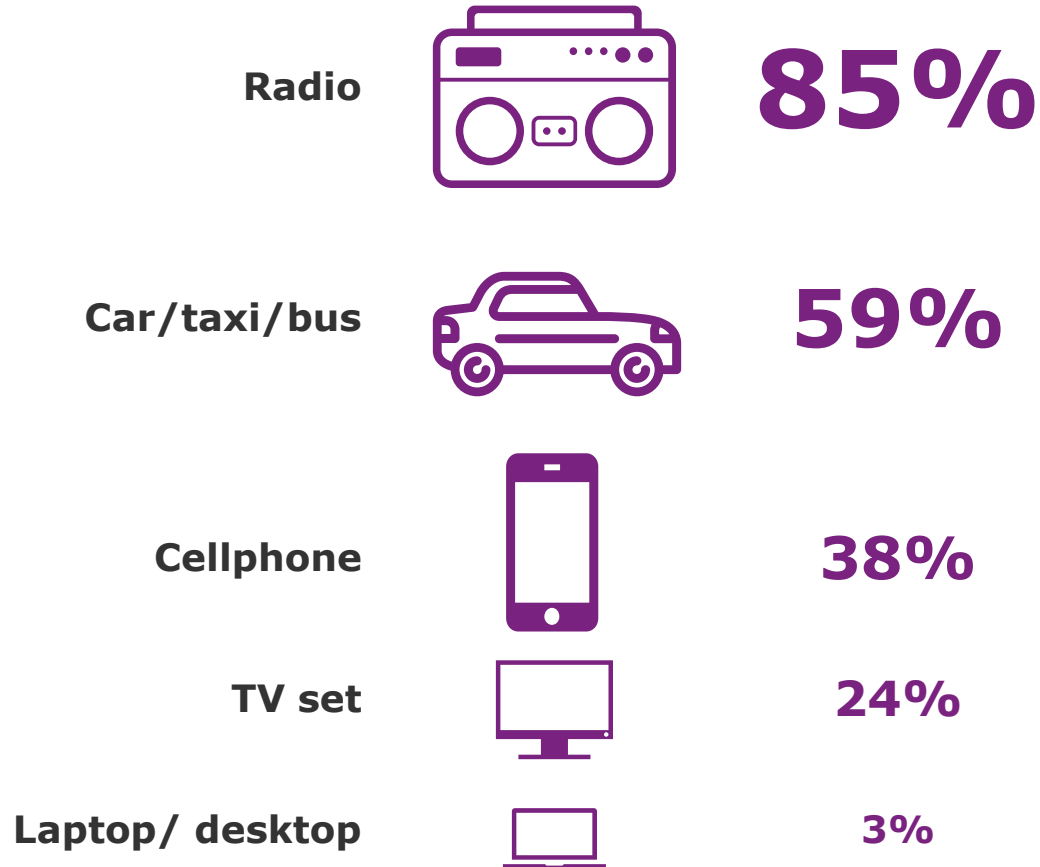
29%
URBAN



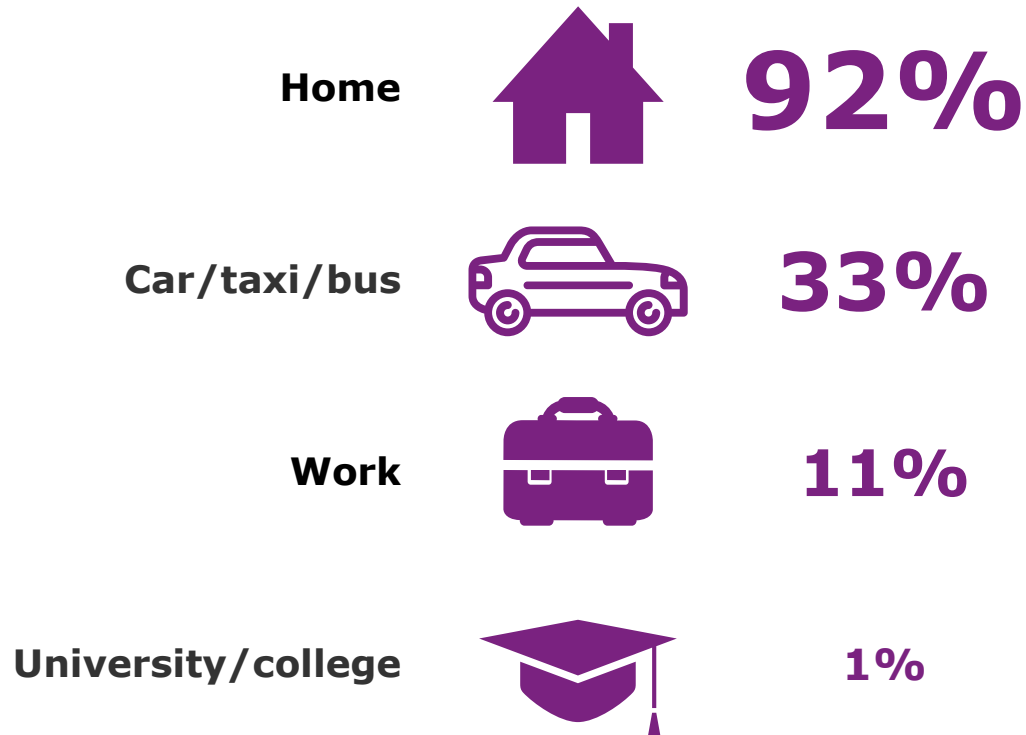
31%
RURAL



LISTENING DEVICE...



LISTENING LOCATION...



VIEWING...

Past 7 days



VIEWING REACH...



90%

of the population
in a **day**



93%

of the population
in a **week**



95%

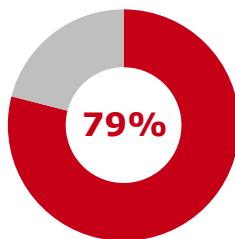
of the population
in a **month**

P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...

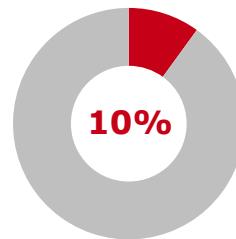


36.2 million
ADULTS 15 YEARS+

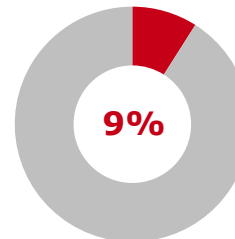
BLACK



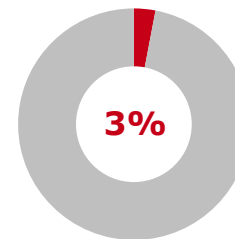
WHITE



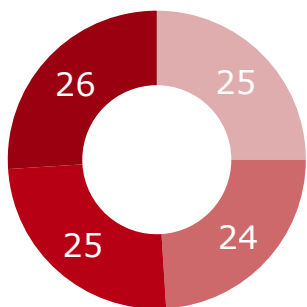
COLOURED



INDIAN



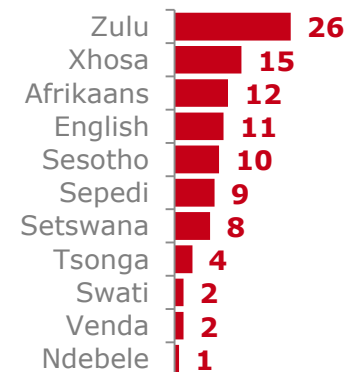
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 +



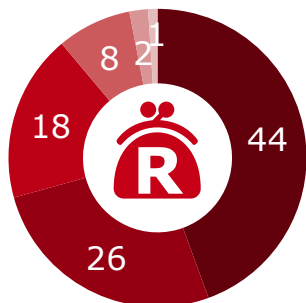
HOME LANGUAGE %



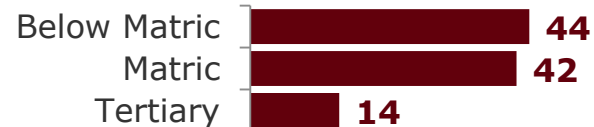
P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,159



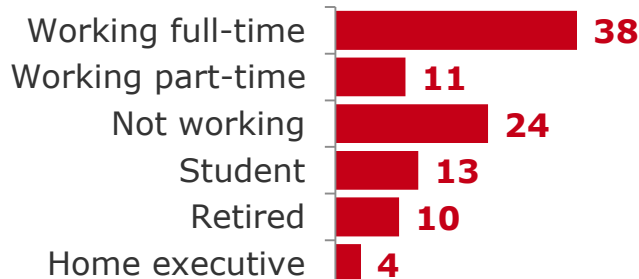
- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



**CHILDREN UNDER 15 YEARS
LIVING AT HOME %**



49% WORKING
51% NOT WORKING



47%
CHILDREN



53%
NONE

P7D TV VIEWERS GEOGRAPHIC LANDSCAPE...



PROVINCE % AND POPULATION FIGURES



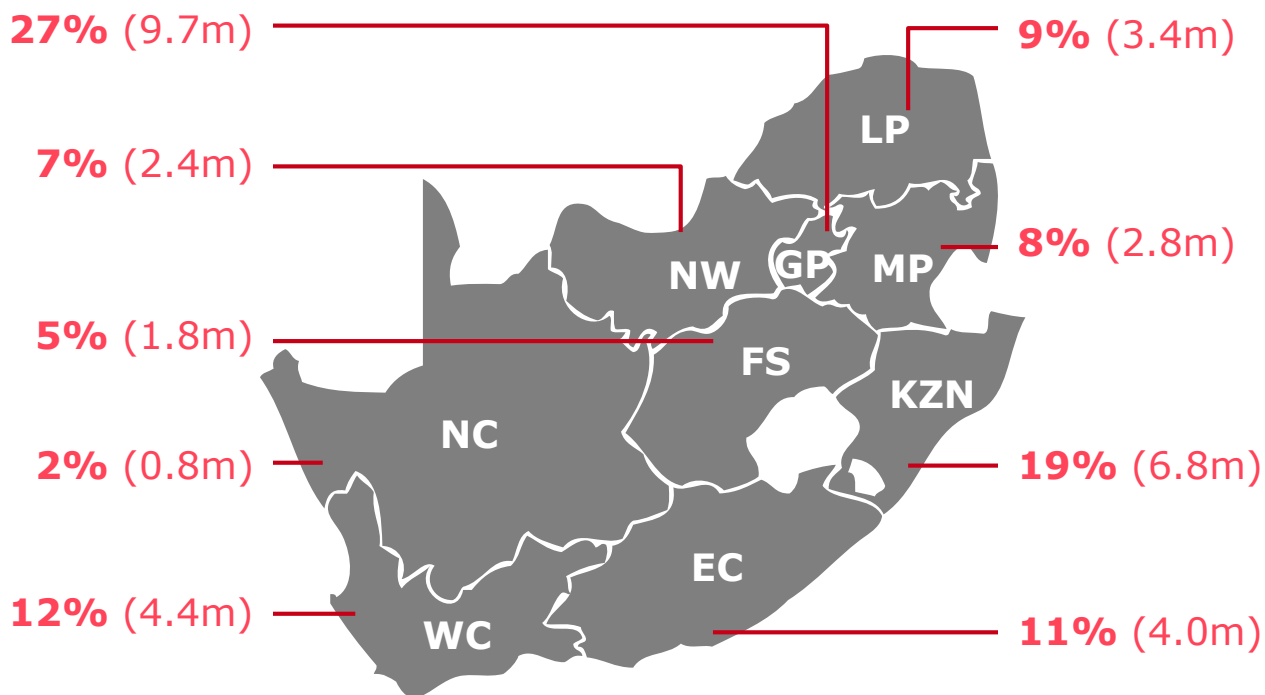
42%
METRO



29%
URBAN



29%
RURAL



VIEWING DEVICE...



TV set

97%



Smartphone

10%



Laptop/ desktop

2%



Tablet

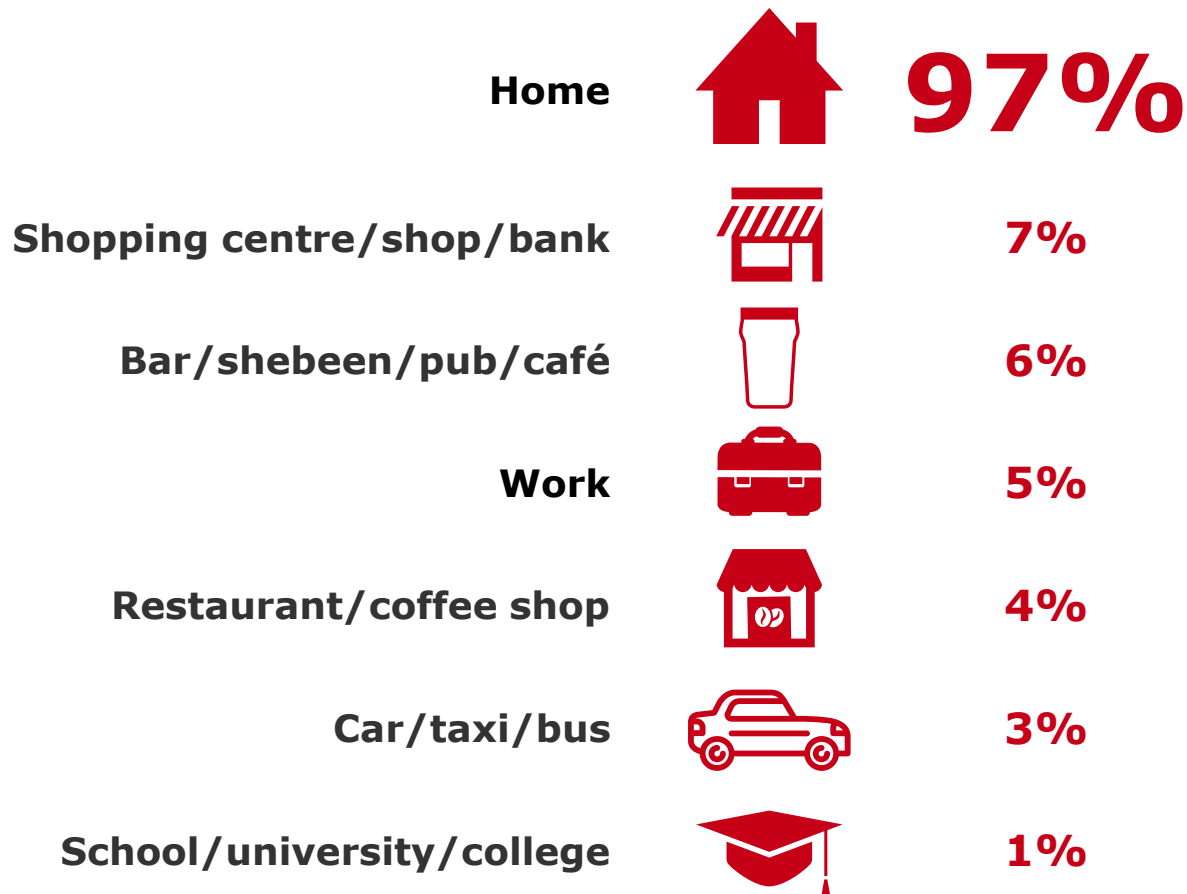
1%



Games console

1%

VIEWING LOCATION...



READING...

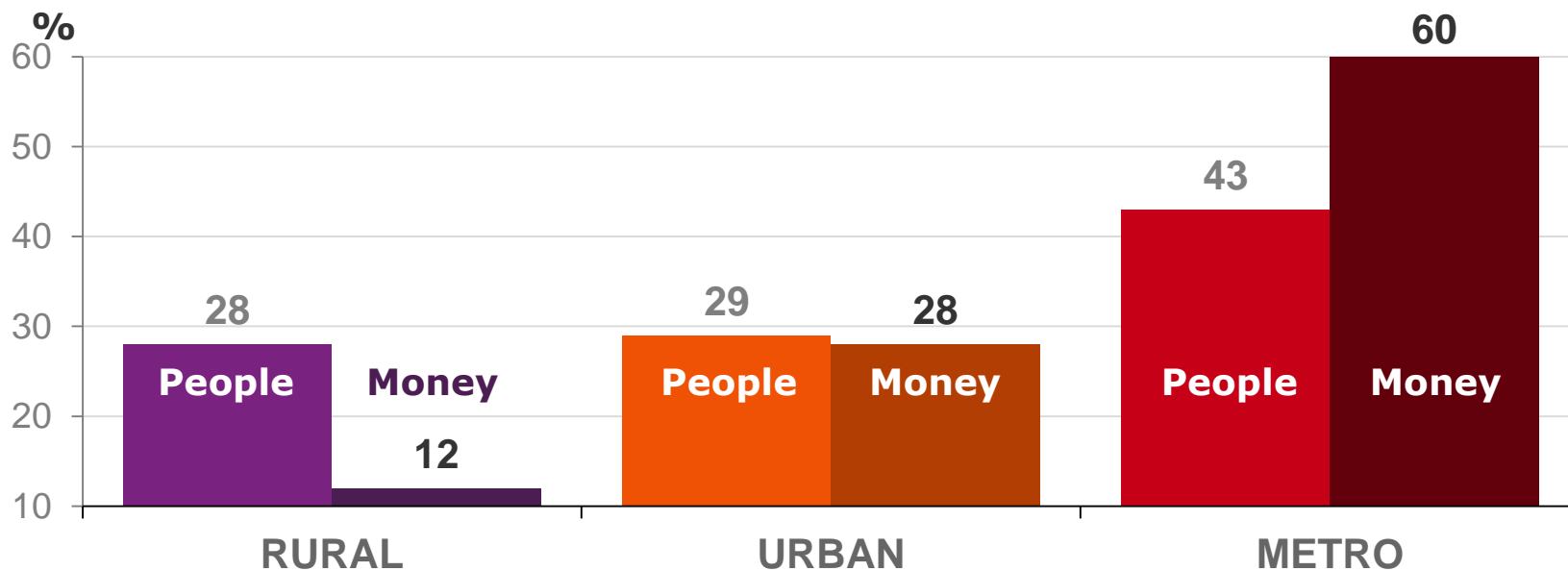
Past 7 days



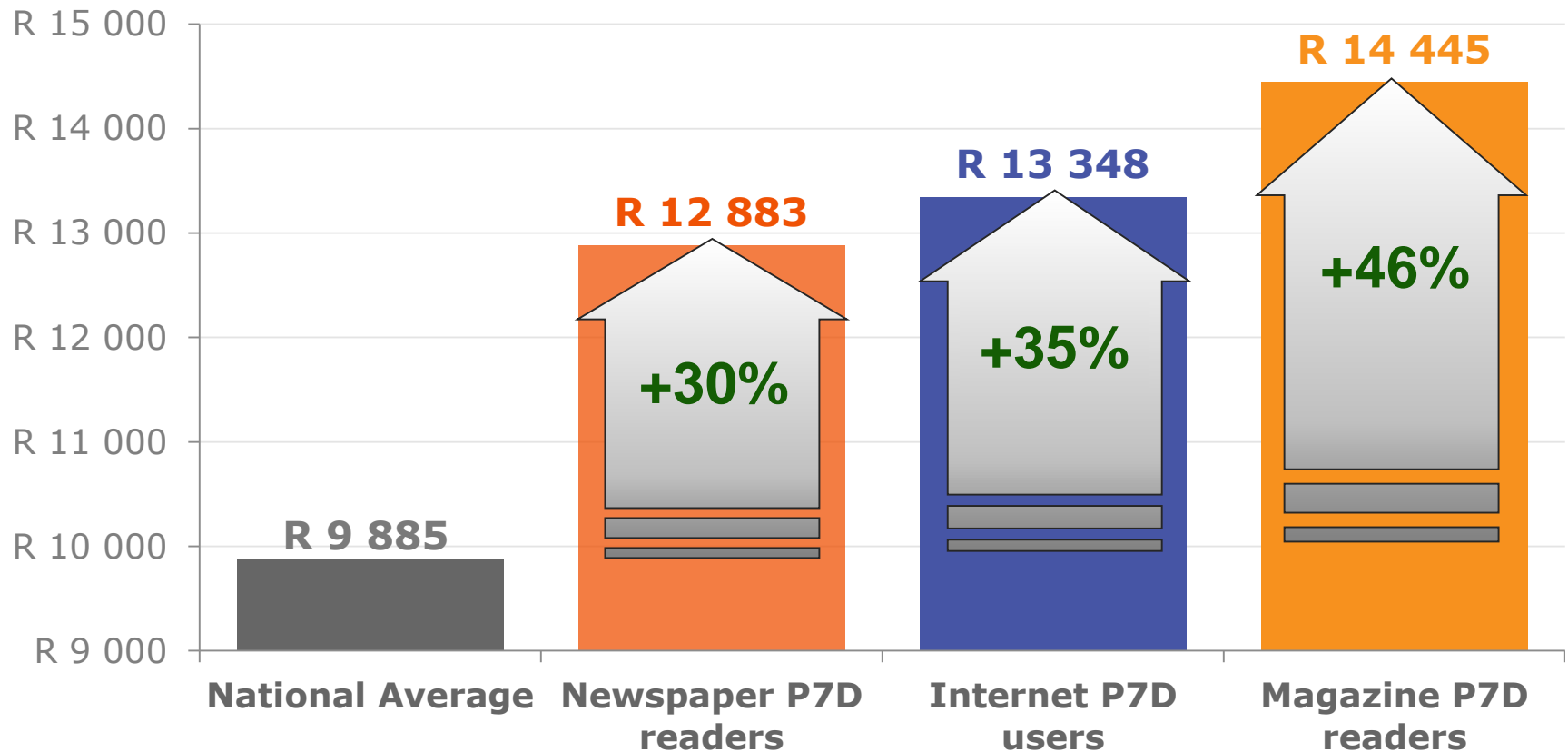
ADVERTISE TO PEOPLE WHO CAN AFFORD YOUR PRODUCTS

AREA TYPE:	RURAL	URBAN	METRO
NO. HHS:	4.5m	4.6m	6.9m
AVG MHI:	R4,504	R9,666	R13,578

POPULATION VS MONEY



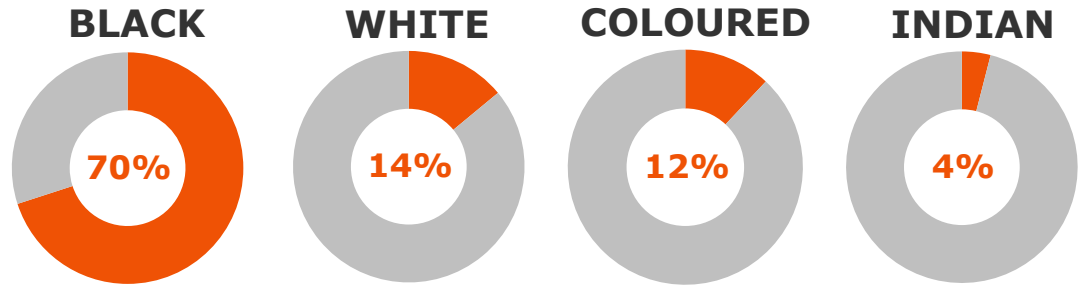
AVERAGE HOUSEHOLD INCOME...



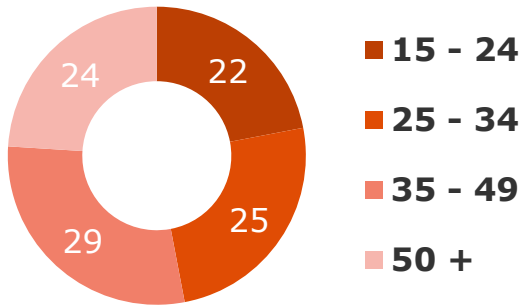
P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...



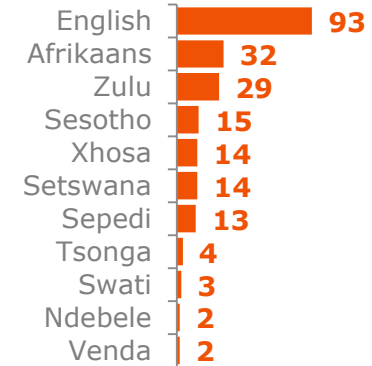
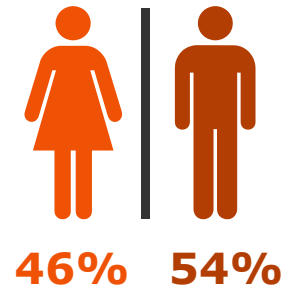
10.5 million
ADULTS 15 YEARS+



AGE %

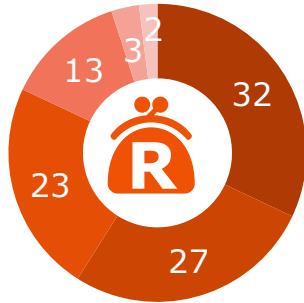


LANGUAGES READ AND UNDERSTAND %



P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME % AVERAGE: R12,883



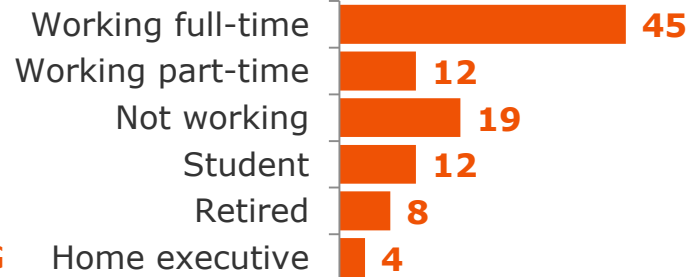
- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



MARITAL STATUS



57% WORKING
43% NOT WORKING



60%
SINGLE/DIV/WID



39%
MARRIED

1%
REFUSED

P7D NEWSPAPER READERS GEOGRAPHIC LANDSCAPE...

PROVINCE % AND POPULATION FIGURES



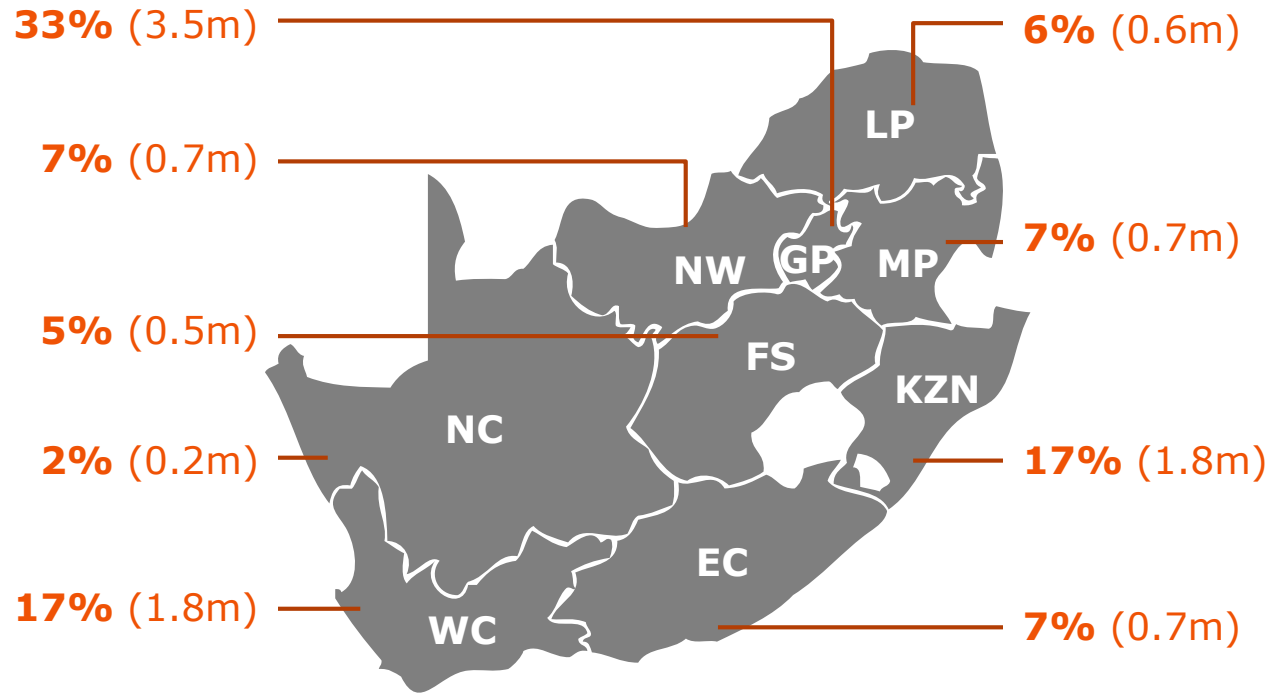
53%
METRO



31%
URBAN



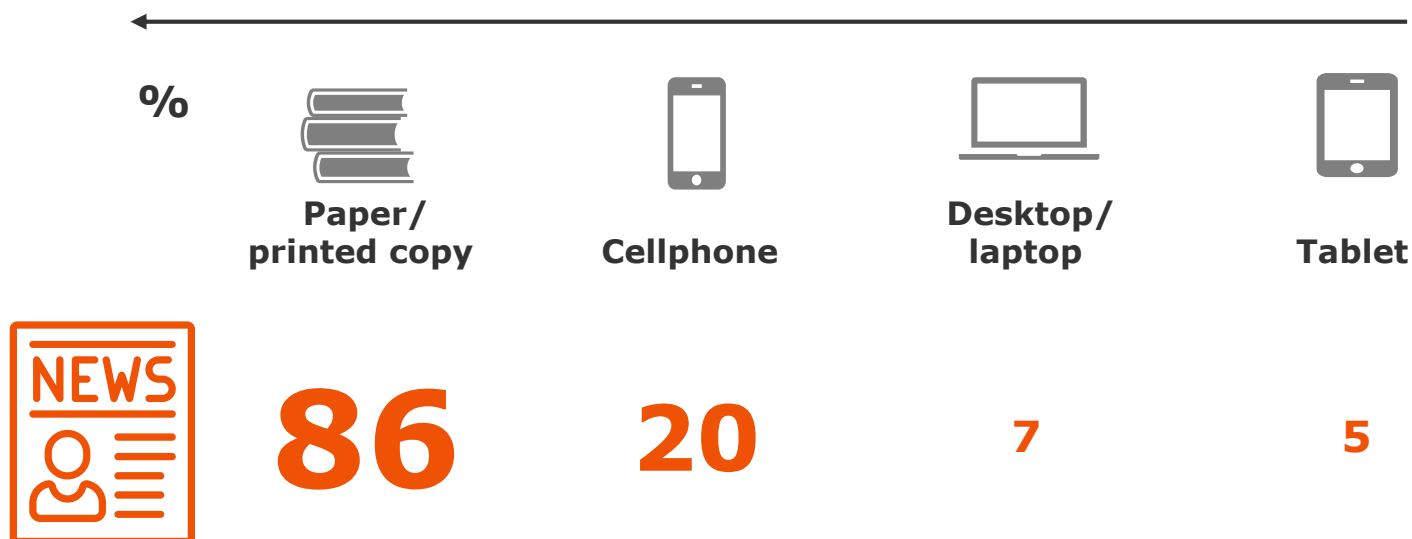
16%
RURAL



NEWSPAPER PLATFORM USAGE...



Multiple platforms



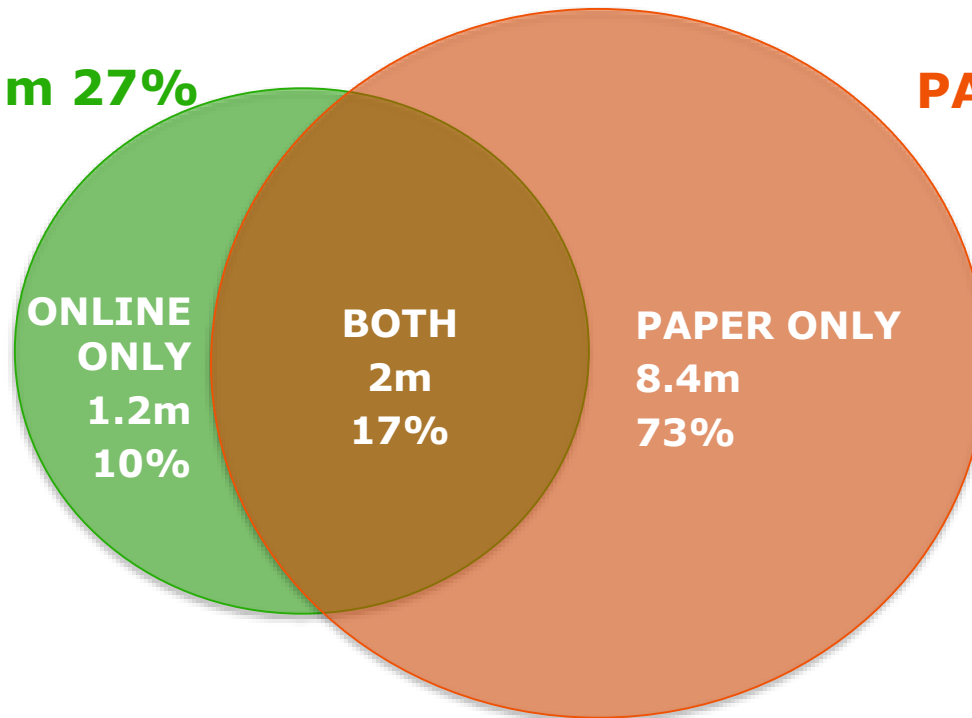
NEWSPAPER PLATFORM OVERLAP...



PAST 7 DAY READERS (Universe 11.5m)

ONLINE 3.1m 27%

PAPER 10.4m 90%



Average Age

34

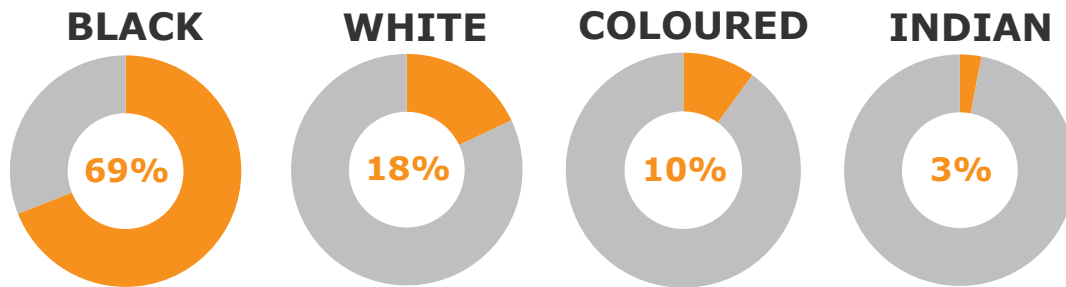
35

39

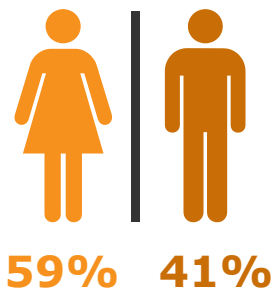
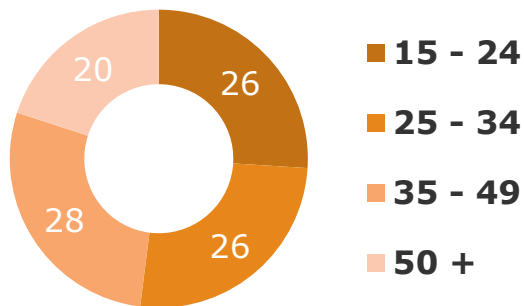
P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...



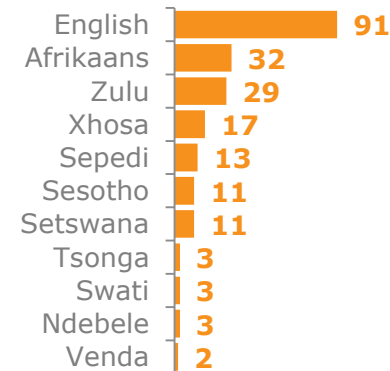
4.2 million
ADULTS 15 YEARS+



AGE %



LANGUAGES READ AND UNDERSTAND %



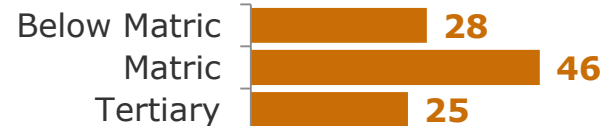
P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...



MONTHLY HOUSEHOLD INCOME % AVERAGE: R14,445



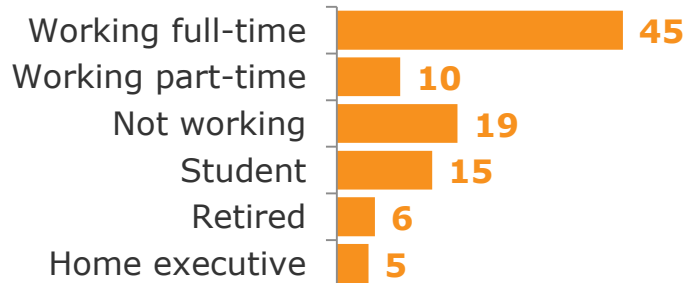
- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



MARITAL STATUS



55% WORKING
45% NOT WORKING



62%
SINGLE/DIV/WID



37%
MARRIED

1%
REFUSED

P7D MAGAZINE READERS GEOGRAPHIC LANDSCAPE...



PROVINCE % AND POPULATION FIGURES



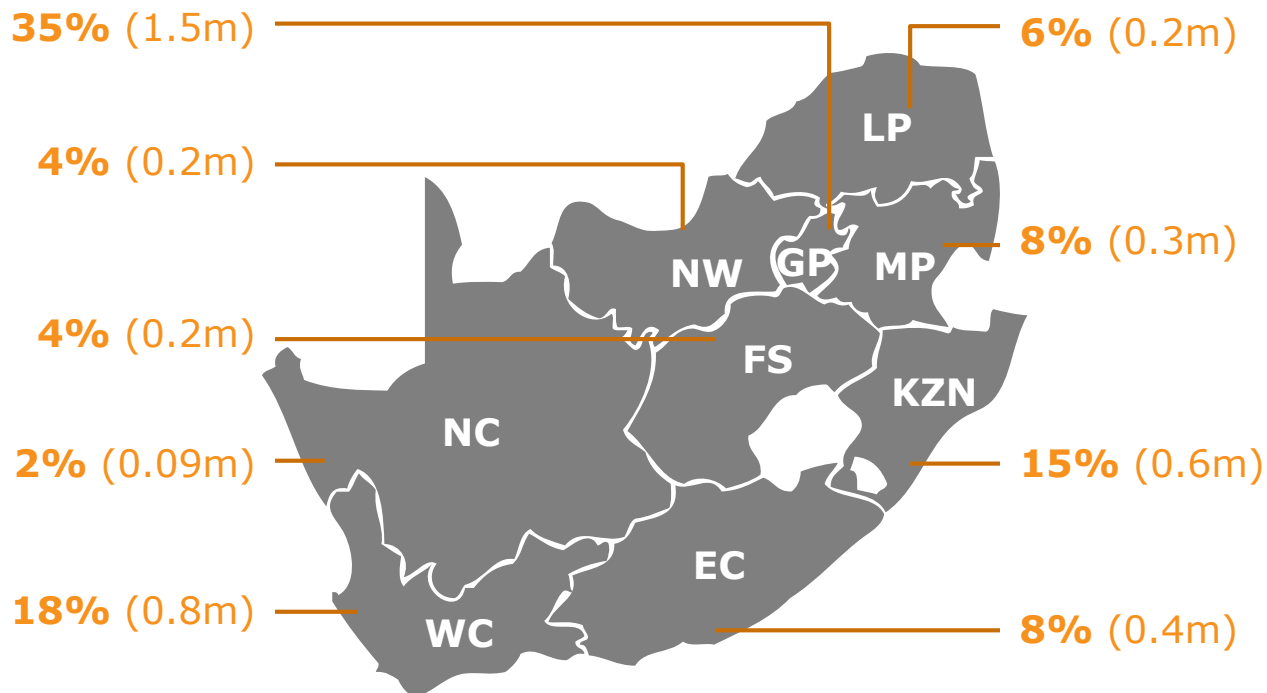
56%
METRO



30%
URBAN



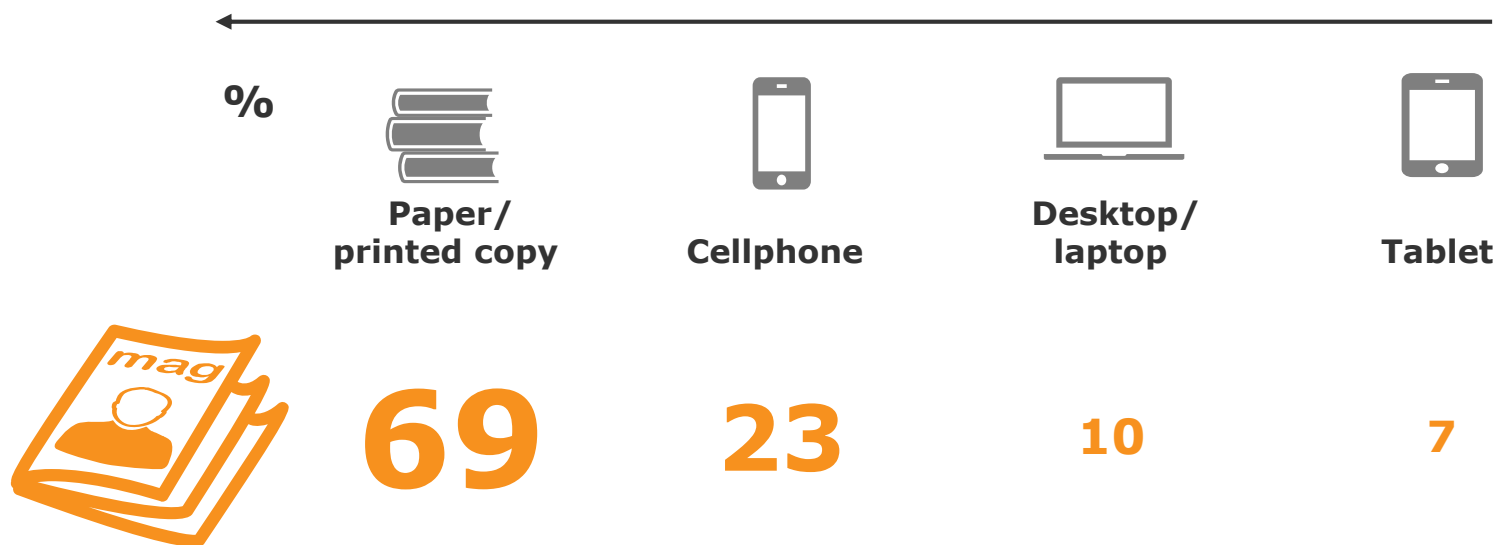
14%
RURAL



MAGAZINE PLATFORM USAGE...



Multiple platforms



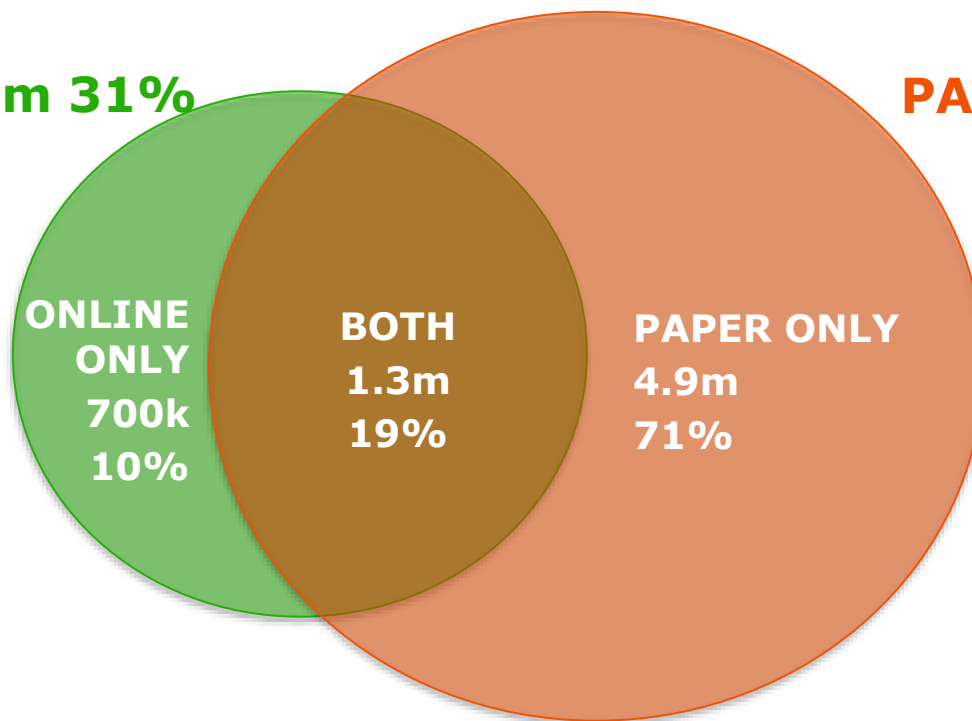
MAGAZINE PLATFORM OVERLAP...



PAST MONTH READERS (Universe 6.9m)

ONLINE 2.1m 31%

PAPER 6.2m 90%



Average Age

33

34

36

DIGITAL

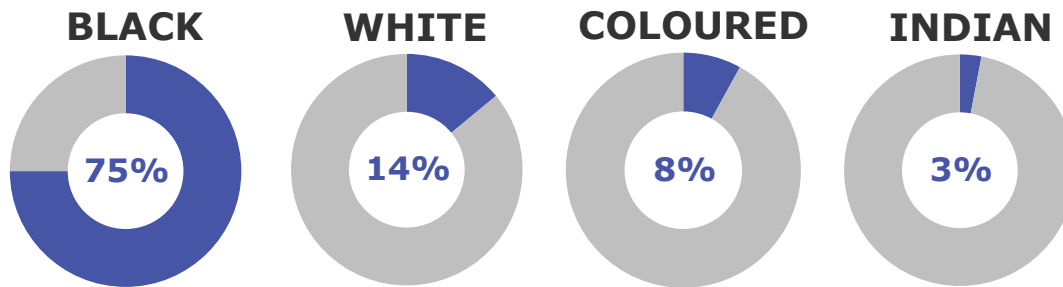
Past 7 days



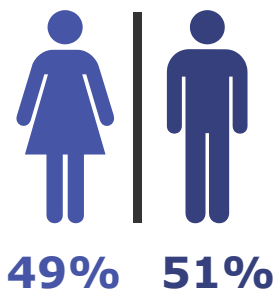
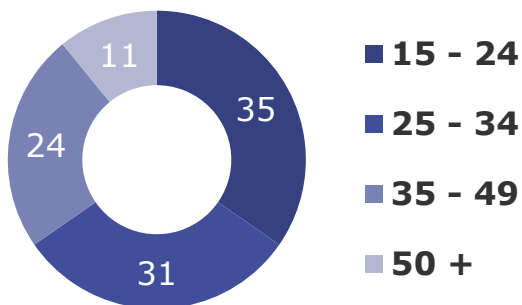
P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...



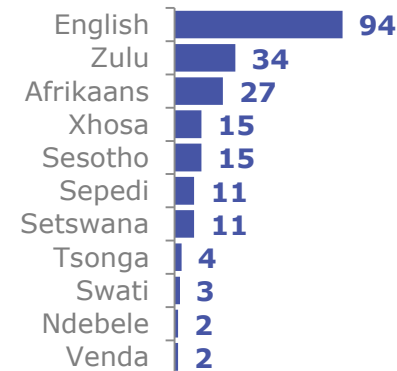
18.2 million
ADULTS 15 YEARS+



AGE %



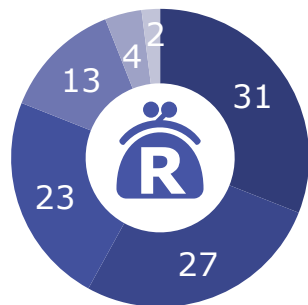
LANGUAGES READ AND UNDERSTAND %



P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...



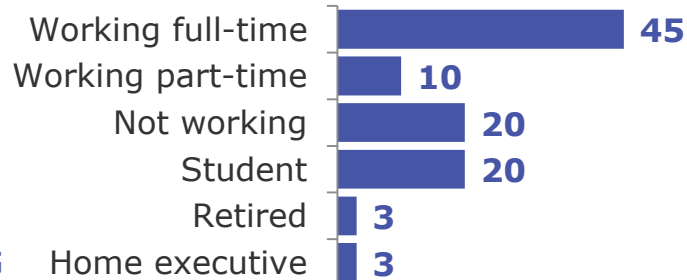
MONTHLY HOUSEHOLD INCOME % AVERAGE: R13,348



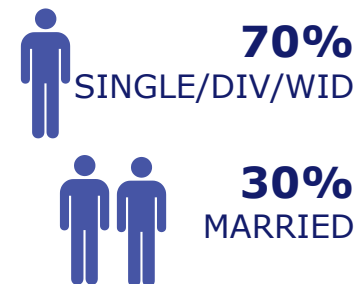
- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



55% WORKING
45% NOT WORKING



MARITAL STATUS



P7D INTERNET USERS GEOGRAPHIC LANDSCAPE...



PROVINCE % AND POPULATION FIGURES



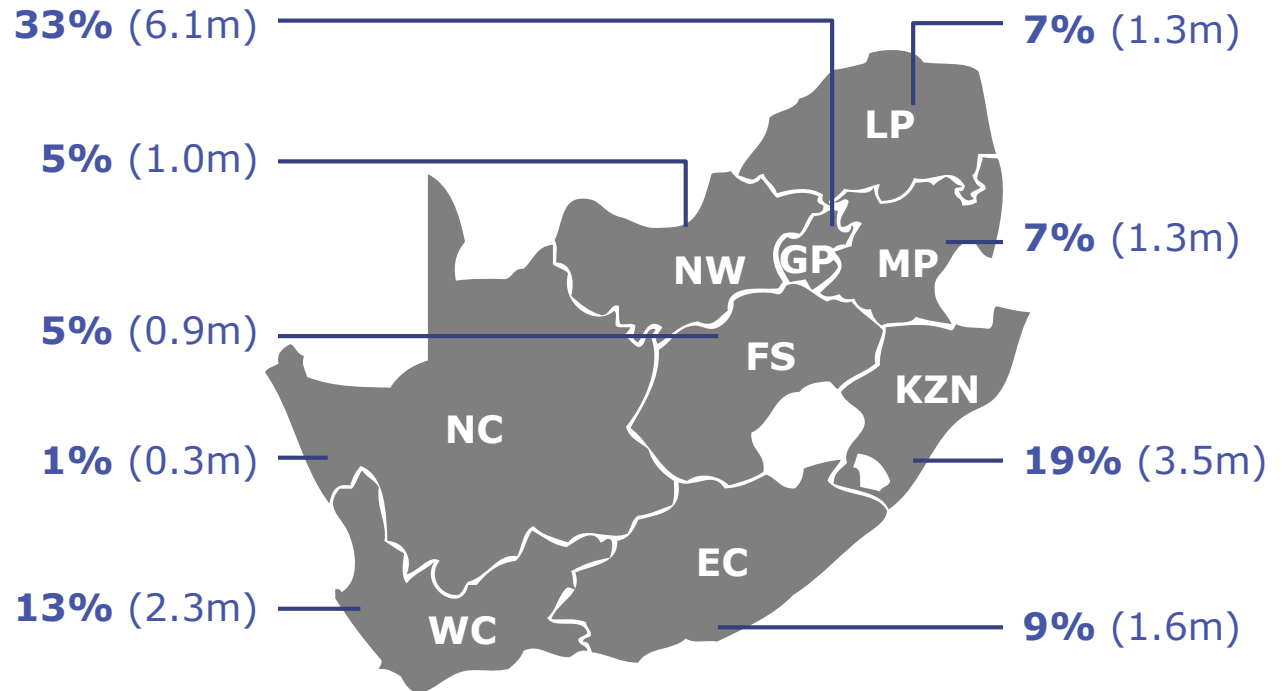
51%
METRO



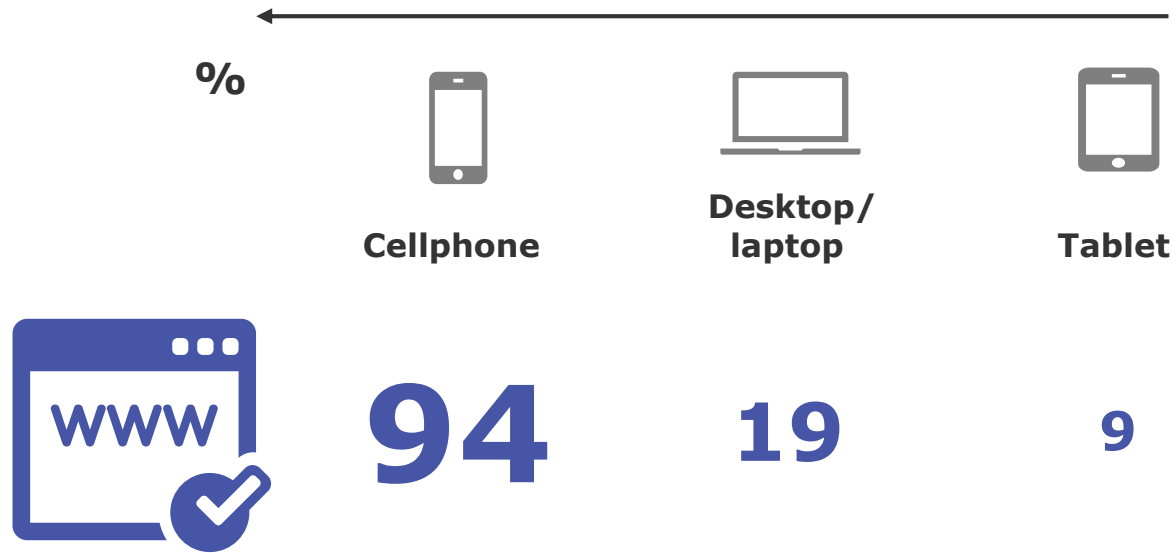
28%
URBAN



21%
RURAL















DIGITAL DEVICE



DIGITAL ACTIVITY BY DEVICE



				
	%	Cellphone	Desktop/ laptop	Tablet
Whatsapp/IM/chat		92	16	46
Social media	 	74	32	53
Search for things		54	73	58
Use/download apps	 	43	32	43
Download music/podcasts		38	24	35
Play games		29	17	31
Email		20	58	43
Banking		20	33	29
Check the weather		19	19	24

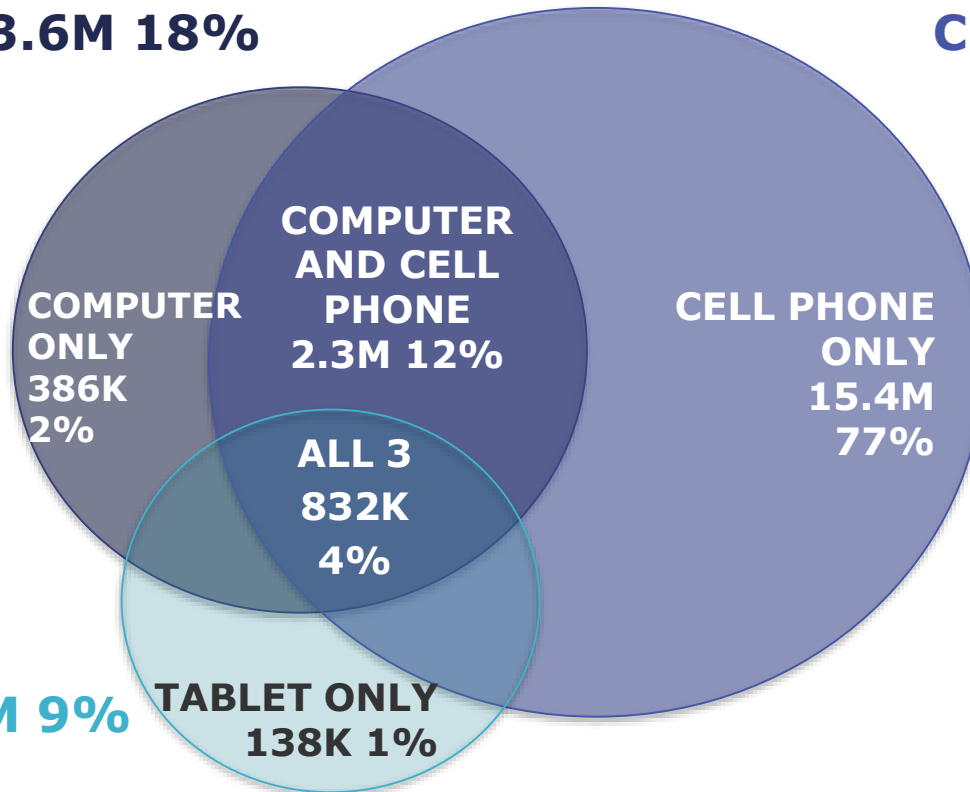
ONLINE ACCESS BY DEVICE



PAST MONTH USERS (Universe 20m)

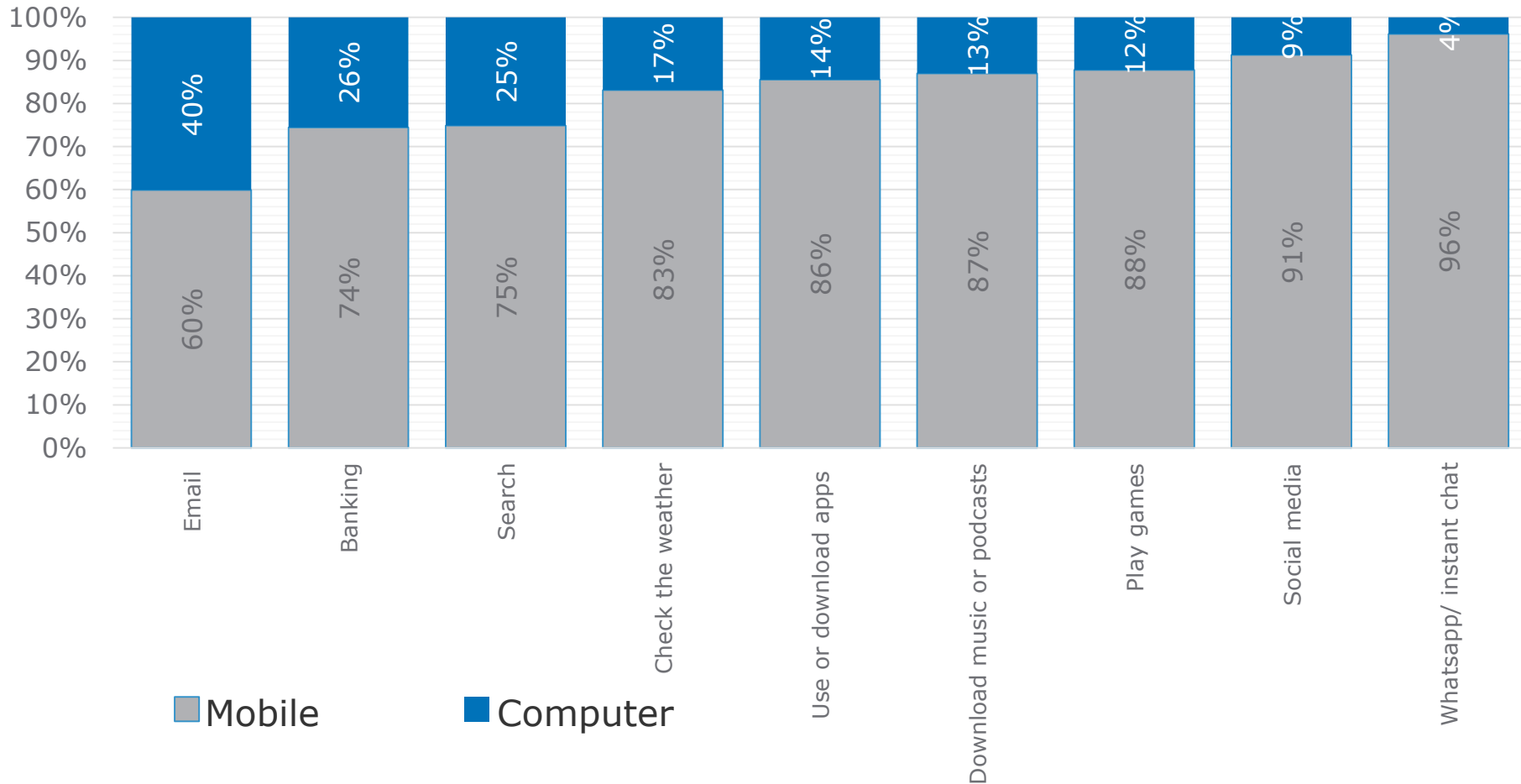
COMPUTER 3.6M 18%

**CELL PHONE 19.4M
97%**



TABLET 1.8M 9%

ONLINE ACTIVITY... MOBILE VS COMPUTER



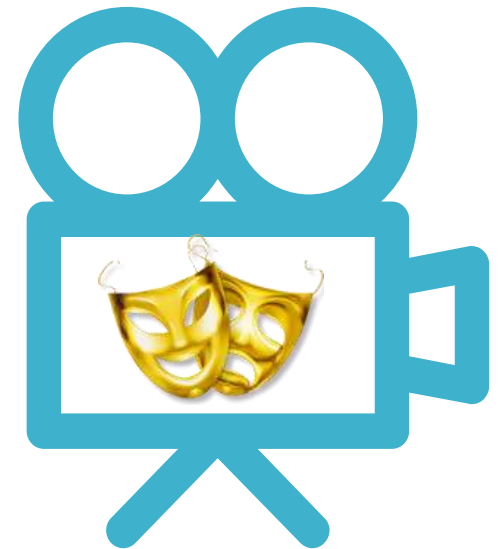
INTERNET FREQUENCY...



	%
Several times a day	66
Once a day	12
Several times a week	14
Once a week	3
Several times a month	1
Average no. of times per month	55.7

CINEMA

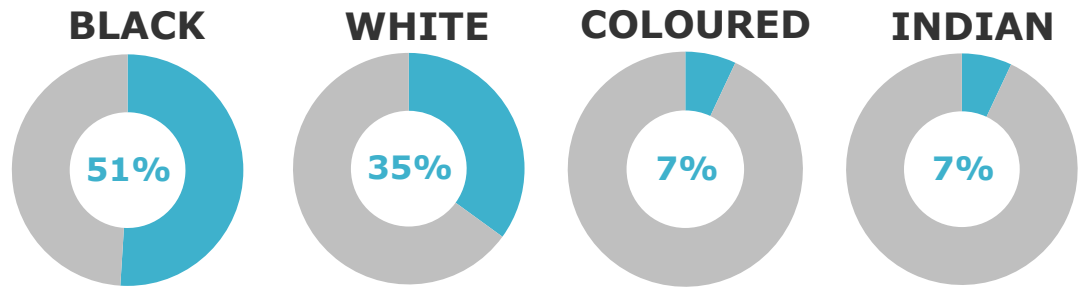
Past month



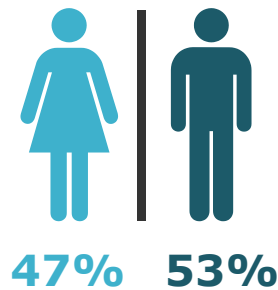
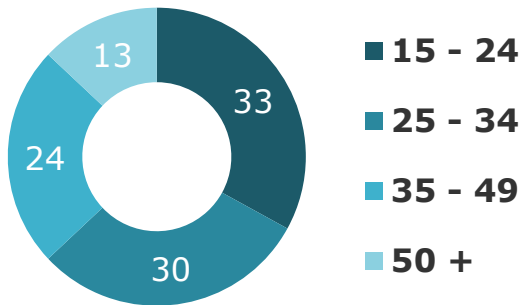
PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...



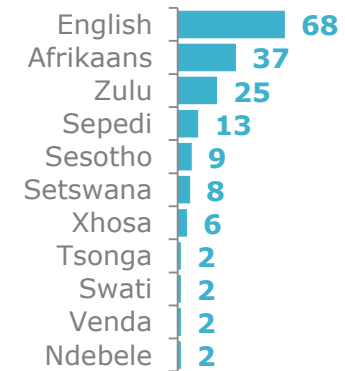
1.1 million
ADULTS 15 YEARS+



AGE %



SPOKEN LANGUAGES %



PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...



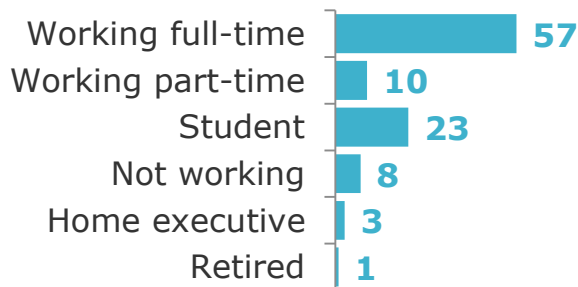
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R25,247



- R0 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



66% WORKING
34% NOT WORKING



**CHILDREN UNDER 15 YEARS
LIVING AT HOME %**



35%
CHILDREN



65%
NONE

PAST MONTH CINEMA GOERS GEOGRAPHIC LANDSCAPE...



PROVINCE % AND POPULATION FIGURES



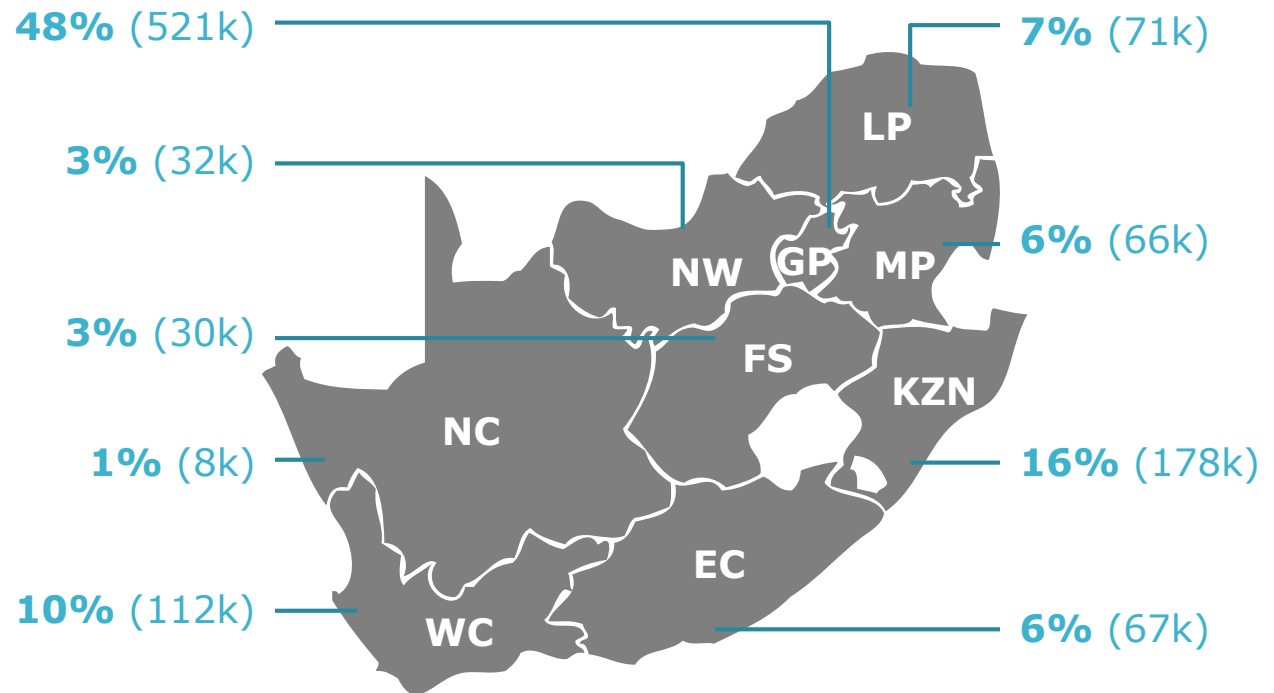
68%
METRO



28%
URBAN



4%
RURAL



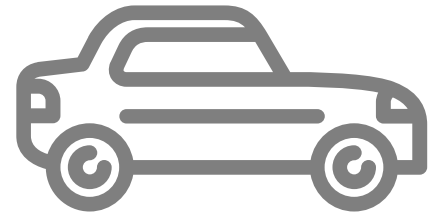
CINEMA FREQUENCY...



	%
Once a week	1
2-3 times a month	7
Once a month	14
Once every 3 months	23
Once every 6 months	25
Once every 12 months	18
Less than once every 12 months	14
Average no. of visits per year	5.6

ON THE GO

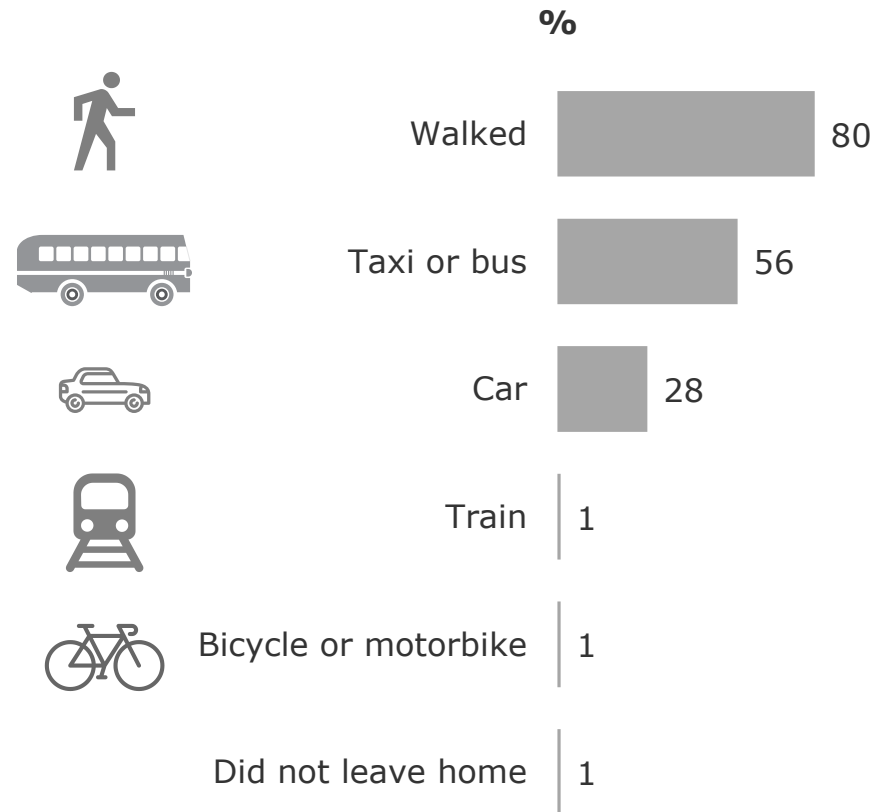
Past 7 days



PAST WEEK DESTINATIONS...



MODES OF TRANSPORT



INTRODUCING A NEW SOCIO-ECONOMIC SEGMENTATION SYSTEM: SEM

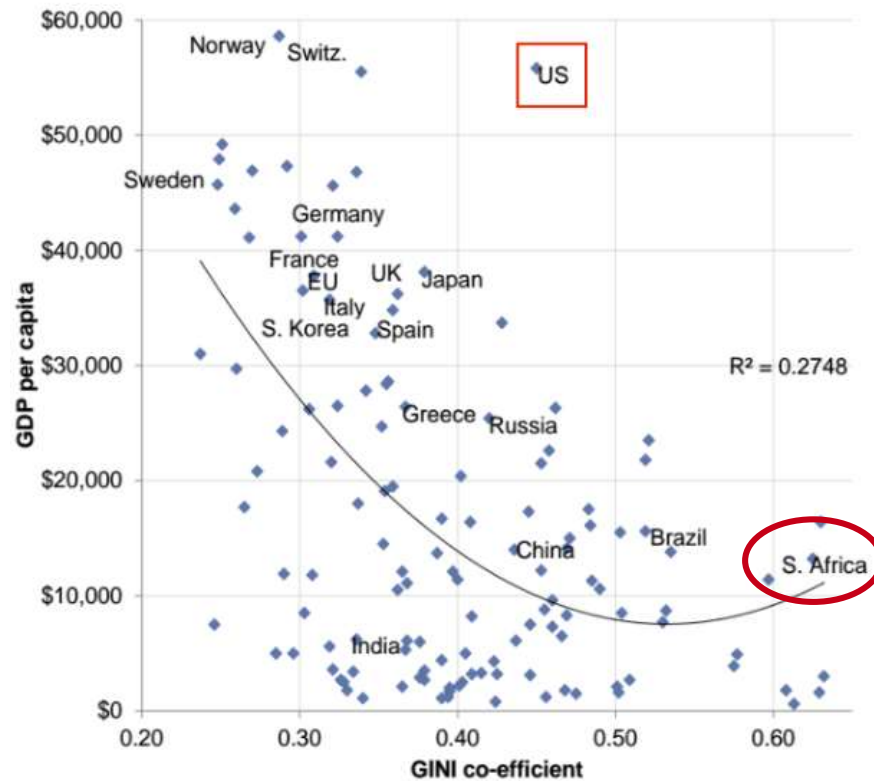


THE SEM CONCEPTUAL STARTING POINT



A measure that depicts how you live, not necessarily what you have

NEEDS TO REFLECT SA SOCIETY



Perfectly equal society

0



1

Perfectly unequal society

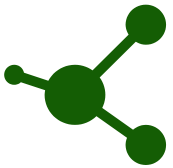
THE SEMS ARE...



Relevant and differentiating



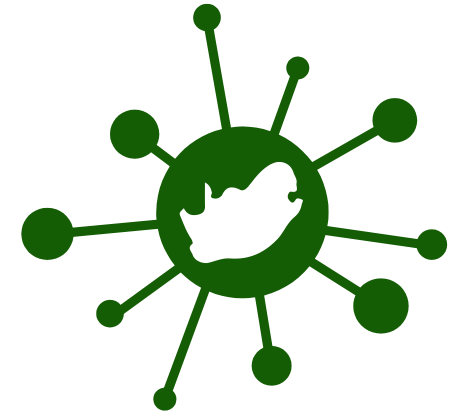
Stable



Not overly dependent on durables

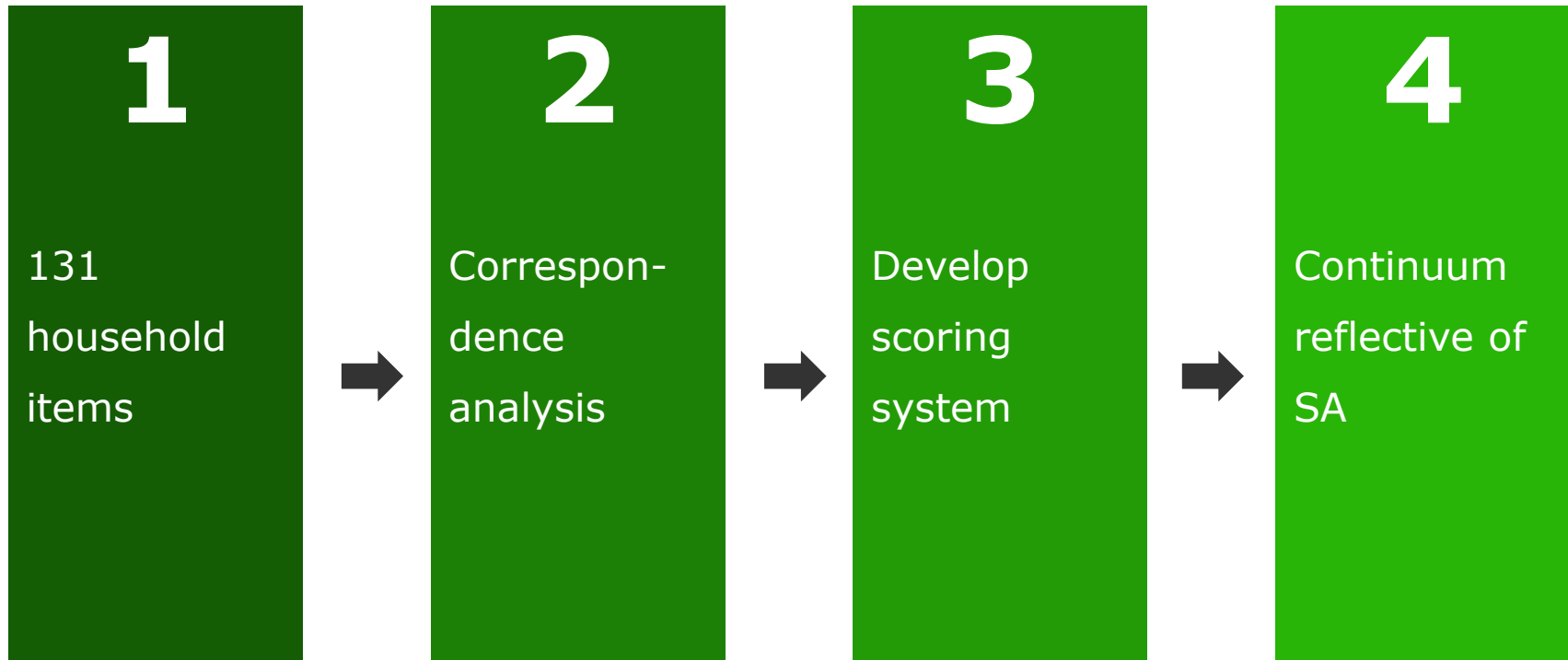


Easy to use

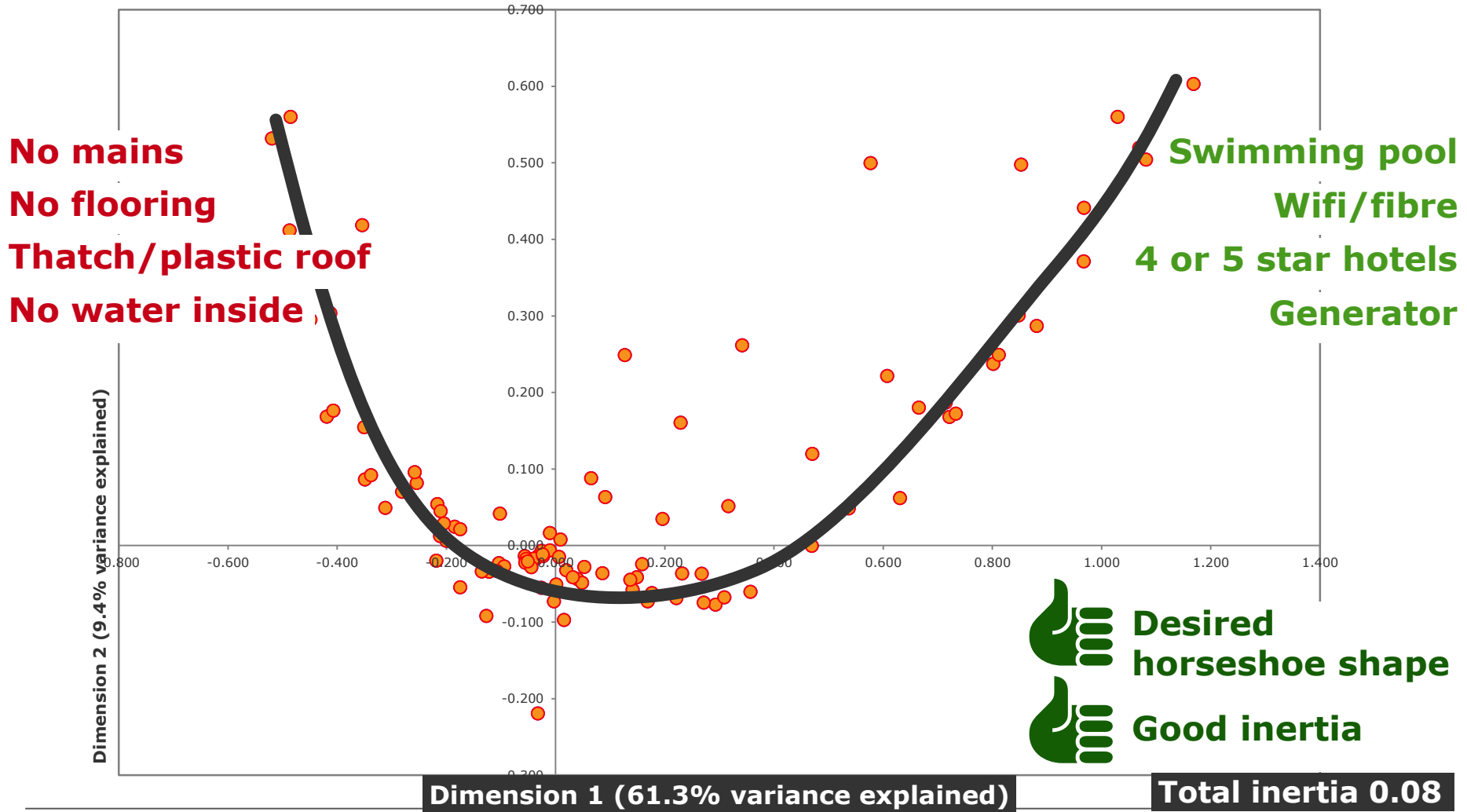


**With the flexibility
to be applied to
any media and
marketing study
in South Africa**

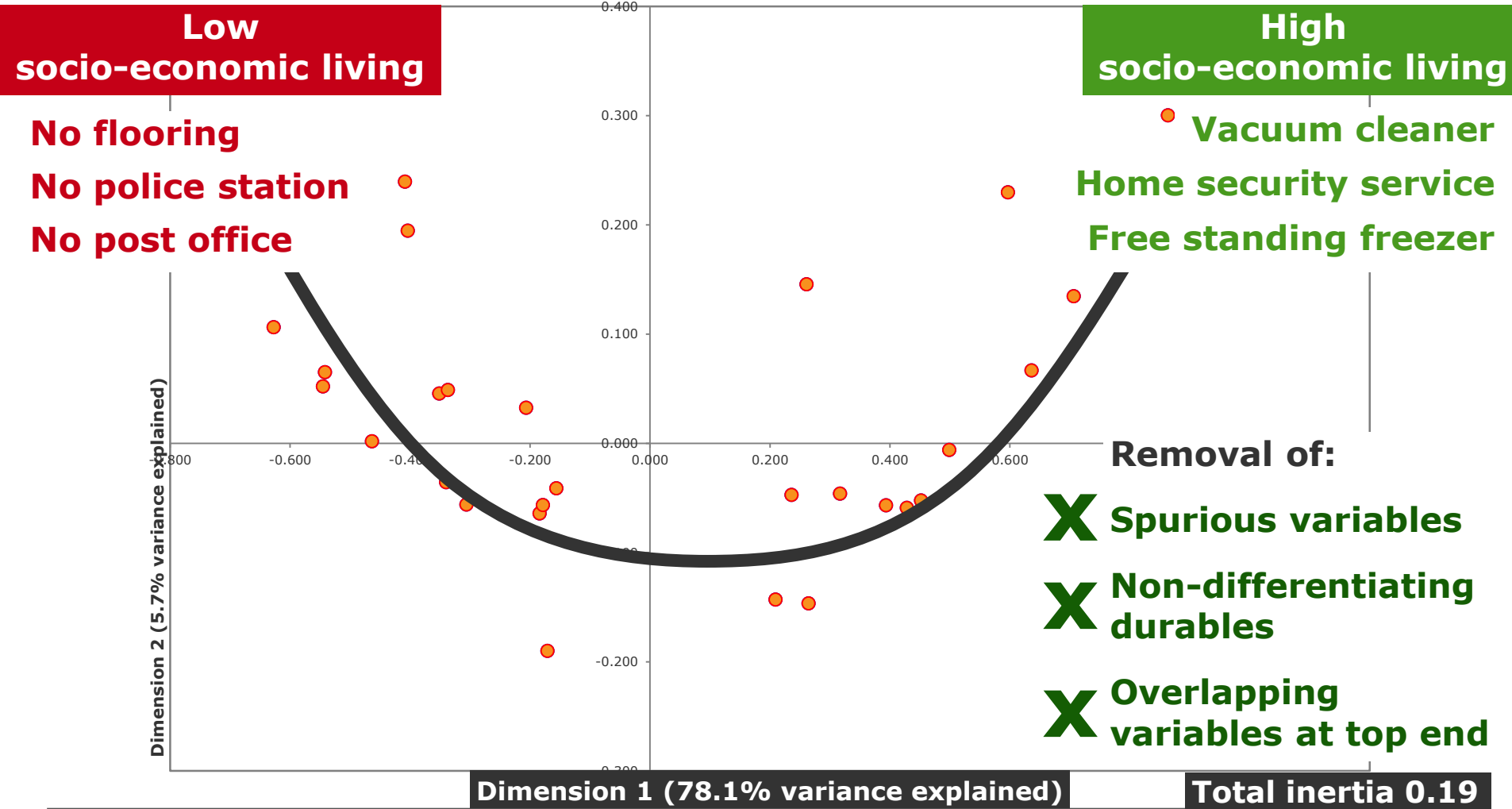
THE SEM DEVELOPMENT PROCESS



FIRST ITERATION HAD 131 VARIABLES

















REMOVAL OF VARIABLES RESULTED IN AN EVEN STRONGER MEASURE



THE 14 SEM VARIABLES...

Final variables:

-  Post Office nearby
-  Police station nearby
-  Built-in kitchen sink
-  Home security service
-  Motor car
-  **Deep freezer which is free standing**
-  **Microwave oven**
-  **Floor polisher or vacuum cleaner**
-  **Washing machine**
-  Floor material
-  Water source
-  Type of toilet
-  Roof material
-  Number of sleeping rooms

 **Focus on structural items**

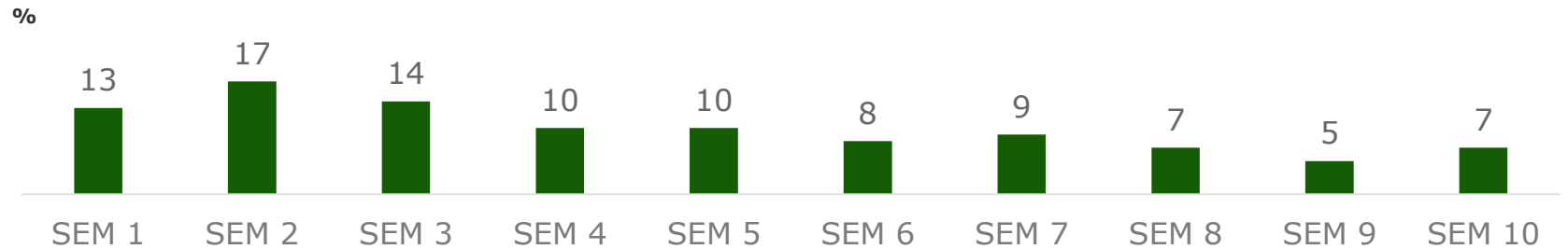
 **Low reliance on durables**

 **No reliance on technology items**

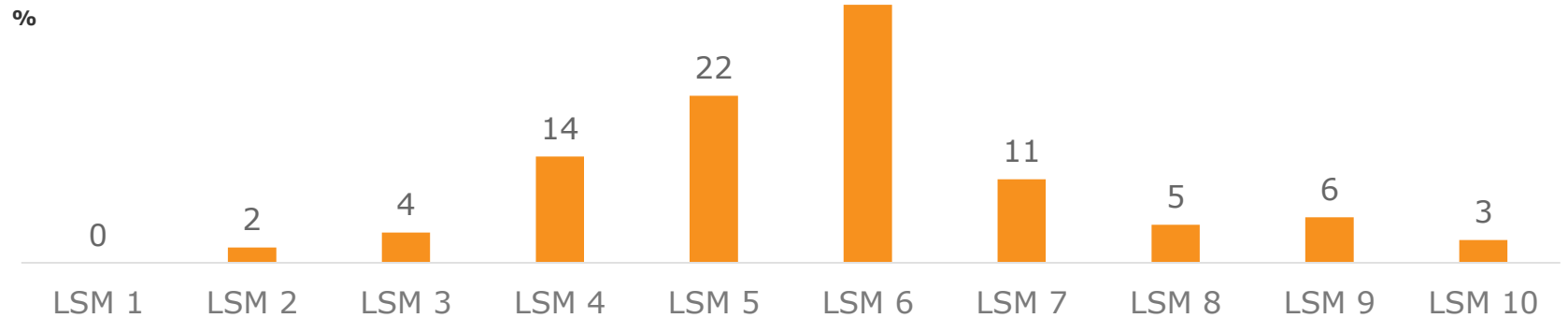
 **Short and easy to use**

THE ES SEMs VS THE ES LSMs

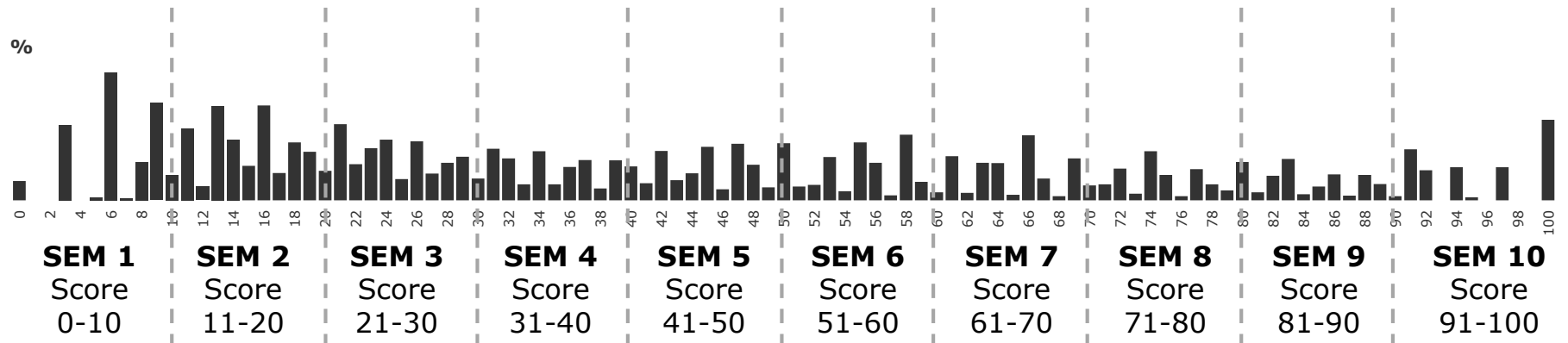
SEM:



LSM:



THE SEM CONTINUUM



Low socio-economic living



High socio-economic living

Currently divided into ten groups, but users have the flexibility to spread the scores in any way they wish

For example: 0-40; 41-95; 96-100

SEM TARGETING EXAMPLE...

The more precisely one defines the TM, the less the wastage and the better the ROI.

Suppose you wanted to advertise petrol, motor spares or used cars...



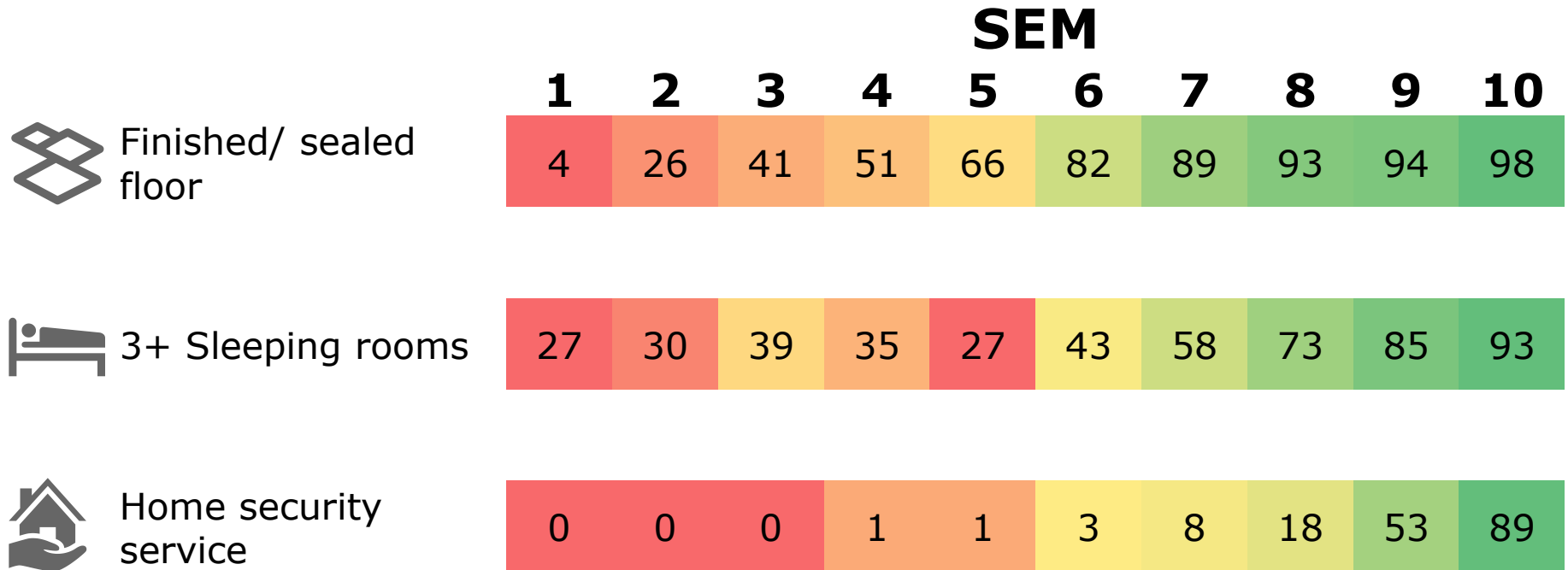
	TOTAL	SEM1	SEM2	SEM3	SEM4	SEM5	SEM6	SEM7	SEM8	SEM9	SEM10
Motor car in home %Col	26	0	1	4	7	11	20	14	84	95	100
Index	100	0	5	14	27	42	77	164	321	360	380

LSM 7-10 miss out on the top end of SEM 6. So you simply code where the index is 100 or greater (penetration above national average of 26%).

TARGET MARKET IS SEM >= 57

SEM INPUT VARIABLES...

STRUCTURAL

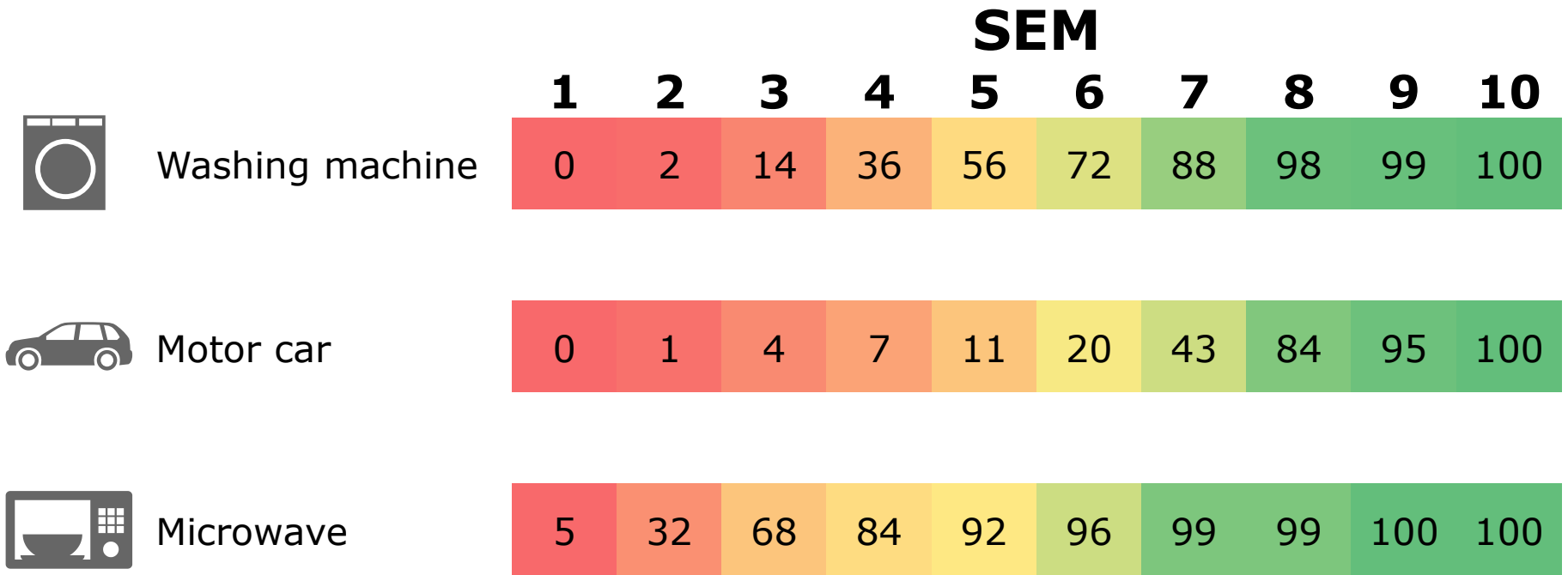


Note: HH weights



SEM INPUT VARIABLES...

CONSUMABLES







Note: HH weights



SEM INPUT VARIABLES...

INFRASTRUCTURE AND BASIC AMENITIES






		SEM									
		1	2	3	4	5	6	7	8	9	10
	NO Police Station nearby	94	57	48	34	28	23	17	12	10	1
	NO Post Office nearby	97	67	55	38	35	30	21	13	12	2
	NO Built-in kitchen sink	100	95	77	55	20	7	3	1	0	0
	NO Flush toilet inside the house	100	96	82	59	29	13	3	1	1	0

Note: HH weights



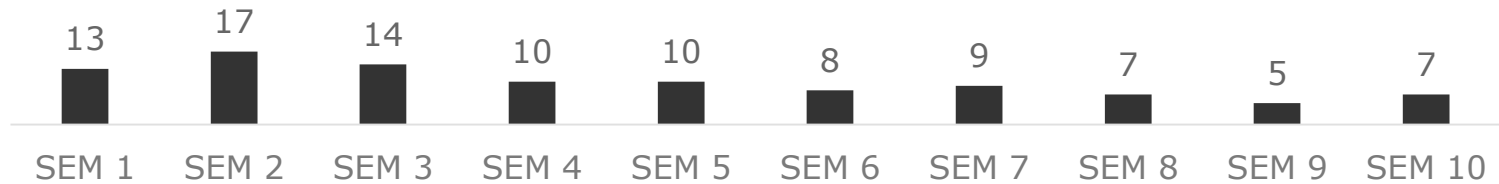
DEMOGRAPHIC LANDSCAPE BY SEM...

		SEM									
		1	2	3	4	5	6	7	8	9	10
	Metro	13	19	22	40	53	62	65	63	69	68
	Urban	13	21	33	38	35	31	30	34	29	32
	Rural	73	60	45	22	12	7	5	3	2	0

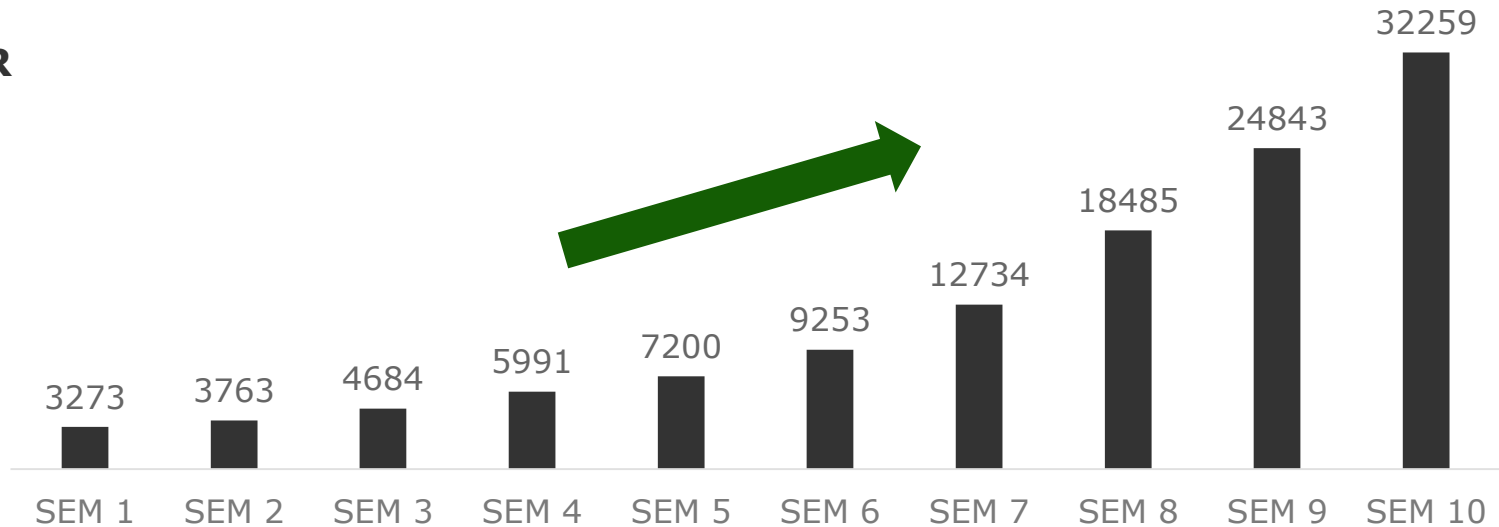
Note: Individual weights

MONTHLY HH INCOME BY SEM...

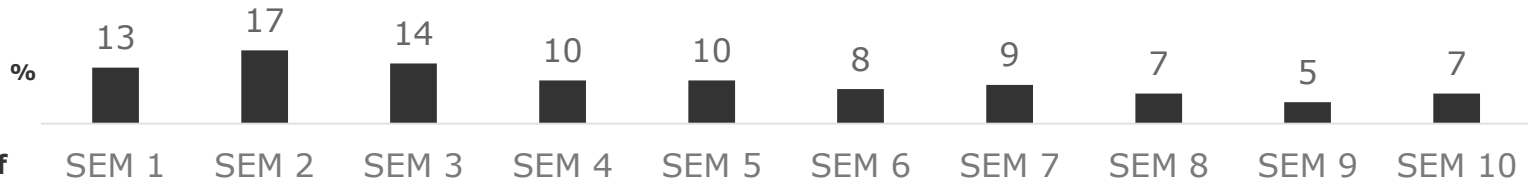
%



R



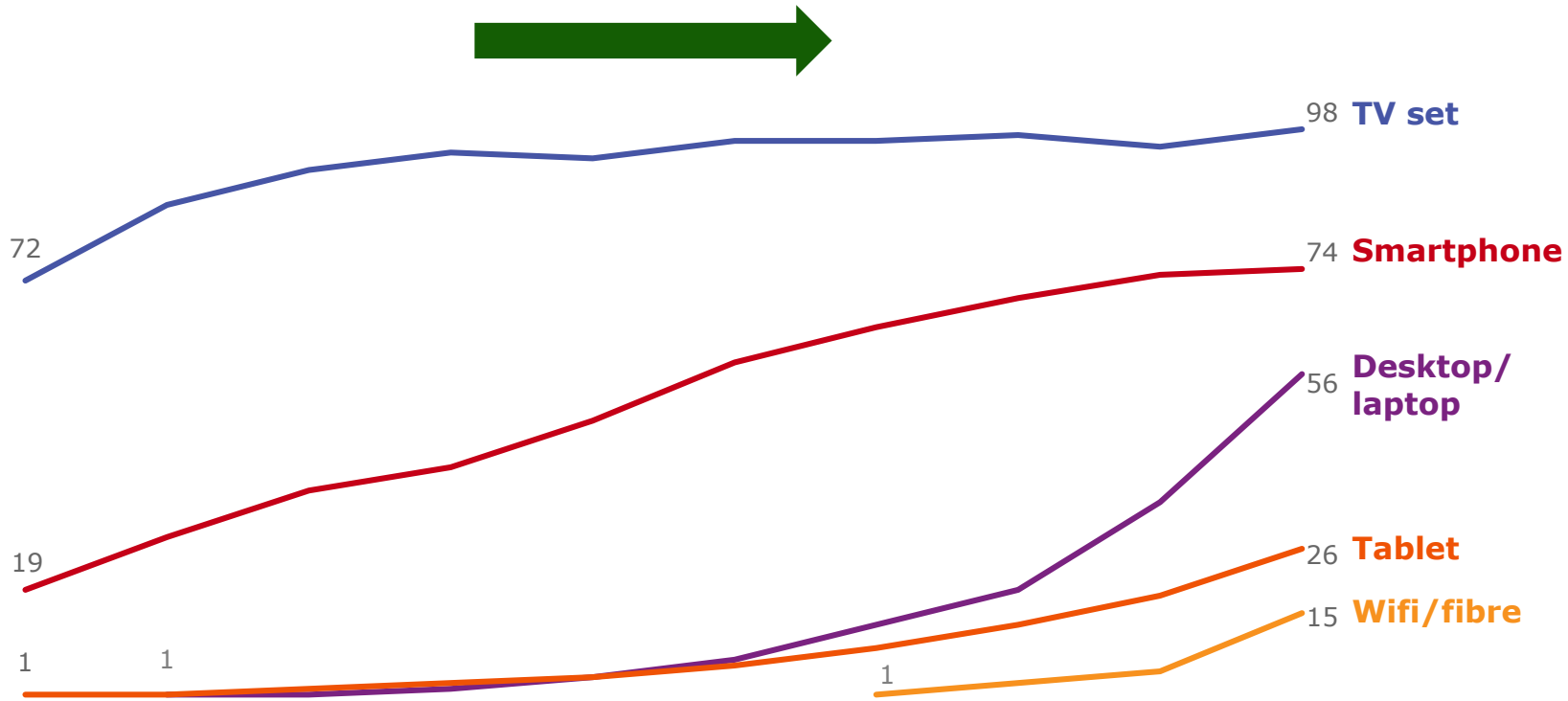
EQUIPMENT IN HOME BY SEM



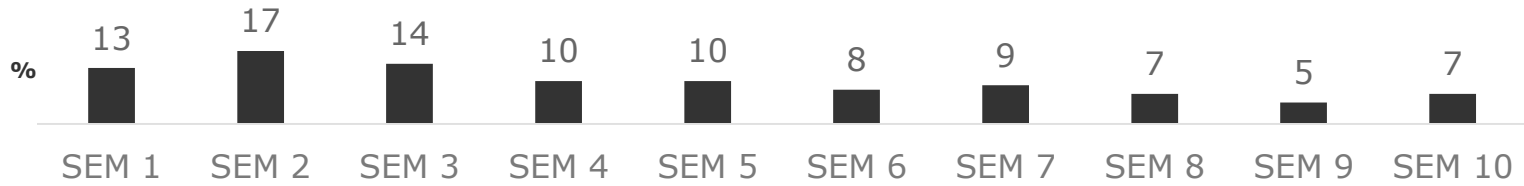
Avg. no. of equipment items in home:

2.4 2.6 2.8 2.9 2.9 3.0 3.1 3.3 3.5 4.2

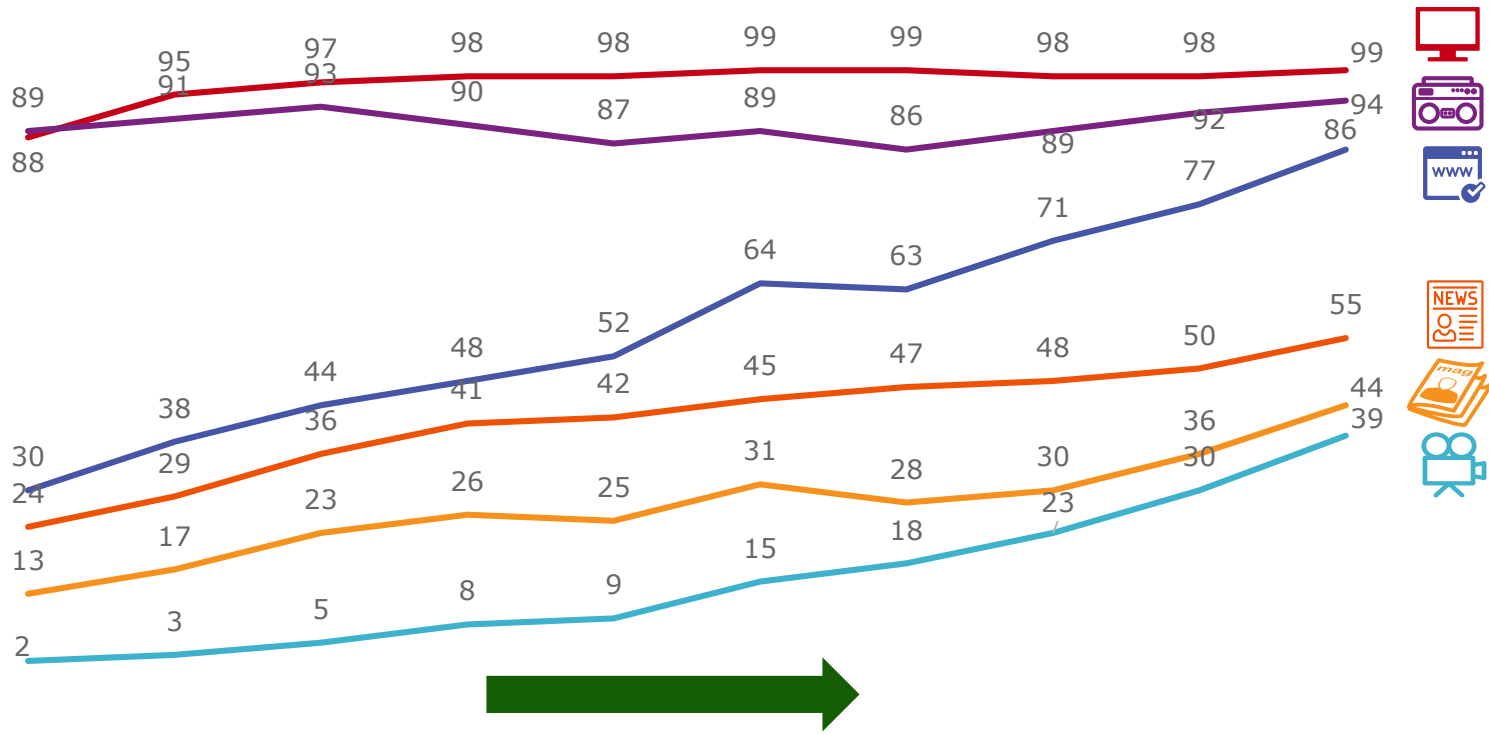
Key equipment penetration:



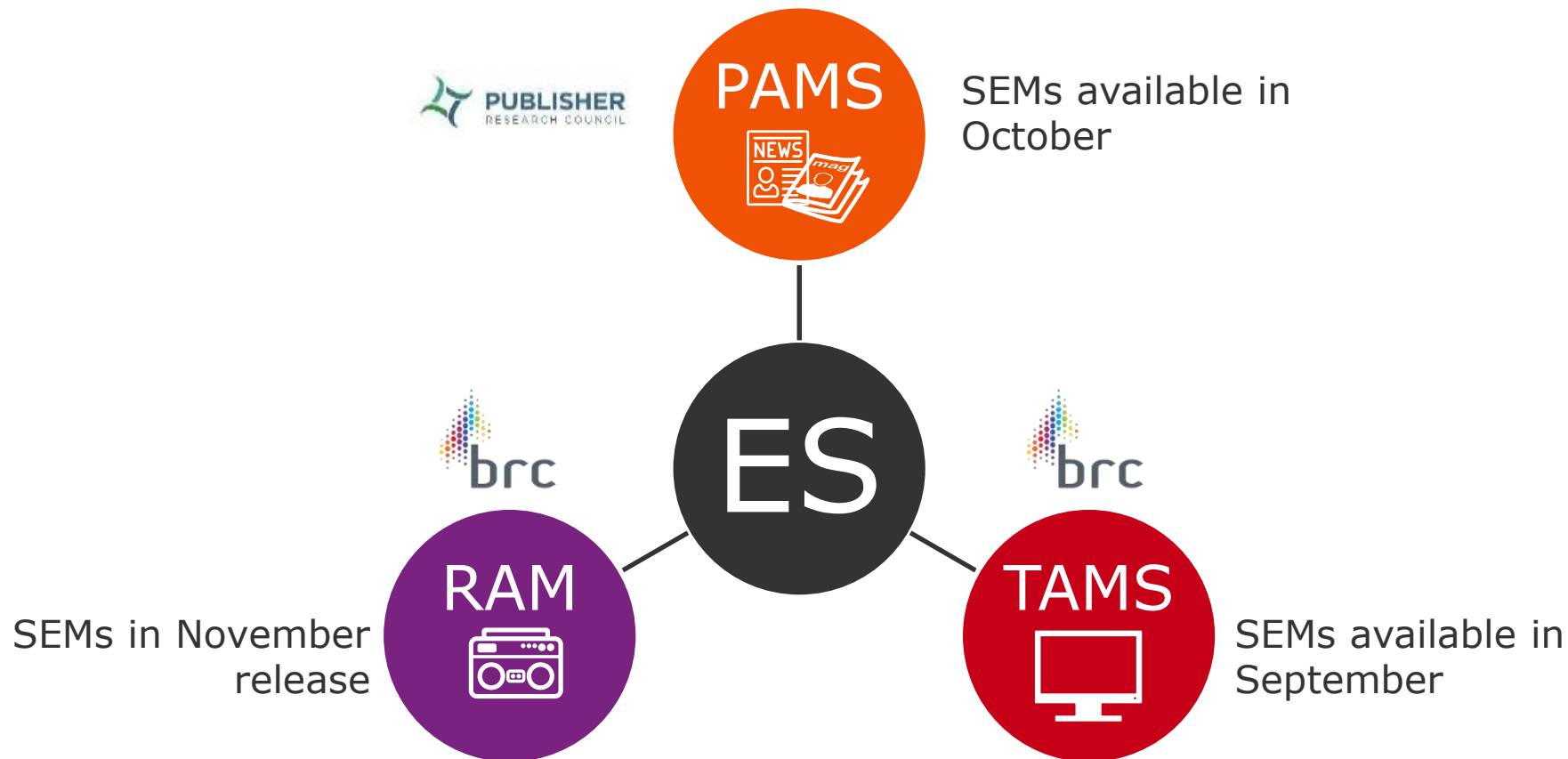
MEDIA CONSUMPTION BY SEM...



Past 12 month usage:



SEM INTEGRATION...



Thank you

