

ESTABLISHMENT SURVEY UPDATE

OCTOBER 2017



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)

SEM'S (SEGMENTATION MODEL)

PRODUCTS & BRANDS MODULE
(IN 2018)



ES SAMPLE...

CLOSELY REFLECTS THE SA POPULATION

ES (unweighted)



■ Black	81%
■ Coloured	10%
■ Indian / Asian	2%
■ White	8%

Source: ES Jul 2016-Jun 2017 (n=25,082)

IHS Population



■ Black	79%
■ Coloured	9%
■ Indian / Asian	3%
■ White	9%

Source: IHS Individual Population estimates Jun 2016



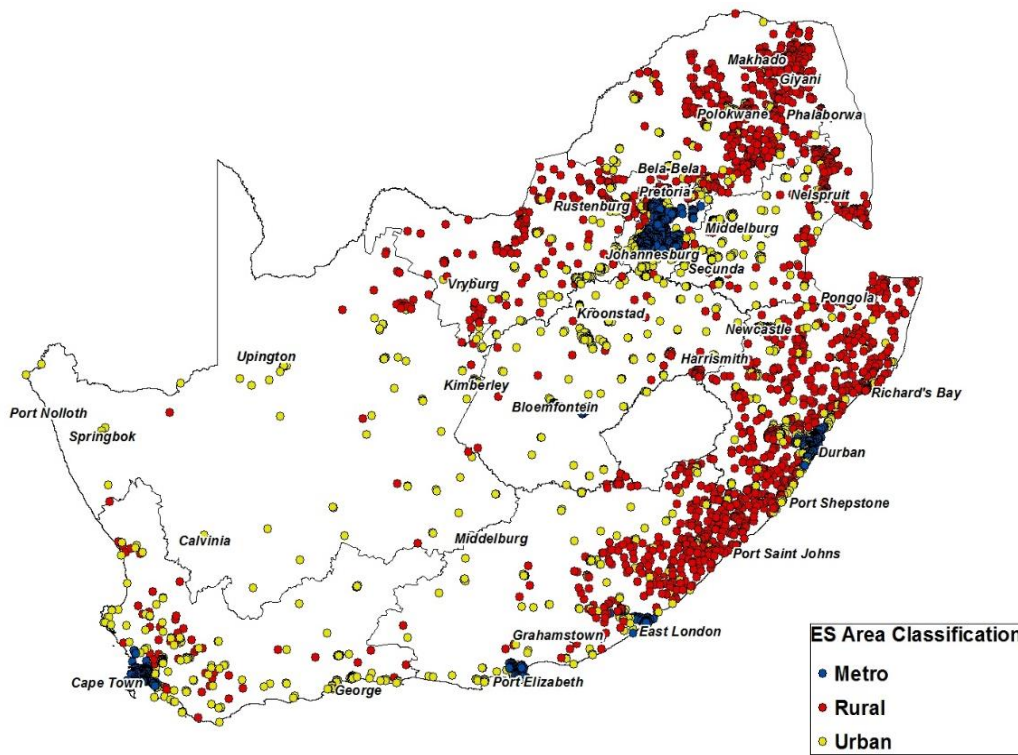
WEIGHTING EFFICIENCY...



HOUSEHOLD 93.8%
INDIVIDUAL 84.7%



ES – VITAL SIGNS...



25,082 sample

JUL 2016 – JUN 2017



41% Metro



28% Urban



31% Rural

Universe: Population aged 15+
39.5 million





DEMOGRAPHIC LANDSCAPE

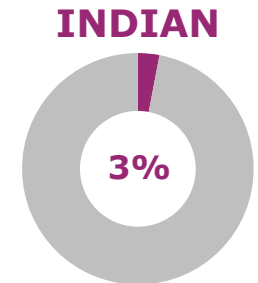
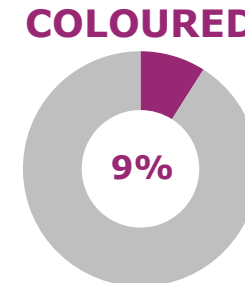
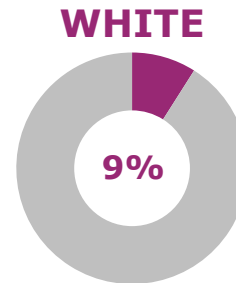
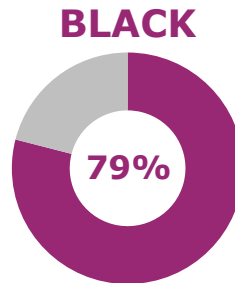
DEMOGRAPHIC LANDSCAPE...



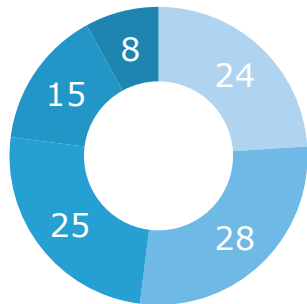
15.8 million
HOUSEHOLDS



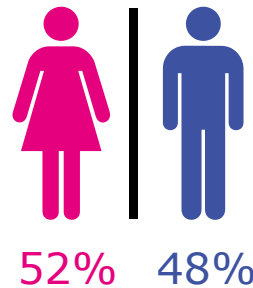
39.5 million
ADULTS 15 YEARS+



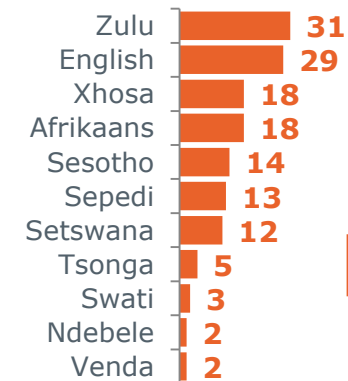
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

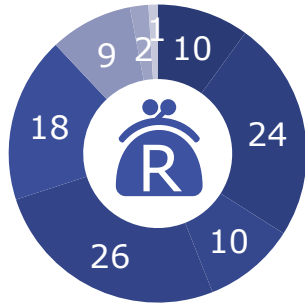


LANGUAGES SPOKEN IN HOME %

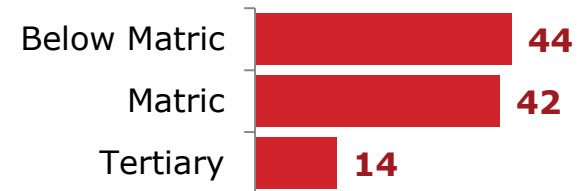


DEMOGRAPHIC LANDSCAPE...

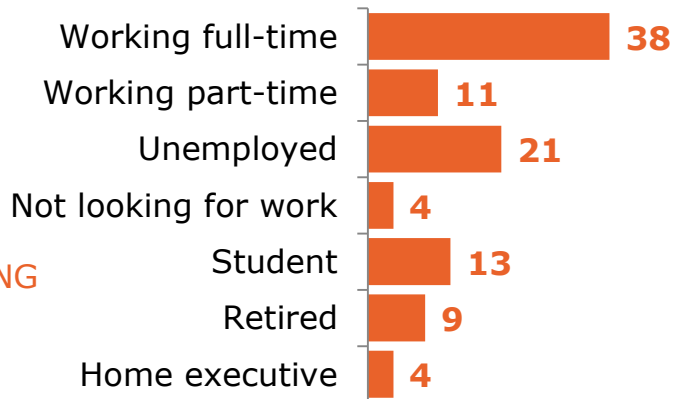
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,259



- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



49% WORKING
51% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



45%
CHILDREN



55%
NONE





GEOGRAPHIC LANDSCAPE

GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



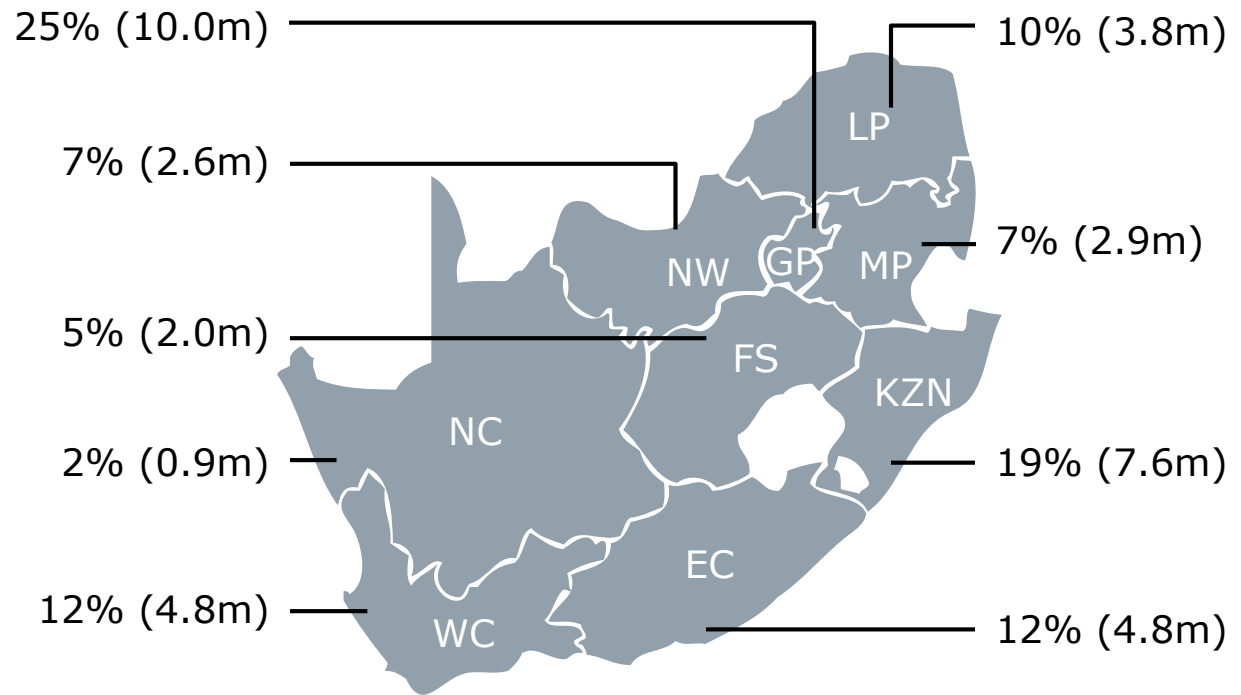
41%
(16.1m)



28%
(11.2m)



31%
(12.1m)





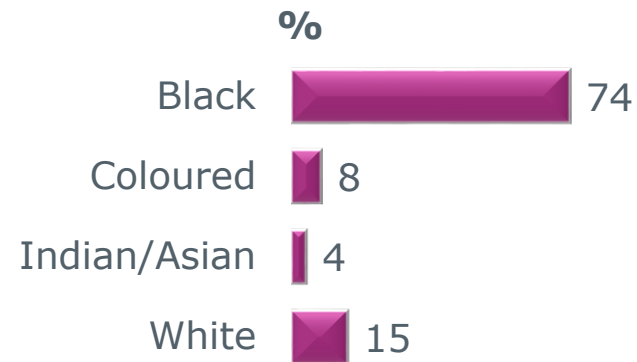
PRODUCTS AND LIFESTYLES

LIFESTYLES...

Past week destinations

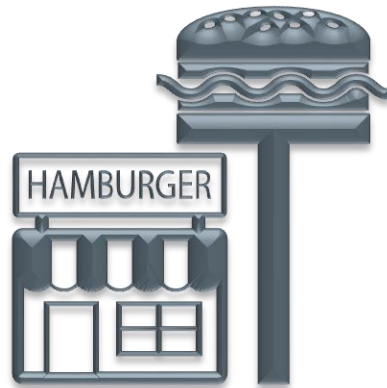


48%
Shopping
mall

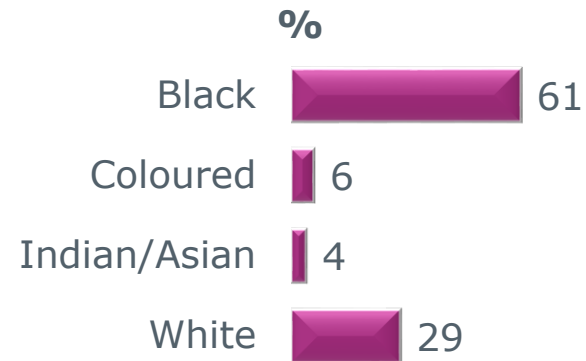


LIFESTYLES...

Past week destinations



11%
Restaurant

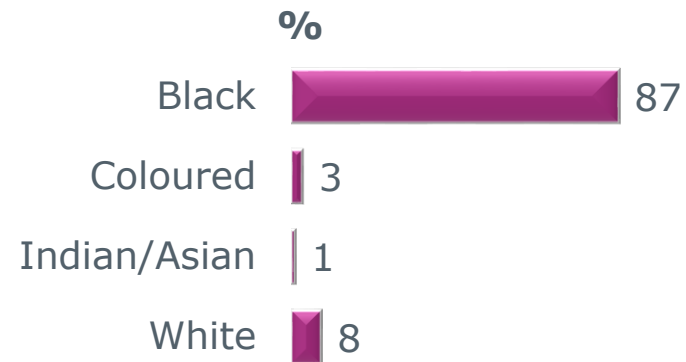


LIFESTYLES...

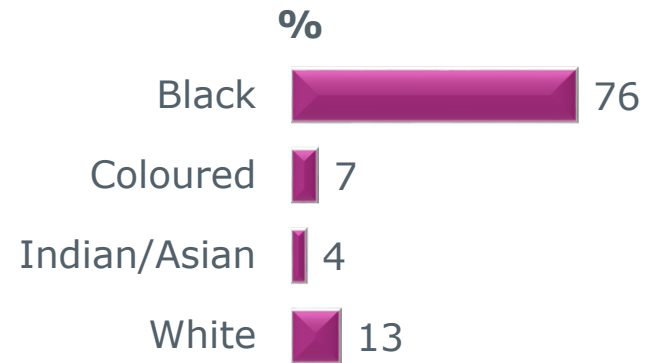
Past week destinations



3%
Stadium



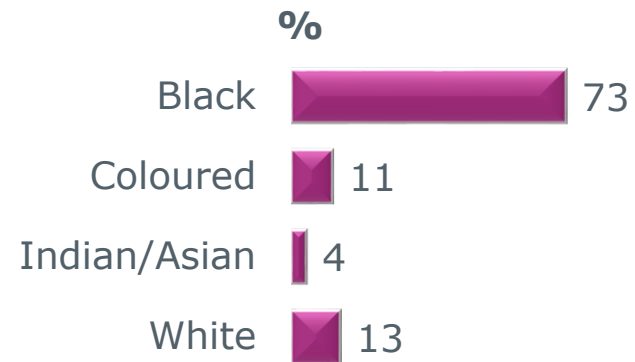
PRODUCT...



38%

Home theatre system in home

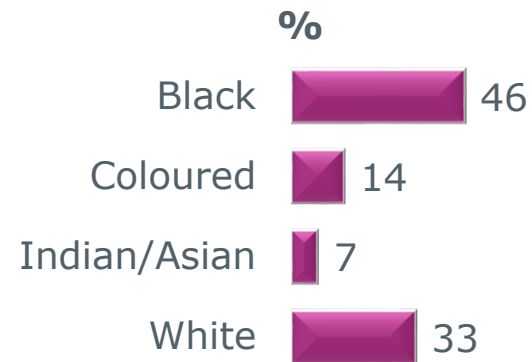
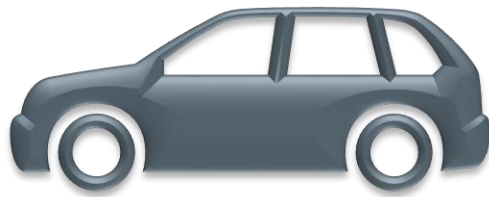
PRODUCT...



69%

**Microwave oven in
home**

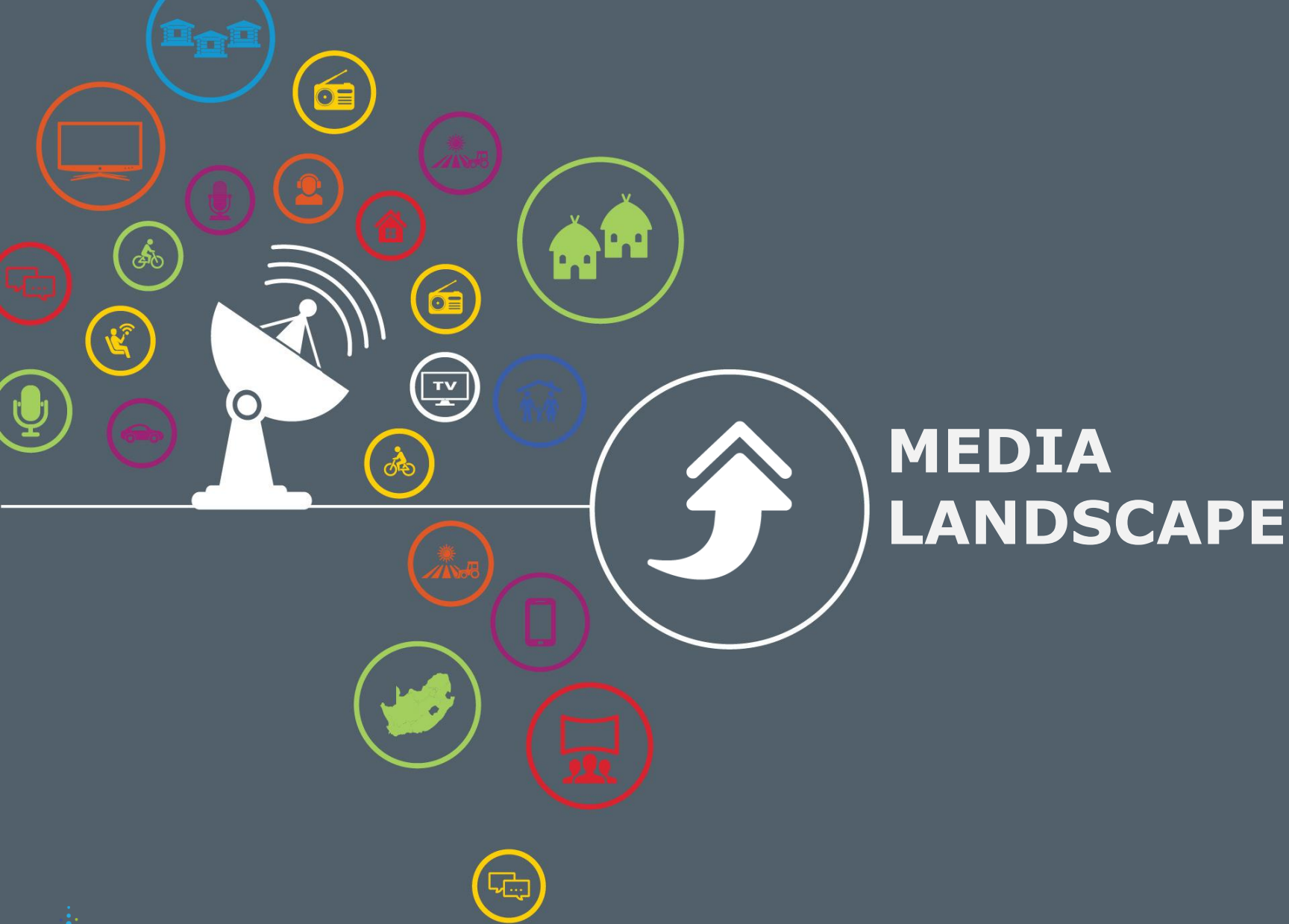
PRODUCT...



25%

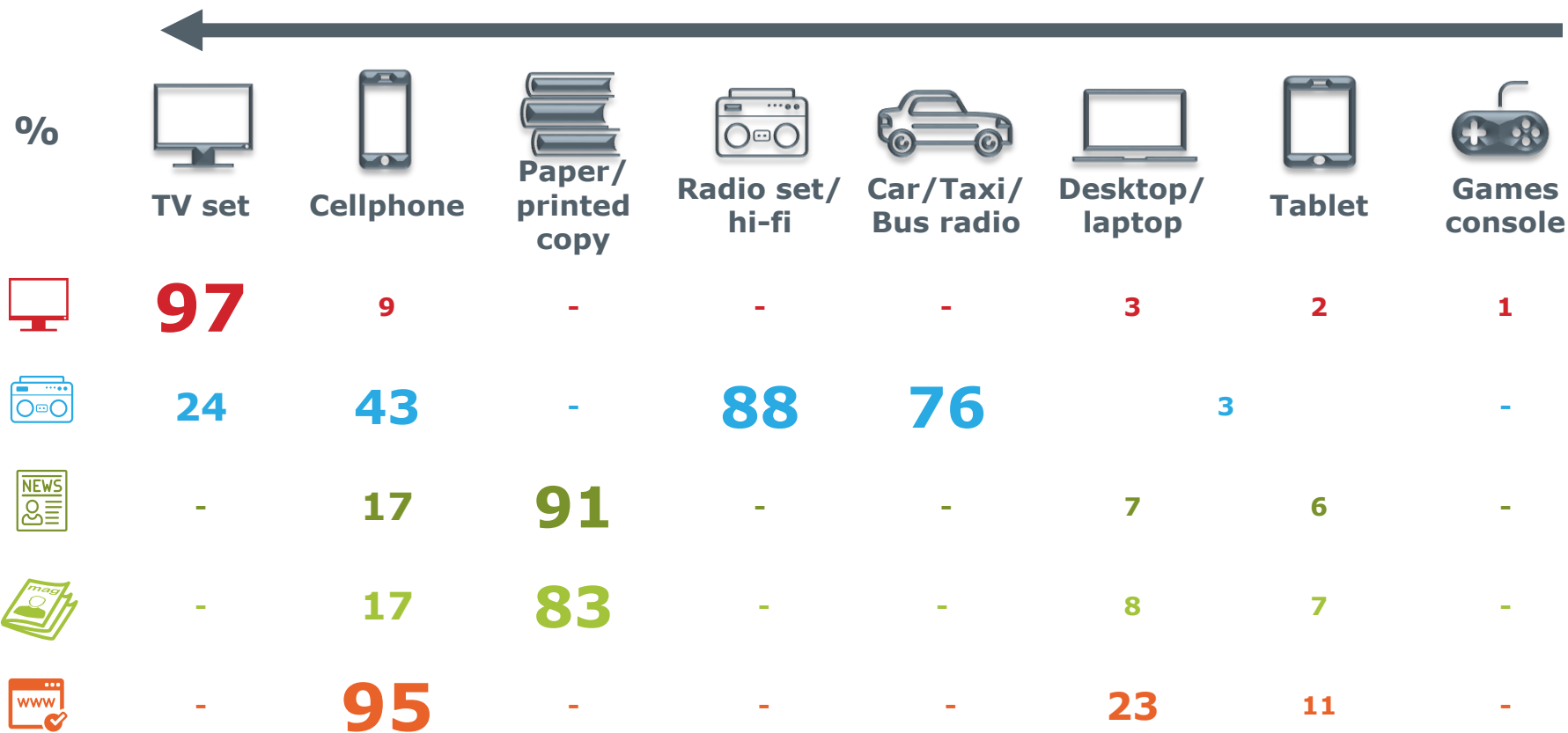
Motor car in home



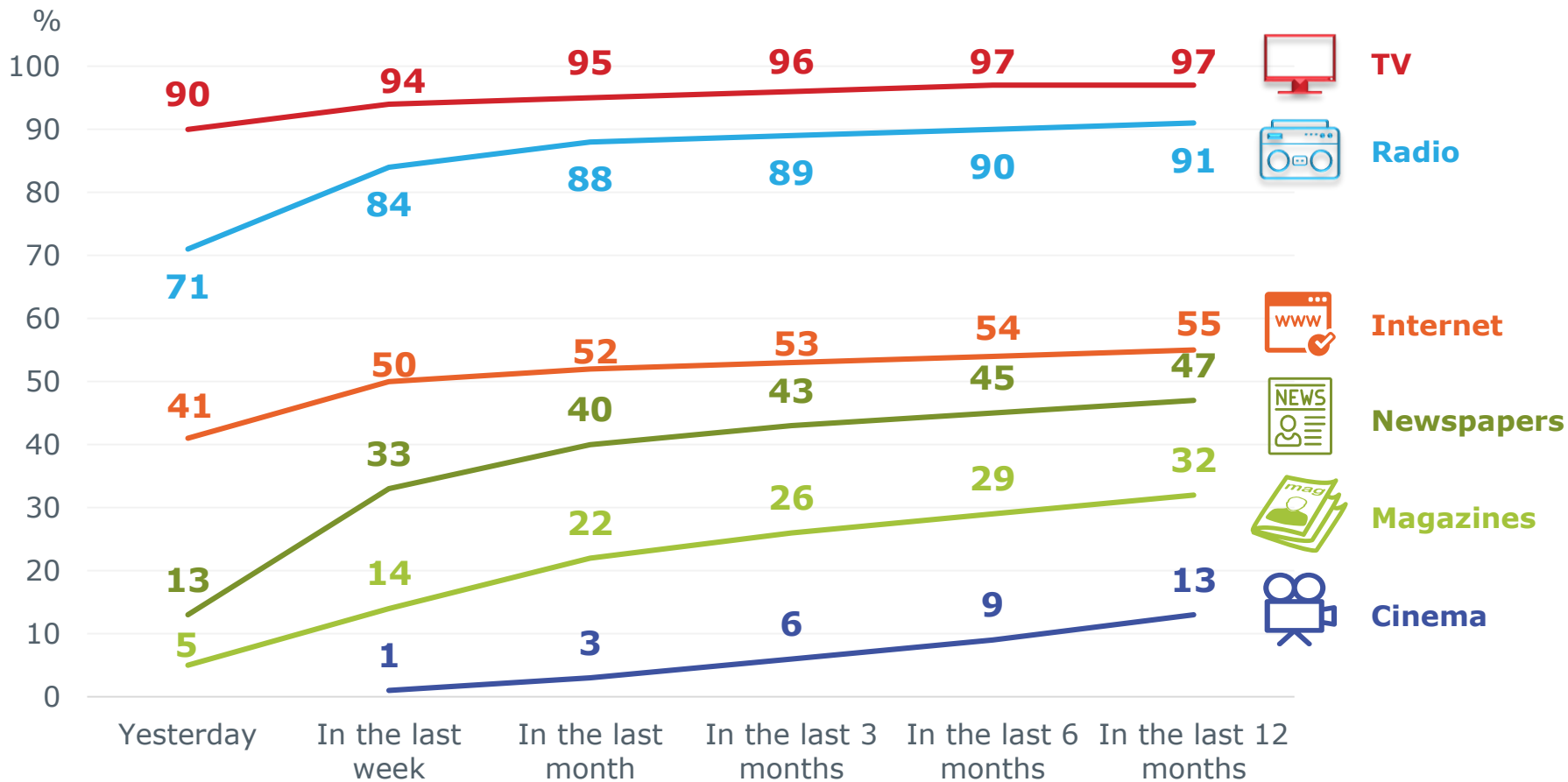


MEDIA LANDSCAPE

P4WEEK MEDIA LANDSCAPE DEVICE...

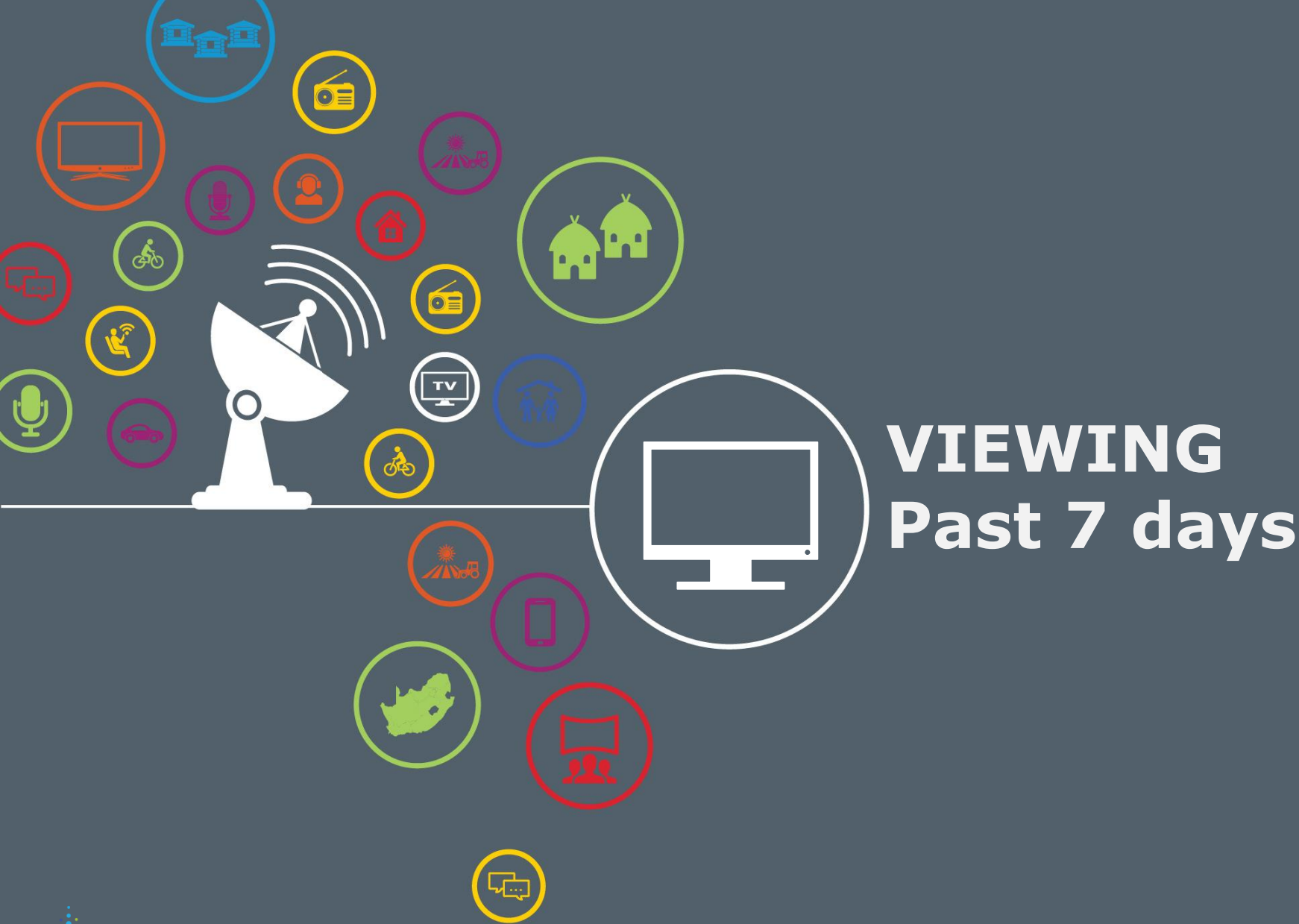


MEDIA LANDSCAPE REACH...





SNAPSHOTS BY MEDIA TYPE



VIEWING

Past 7 days



VIEWING REACH...



90%

of the population
in a **day**



94%

of the population
in a **week**



95%

of the population
in a **month**

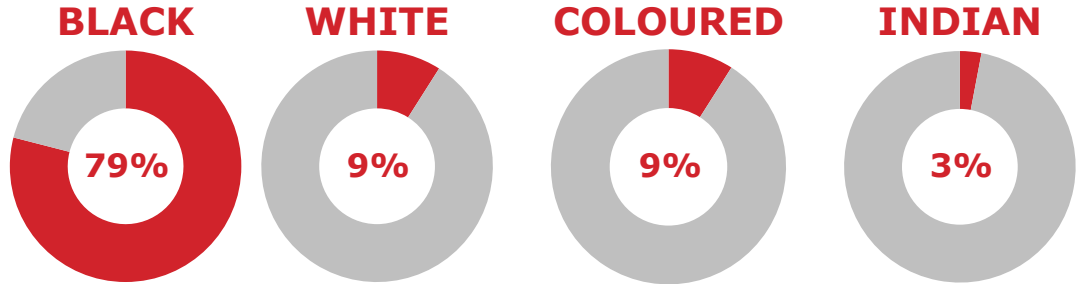




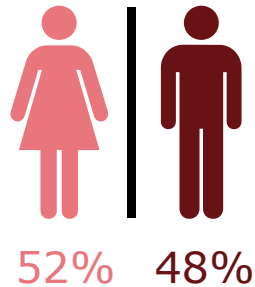
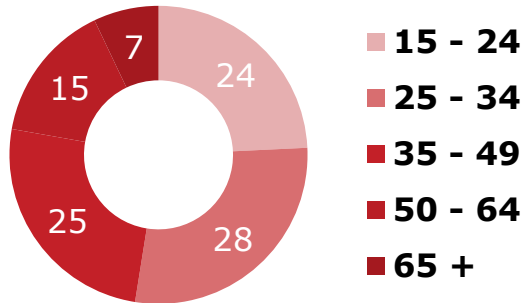
P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



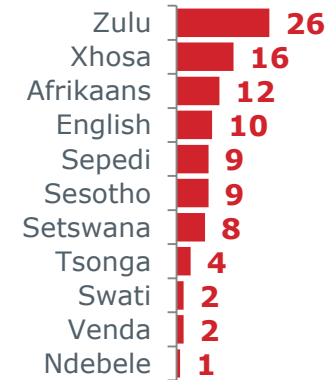
37.1 million
ADULTS 15 YEARS+



AGE %



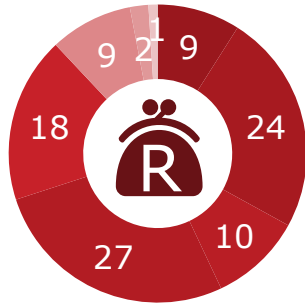
HOME LANGUAGE %



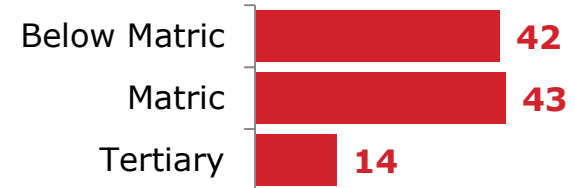


P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,535

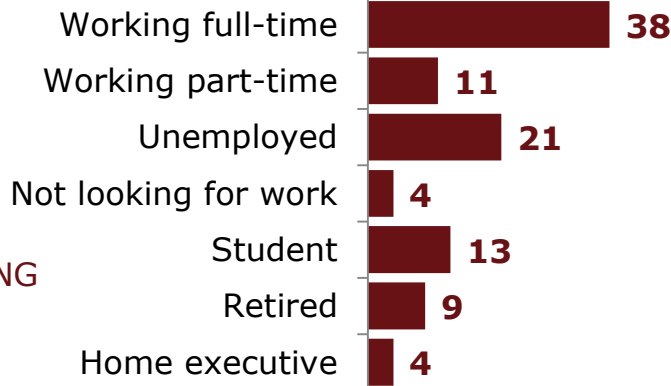


- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



49% WORKING

51% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



46%
CHILDREN



54%
NONE





P7D TV VIEWERS GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



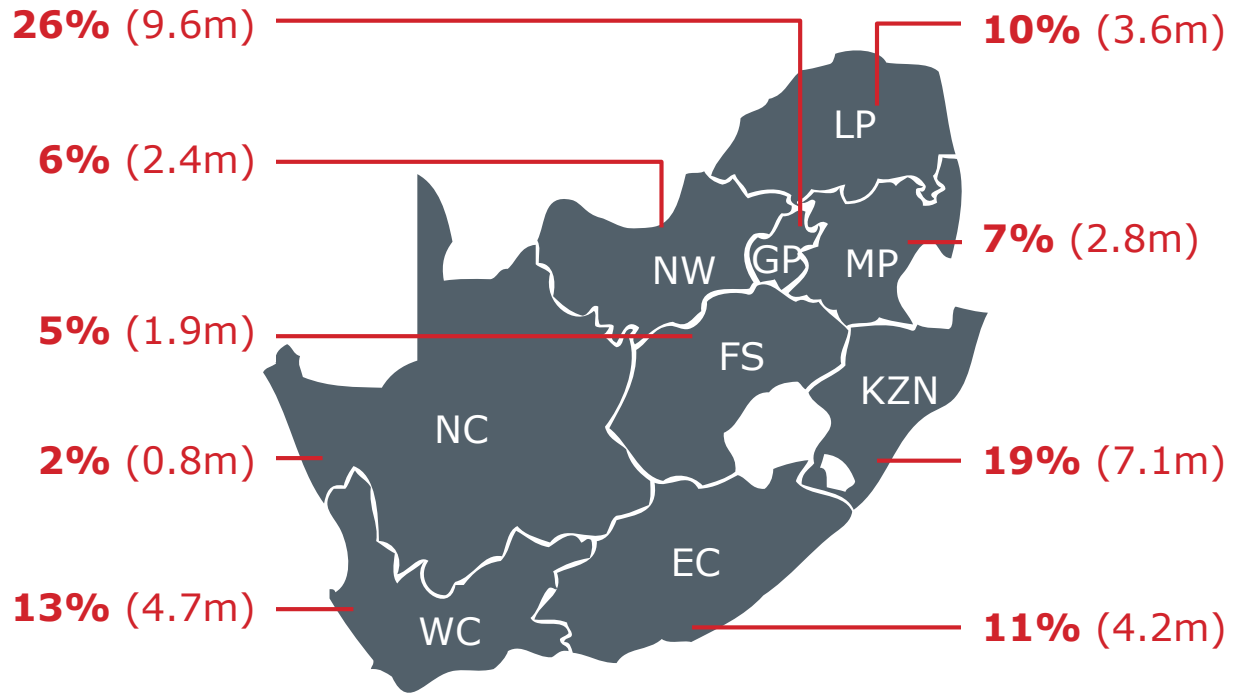
42%
METRO



28%
URBAN

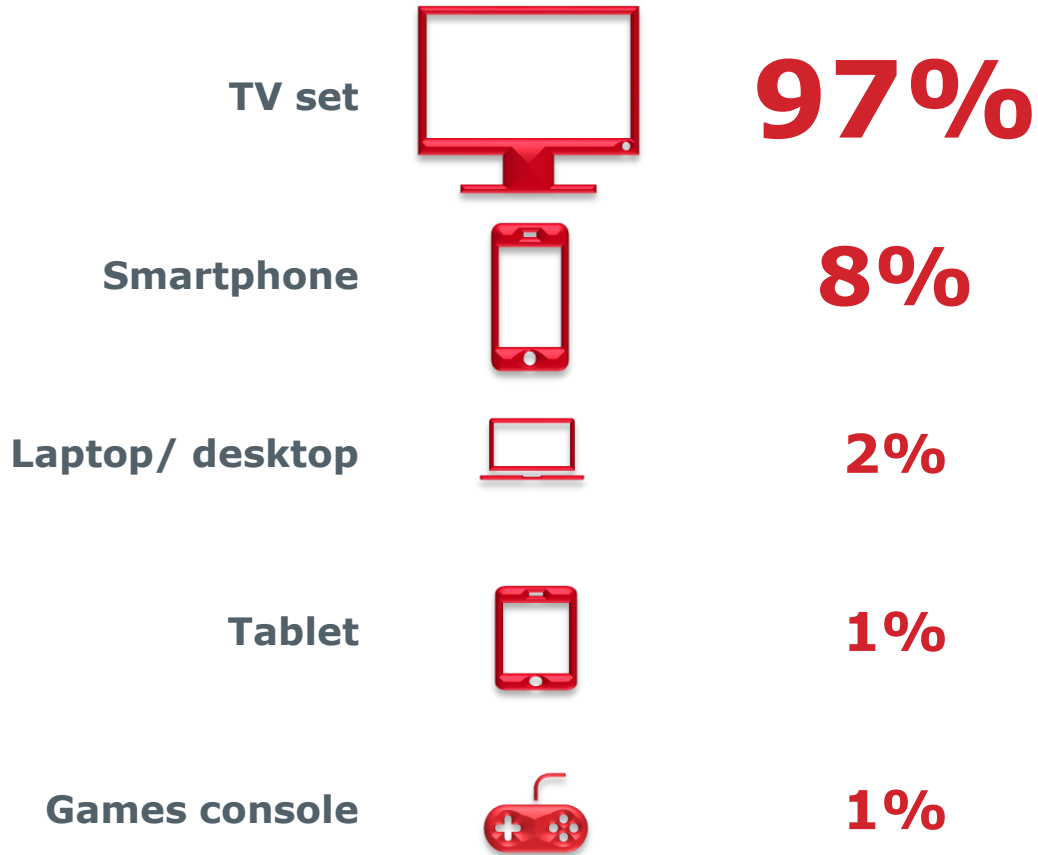


30%
RURAL





VIEWING DEVICE...





VIEWING LOCATION...

Location
in past week %

Home/someone else's home



98



Shopping centre/shop/bank



7



Bar/shebeen/pub/café



6

Work



5



Restaurant/coffee shop



5



Car/taxi/bus



4

School/university/college



1





LISTENING Past 7 days

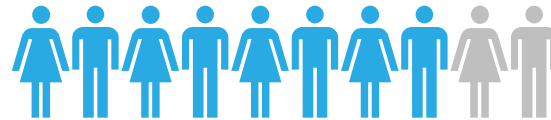


LISTENING REACH...



71%

of the population
in a **day**



84%

of the population
in a **week**



88%

of the population
in a **month**

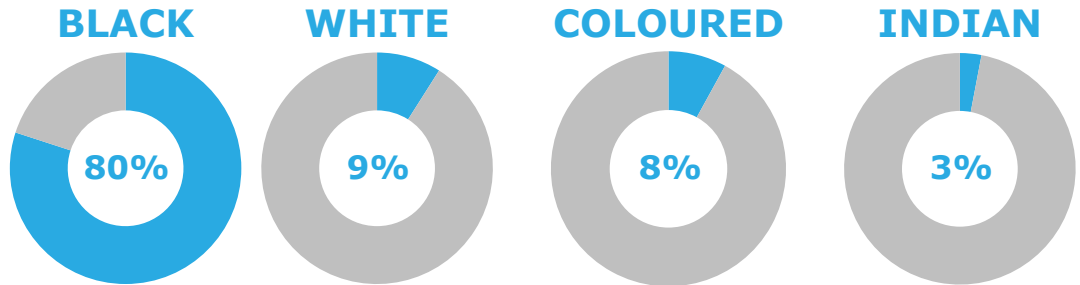




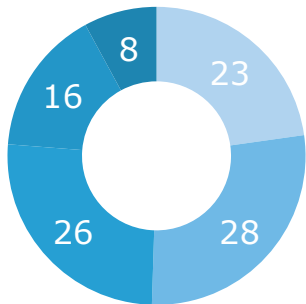
P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...



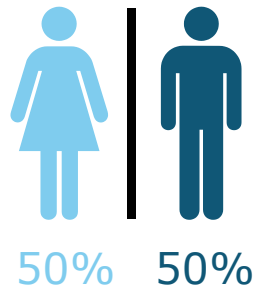
33.3 million
ADULTS 15 YEARS+



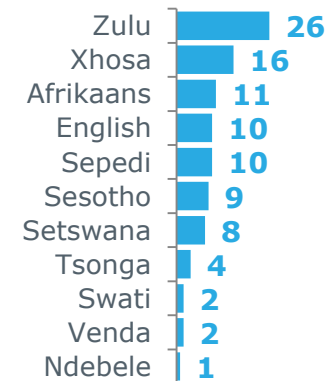
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +



HOME LANGUAGE %





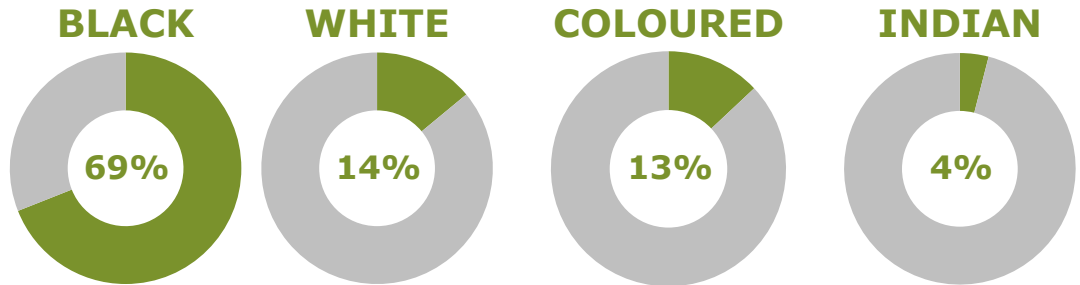
READING Past 7 days



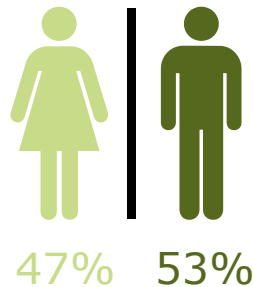
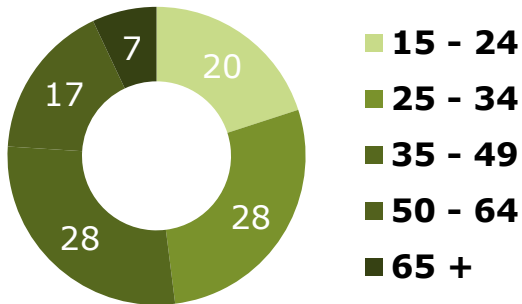
P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...



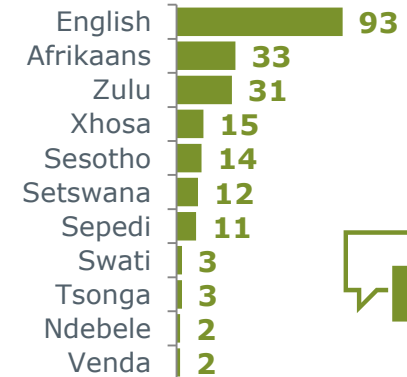
13.1 million
ADULTS 15 YEARS+



AGE %



LANGUAGES READ AND UNDERSTAND %

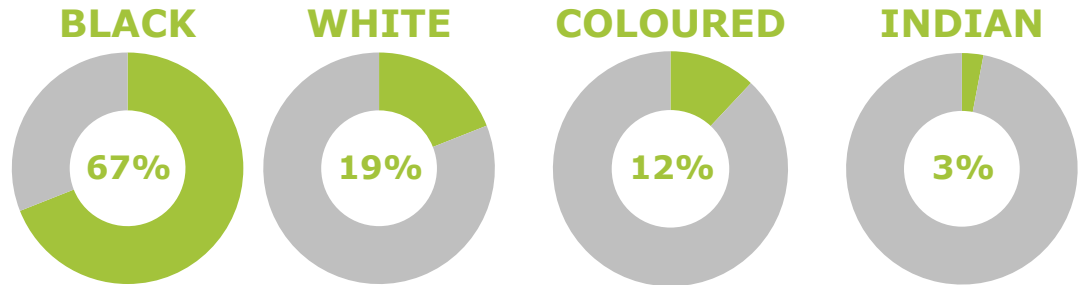




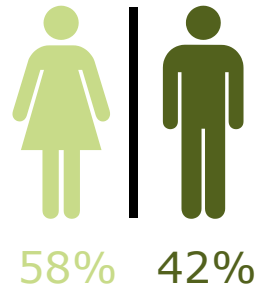
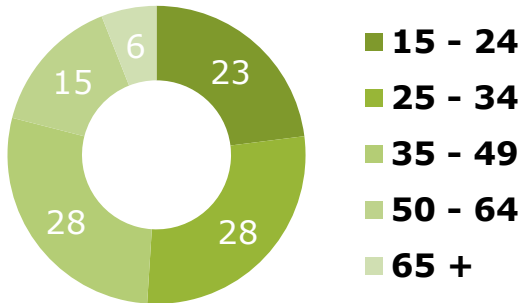
P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...



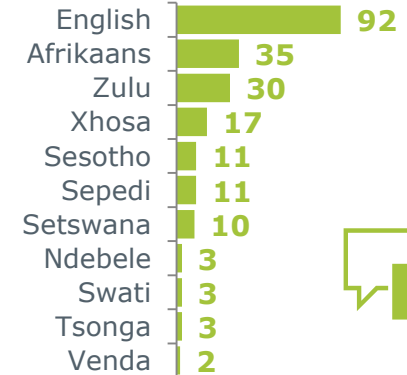
5.7 million
ADULTS 15 YEARS+



AGE %



LANGUAGES READ AND UNDERSTAND %





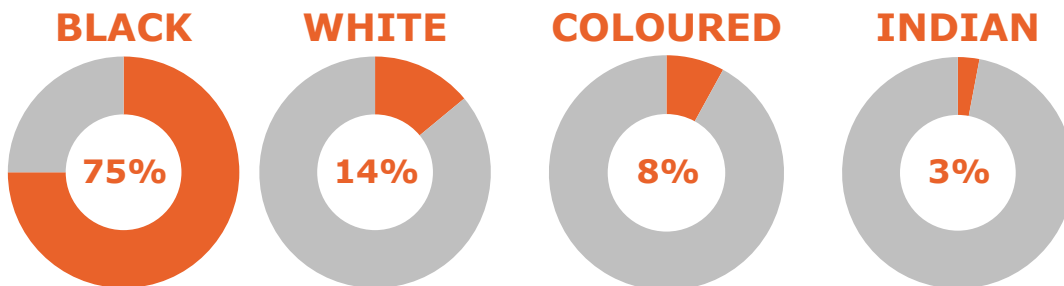
DIGITAL Past 7 days



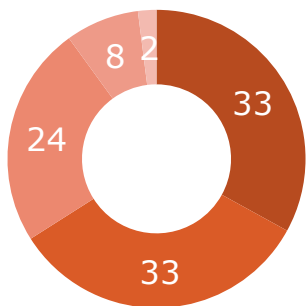
P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...



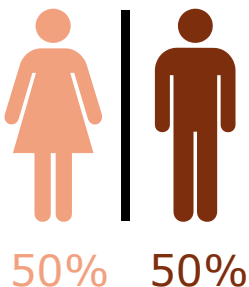
19.6 million
ADULTS 15 YEARS+



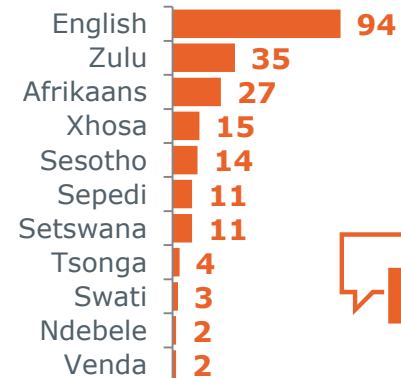
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

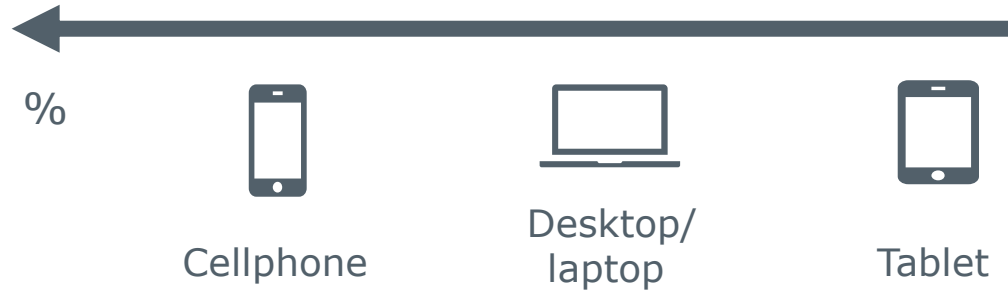


LANGUAGES READ AND UNDERSTAND %





DIGITAL DEVICE



94













18

9





DIGITAL ACTIVITY BY DEVICE

	%	 Cellphone	 Desktop/ laptop	 Tablet
Whatsapp/IM/chat 		93	17	45
Social media 		76	33	53
Search for things 		57	77	62
Use/download apps 		45	35	44
Download music/podcasts 		40	26	36
Play games 		31	18	34
Check the weather 		21	21	25
Email 		20	61	43
Banking 		20	35	27





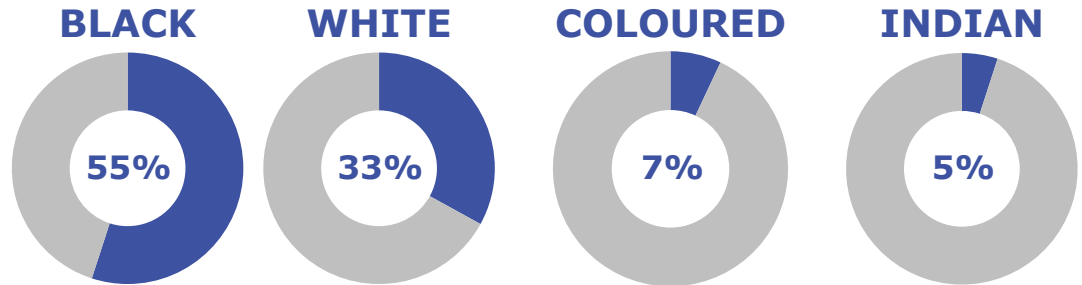
CINEMA Past month



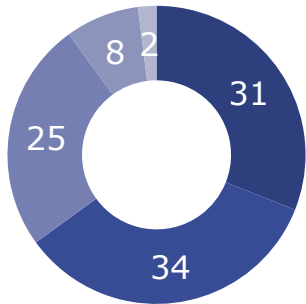
PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...



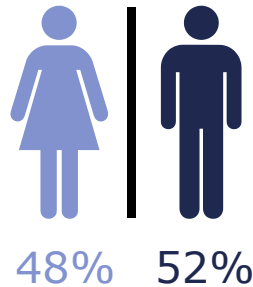
1.2 million
ADULTS 15 YEARS+



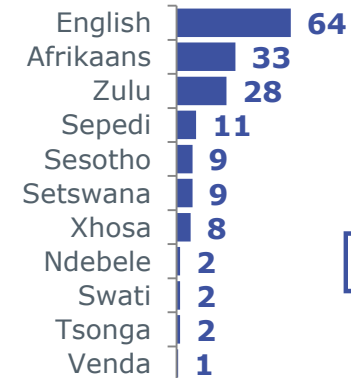
AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +



LANGUAGES SPOKEN IN HOME %

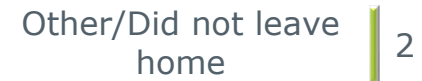
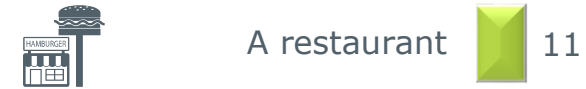
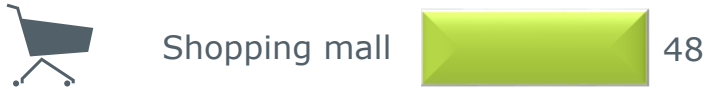




ON THE GO
Past 7 days

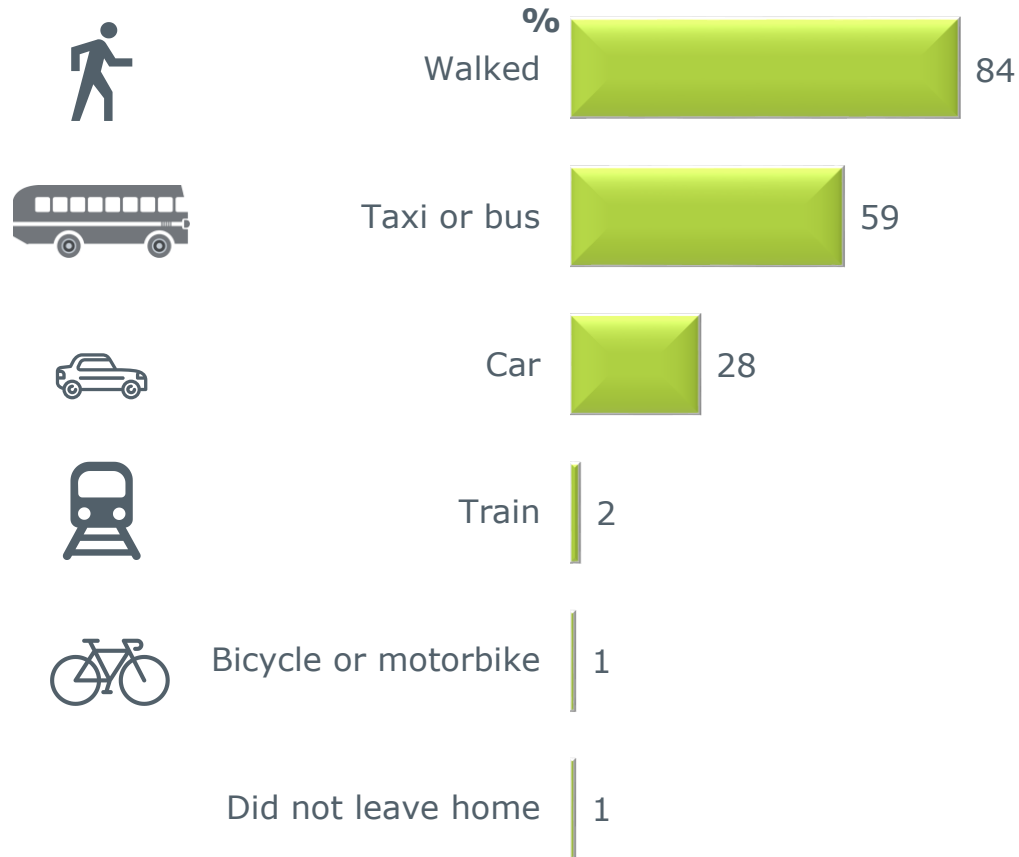


PAST WEEK DESTINATIONS...





MODES OF TRANSPORT

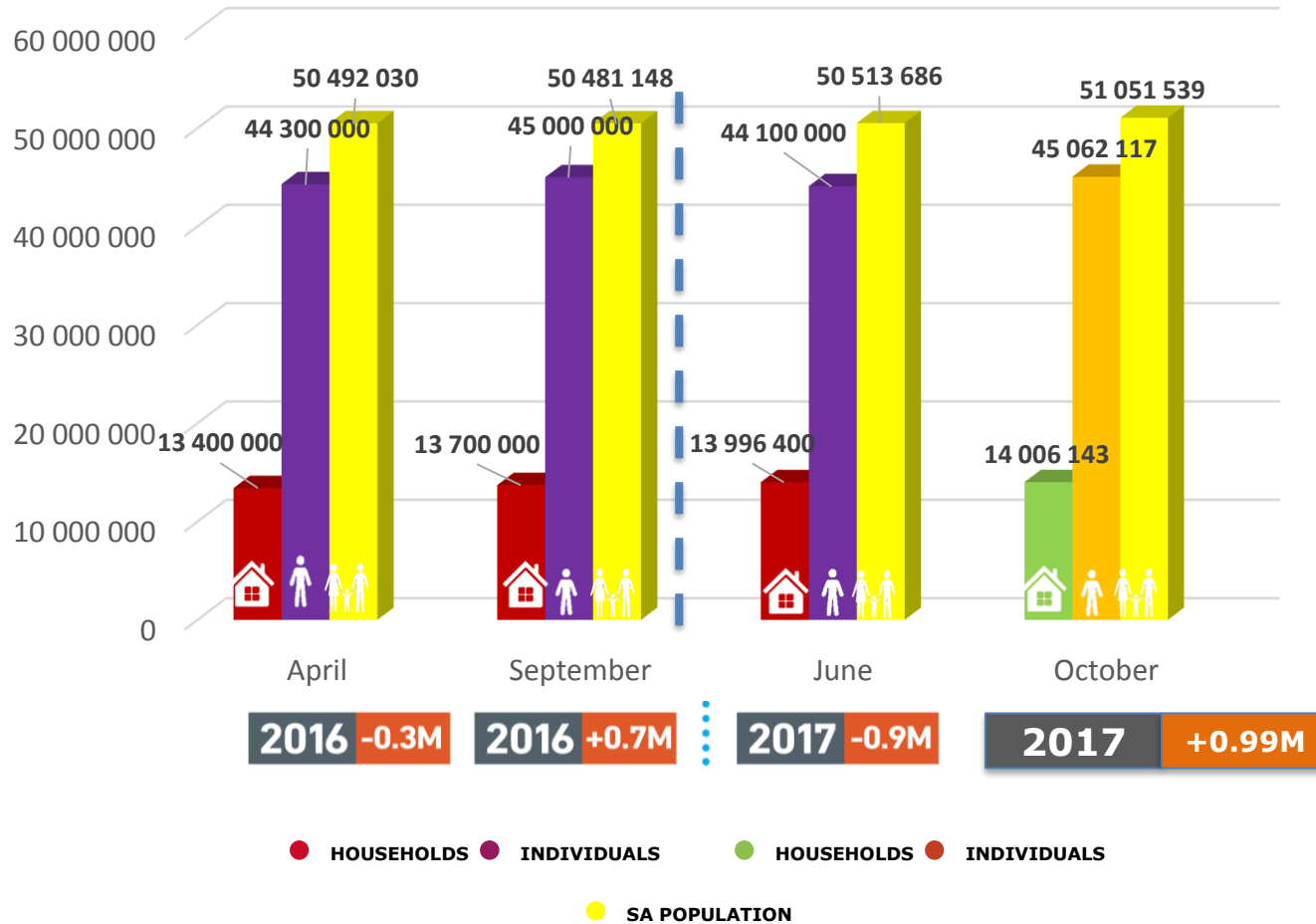




TV UNIVERSE UPDATE

(from the ES)

ES SURVEY

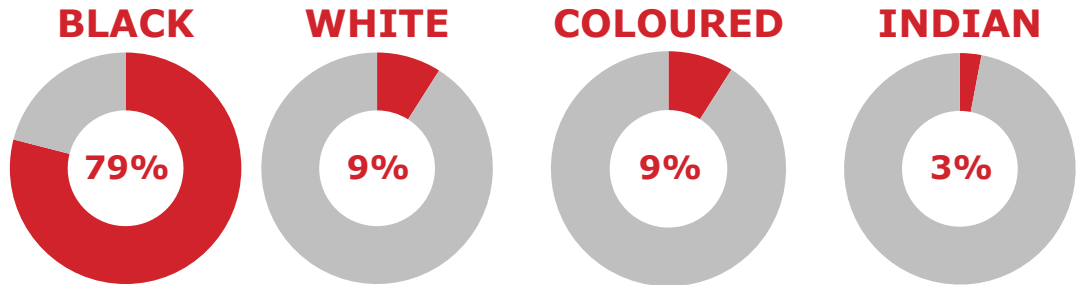




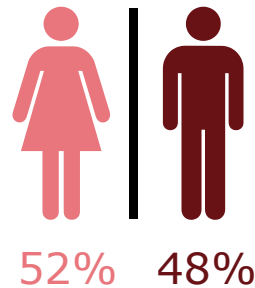
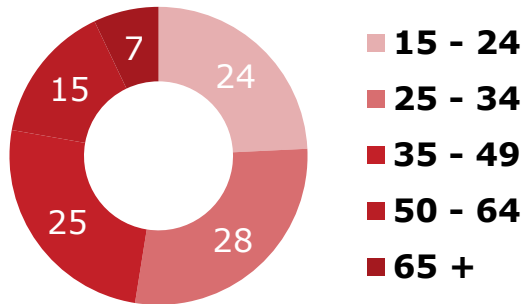
P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



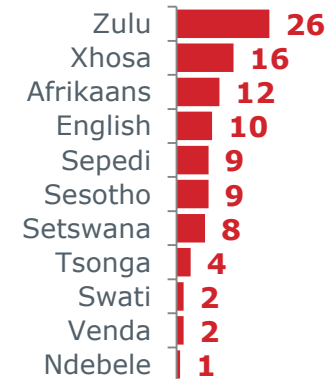
37.1 million
ADULTS 15 YEARS+



AGE %



HOME LANGUAGE %

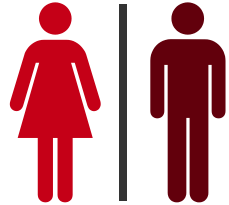




FREE TO AIR VIEWERS DEMOGRAPHIC LANDSCAPE...

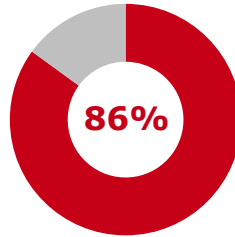


18.1 million
ADULTS 15 YEARS+

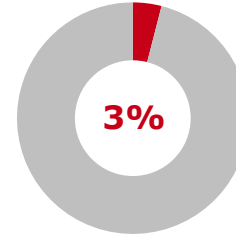


52% **48%**

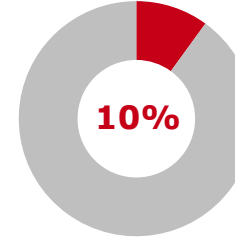
BLACK



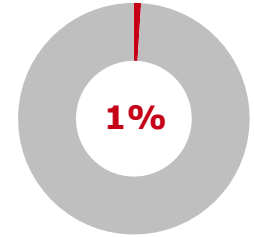
WHITE



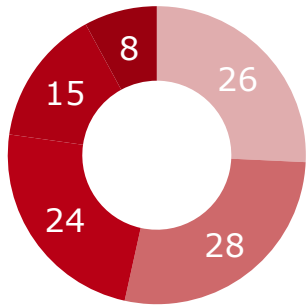
COLOURED



INDIAN



AGE %

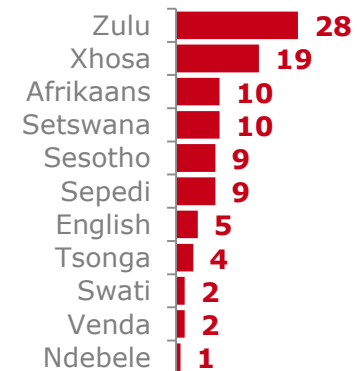


- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

**MONTHLY
HOUSEHOLD INCOME
AVERAGE: R5,971**



HOME LANGUAGE %

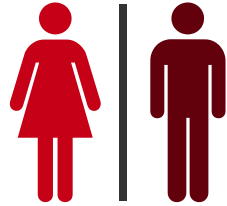




PAY TV SUBSCRIBERS DEMOGRAPHIC LANDSCAPE...

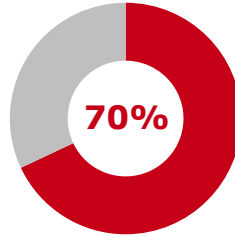


15.4 million
ADULTS 15 YEARS+

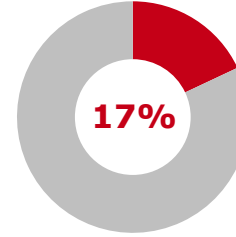


51% **49%**

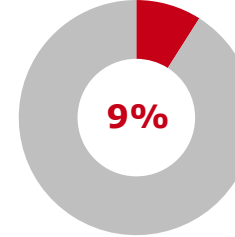
BLACK



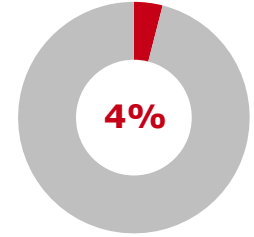
WHITE



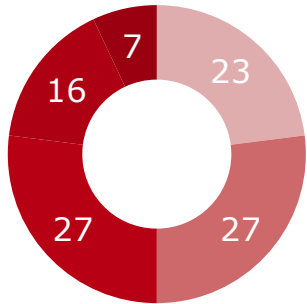
COLOURED



INDIAN



AGE %

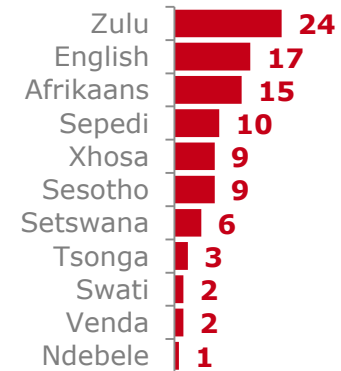


- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

**MONTHLY
HOUSEHOLD INCOME
AVERAGE: R16,882**



HOME LANGUAGE %



TV SETS IN HH...



Average of 1.1 working TV sets in household



92%

Have 1 working TV set



7%

Have 2 working TV sets



1%

Have 3+ working TV sets



5%

Also have a non-working TV set in home



EQUIPMENT IN HH...



FLAT SCREEN/HD VS STANDARD BOX TELEVISION SETS IN HH



60%

Standard box



42%

Flat screen/HD

PLUG-IN EQUIPMENT



54%

DVD player



4%

Media player



2%

VHS recorder



1%

Games console



TECHNOLOGY IN HH...



46%
Satellite dish



8%
PVR decoder



51%
Antenna/Aerial



38%
Standard decoder



TV & INTERNET PLATFORMS...



46%

showmax



1%

OPENVIEW HD

NETFLIX



0.3%



21,462 individuals

0.05%

**** very small base**



VIEWING BEHAVIOUR...



96%
Live TV



10%
Recorded TV



7%
Automatically
stored on decoder



13%
DVD box set



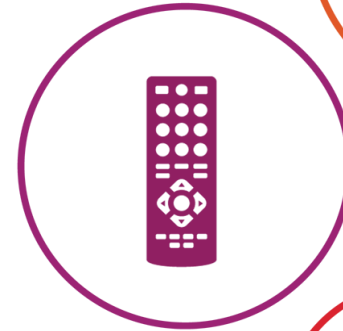
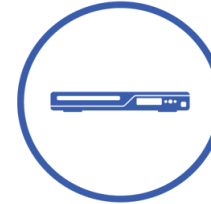
3%
Online

*9% have internet enabled TV sets
2% claim internet usage on TV set*



FROM THE ES TO THE DAILY PANEL...

- The daily panel is compared to the **ES TV UNIVERSE** on a household and individual level.
- Theoretically, in a perfectly representative panel, everyone has the same weight.



THE NATURE OF LIVE PANELS...

- Panels churn, **CHANGE** and **EVOLVE** all the time
- Polling on any given day will not collect data from the whole panel.
- To **PROJECT** the correct picture, panels require **DAILY ADJUSTMENT** by **WEIGHTING**



HOUSEHOLD RIM WEIGHTING STRUCTURE...

HOUSEHOLD RIMS

Province
Race
Area (M/U/R)
Pay TV/Non Pay TV
Household Size

Total Number of Categories

CATEGORIES

9
4
3
2
3

21

Min

1,124

AVG Factor

5,402

Max

16,523

Efficiency Index

73.14



INDIVIDUAL RIM WEIGHTING STRUCTURE...

INDIVIDUAL RIMS

Age Group
Kids/Adults x Pay TV/Non Pay TV
Kids/Adults x Gender
Kids/Adults x Province
Kids/Adults x Race
Kids/Adults x Area (M/U/R)

Total Number of Categories

CATEGORIES

8
4
4
18
8
6

48

Min

1,689

AVG Factor

4,043

Max

13,487

Efficiency Index

93.28



THE PANEL...

KPI Panel Health	August 2014	August 2015	August 2016	August 2017
Installed Panel	2658	2667	2899	2935
Polling	95%	94.5%	93%	97.1%
Reporting (Intabs)	90.9%	89.8%	89.7%	91.0%
Coverage of TV sets	89.3%	92.8%	91%	94%



WEIGHTING EFFICIENCIES...

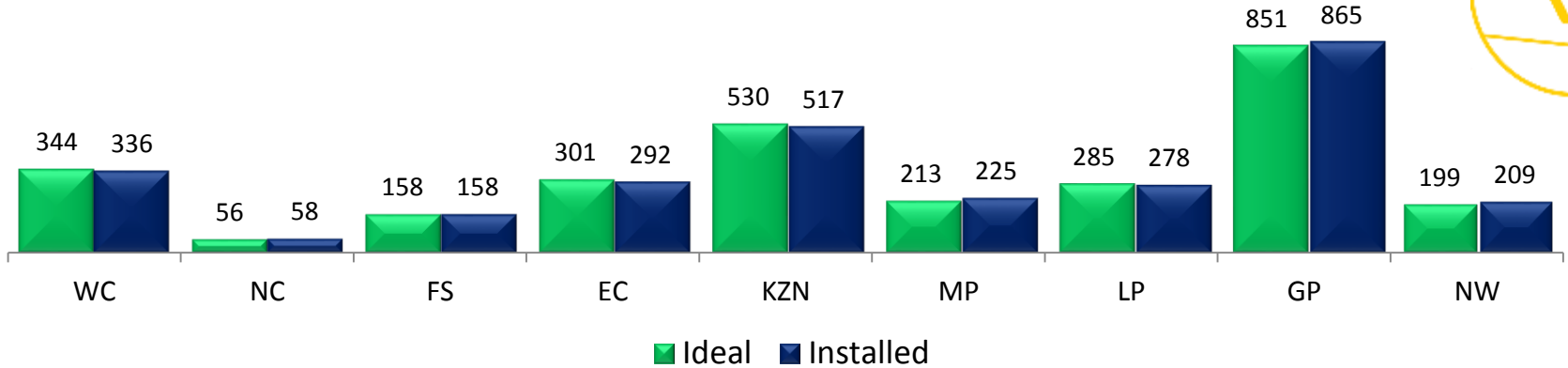
KPI Panel Health	August 2014	August 2015	August 2016	August 2017
Ind. weighting efficiency	64.9%	79.5%	75%	93%
H/H weighting efficiency	54.5%	65%	65%	74%
Ind. maximum weight	40 860	22 618	22 618	18 634



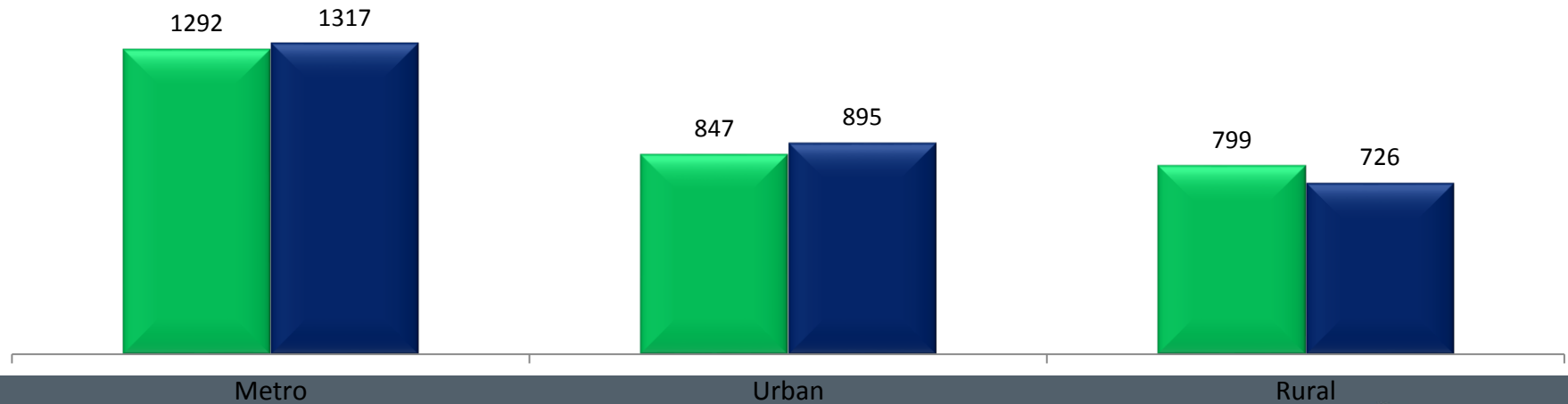
PANEL BALANCE BY PROVINCE & AREA...



PROVINCE



AREA



TV & INTERNET PLATFORMS ON TAMS...



showmax

NETFLIX



**18 HHs
equates to 840,000
homes when weighted
up**



Smart TV's will be tracked on the BRC TAMS Panel, as this is a live panel and will give us a better indication of TV Internet Platforms



BRC TAMS INSTALLED PANEL ALIGNED TO ES TV UNIVERSE...

BRC TAMS PANEL
(installed H/H)



BLACK		79%
COLOURED		8%
ASIAN/INDIAN		2%
WHITE		11%

ES TV Universe



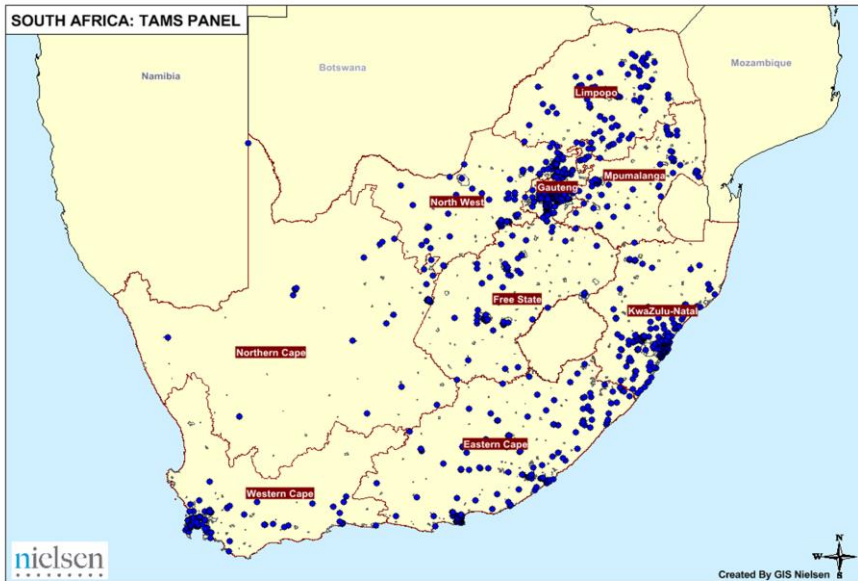
BLACK		79%
COLOURED		8%
ASIAN/INDIAN		3%
WHITE		10%



BRC TAMS VITAL SIGNS...

Universe: Population age 4+
45.0 million

14,021 Individual Sample
OCT 2017



44%

METRO



29%

URBAN



27%

RURAL



BRC TAMS SNAPSHOTS...



TOTAL TV HOUSEHOLDS H/H

14 006 143



FREE TO AIR (FTA)

8,221,606



DSTV

5,784,537



OVHD

700,307



TOTAL TV HOUSEHOLDS H/H

14 MILLION

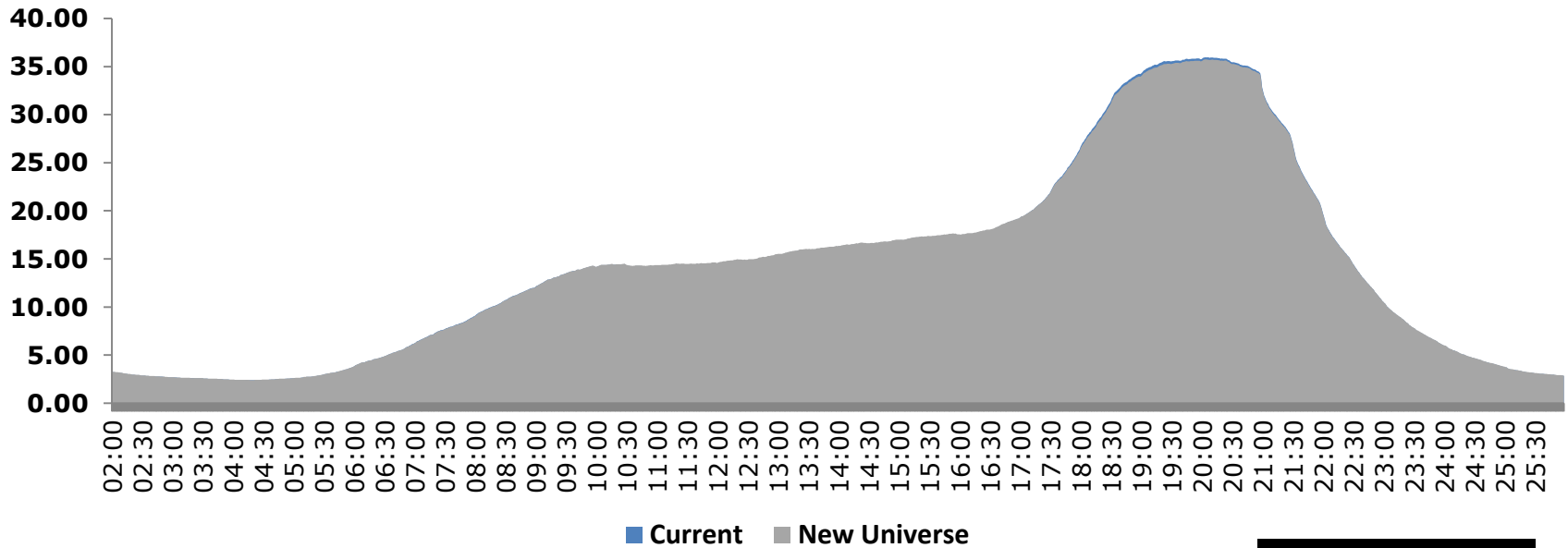


No, of TV CHANNELS

111



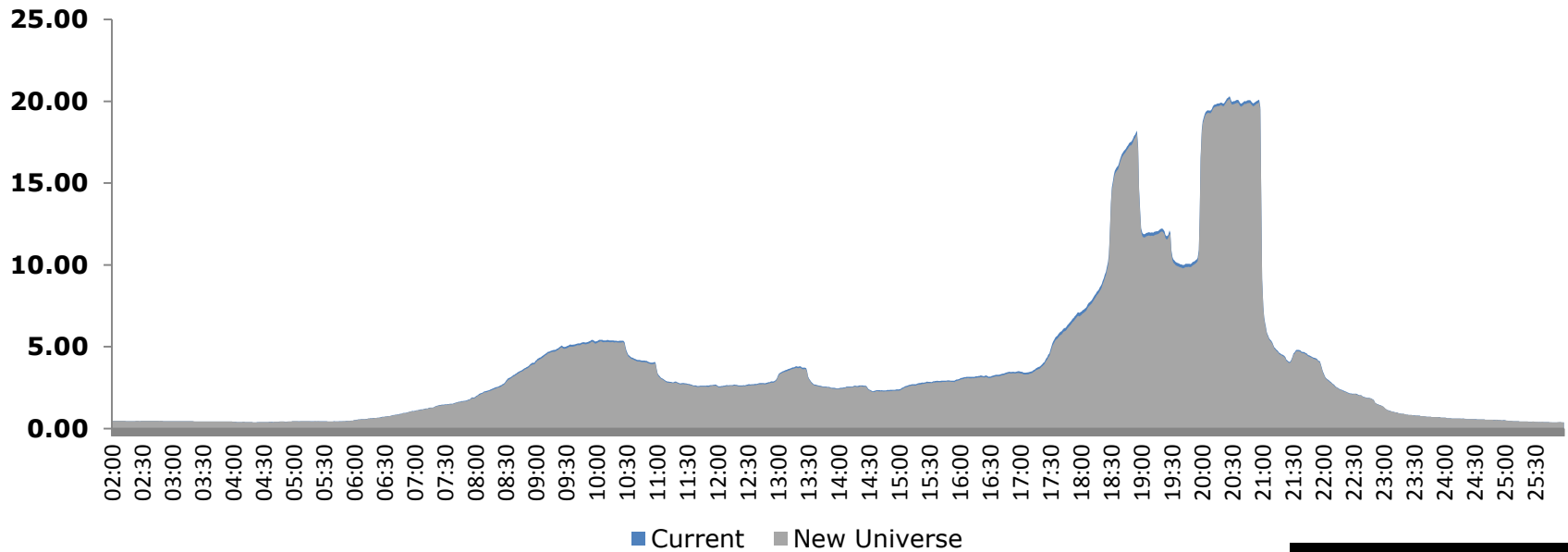
TOTAL TELEVISION...



SOURCE: 17 Jul - 30 Jul 17



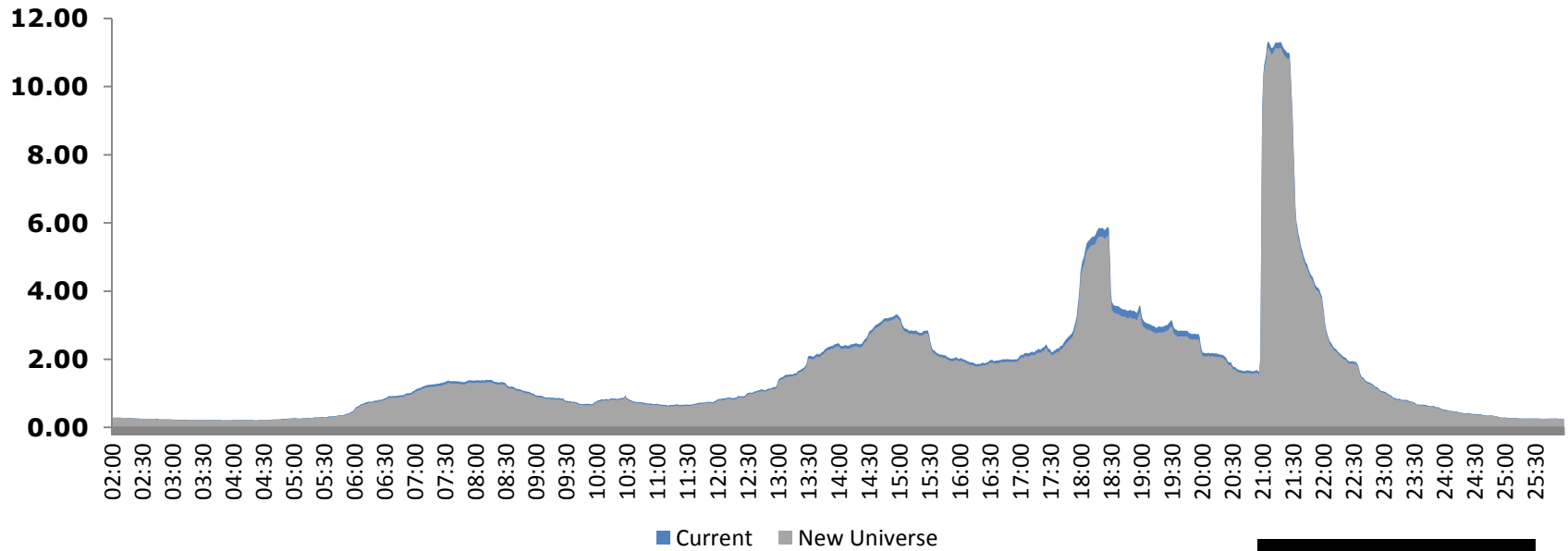
SABC 1...



SOURCE: 17 Jul - 30 Jul 17



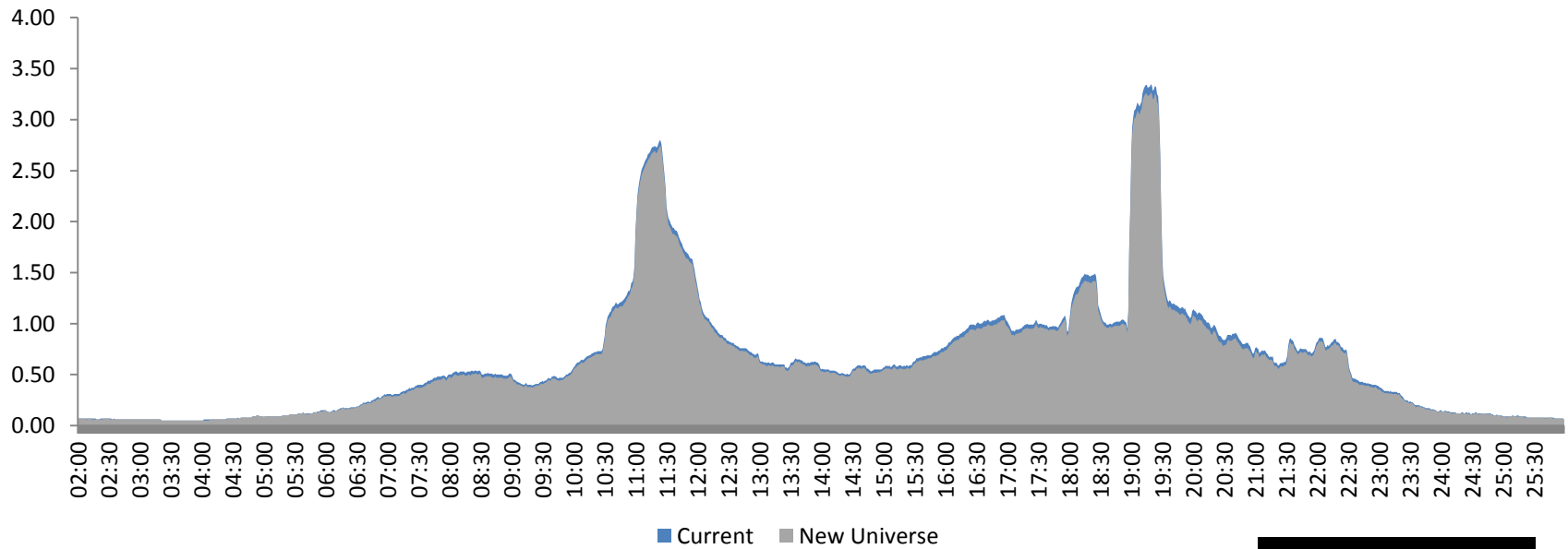
SABC 2...



SOURCE: 17 Jul - 30 Jul 17



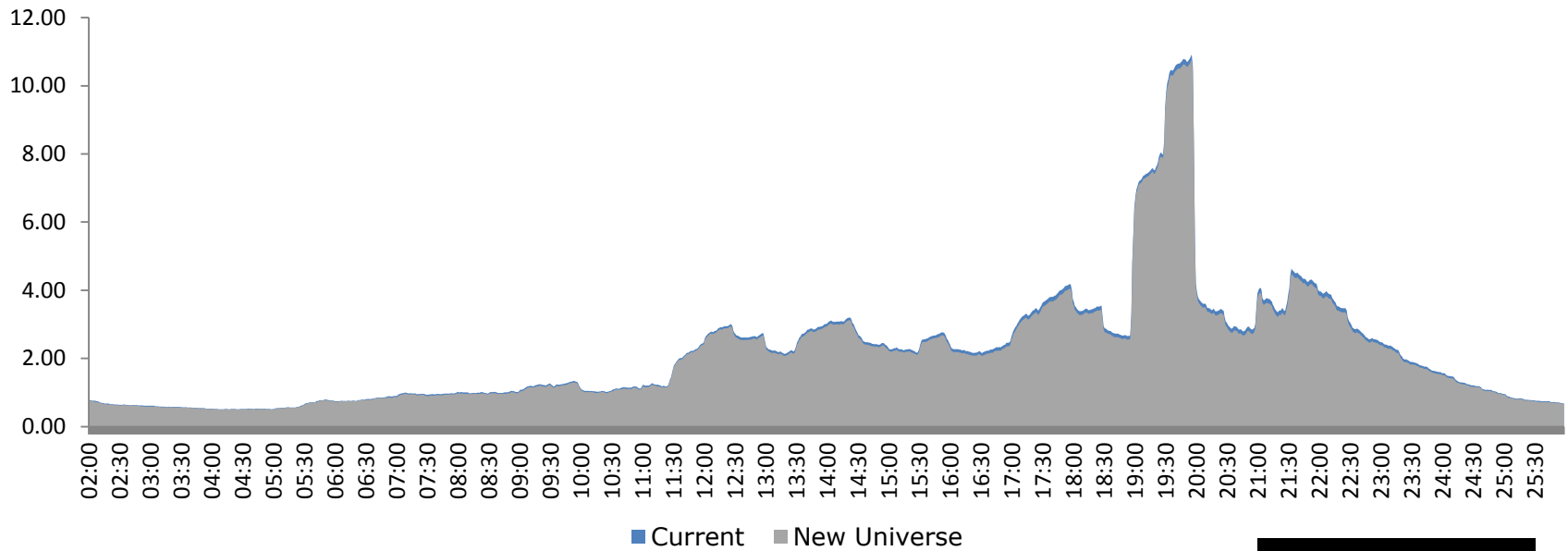
SABC 3...



SOURCE: 17 Jul - 30 Jul 17



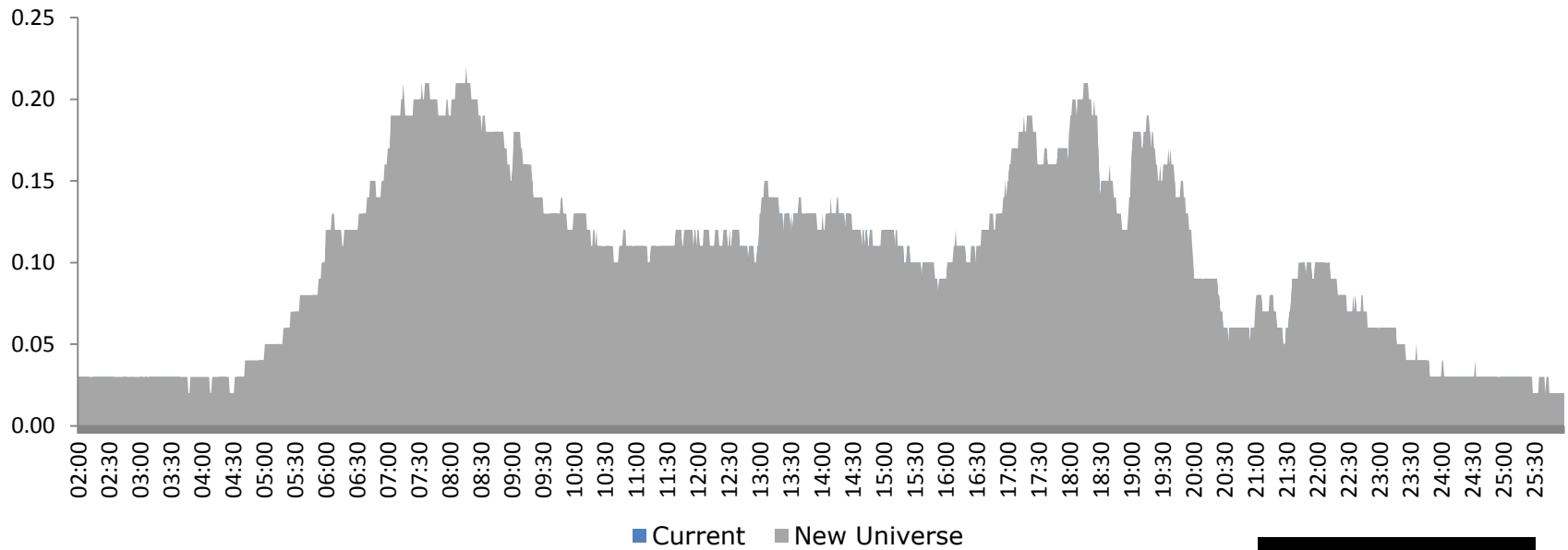
eTV...



SOURCE: 17 Jul - 30 Jul 17



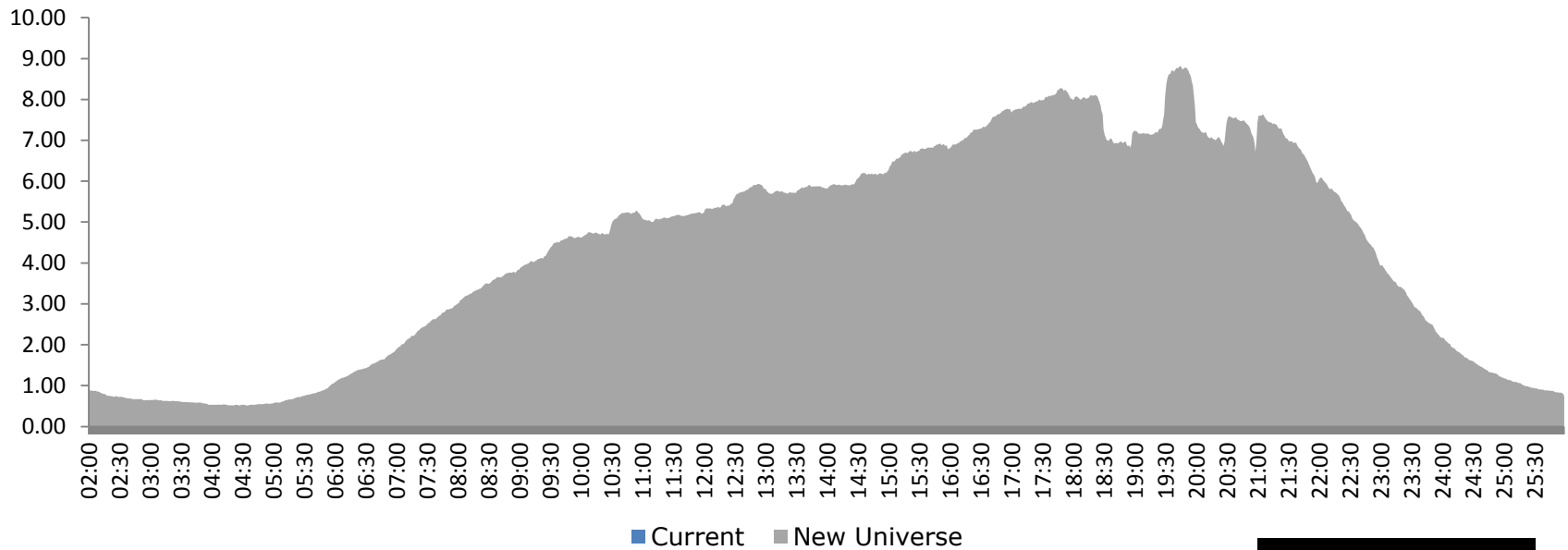
eNCA...



SOURCE: 17 Jul - 30 Jul 17



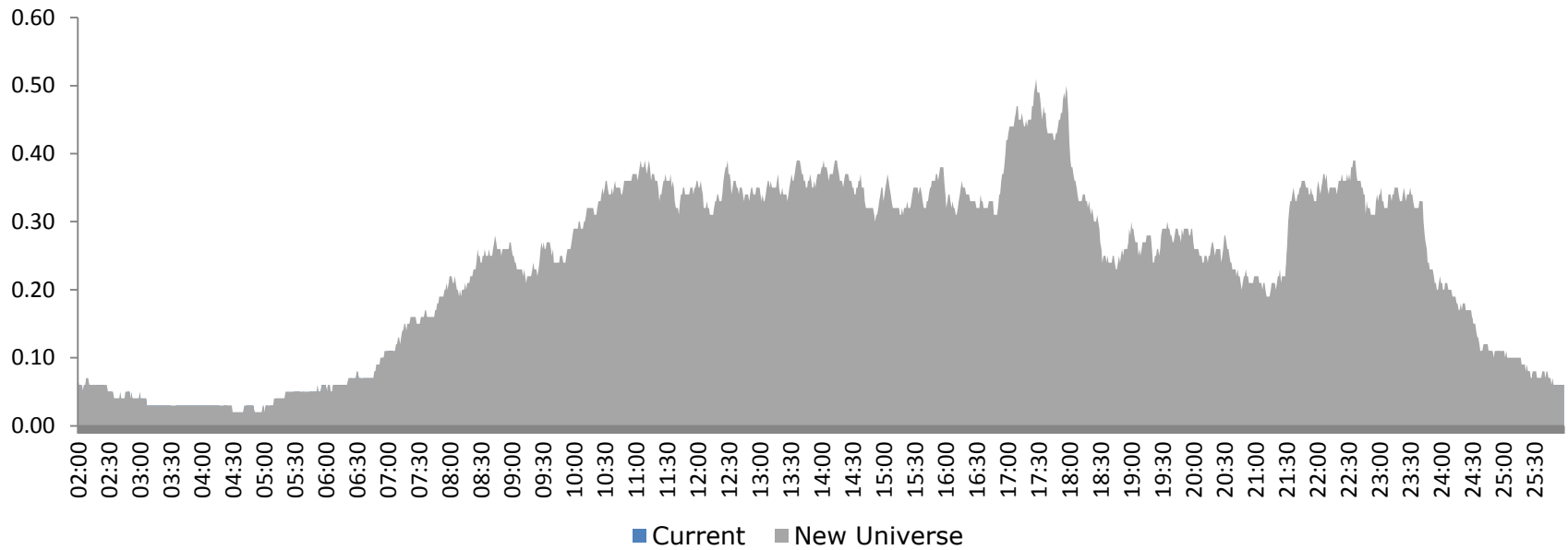
DStv...



SOURCE: 17 Jul - 30 Jul 17



MTV...



THE ESTABLISHMENT SURVEY SEM™ CONCEPTUAL STARTING POINT...



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

THE SEMS ARE...



Relevant and differentiating



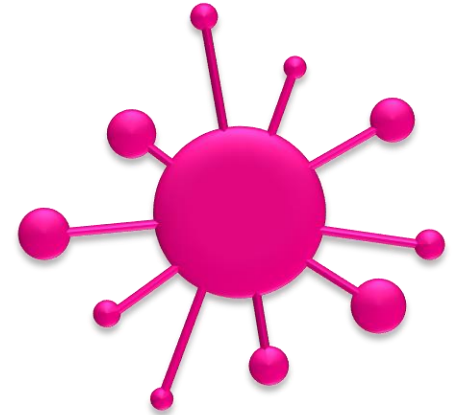
Stable



Not overly dependent on durables

















Easy to use



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

THE 14 ESTABLISHMENT SURVEY 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



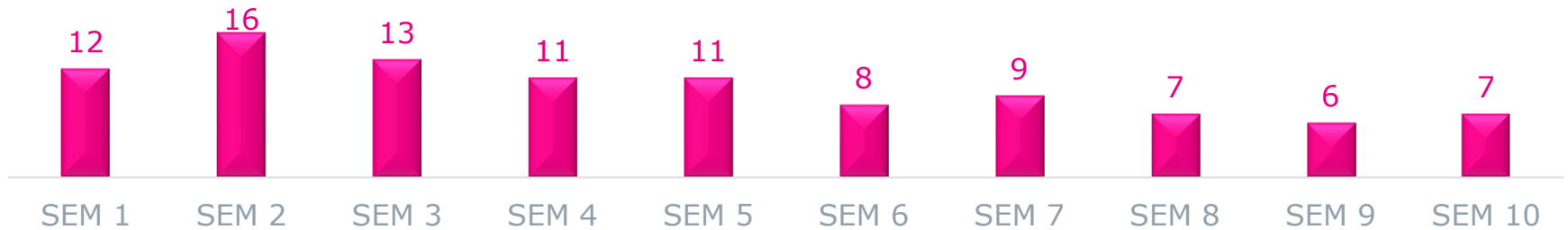
Short and easy to use



ES SEMs VS ES LSMs...

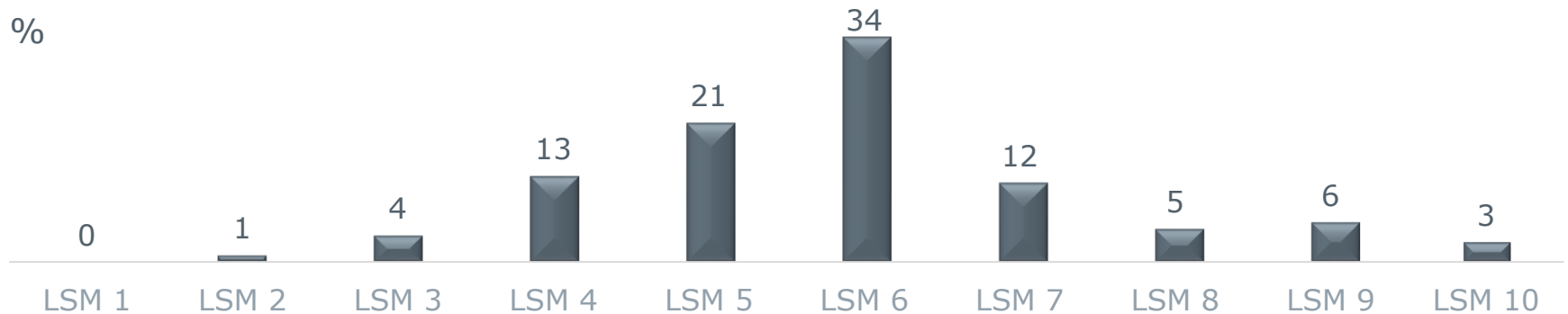
SEM:

%



LSM:

%

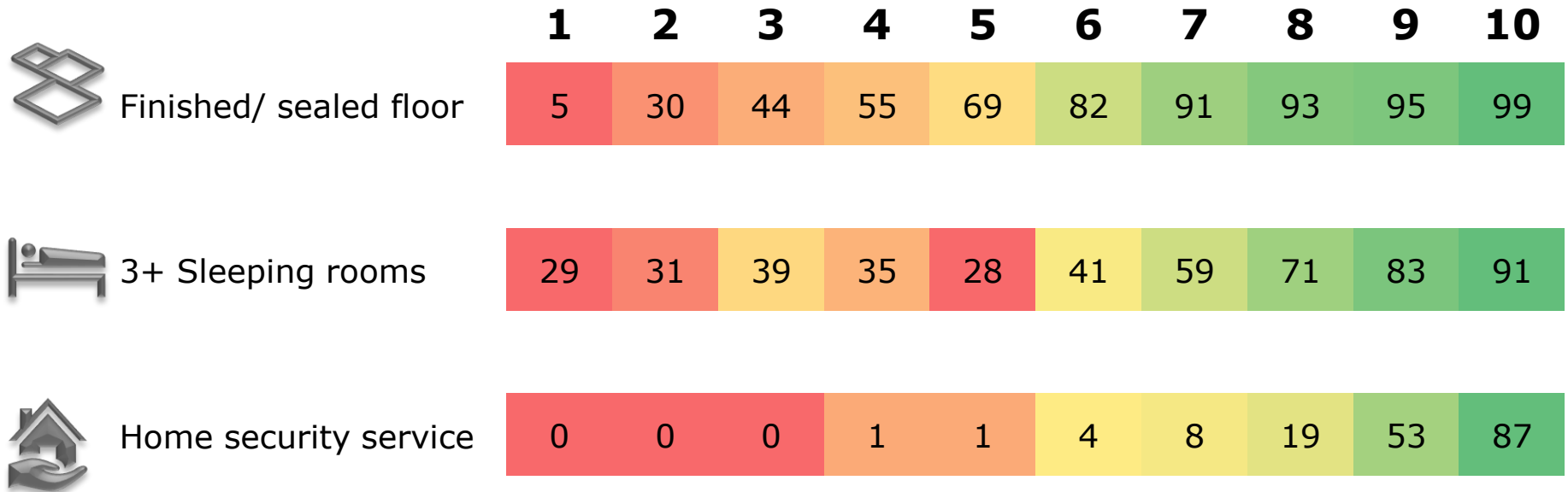


SEM INPUT VARIABLES...

STRUCTURAL



SEM



SEM INPUT VARIABLES...

DURABLES

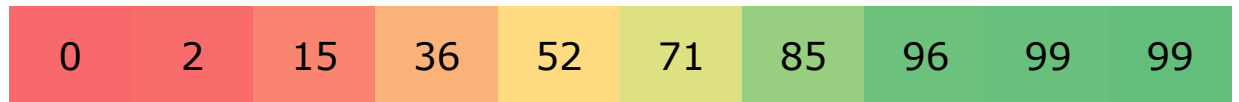


SEM

1 2 3 4 5 6 7 8 9 10



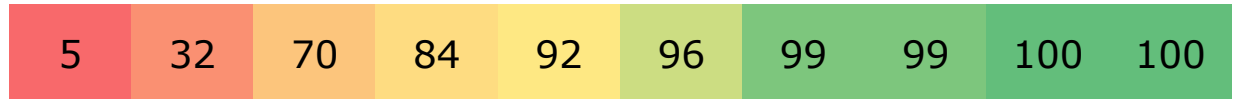
Washing machine



Motor car

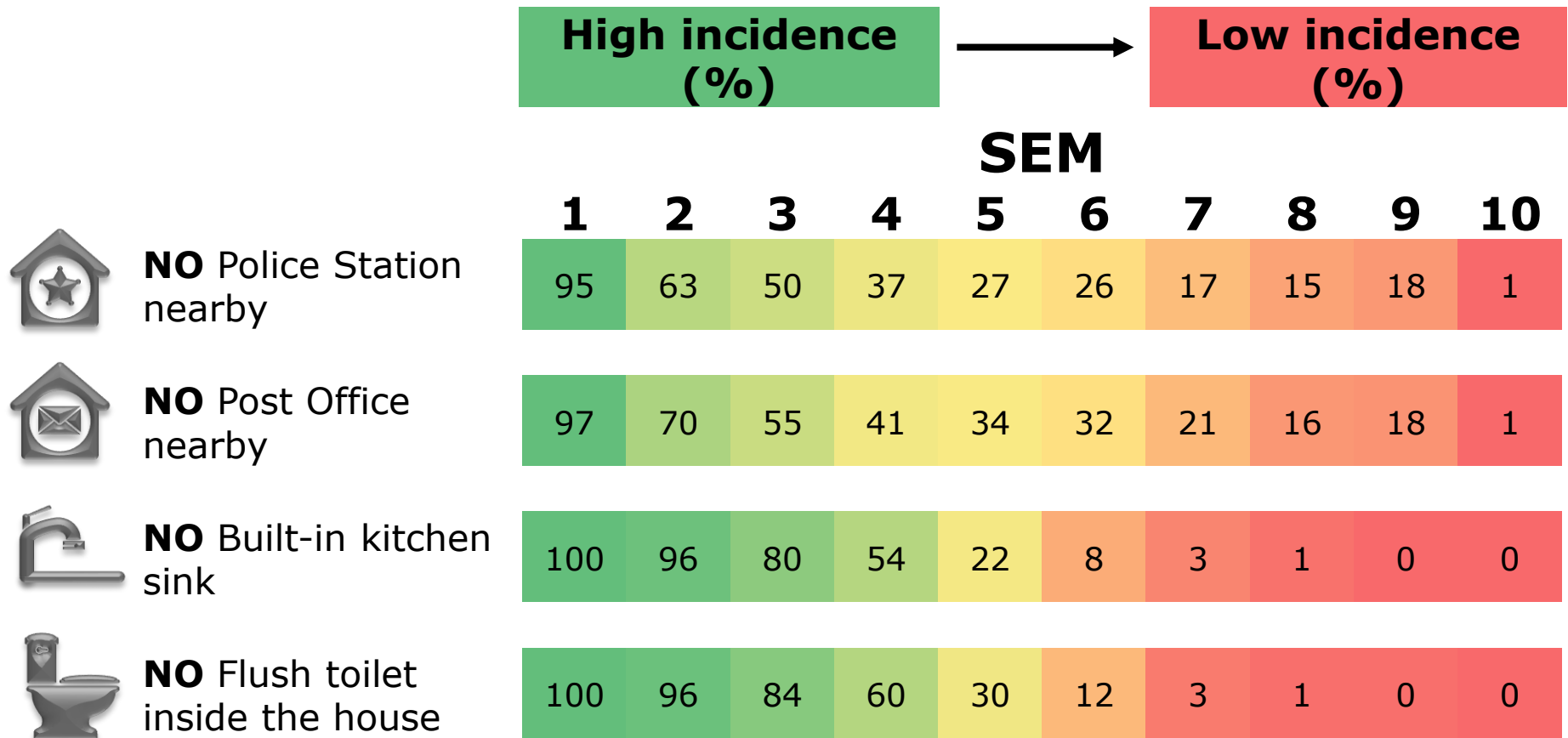


Microwave






SEM INPUT VARIABLES...

INFRASTRUCTURE AND BASIC AMENITIES



AREA DISTRIBUTION BY SEM...

		SEM									
		1	2	3	4	5	6	7	8	9	10
	Metro	14	19	25	40	54	60	65	64	71	71
	Urban	14	21	32	37	35	32	31	33	28	28
	Rural	72	60	43	23	11	7	5	2	1	1





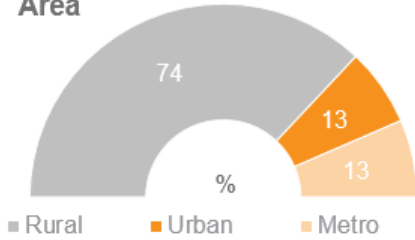
ESTABLISHMENT SURVEY SEM™ VISUAL REPRESENTATIONS

SEM 1

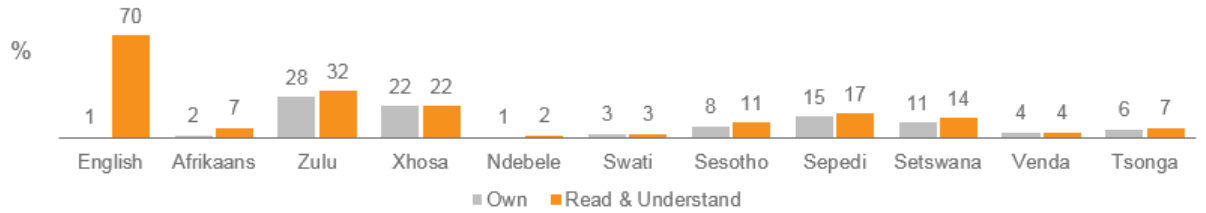
Population: 4.9 million (12%)



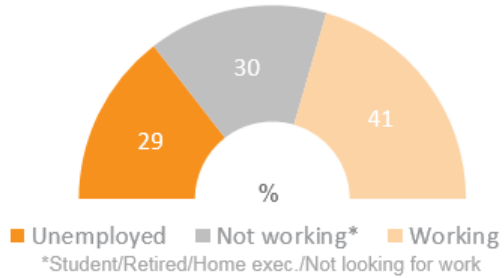
Area



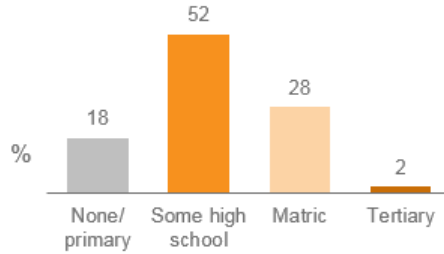
Language



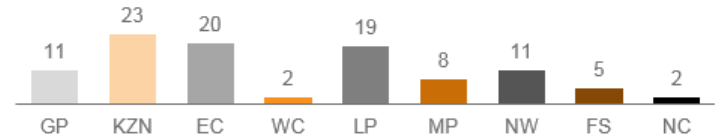
Work status



Education

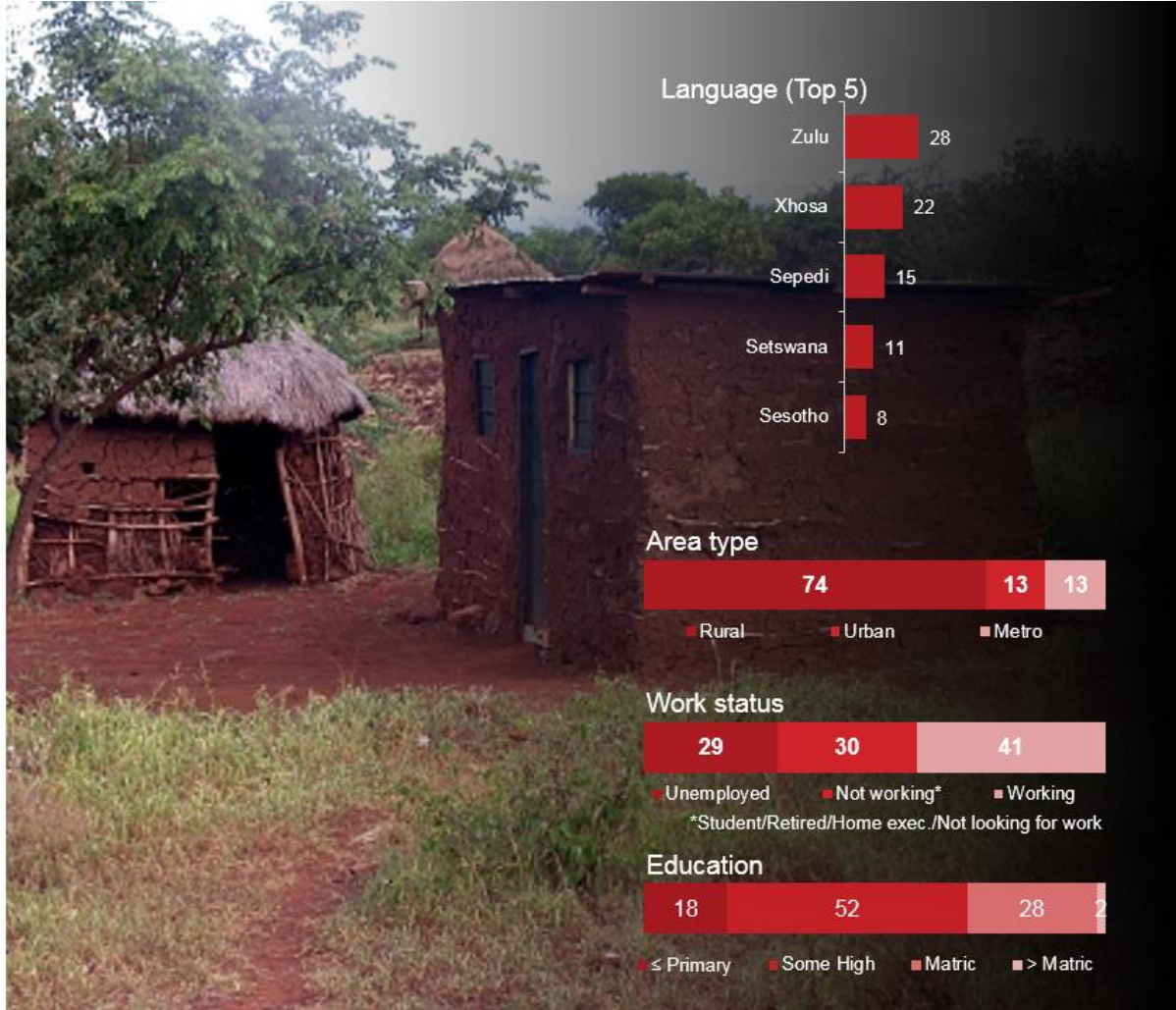


Province





SEM 1:
Population: 4.9 million (12%)

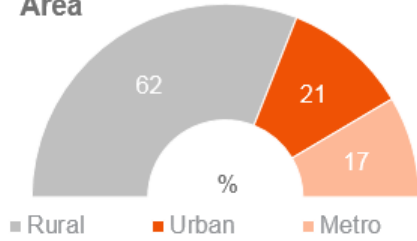


SEM 2

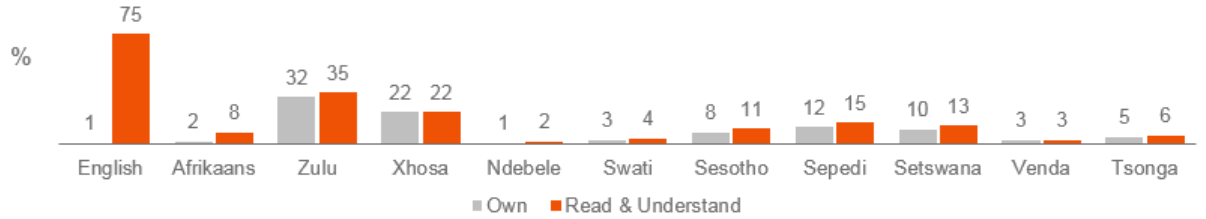
Population: 6.7 million (17%)



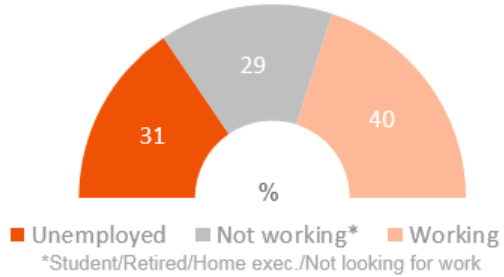
Area



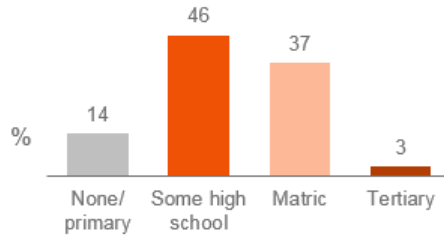
Language



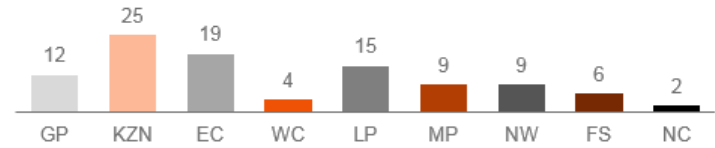
Work status

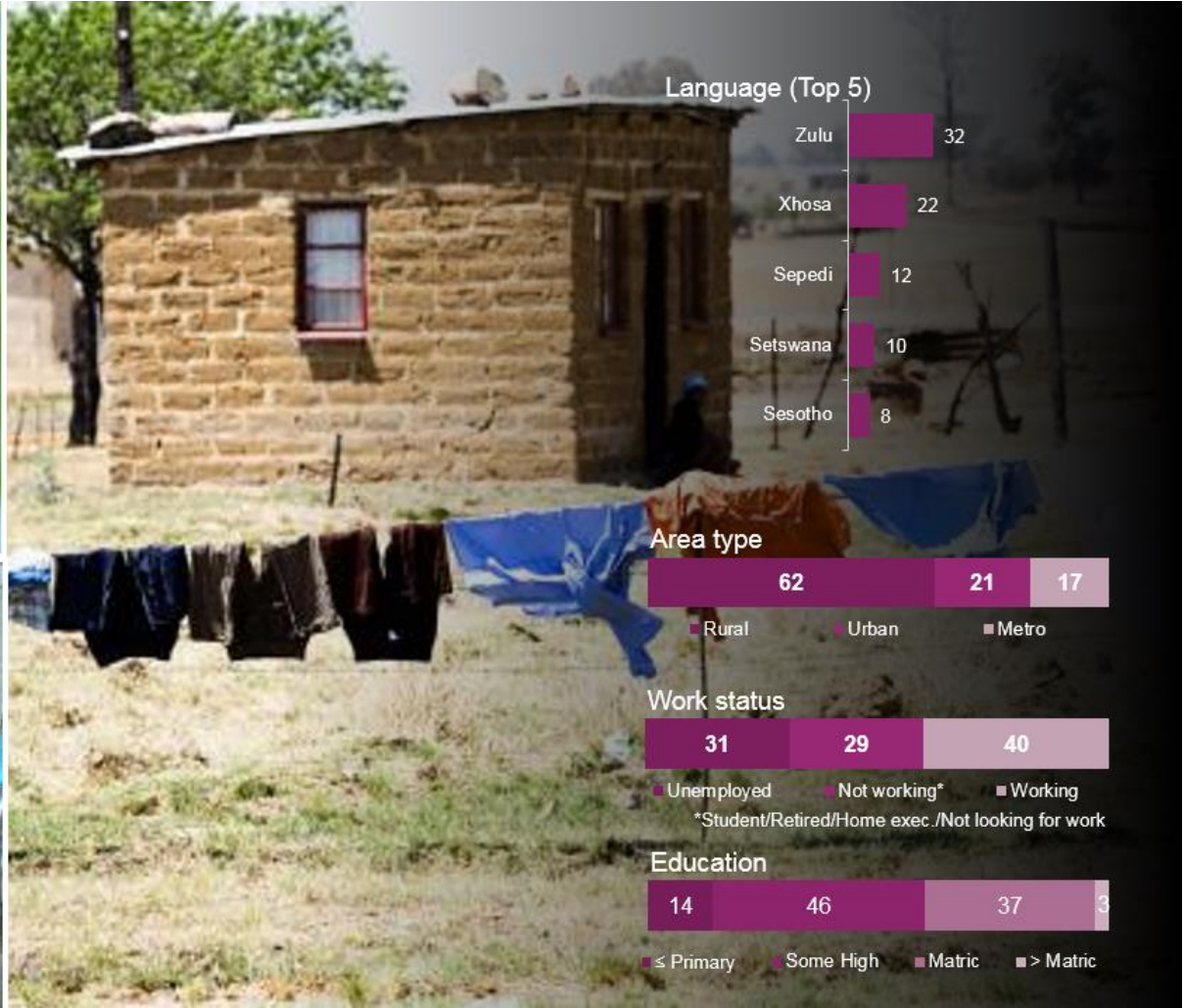


Education



Province



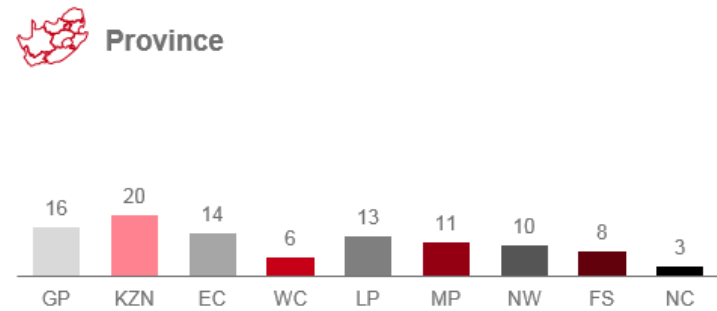
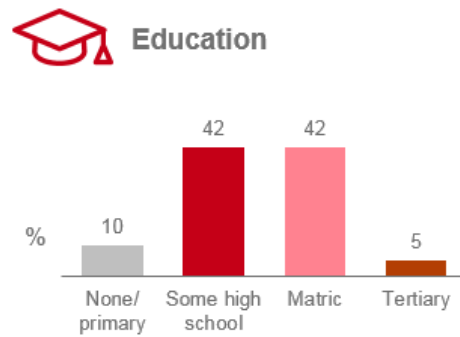
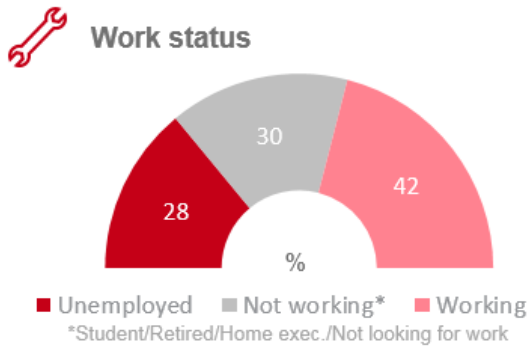
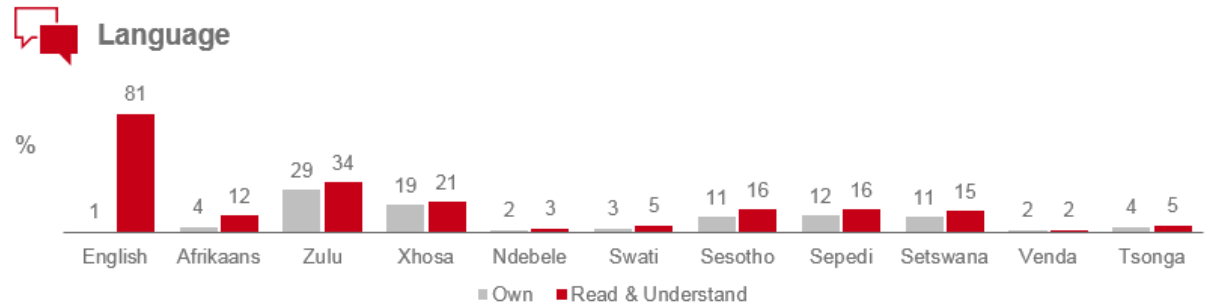
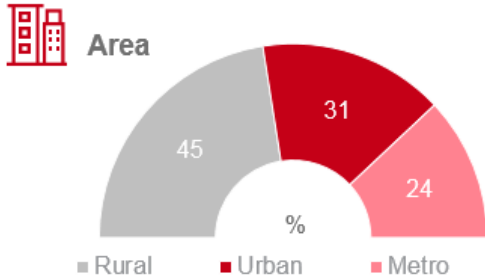


SEM 2:
Population: 6.7 million (17%)



SEM 3

Population: 5.2 million (13%)



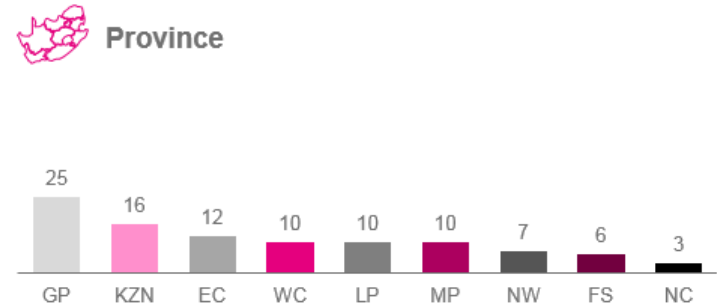
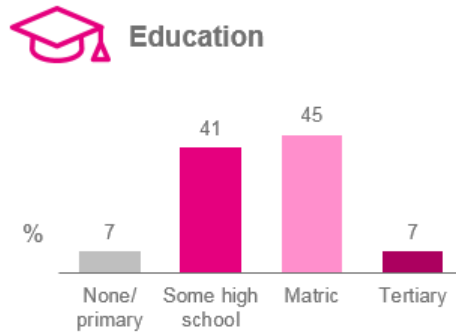
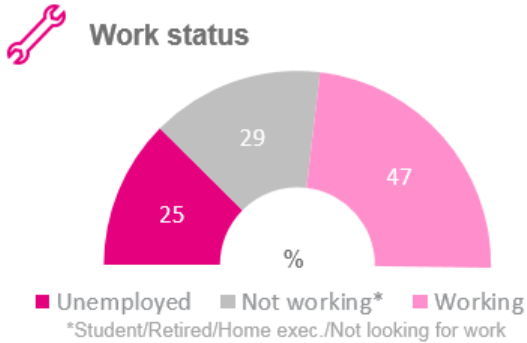
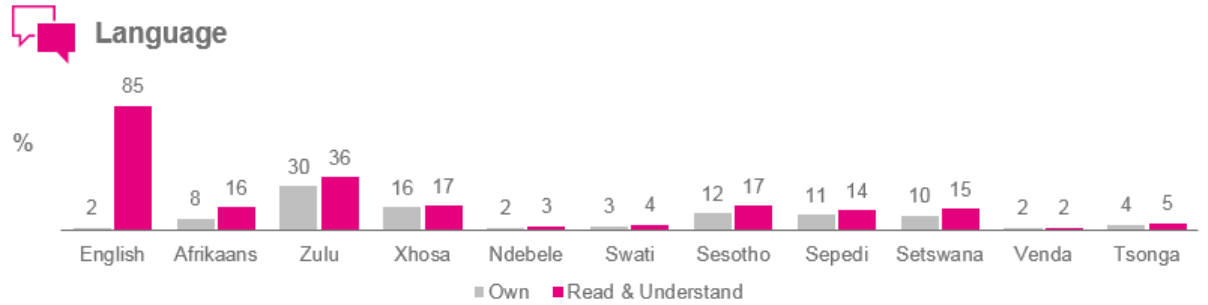
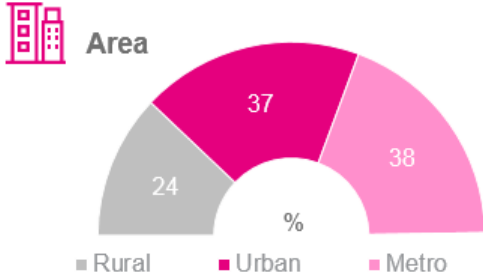


SEM 3:
Population: 5.2 million (13%)



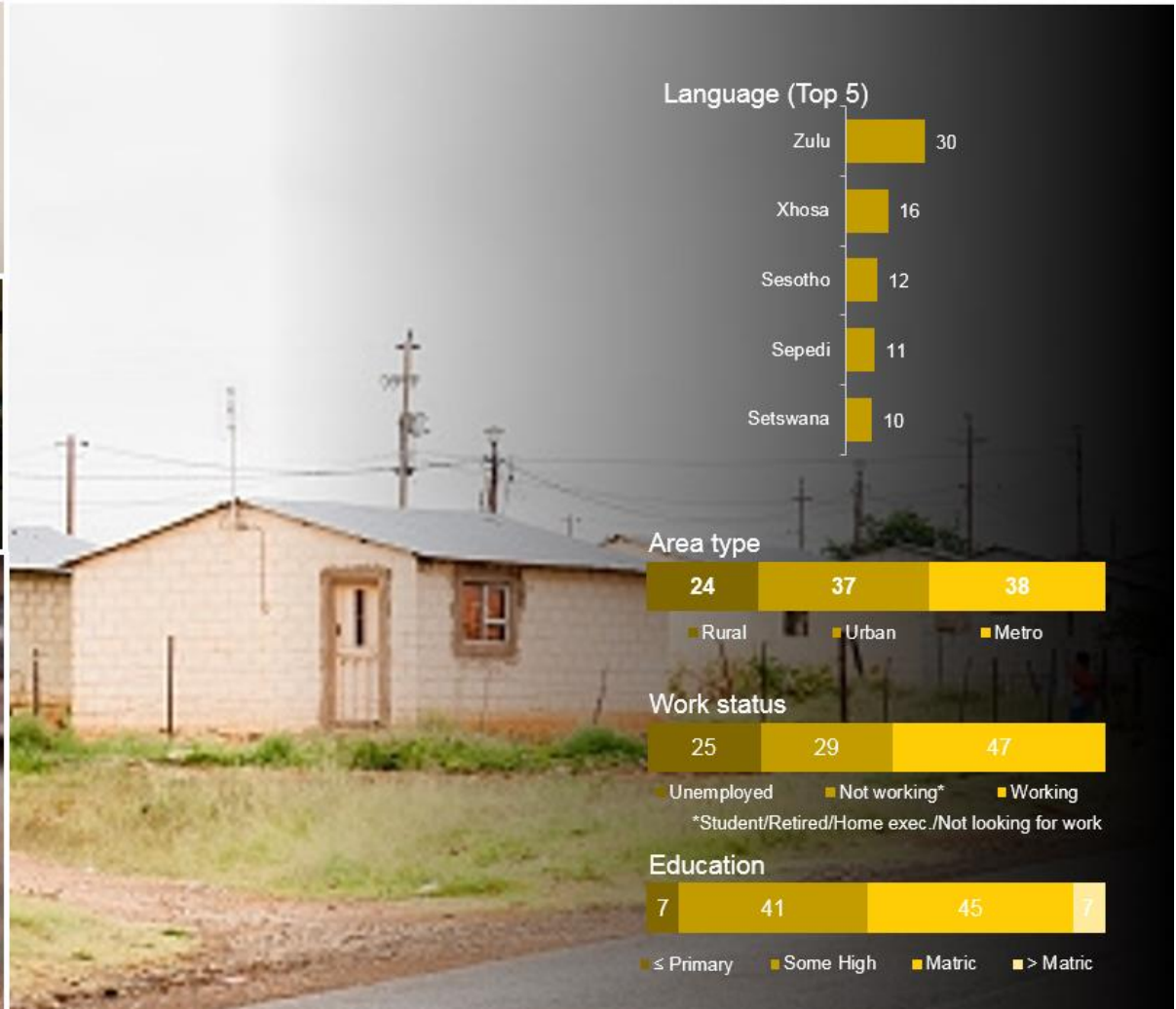
SEM 4

Population: 4.1 million (10%)



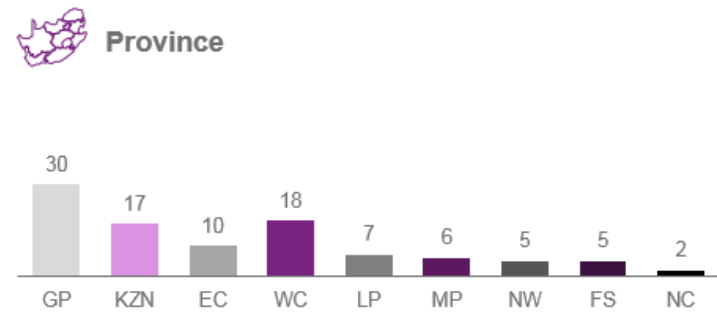
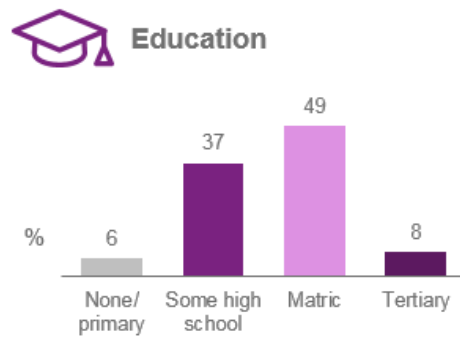
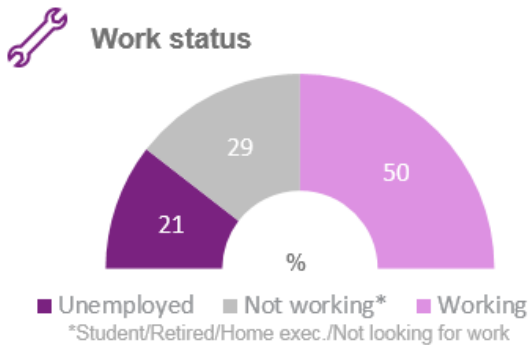
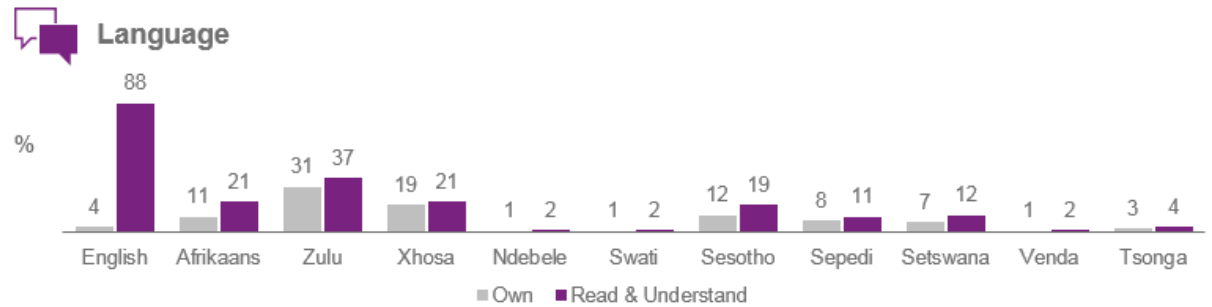
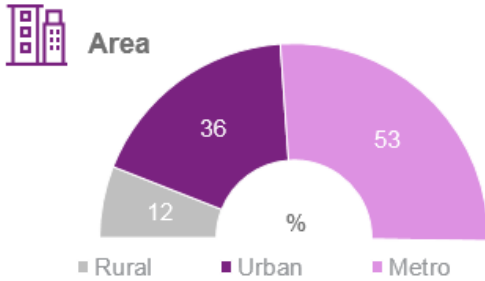


SEM 4:
Population: 4.1 million (10%)



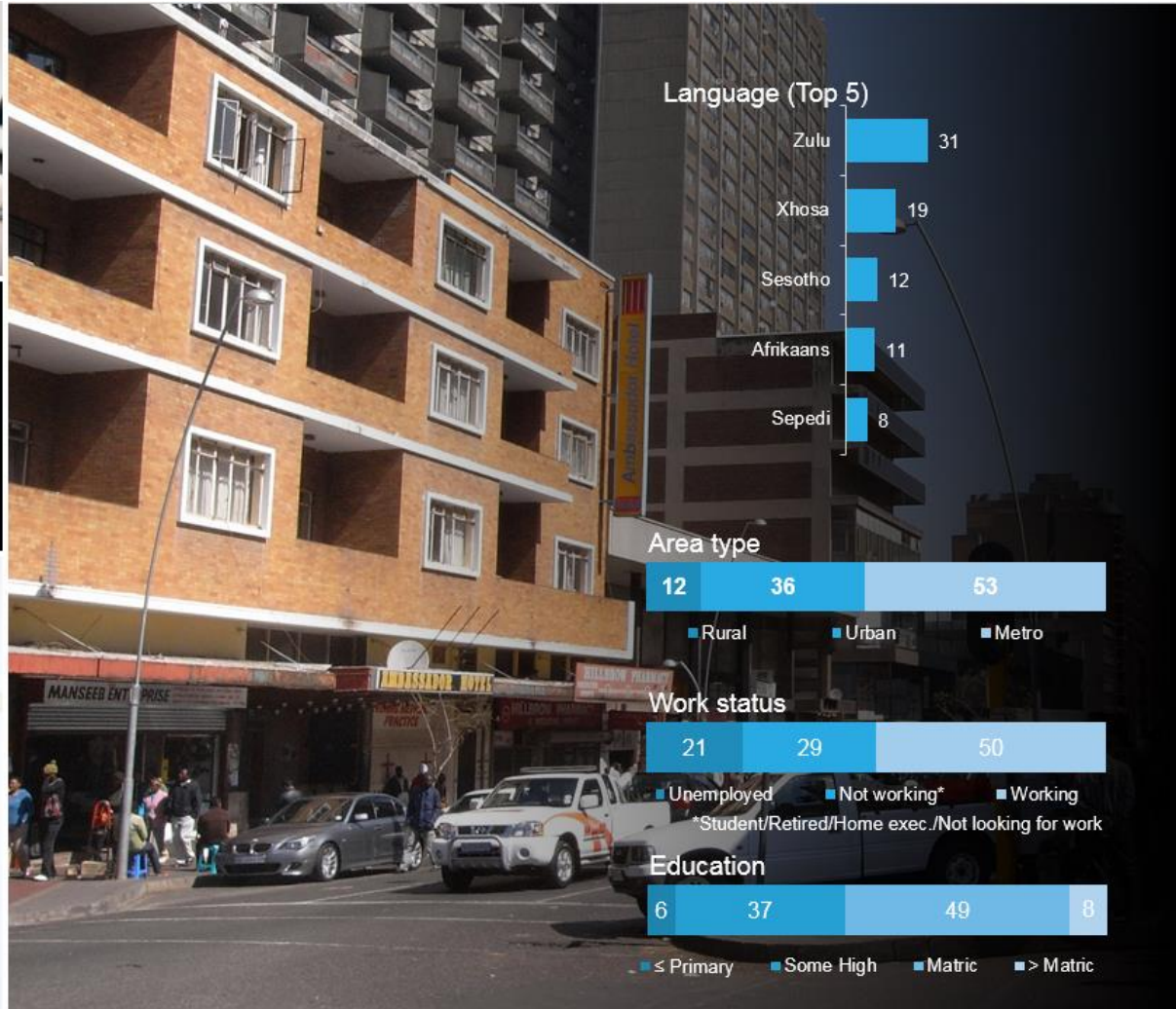
SEM 5

Population: 4.2 million (11%)



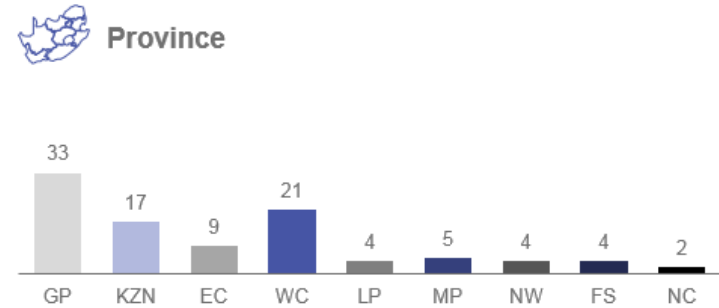
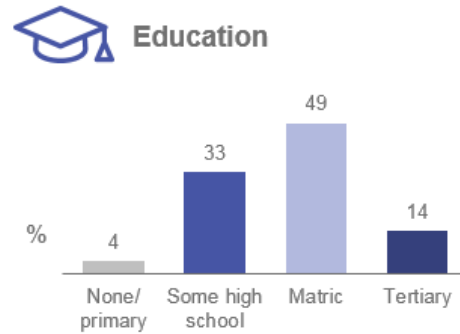
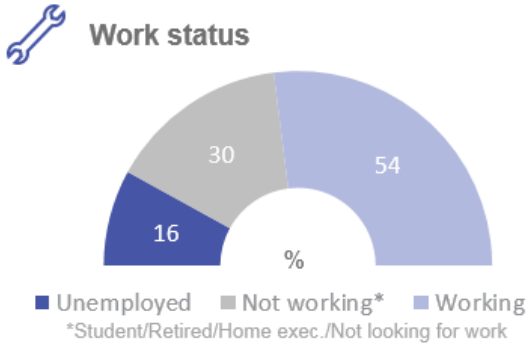
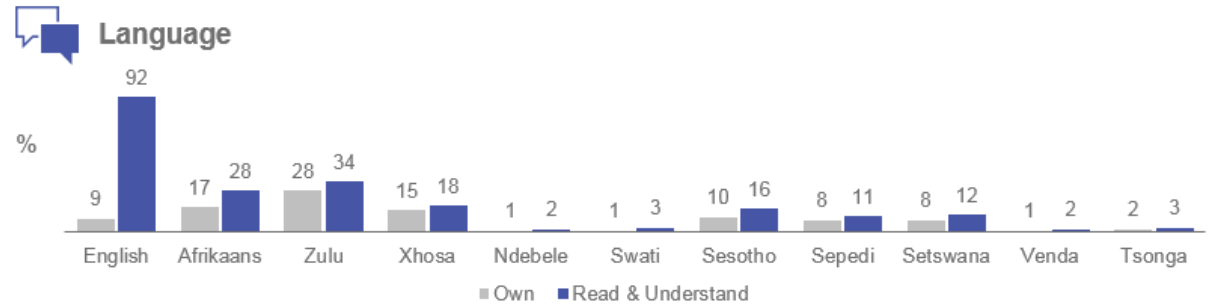
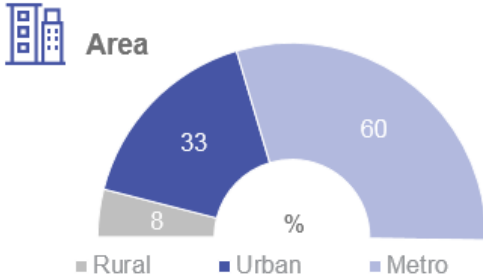


SEM 5:
Population: 4.2 million (11%)



SEM 6

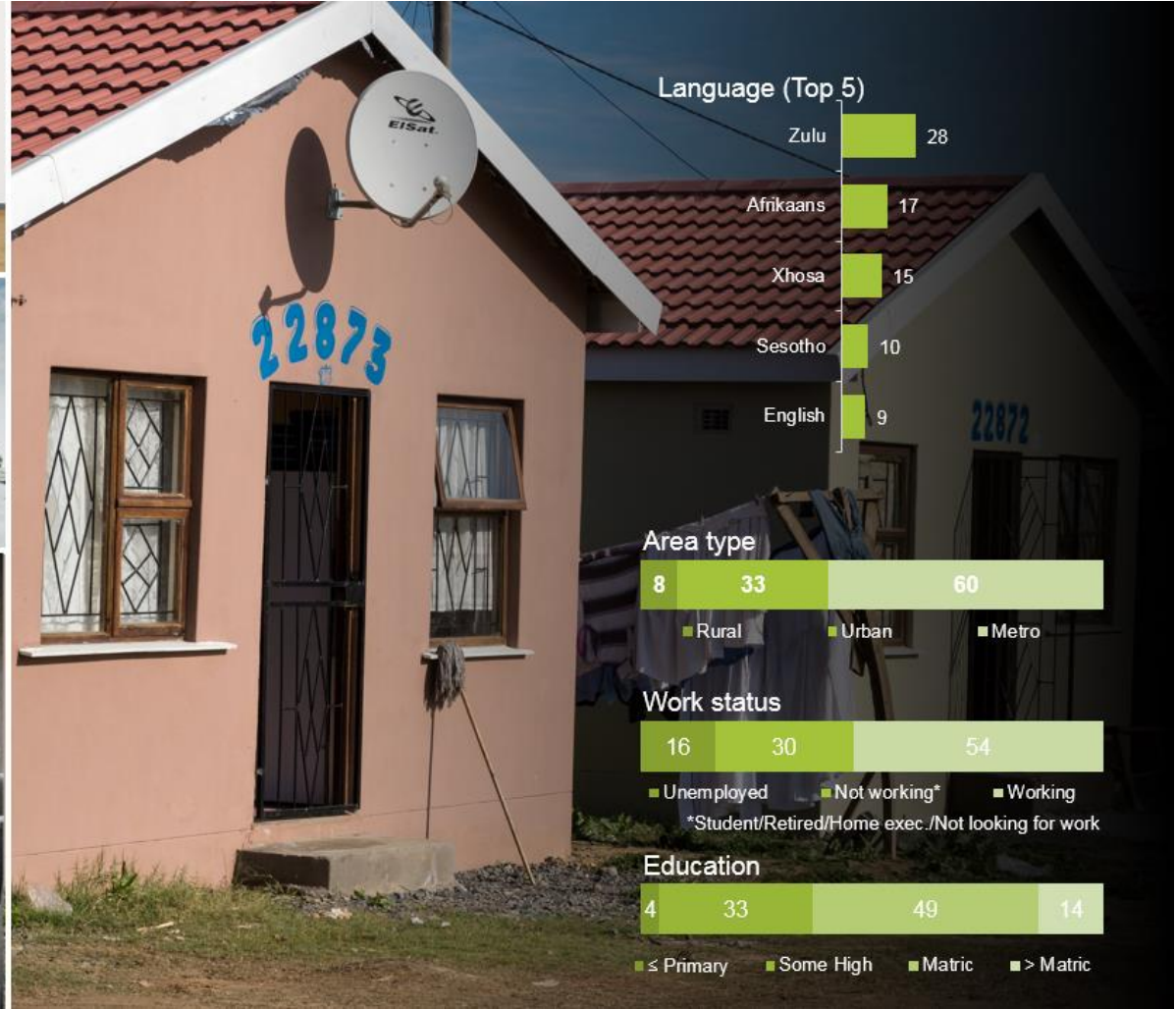
Population: 3.3 million (8%)





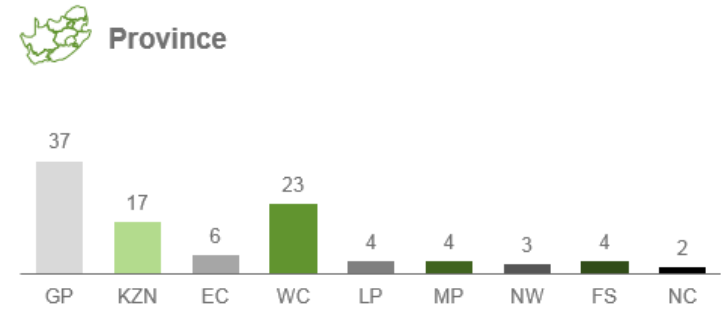
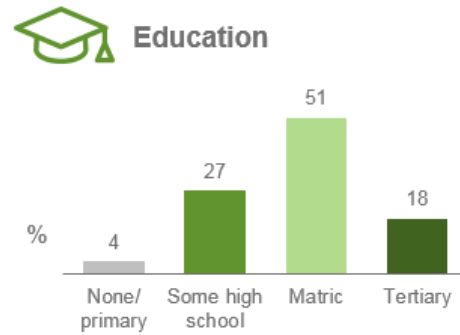
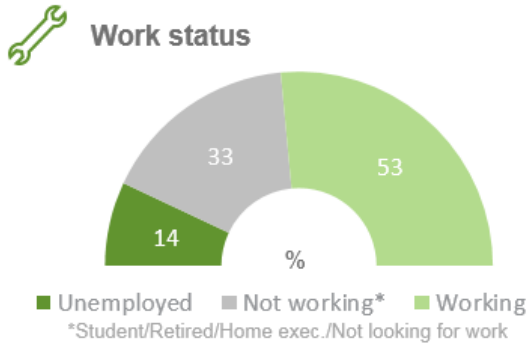
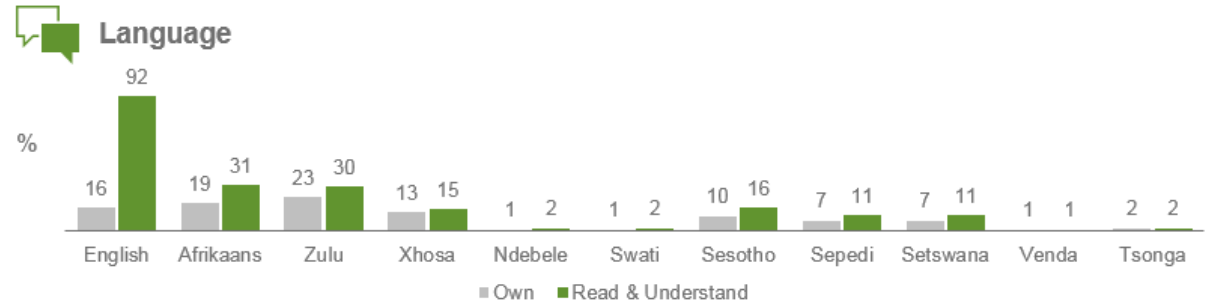
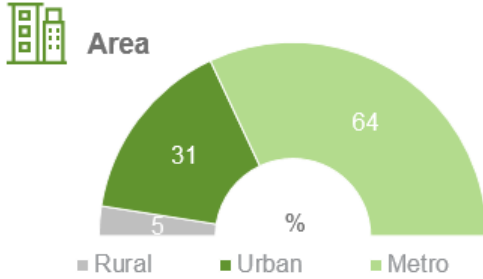
SEM 6:

Population: 3.3 million (8%)



SEM 7

Population: 3.5 million (9%)



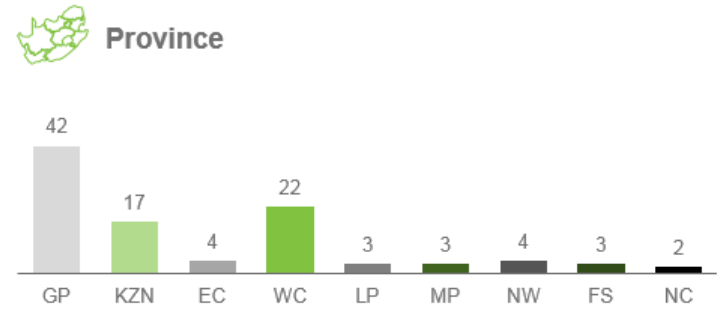
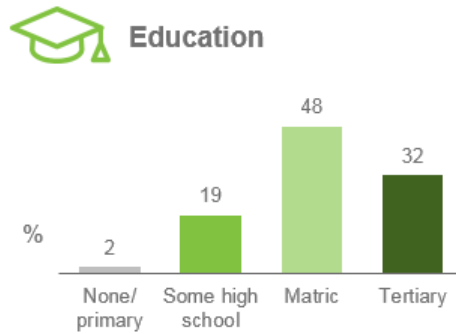
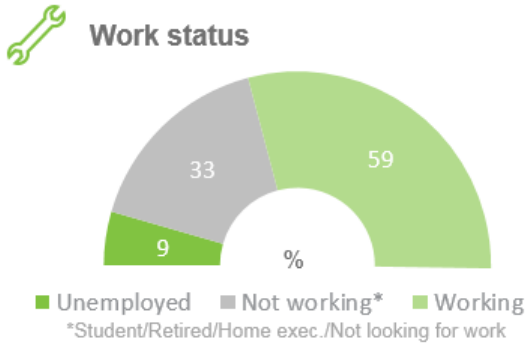
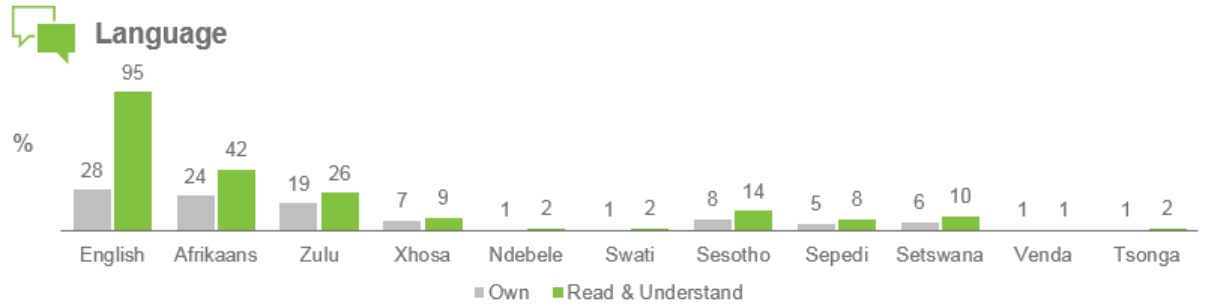
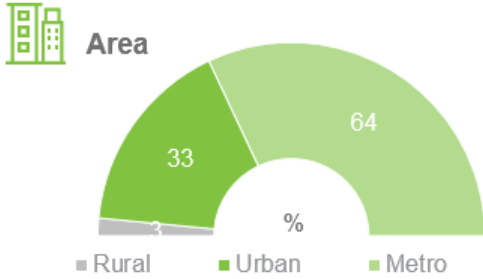


SEM 7:
Population: 3.5 million (9%)



SEM 8

Population: 2.8 million (7%)



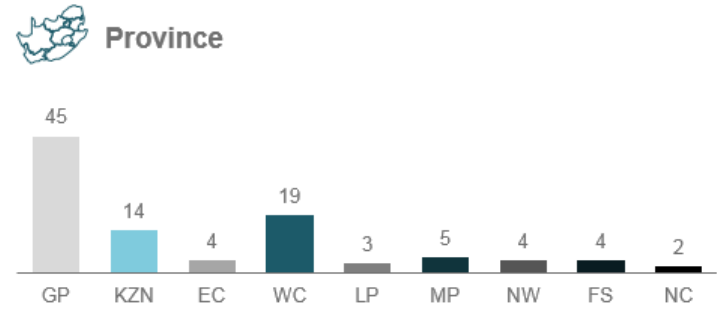
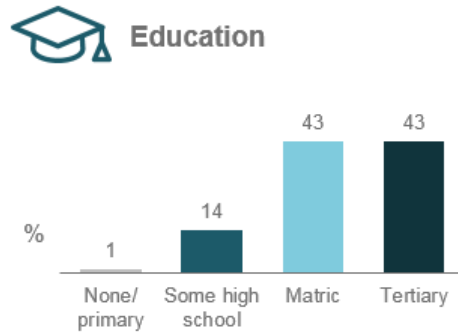
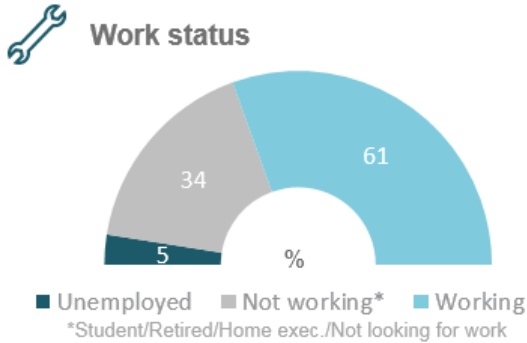
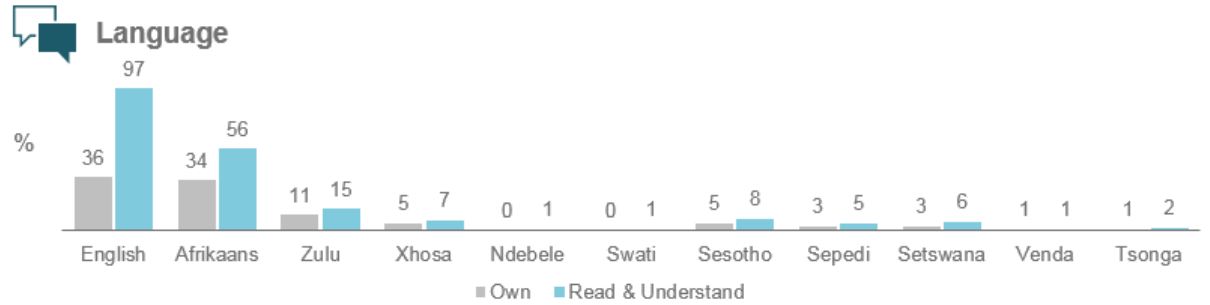
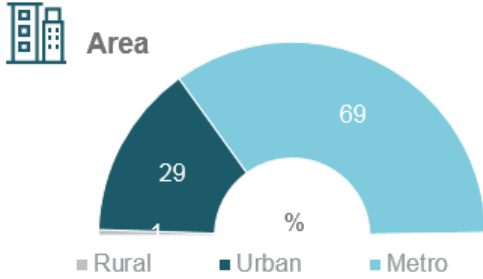


SEM 8:
Population: 2.8 million (7%)



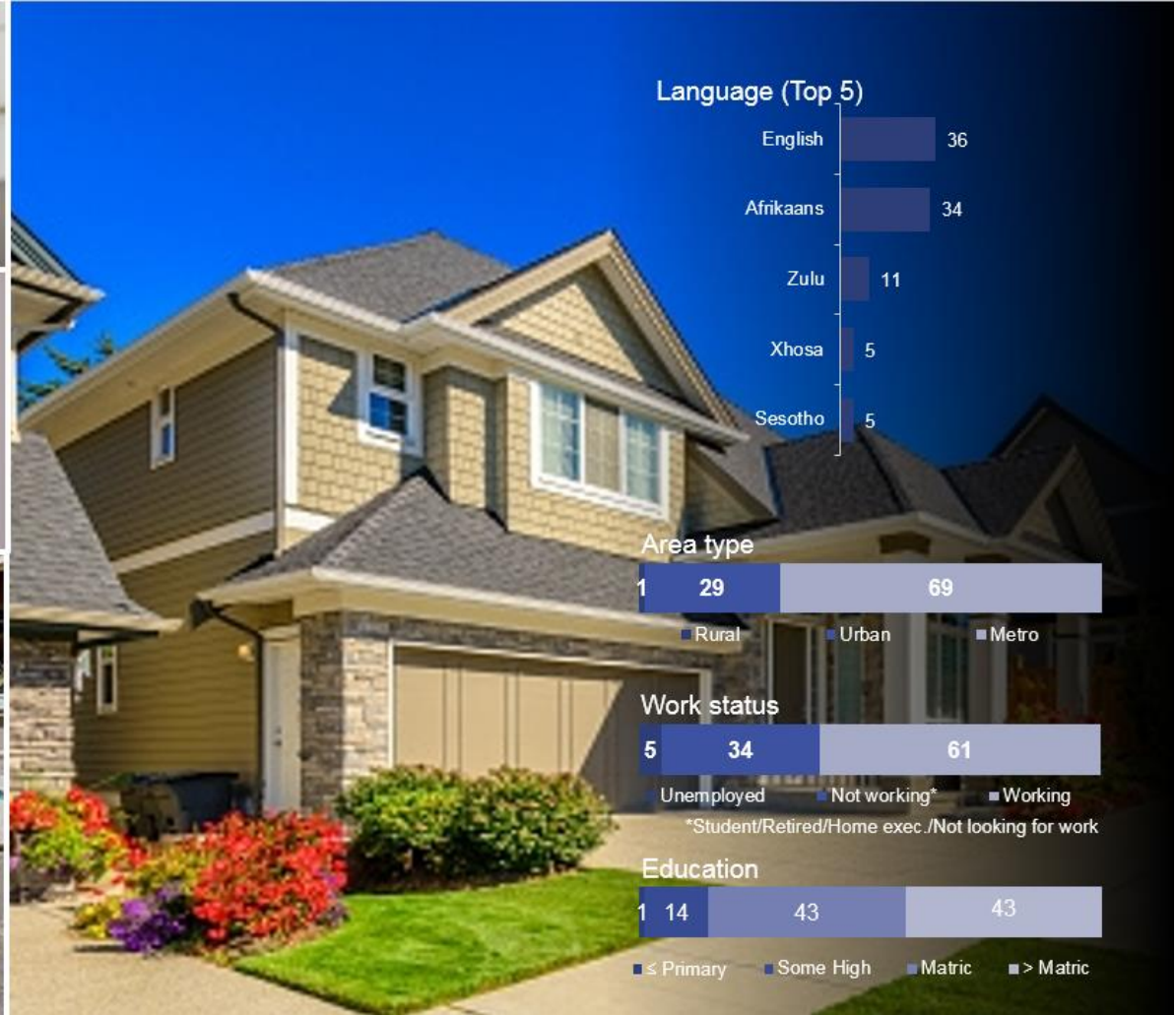
SEM 9

Population: 2.2 million (6%)



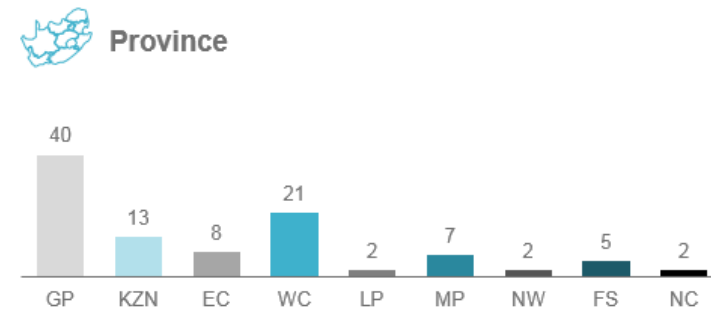
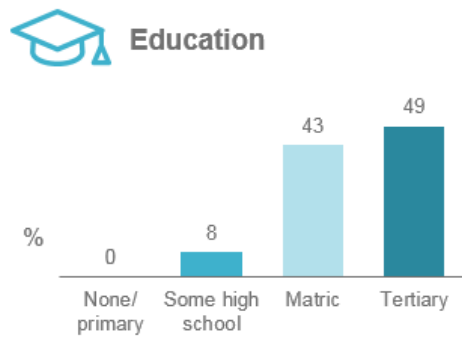
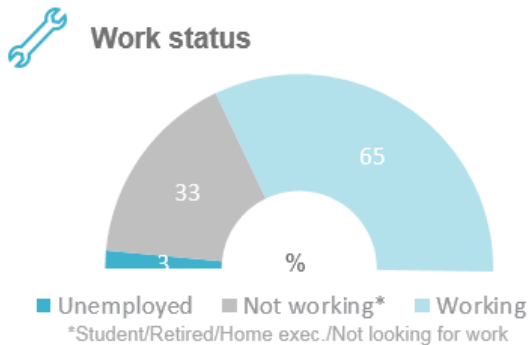
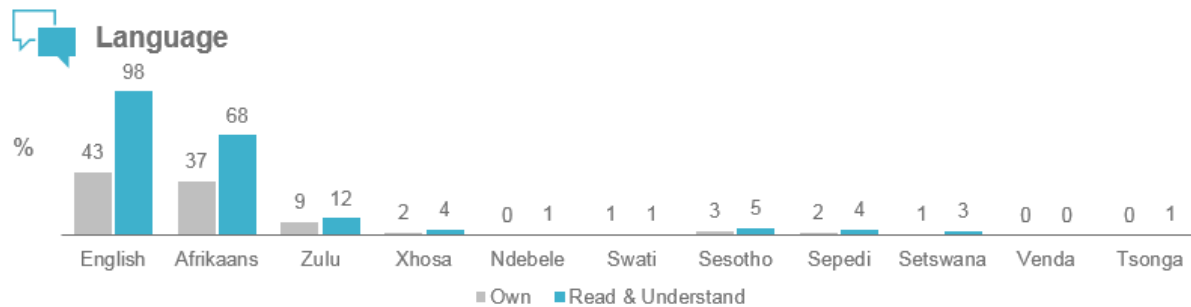
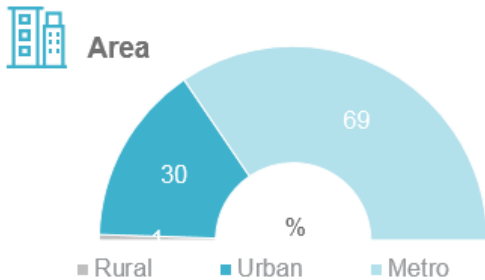


SEM 9:
Population: 2.2 million (6%)



SEM 10

Population: 2.6 million (6%)

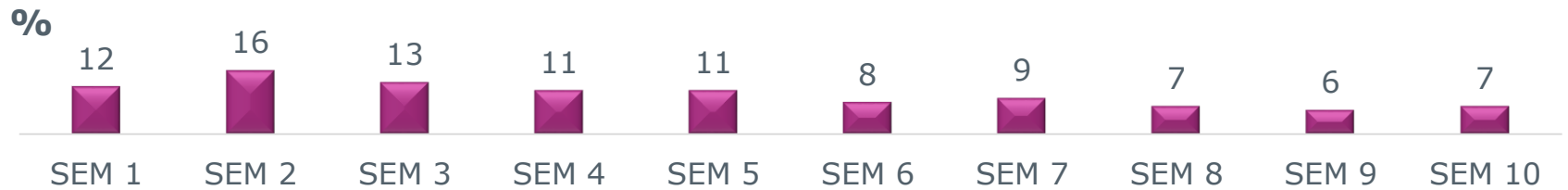




SEM 10:
Population: 2.6 million (6%)



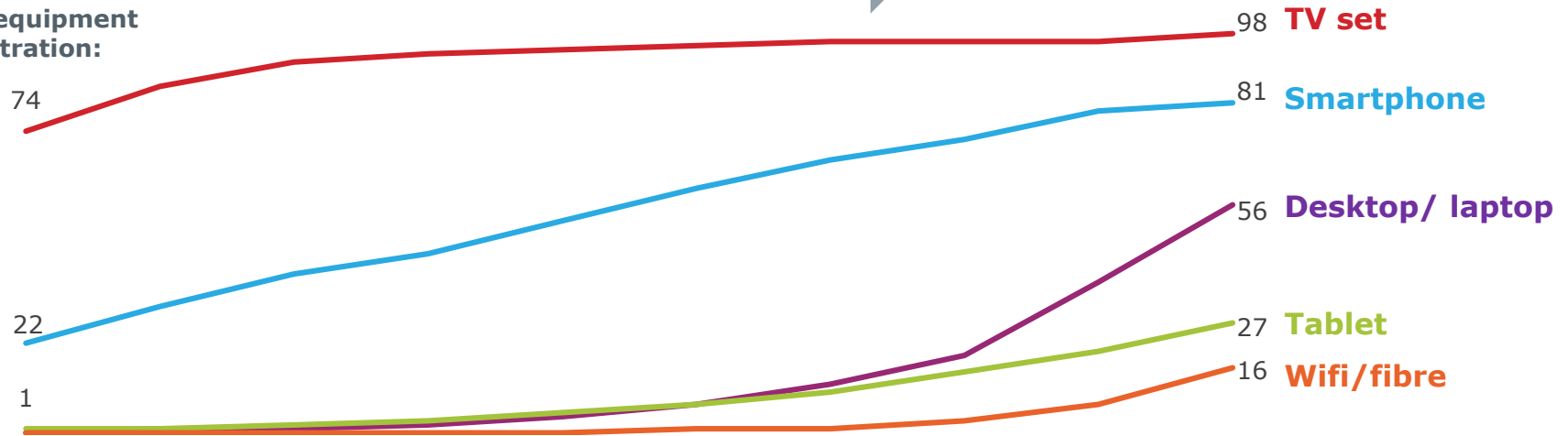
EQUIPMENT IN HOME BY SEM...



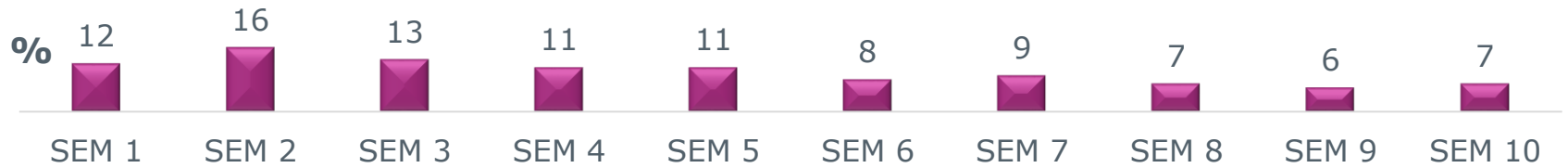
Avg. no. of equipment items in home:

2.5 2.7 2.8 2.9 2.9 3.0 3.2 3.3 3.6 4.2

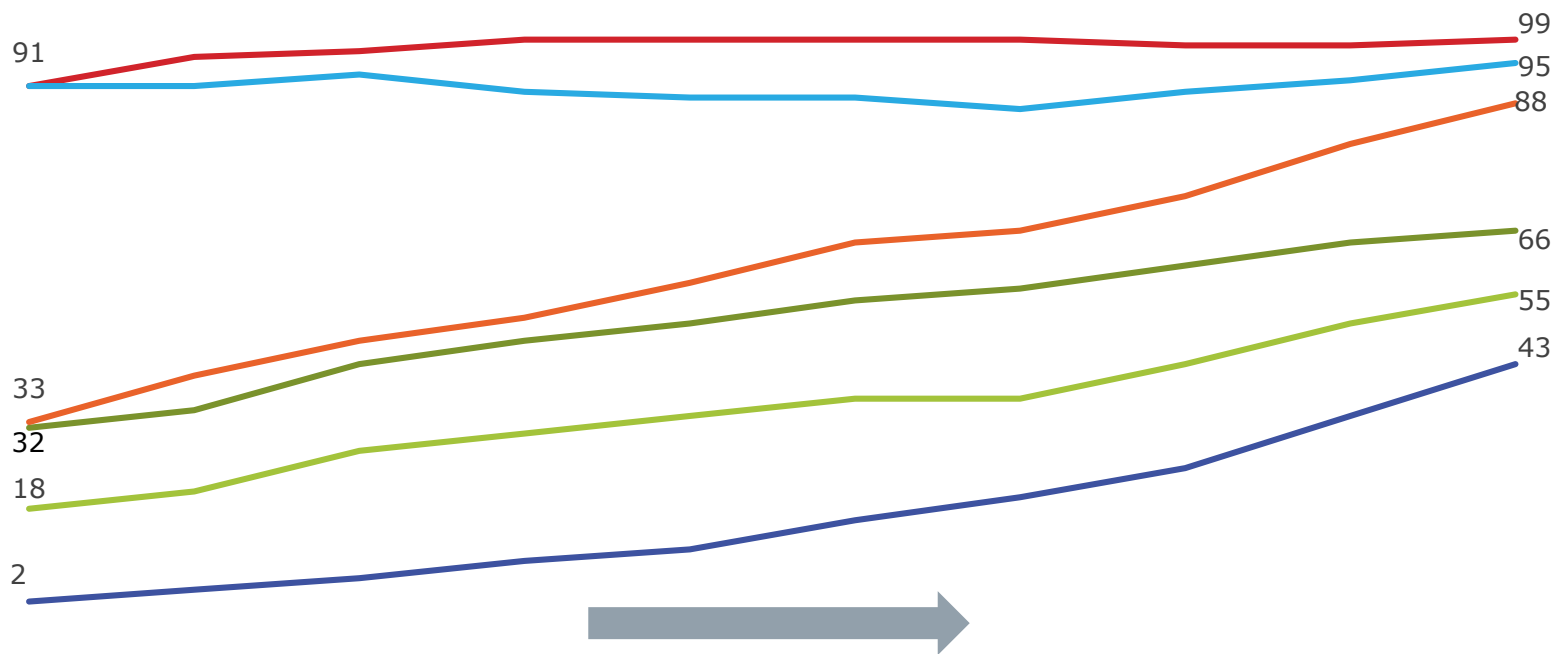
Key equipment penetration:



MEDIA CONSUMPTION BY SEM...



Past 12 month usage:



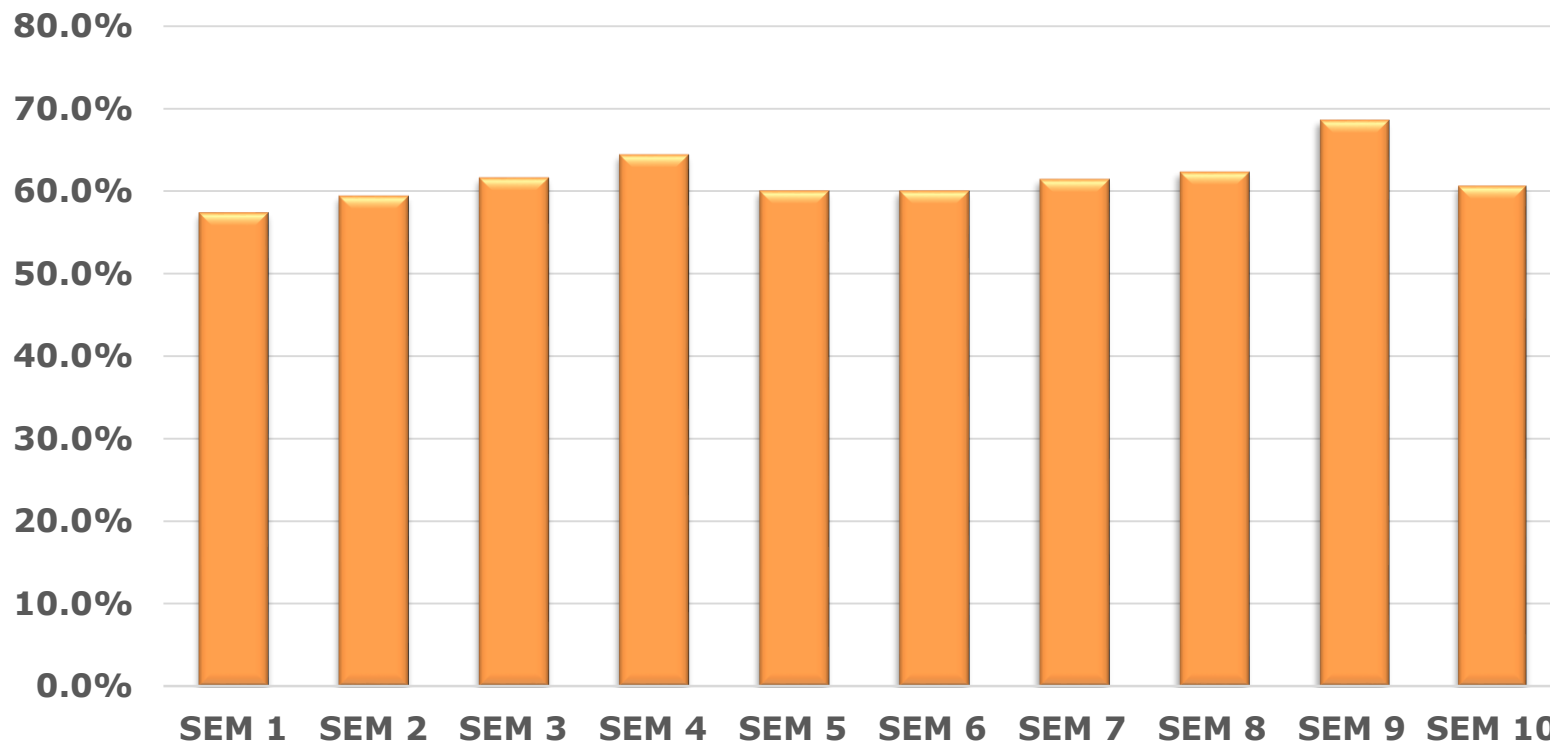


SEM VIEWING PROFILES BY TV CHANNEL

AVERAGE DAILY REACH BY SEM...



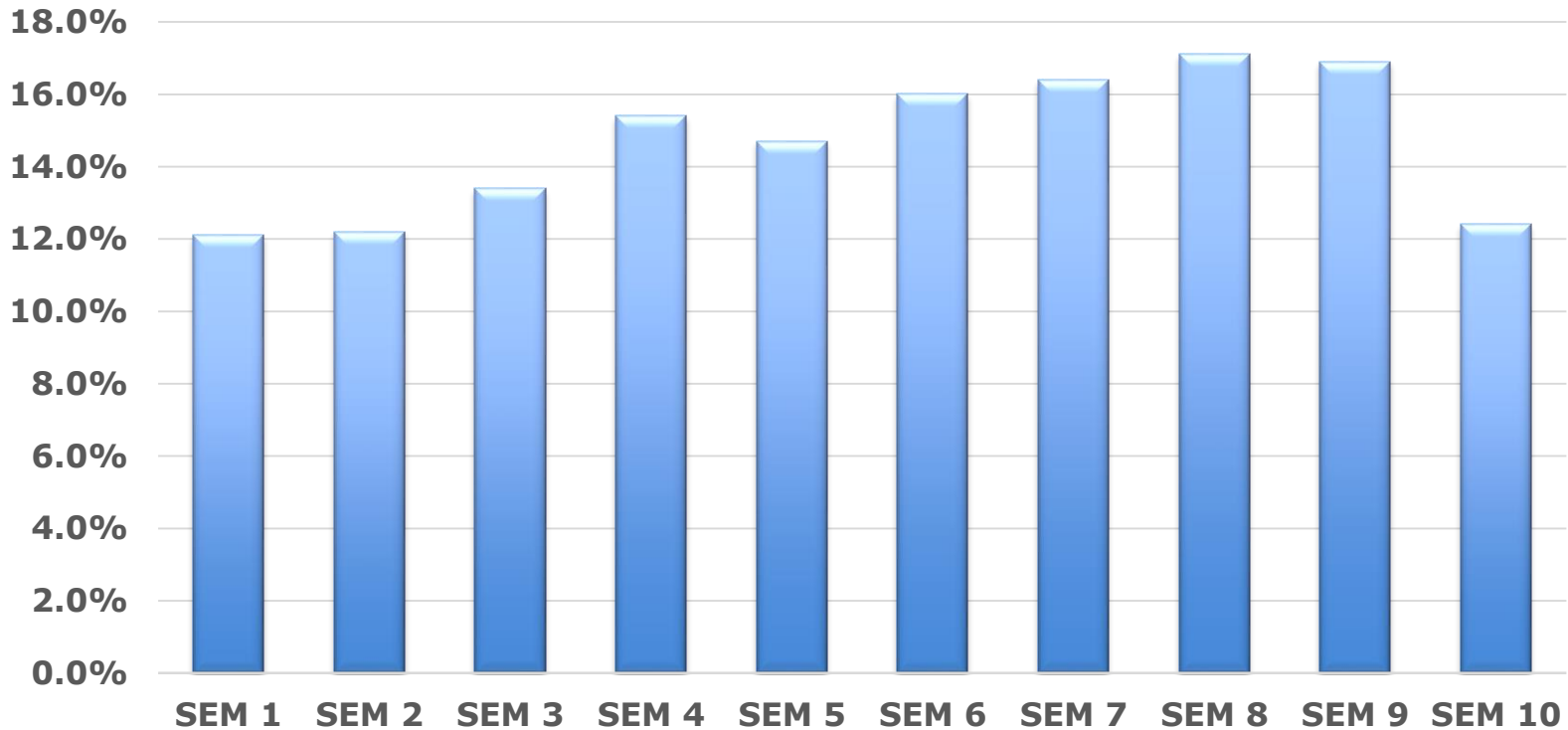
Average Daily REACH %



SEM: AVERAGE DAILY RATINGS

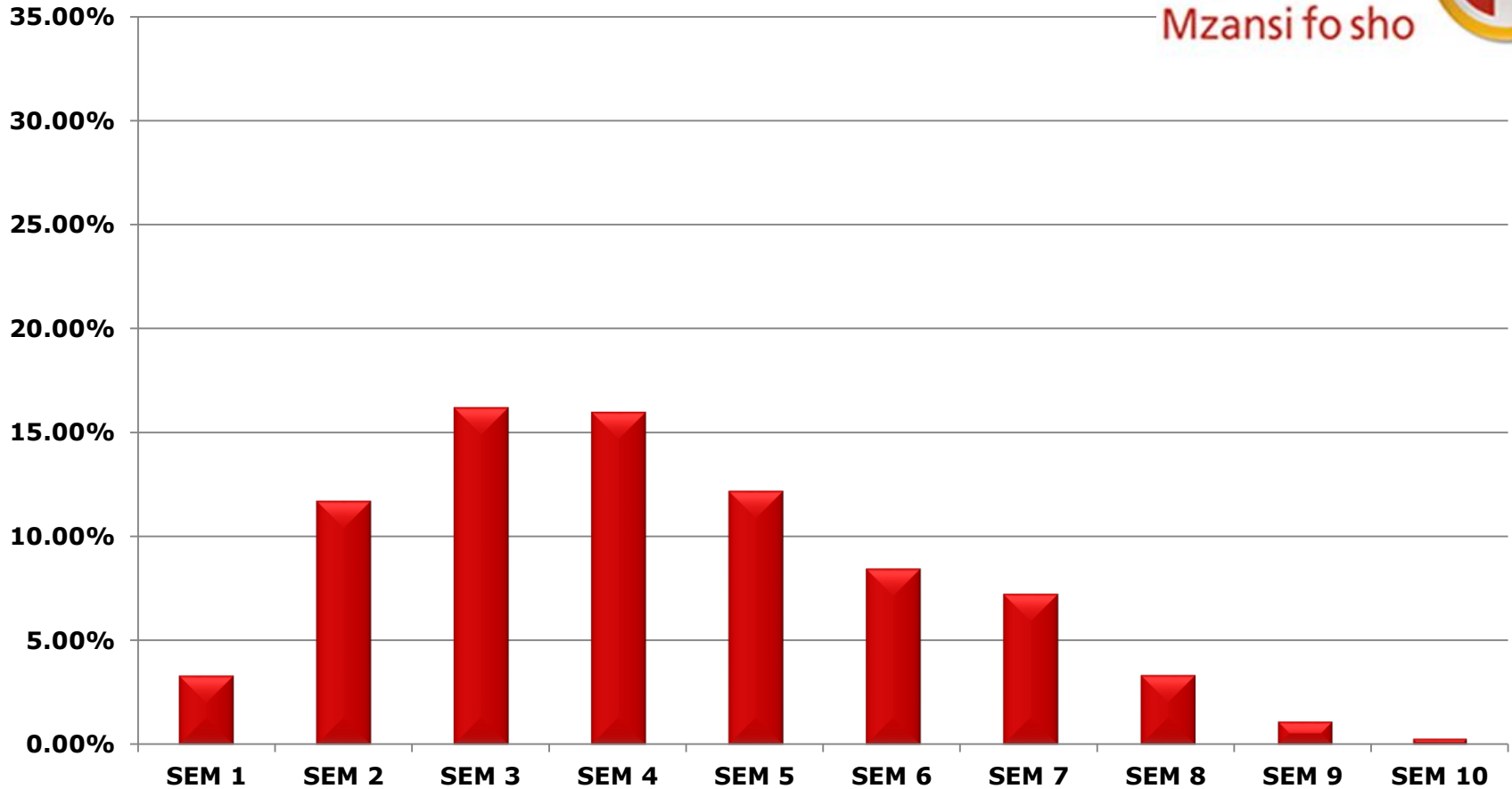


Average daily AR %



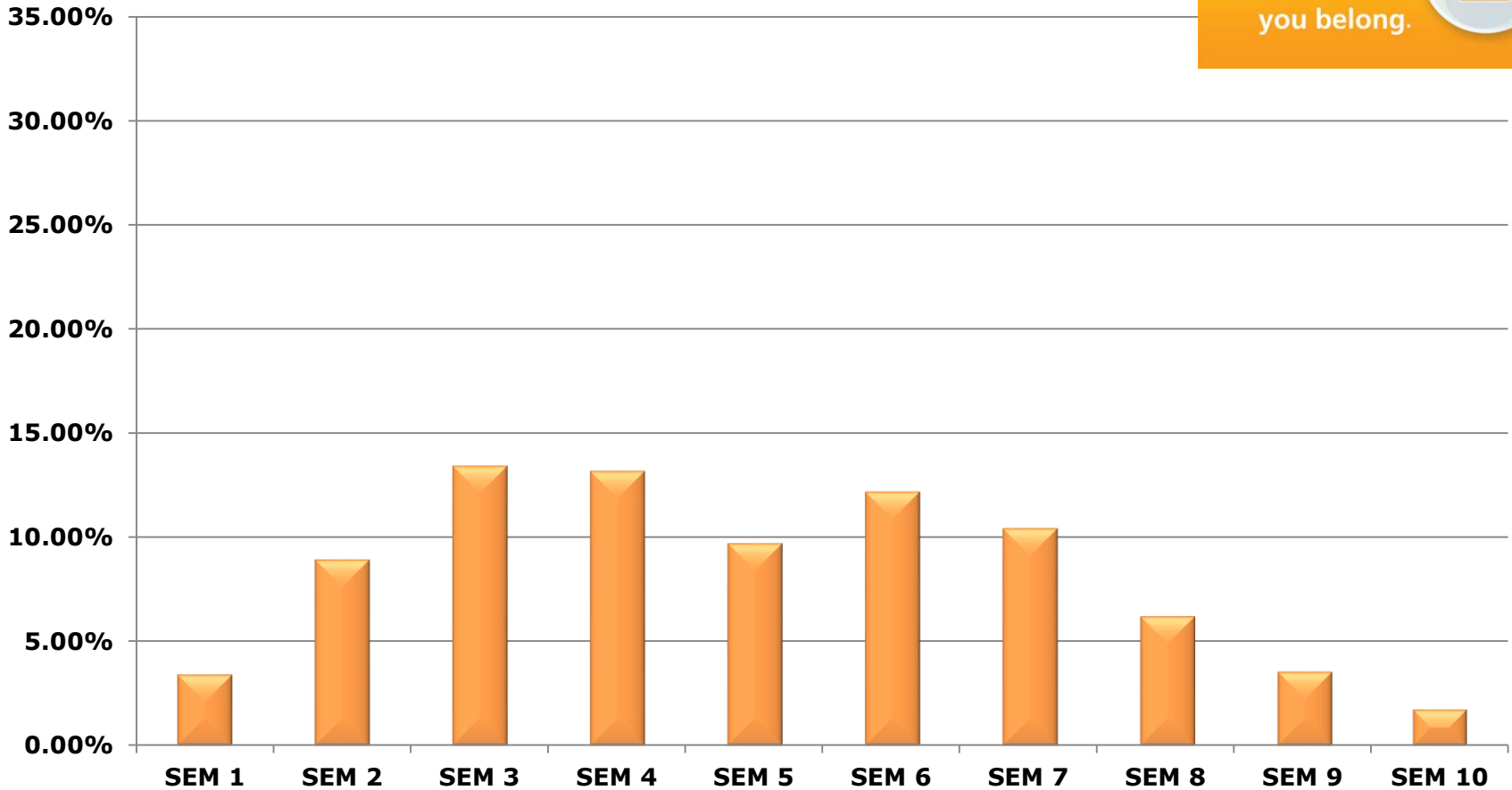
SEM VIEWING PROFILE...

SABC1



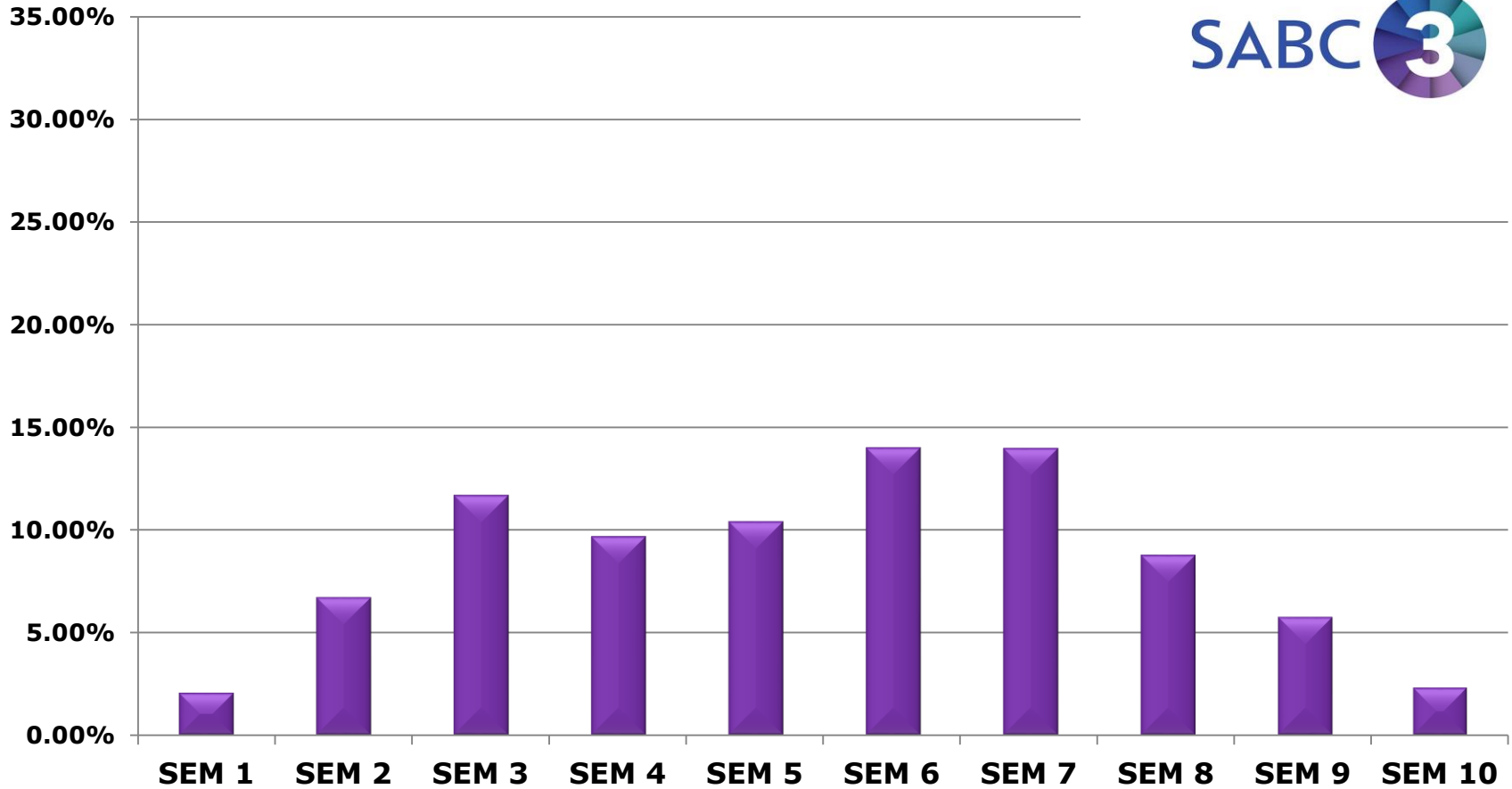
SEM VIEWING PROFILE...

SABC 2

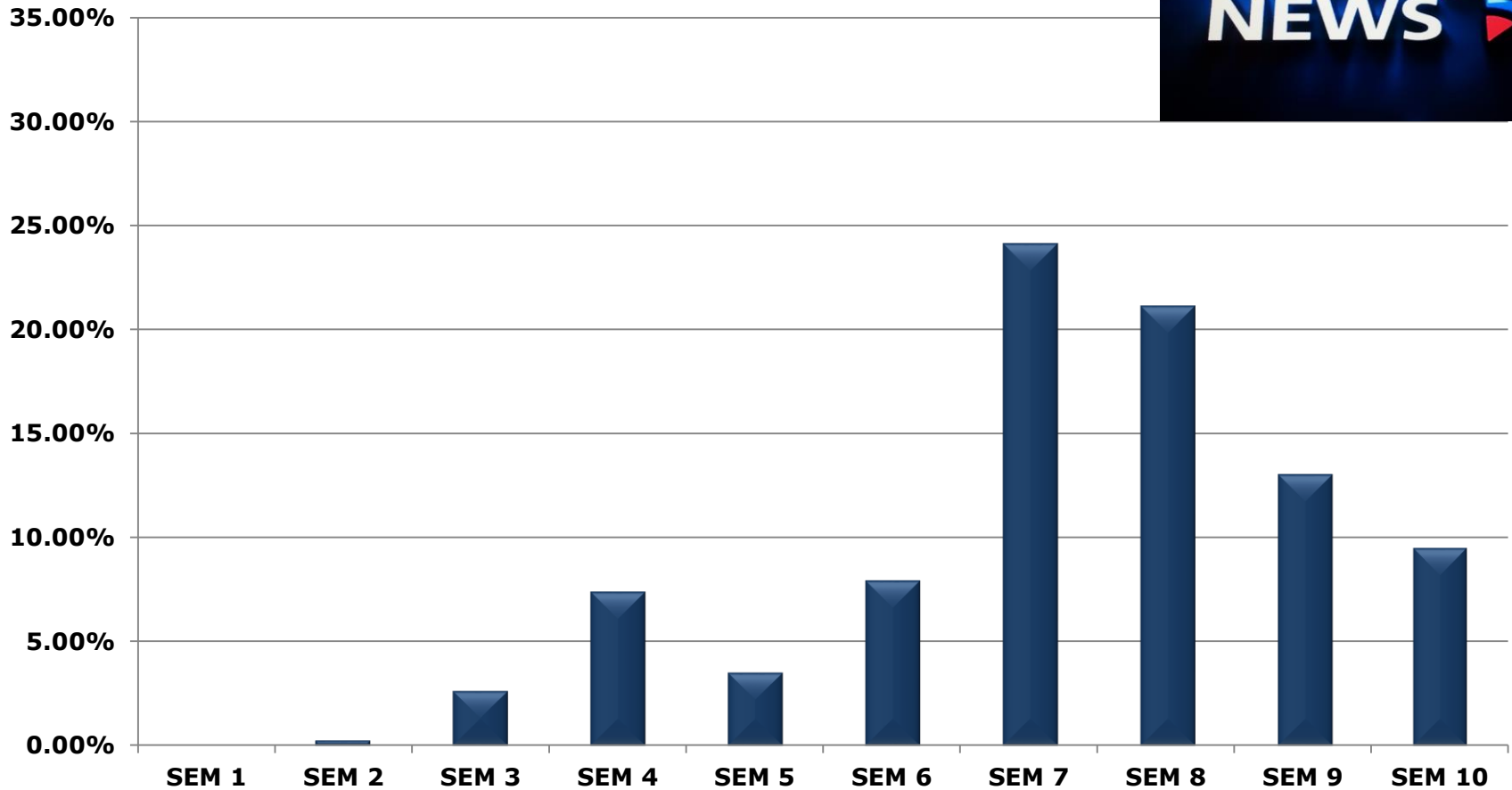


SEM VIEWING PROFILE...

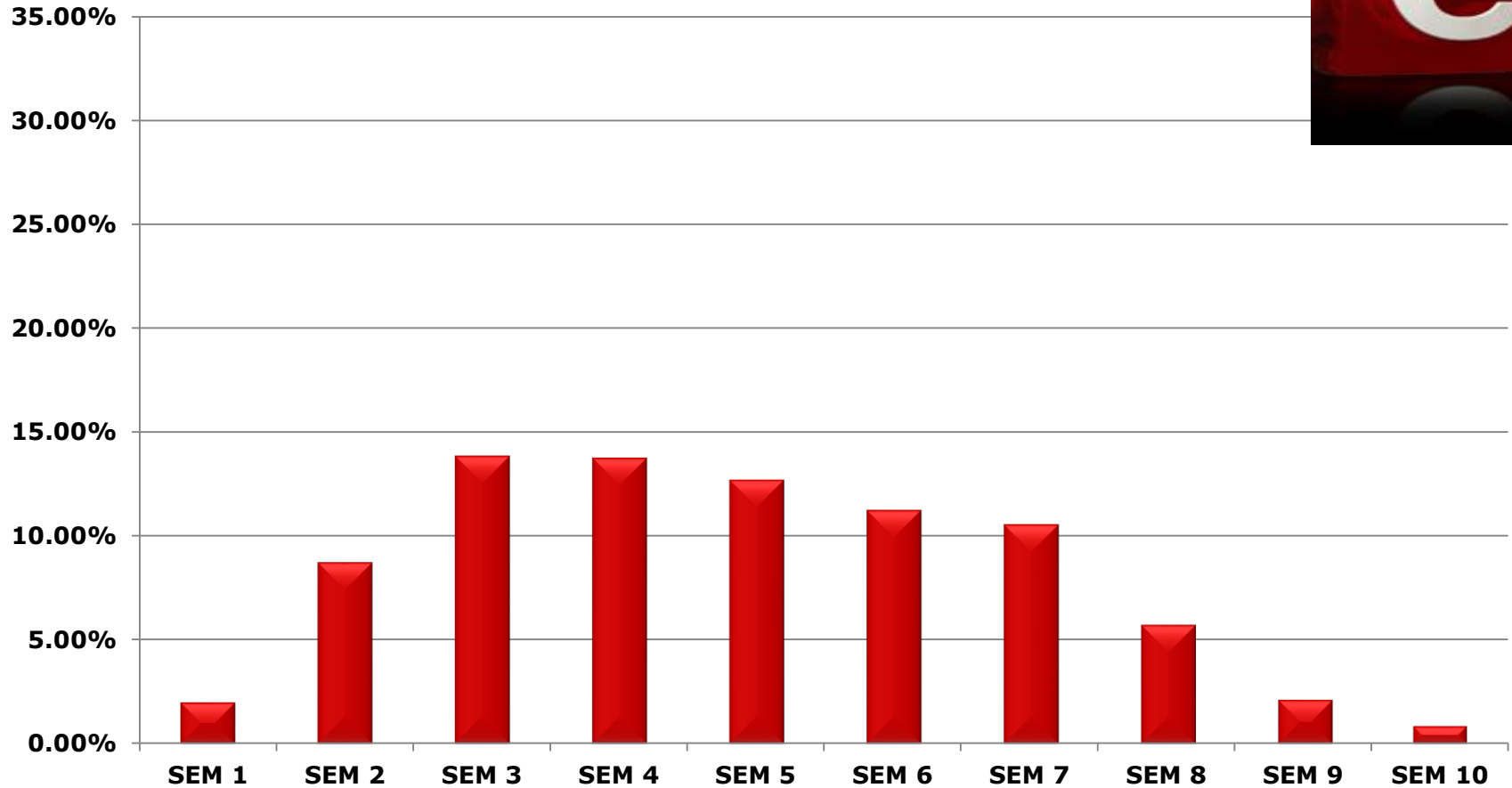
SABC 3



SEM VIEWING PROFILE... SABC NEWS INTERNATIONAL

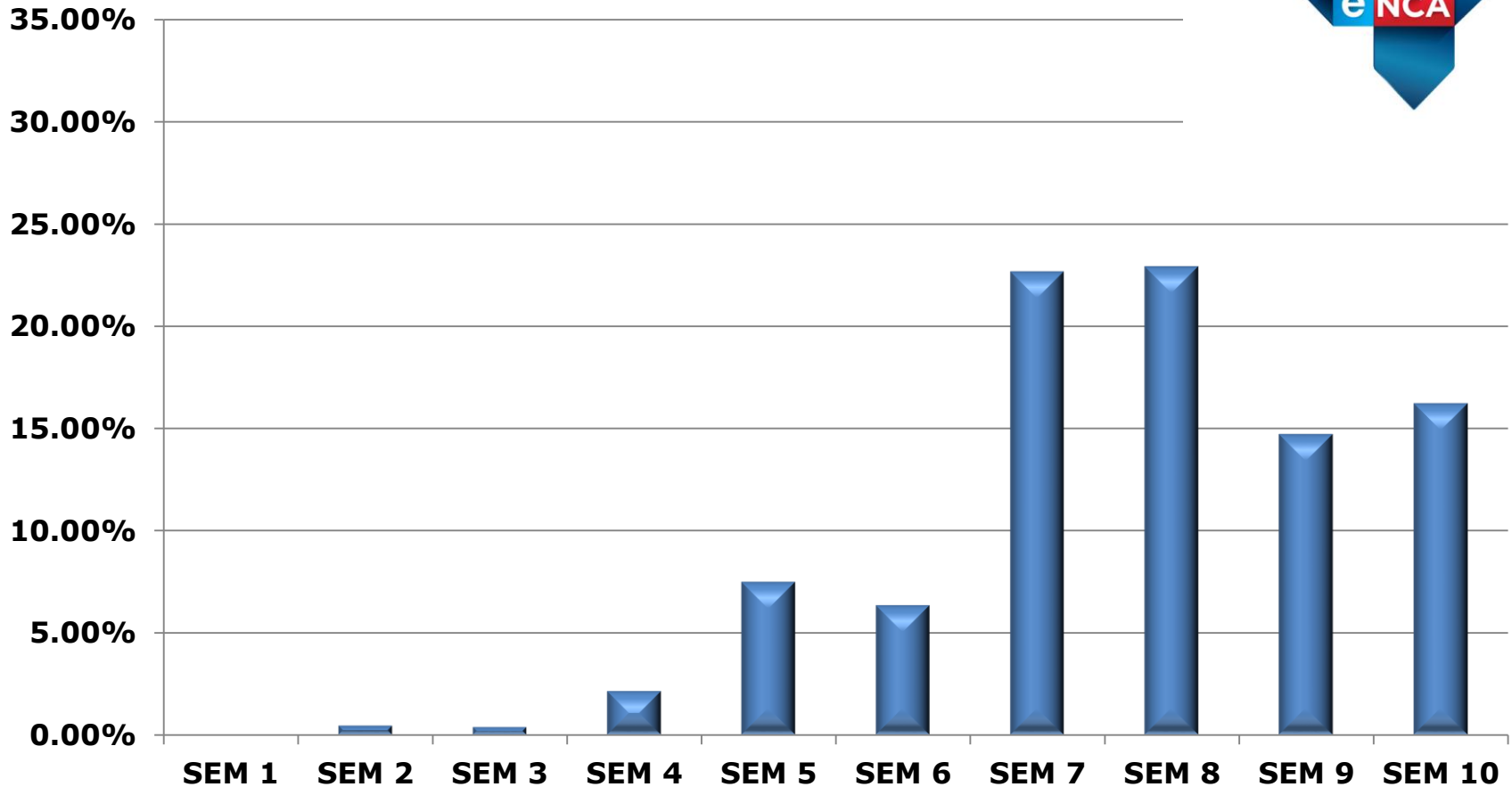


SEM VIEWING PROFILE... ETV

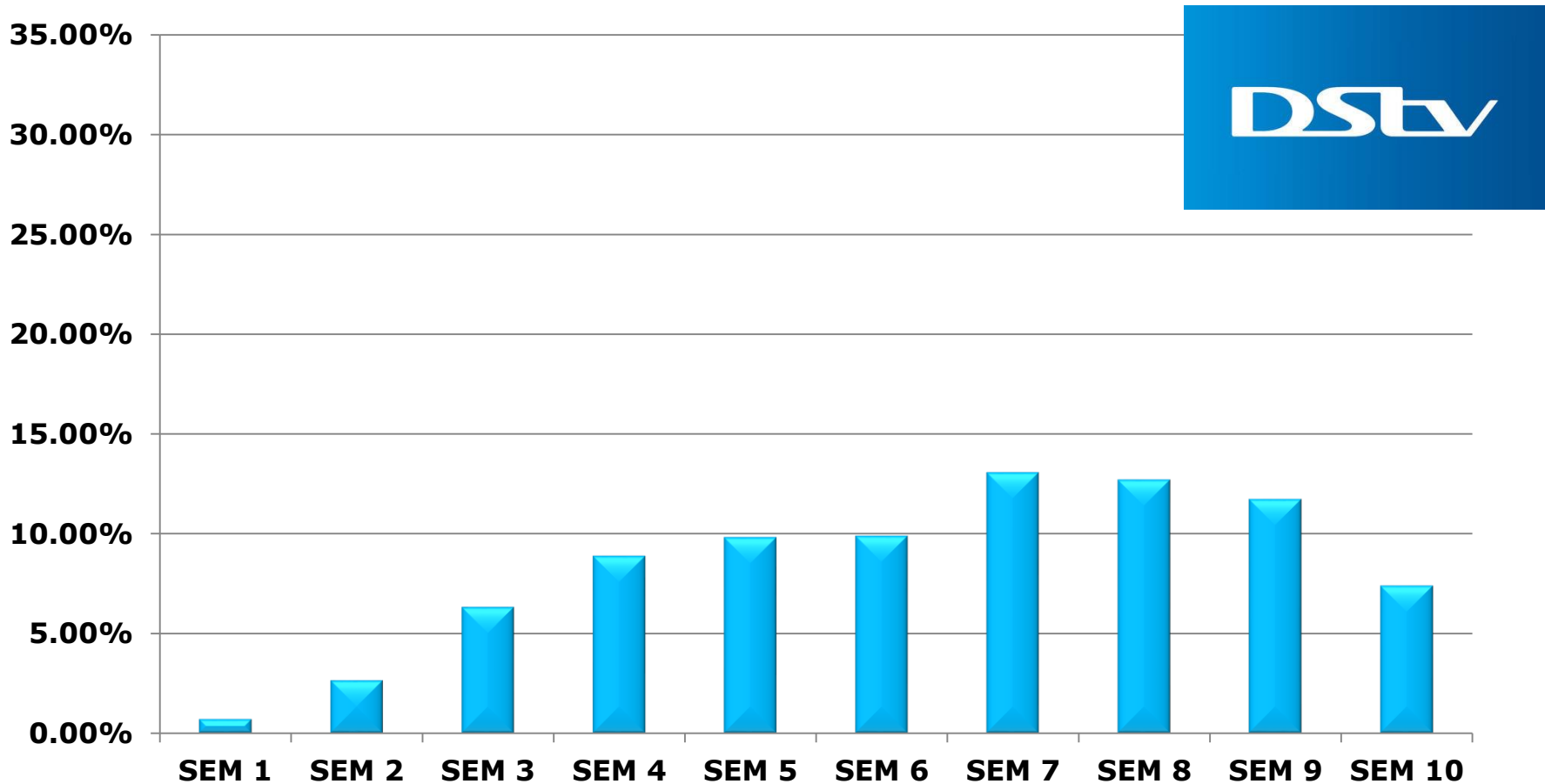


SEM VIEWING PROFILE...

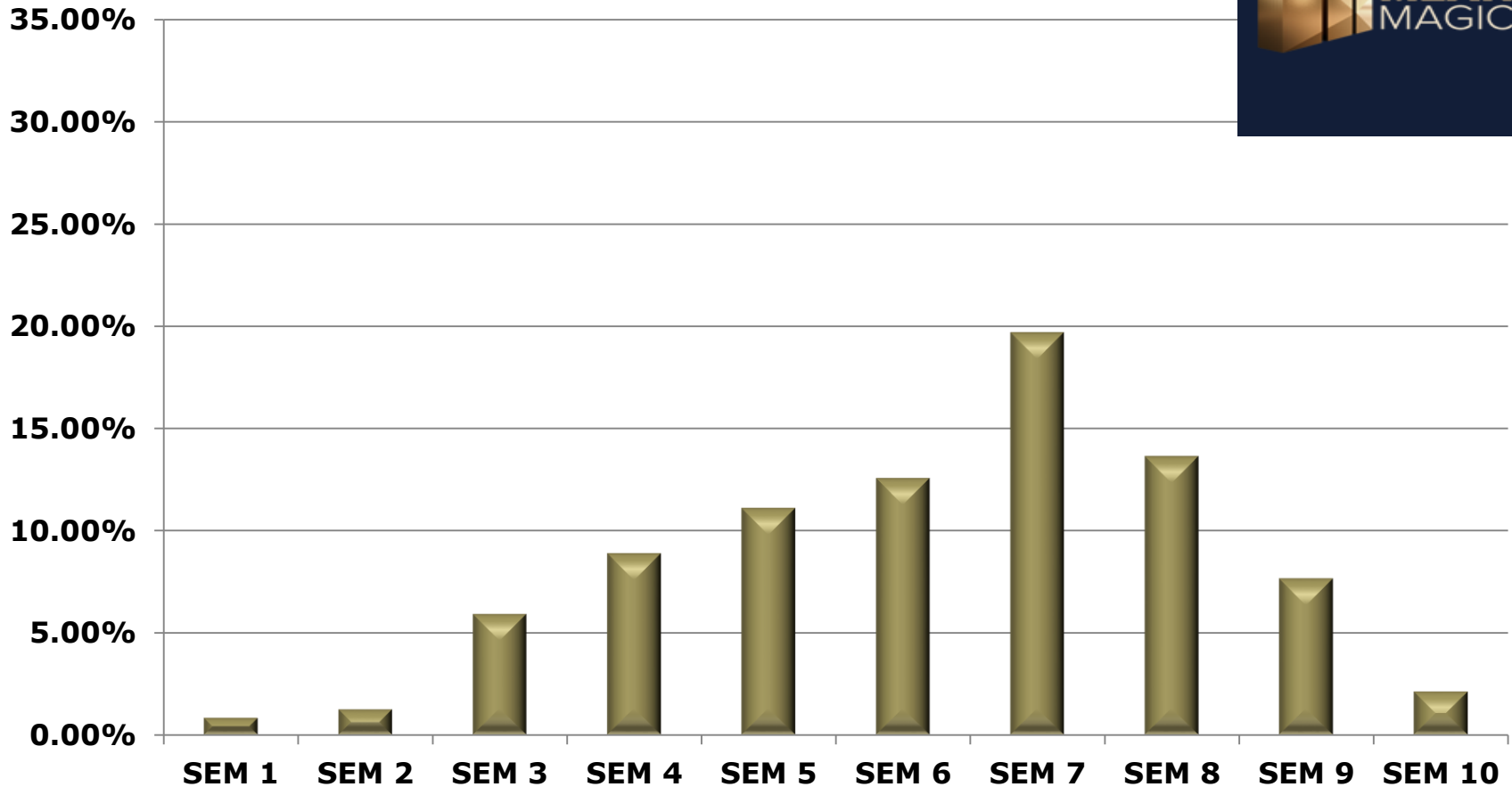
eNCA



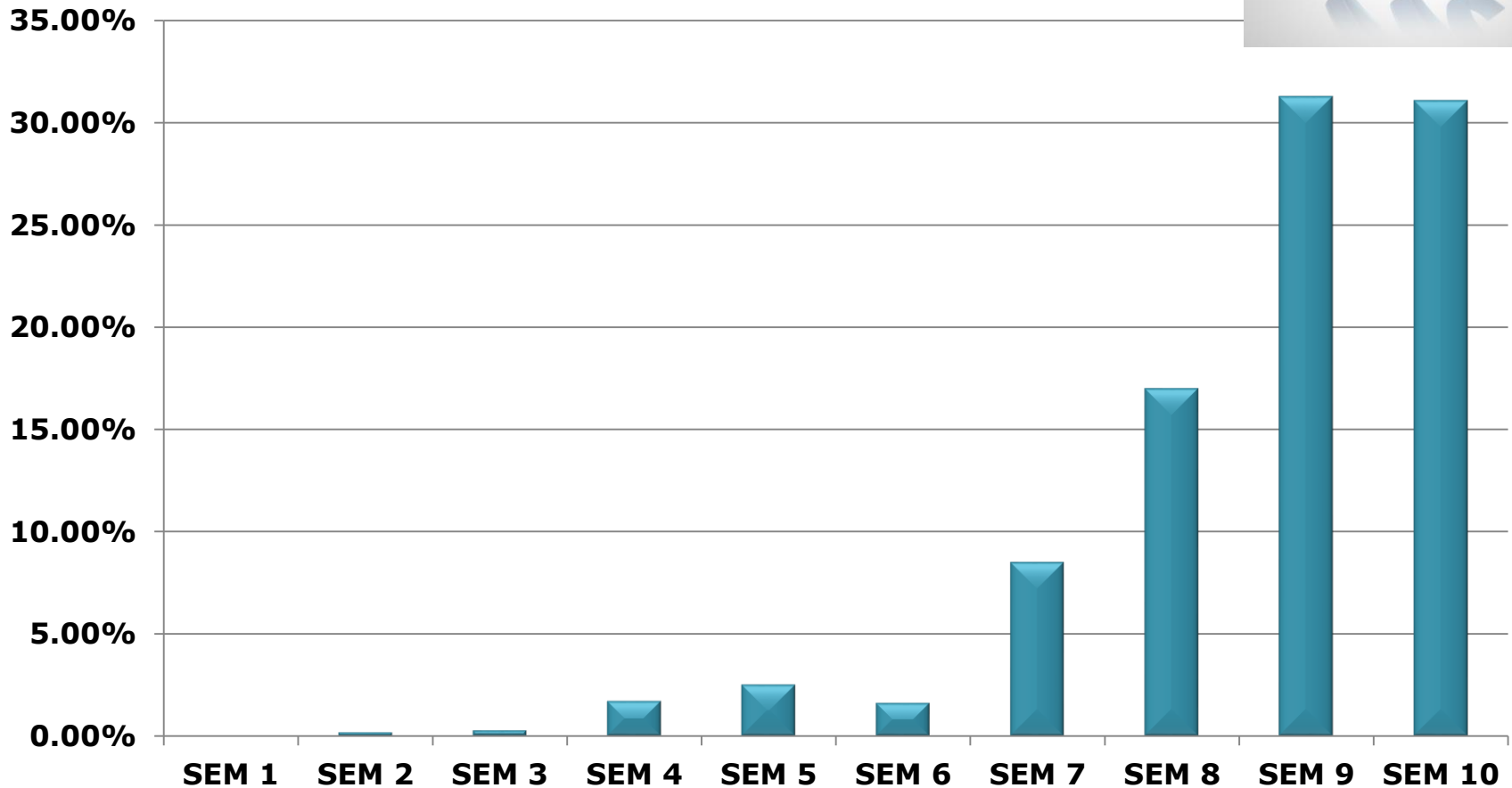
SEM VIEWING PROFILE... DSTV COMMERCIAL



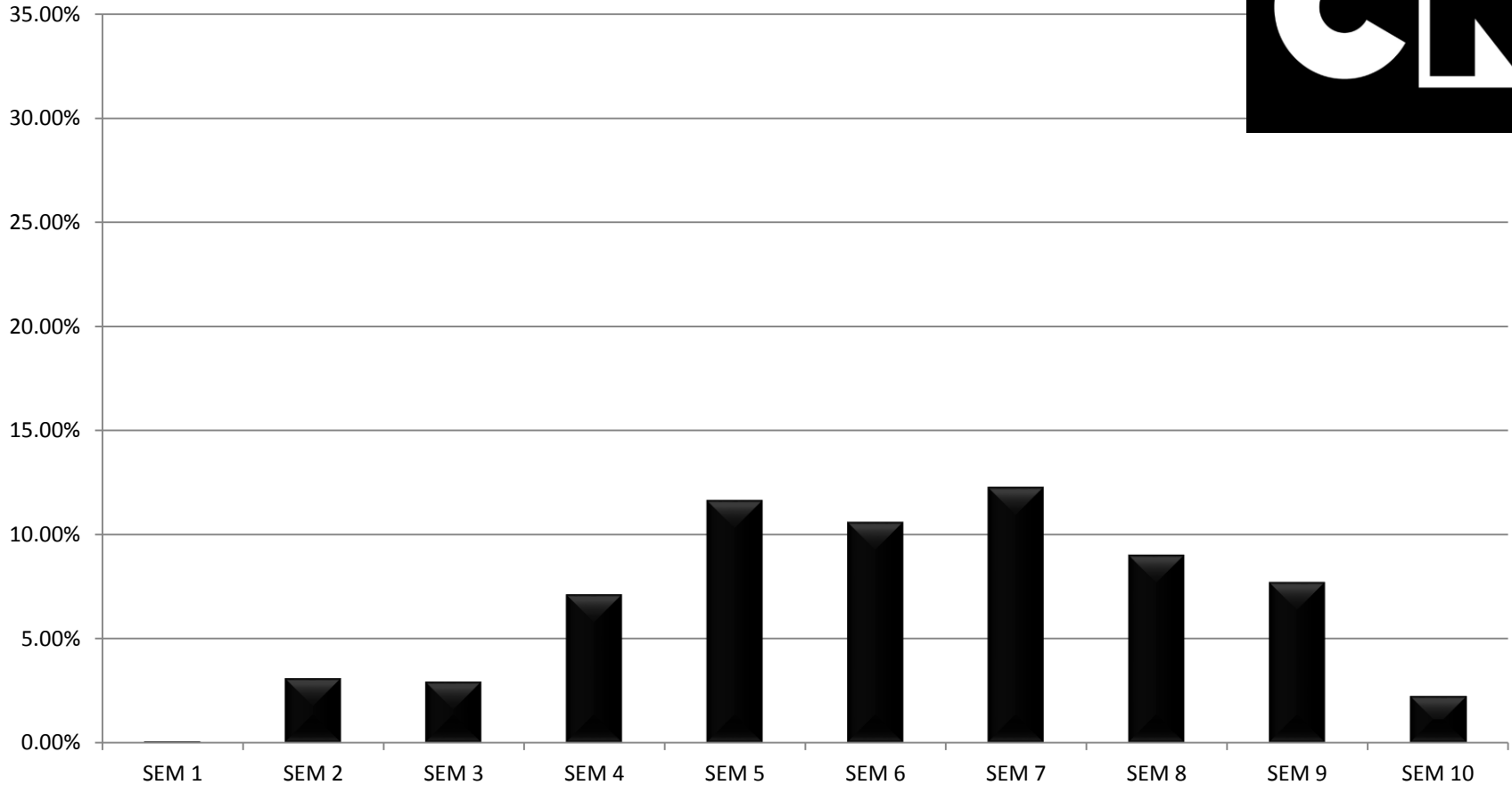
SEM VIEWING PROFILE... MZANZI MAGIC



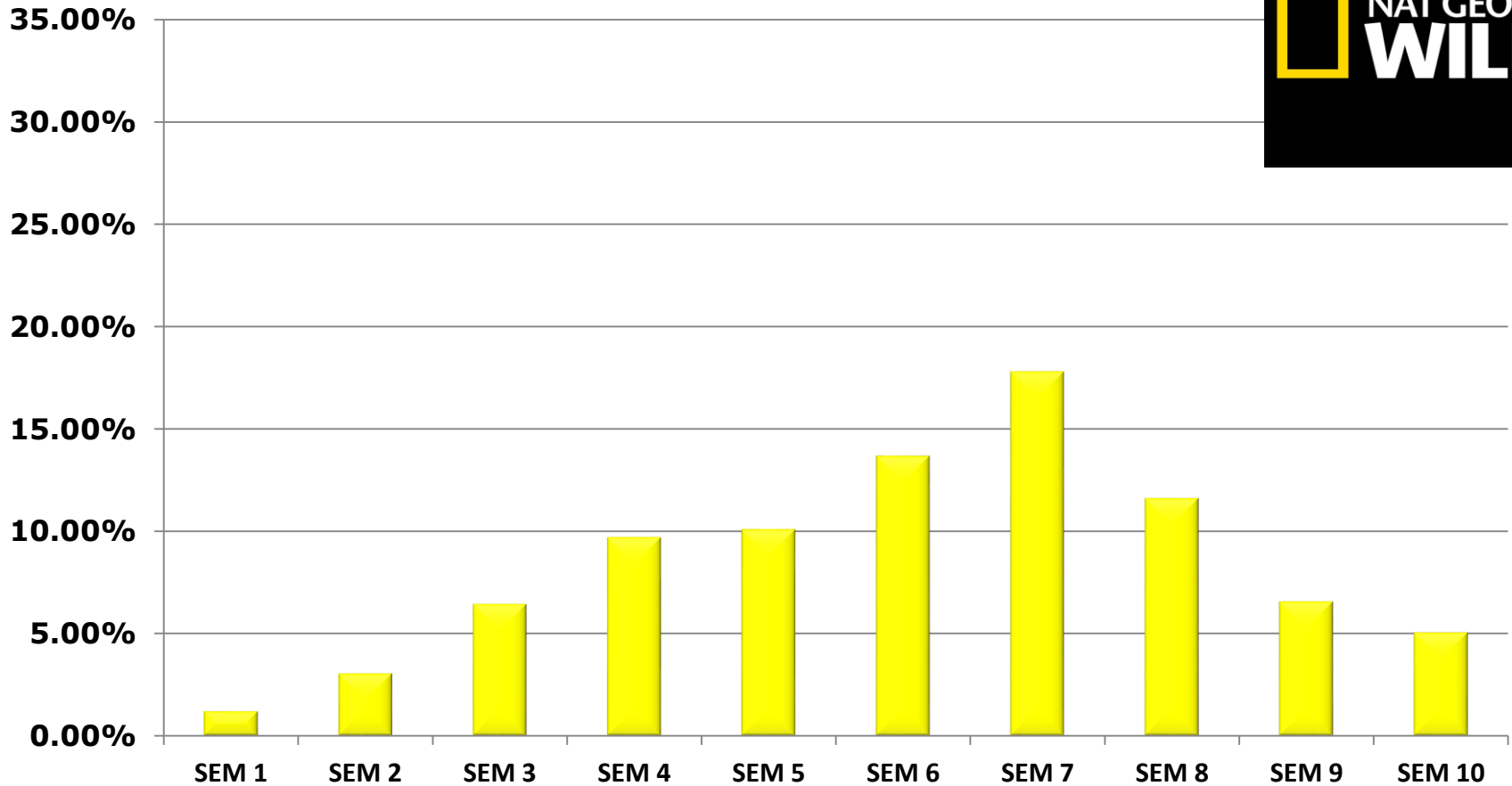
SEM VIEWING PROFILE... M-NET



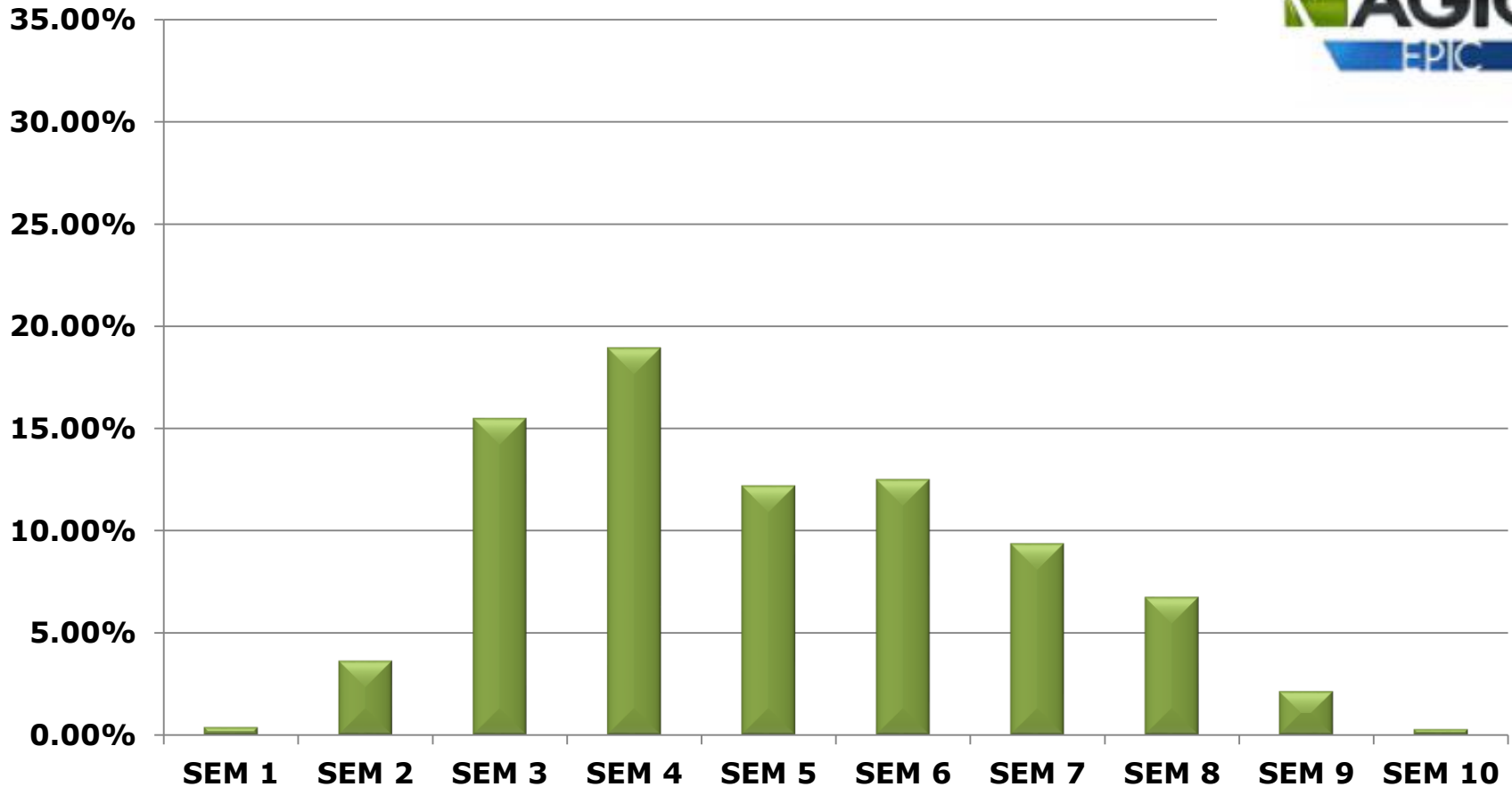
SEM VIEWING PROFILE... CARTOON NETWORK



SEM VIEWING PROFILE... NAT GEO WILD

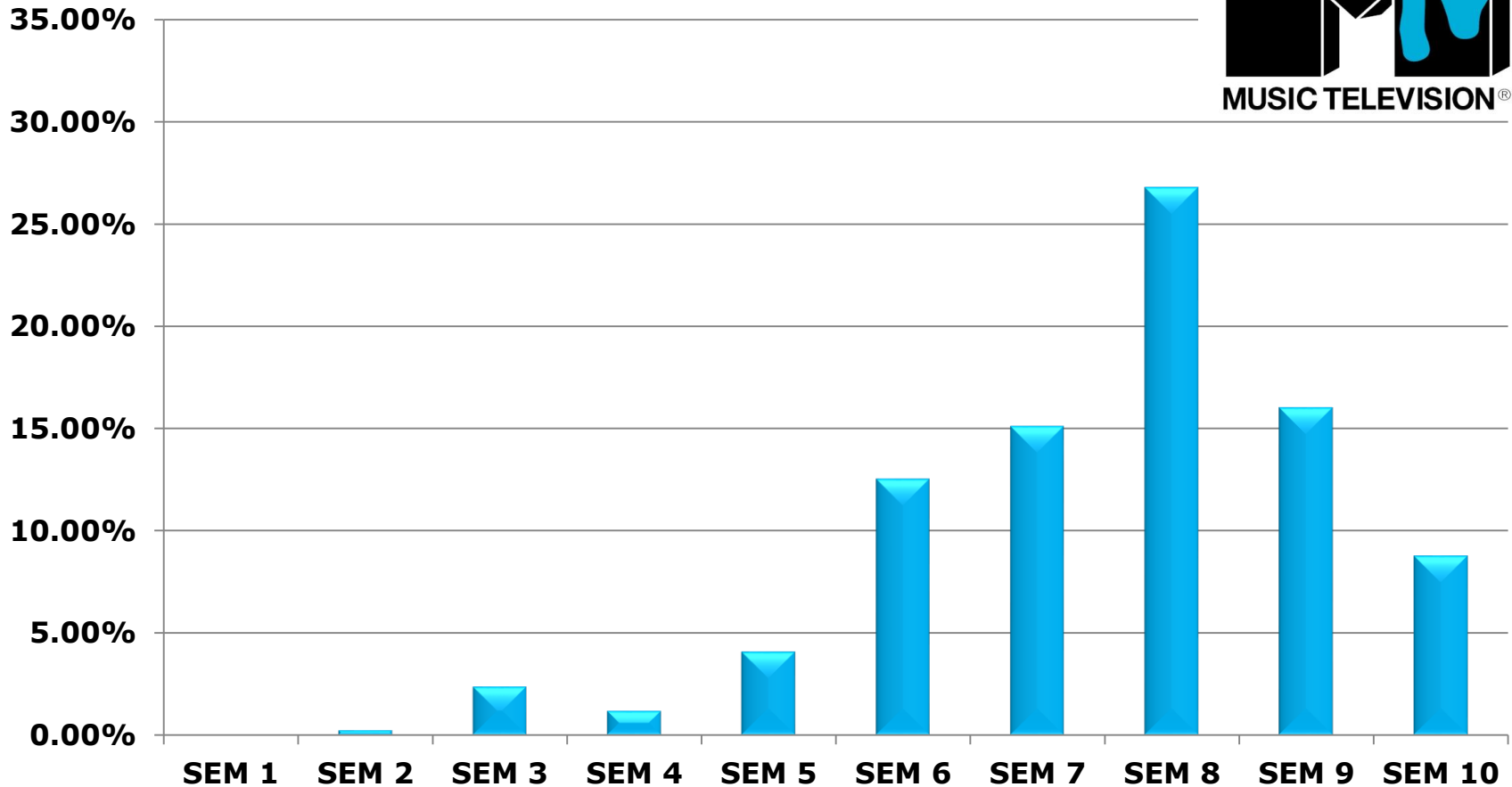


SEM VIEWING PROFILE... AFRICA MAGIC EPIC

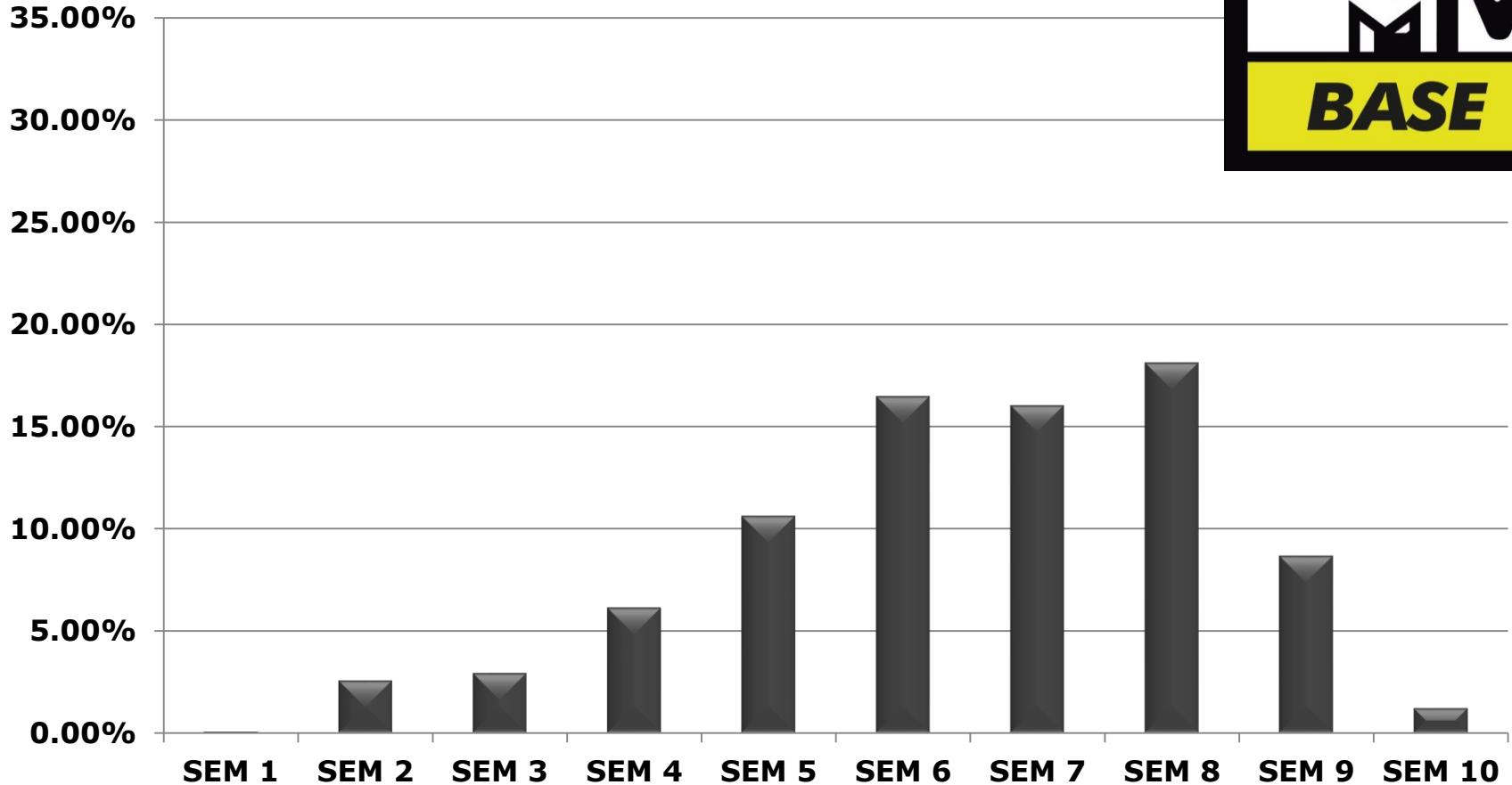


SEM VIEWING PROFILE...

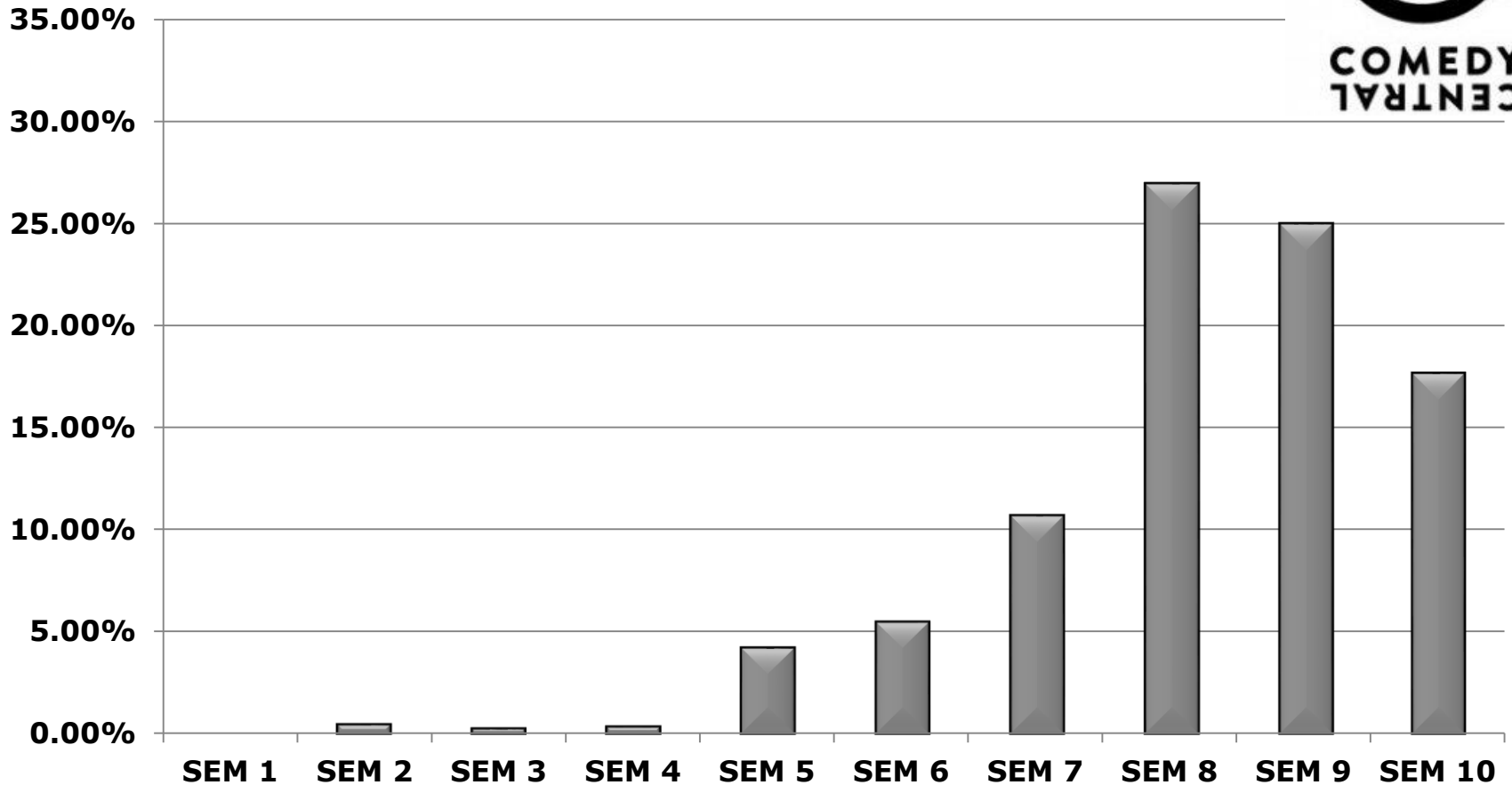
MTV



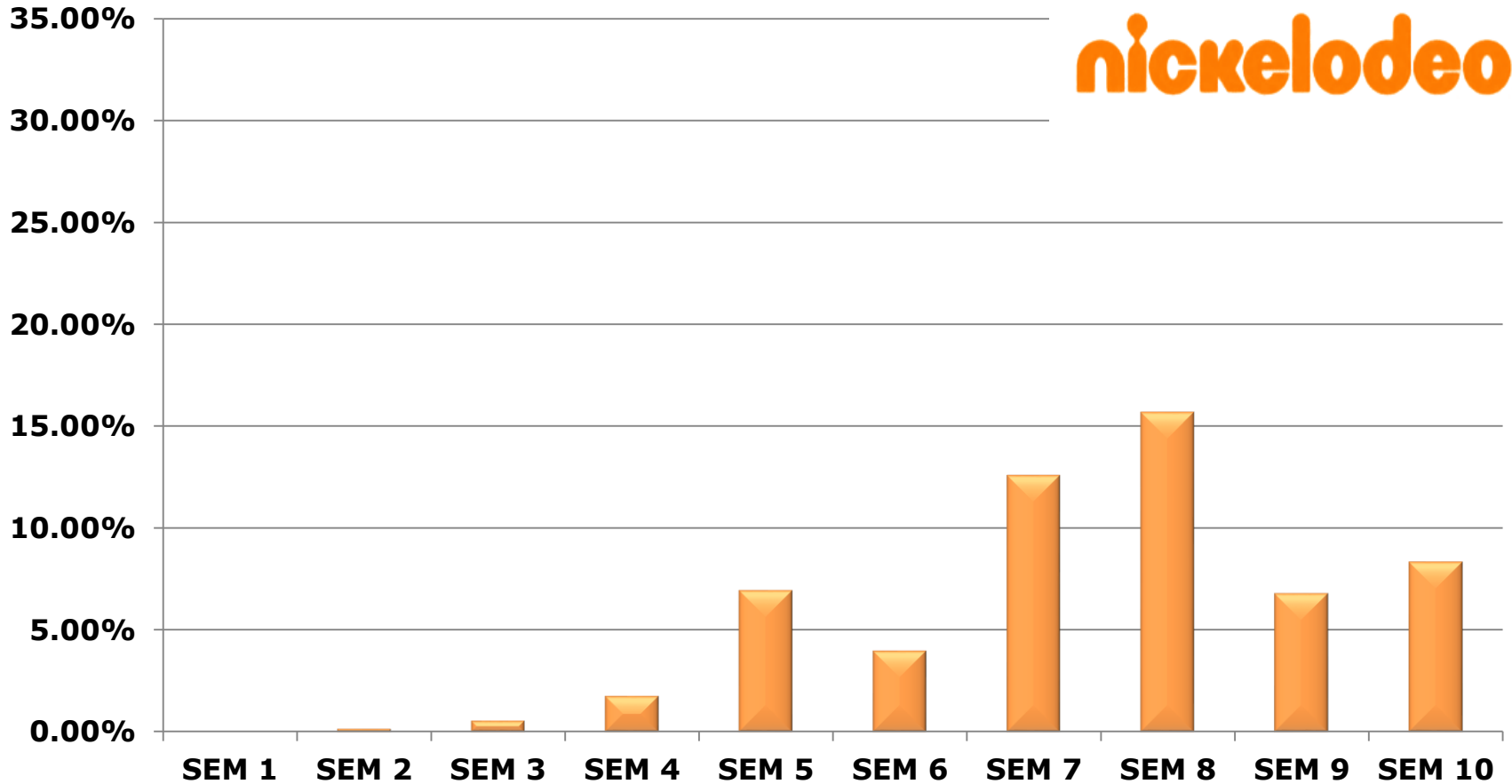
SEM VIEWING PROFILE... MTV BASE



SEM VIEWING PROFILE... COMEDY CENTRAL



SEM VIEWING PROFILE... NICKELODEON

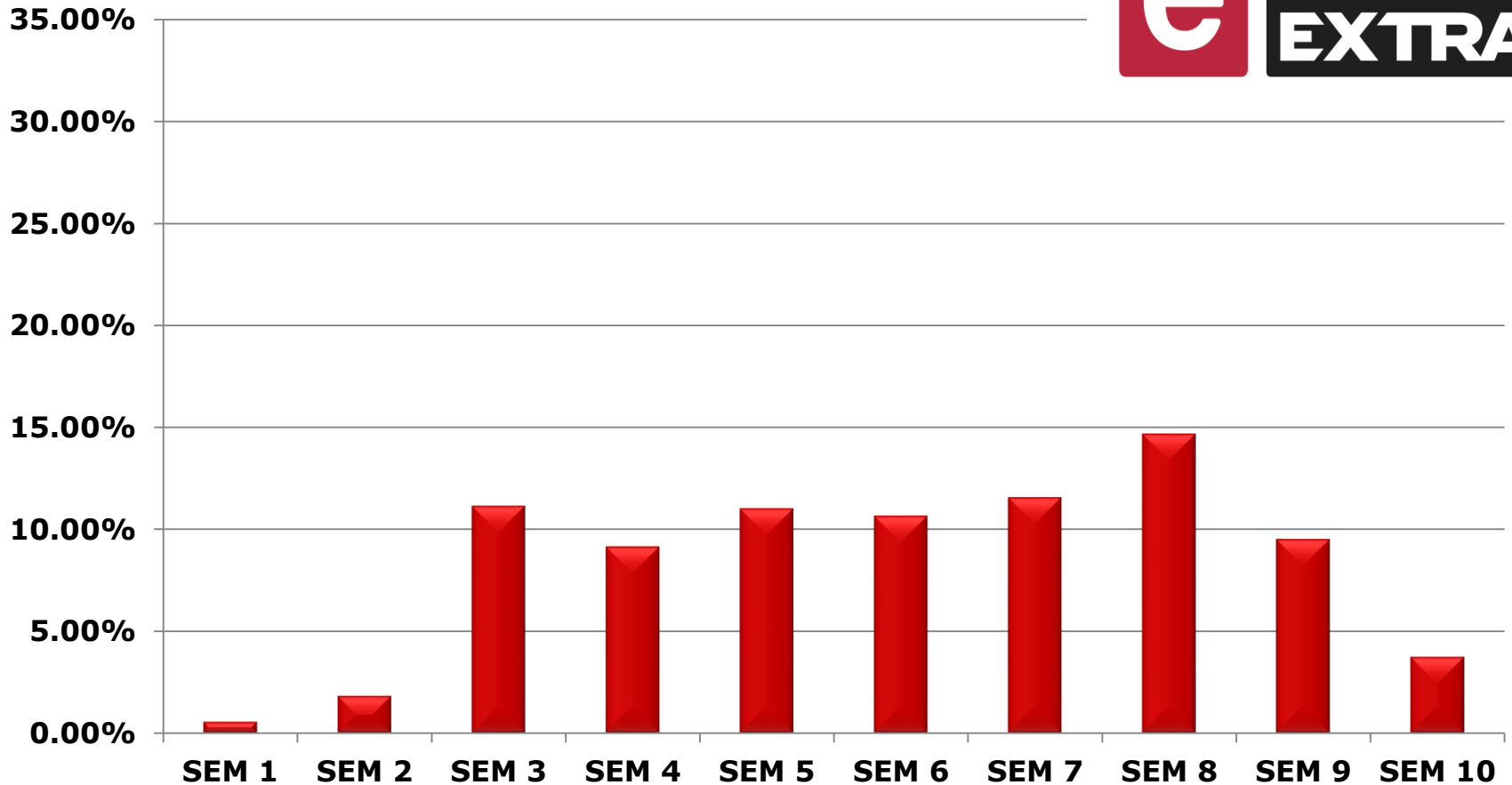


nickelodeon[®]



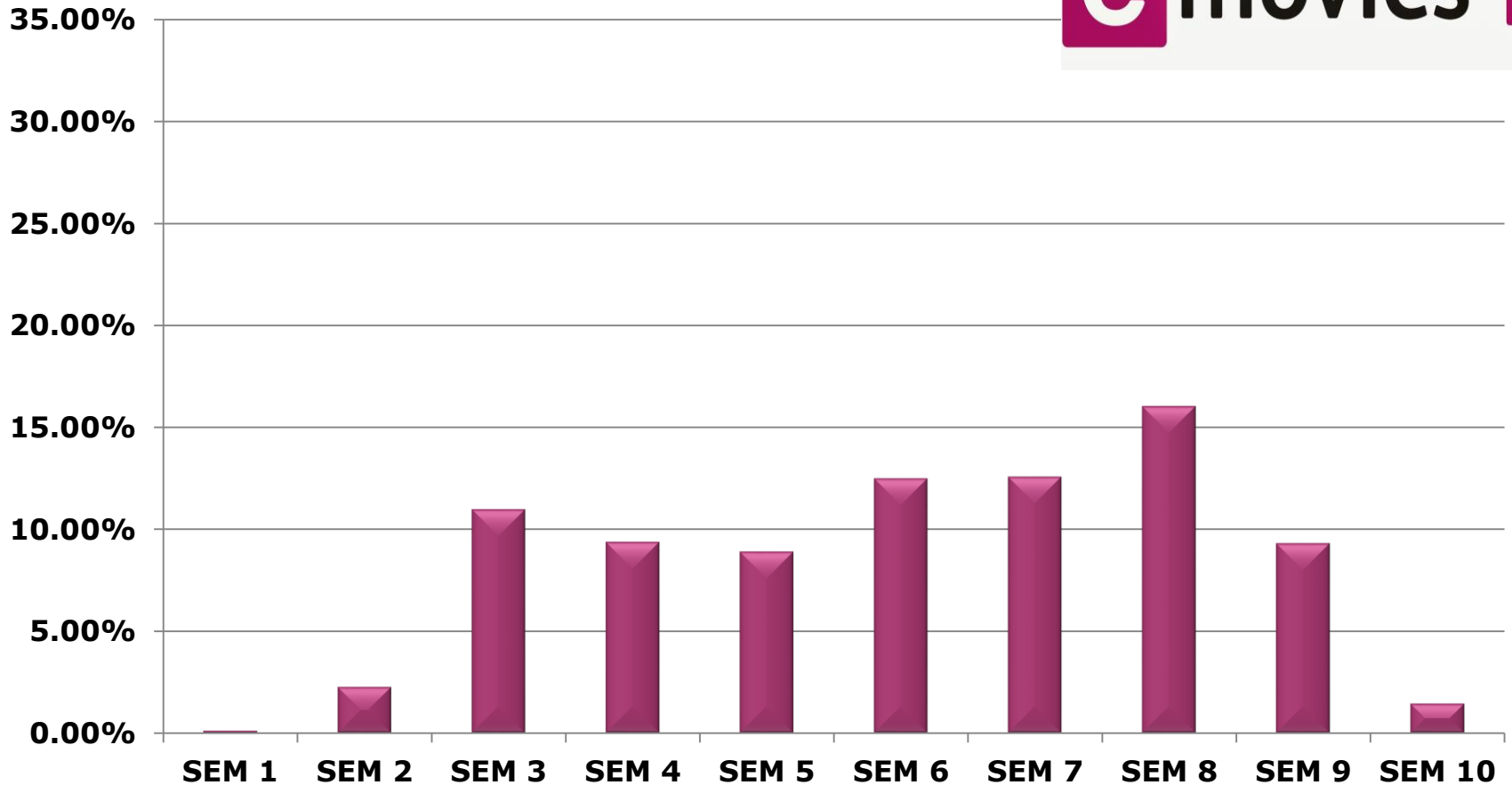
SEM VIEWING PROFILE...

eMOVIES EXTRA



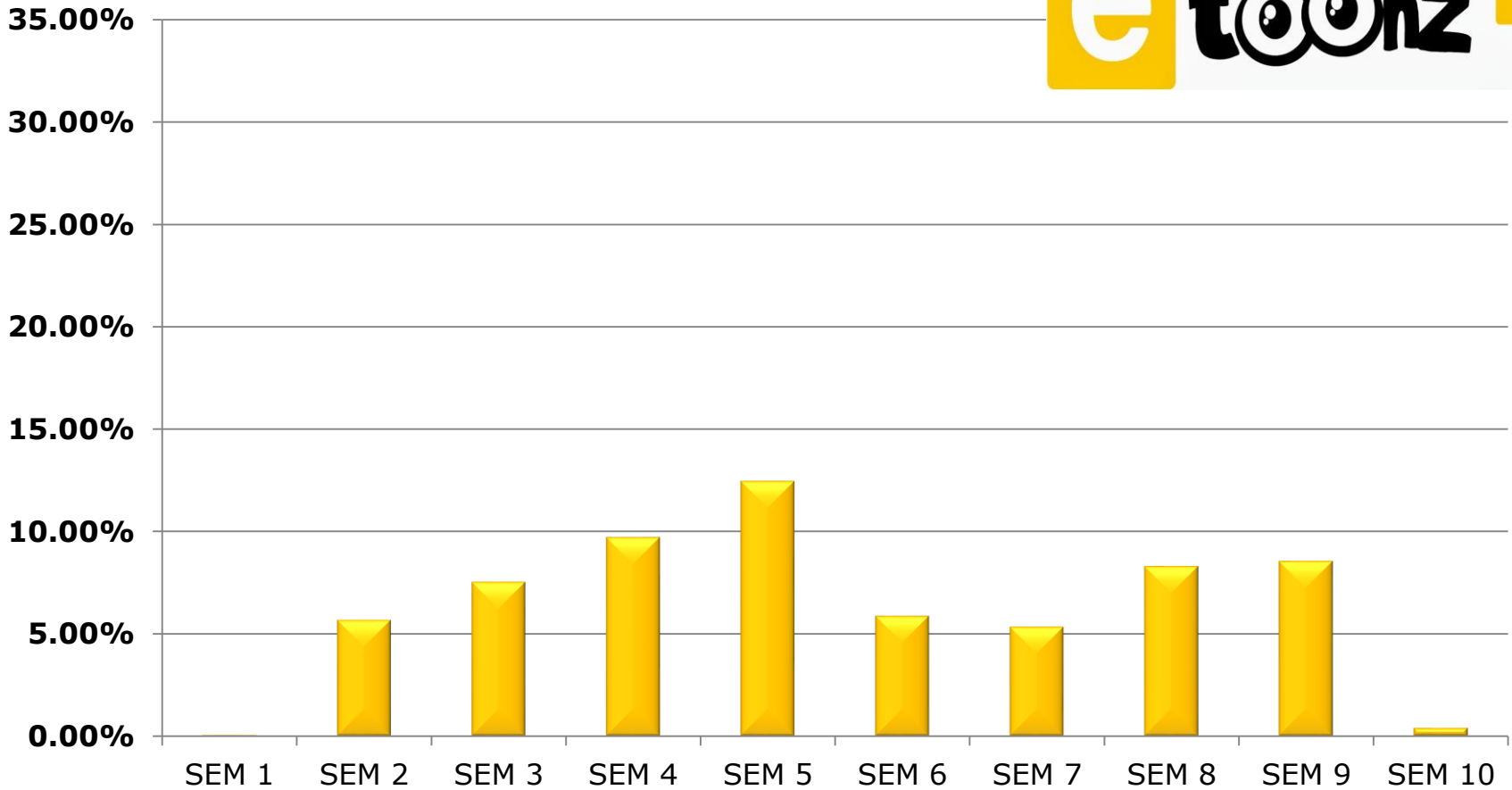
SEM VIEWING PROFILE...

eMOVIES+



SEM VIEWING PROFILE...

eTOONZ



BRC TAMS DASHBOARD

TOTAL TV

SABC

eTV

DStv



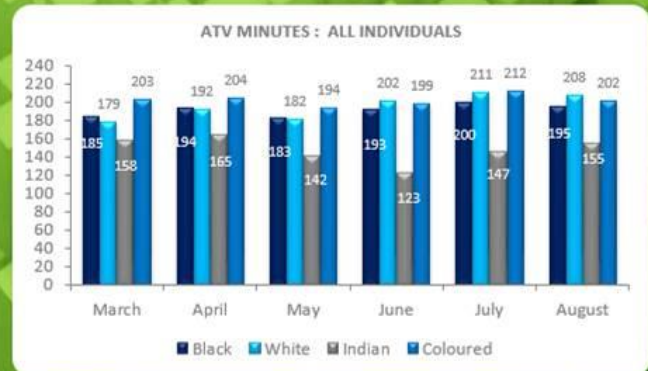
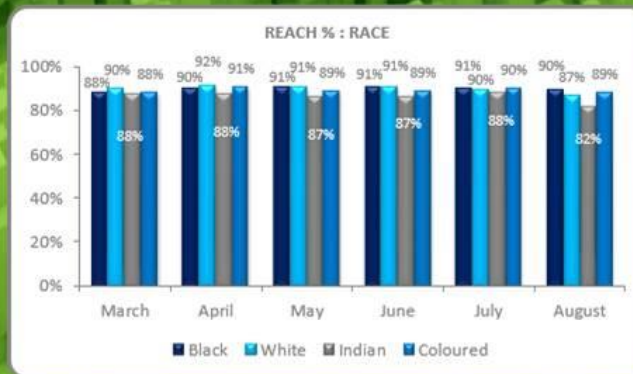
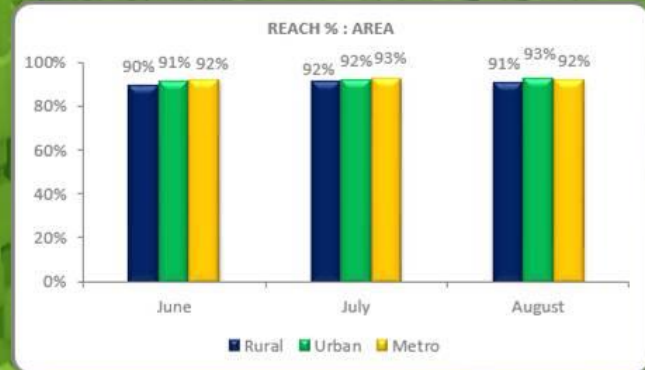


TOTAL TV

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