

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)

SEGMENTATION MODEL (SEM)

PRODUCTS & BRANDS (2018)



ES SAMPLE...

CLOSELY REFLECTS THE SA POPULATION

ES (unweighted)

IHS Population



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

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



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

Source: IHS Individual Population estimates Jun 2016



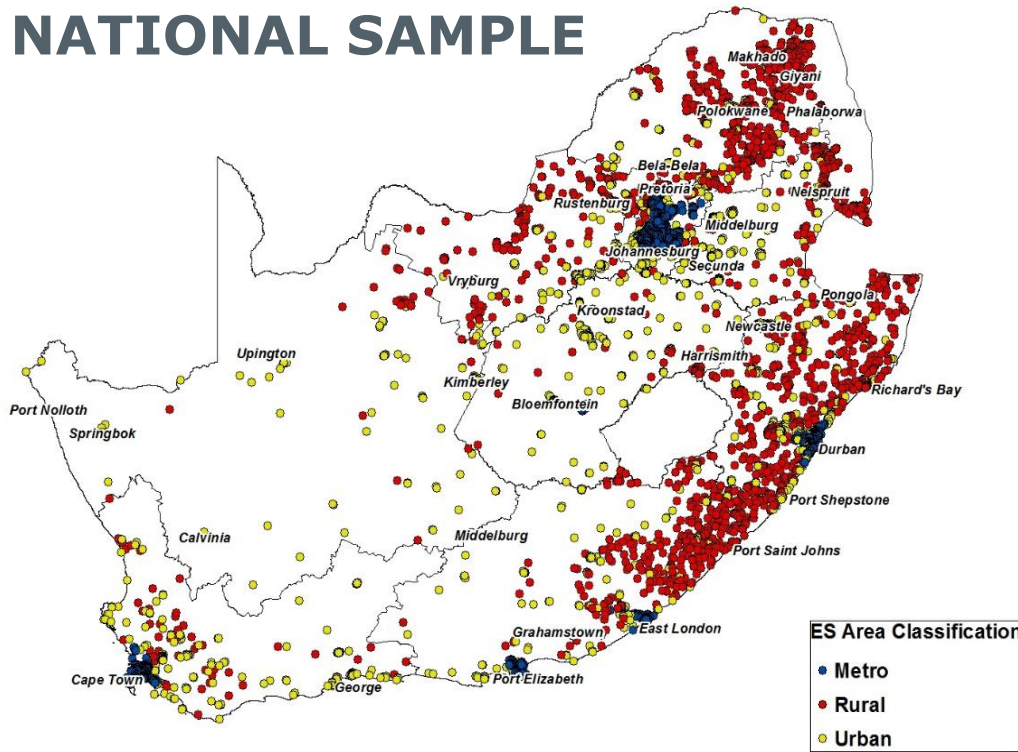
WEIGHTING EFFICIENCY...

HOUSEHOLD 93.8%
INDIVIDUAL 84.7%



ES – VITAL SIGNS...

NATIONAL SAMPLE



25,082 sample

JUL 2016 – JUN 2017



41% Metro



28% Urban



31% Rural

Universe: Population aged 15+
39.5 million





DEMOGRAPHIC LANDSCAPE...

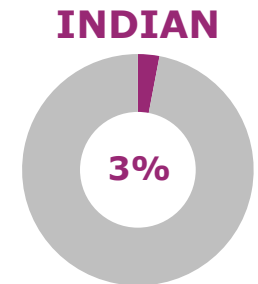
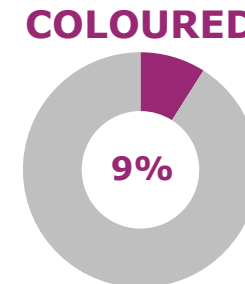
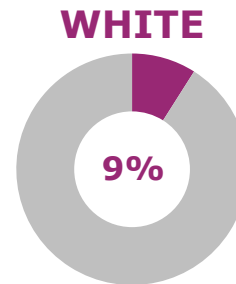
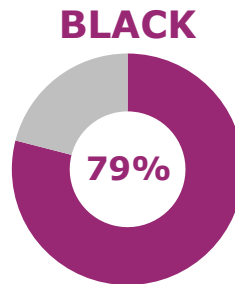
DEMOGRAPHIC LANDSCAPE...



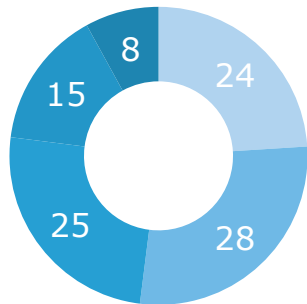
15.8 million
HOUSEHOLDS



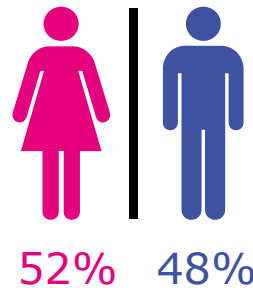
39.5 million
ADULTS 15 YEARS+



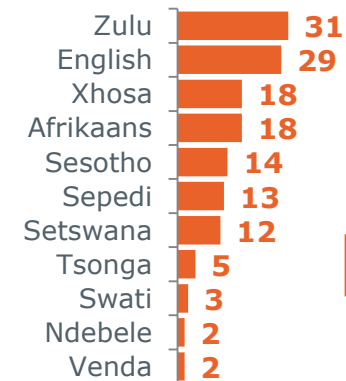
AGE %



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

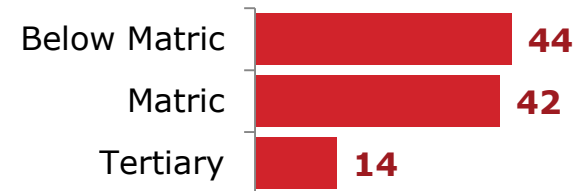
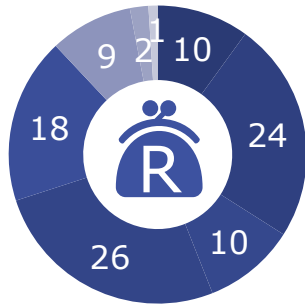


LANGUAGES SPOKEN IN HOME %

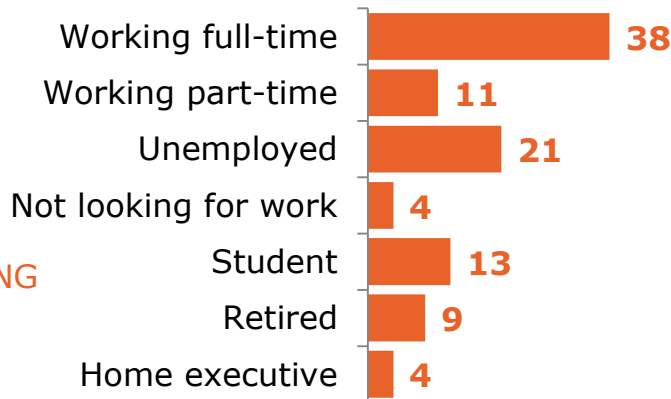


DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,497



49% WORKING
51% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



45%
CHILDREN



55%
NONE





GEOGRAPHIC LANDSCAPE...

GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



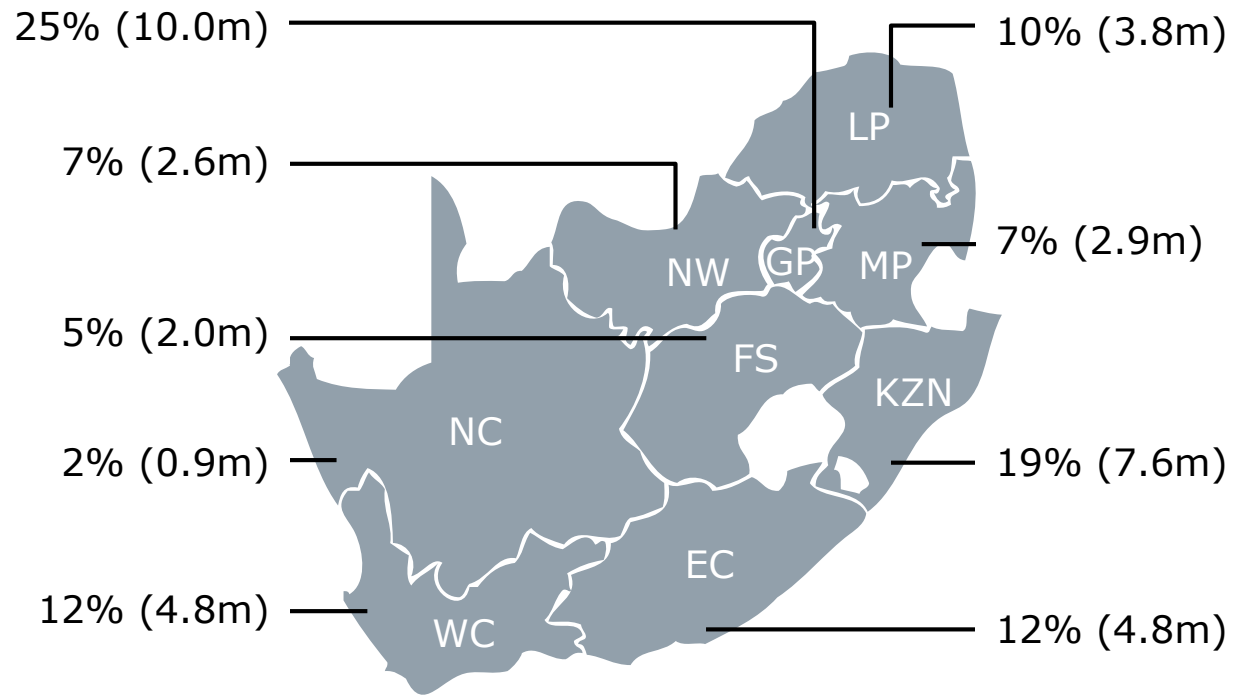
41%
(16.1m)



28%
(11.2m)



31%
(12.1m)





PRODUCTS AND LIFESTYLES...

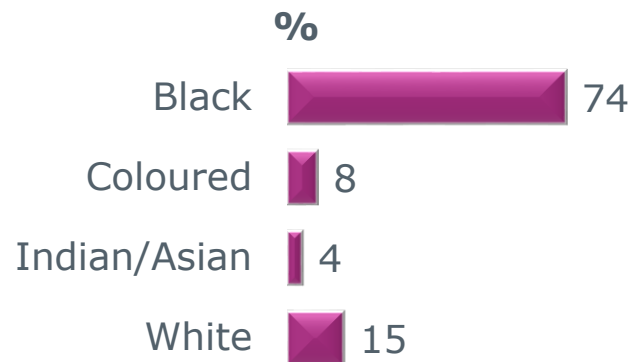
LIFESTYLES...

Past week destinations



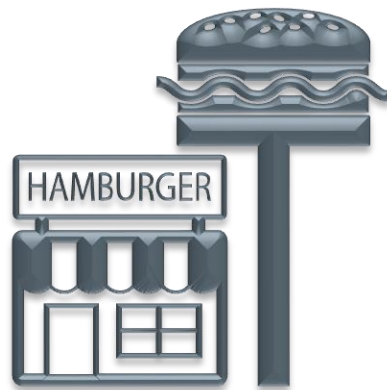
48%

Shopping mall



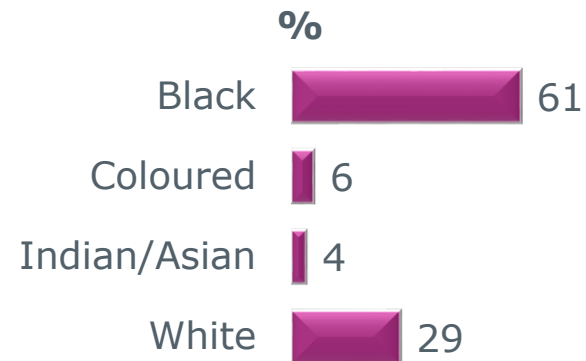
LIFESTYLES...

Past week destinations



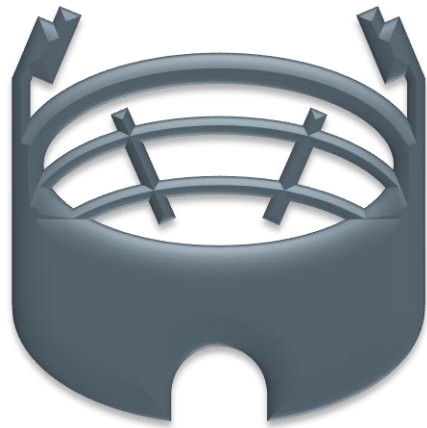
11%

Restaurant



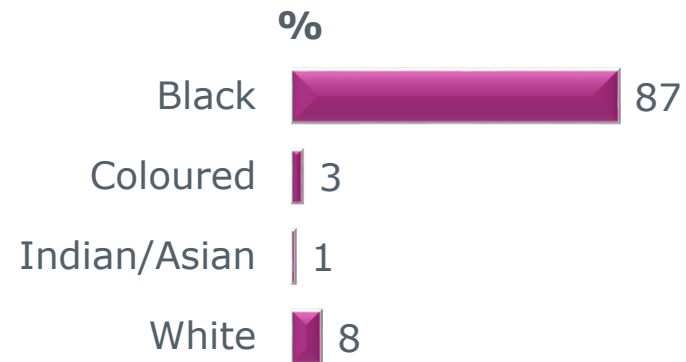
LIFESTYLES...

Past week destinations



3%

Stadium

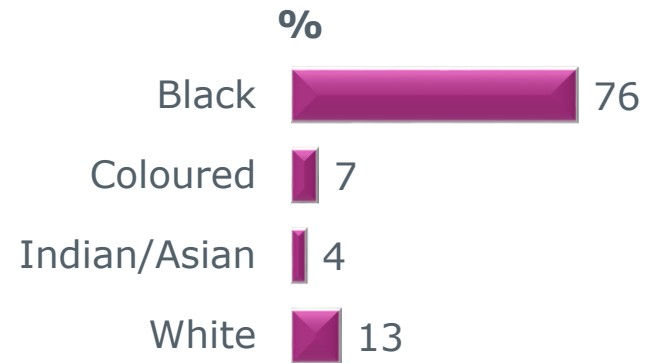


PRODUCT...



38%

Home theatre system in home

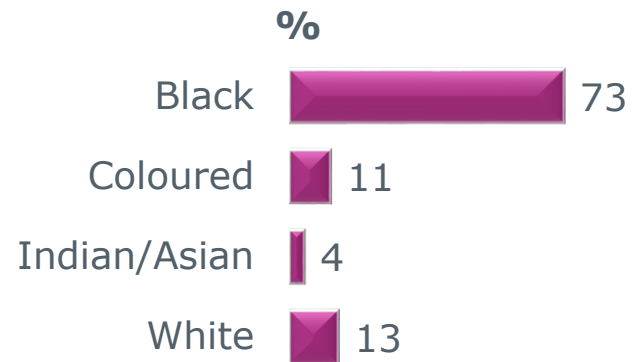


PRODUCT...

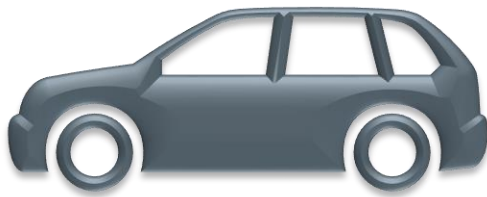


69%

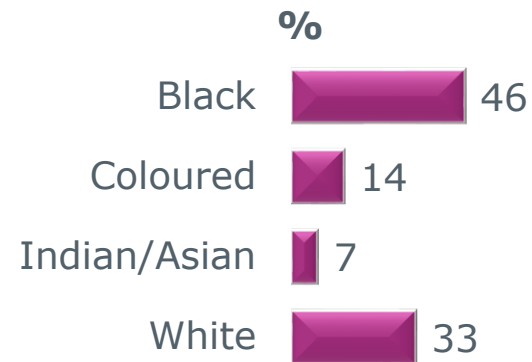
Microwave oven in home

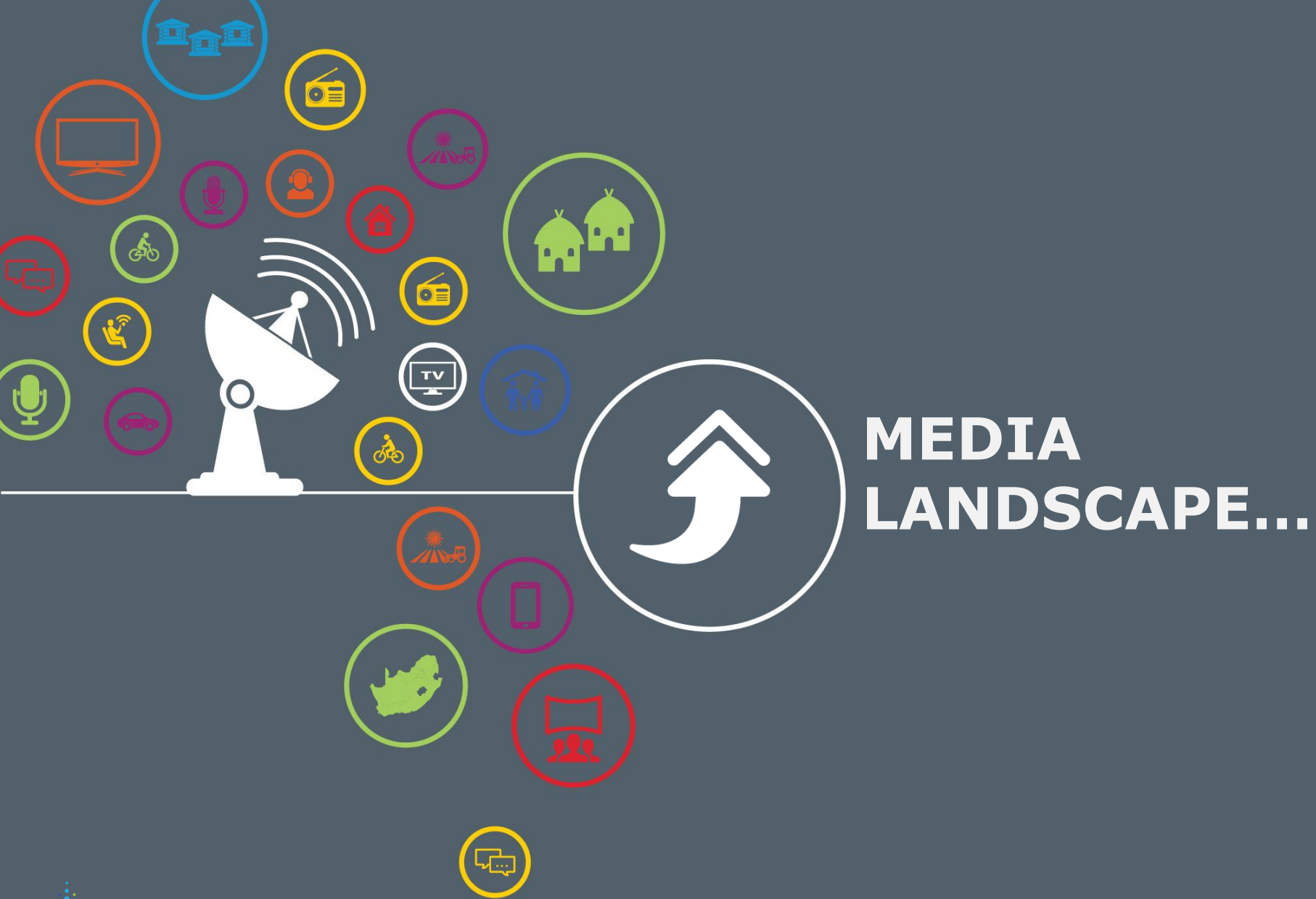


PRODUCT...



25%
Motor car in home





MEDIA LANDSCAPE...

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

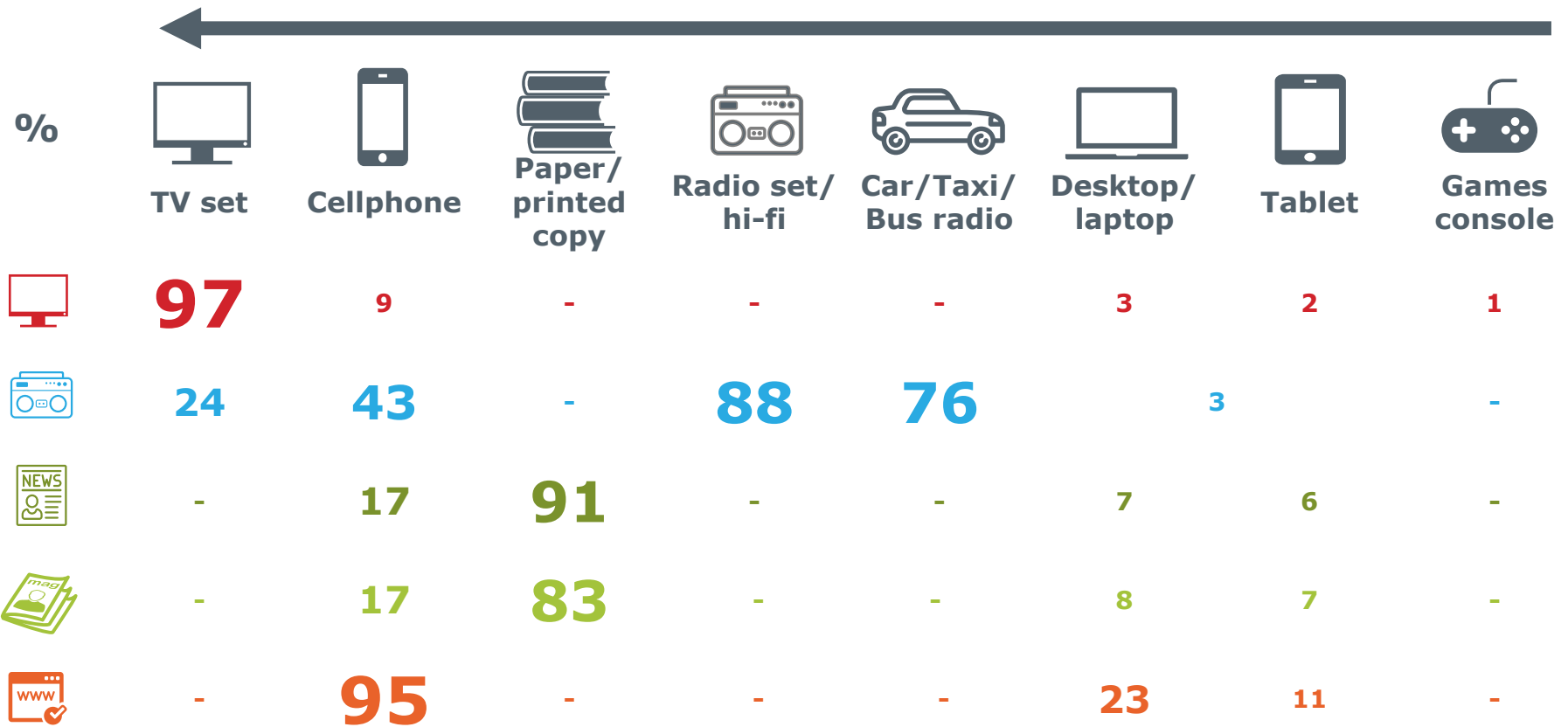


Profiling

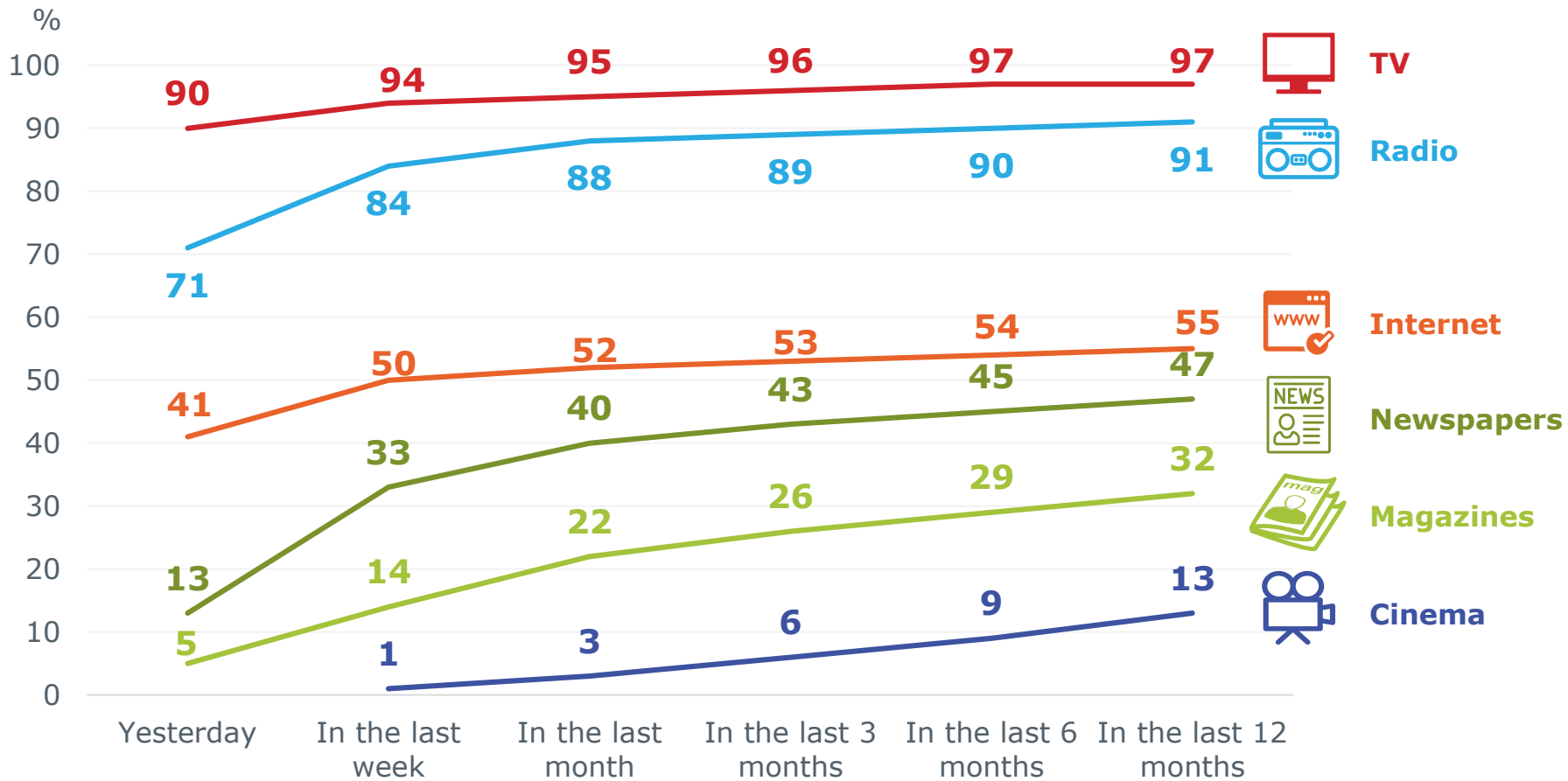
- Demographics
- Geographics
- Lifestyles
- Products
- SEM variables



P4WEEK MEDIA LANDSCAPE DEVICE...



MEDIA LANDSCAPE REACH...





SNAPSHOTS BY MEDIA TYPE...



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**

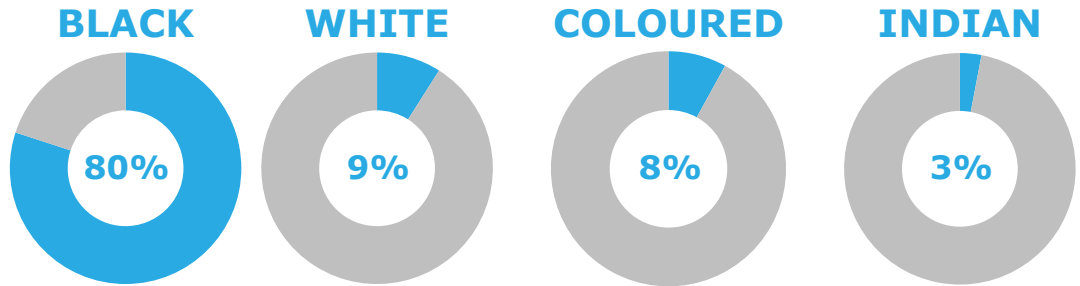




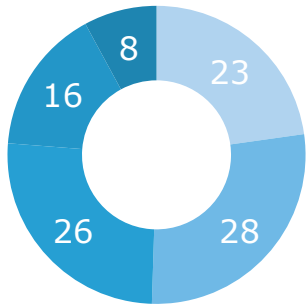
P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...



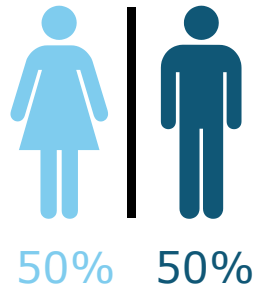
33.3 million
ADULTS 15 YEARS+



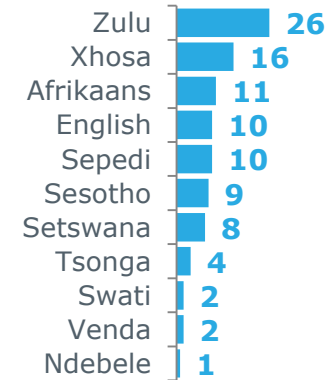
AGE %



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



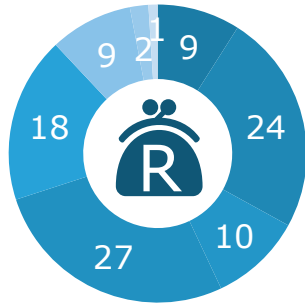
HOME LANGUAGE %



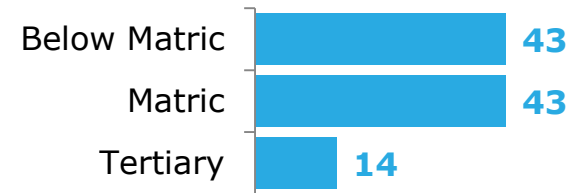


P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,810

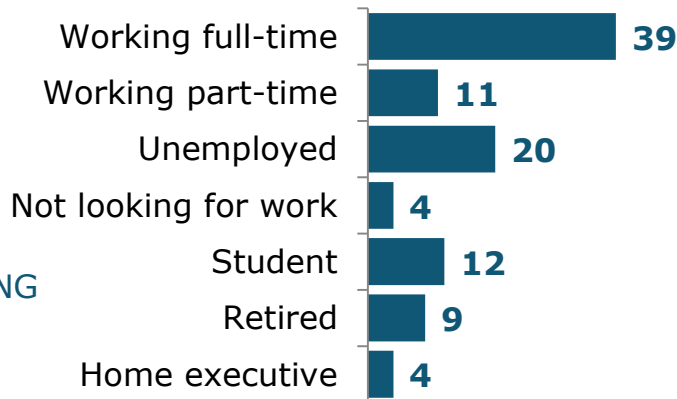


- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



50% WORKING

50% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



45%
CHILDREN



55%
NONE





P7D RADIO LISTENERS GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



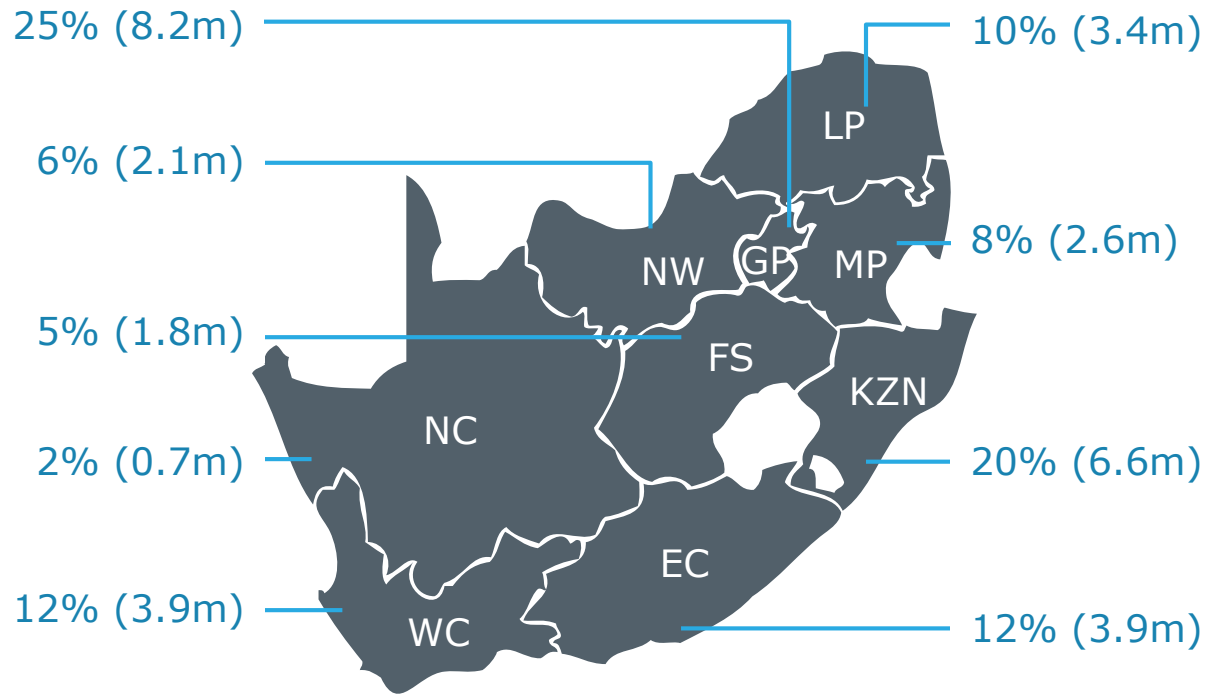
41%
METRO



28%
URBAN

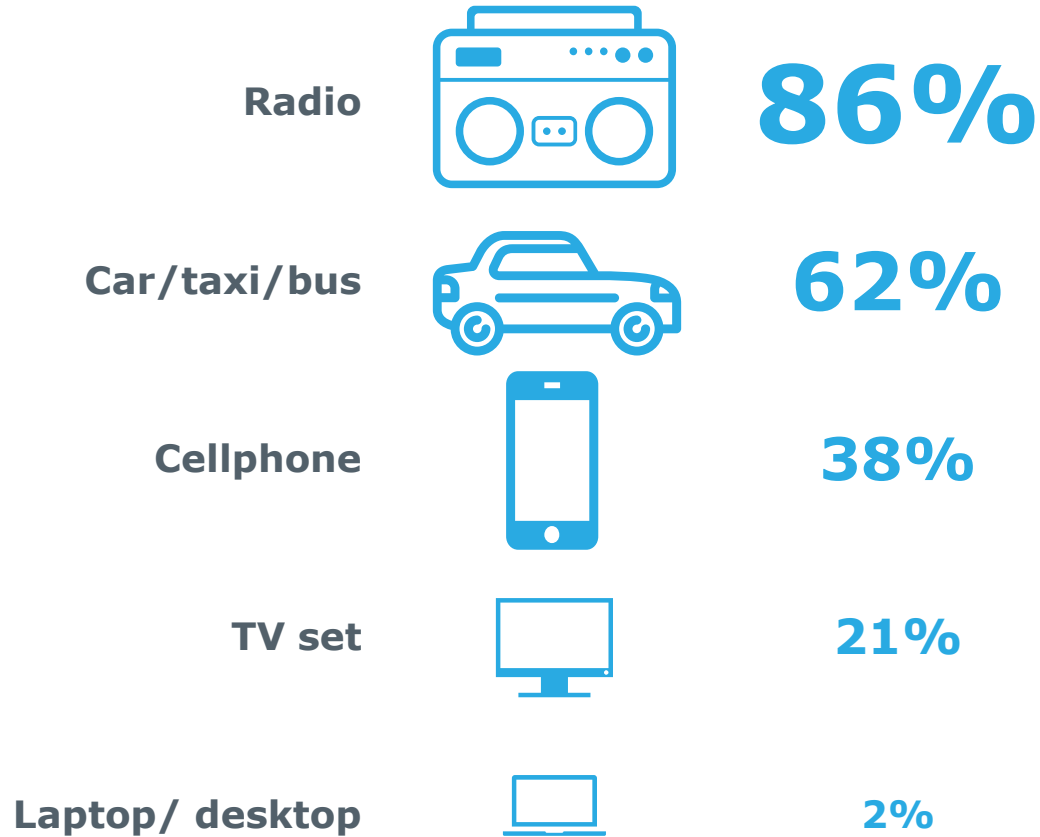


31%
RURAL



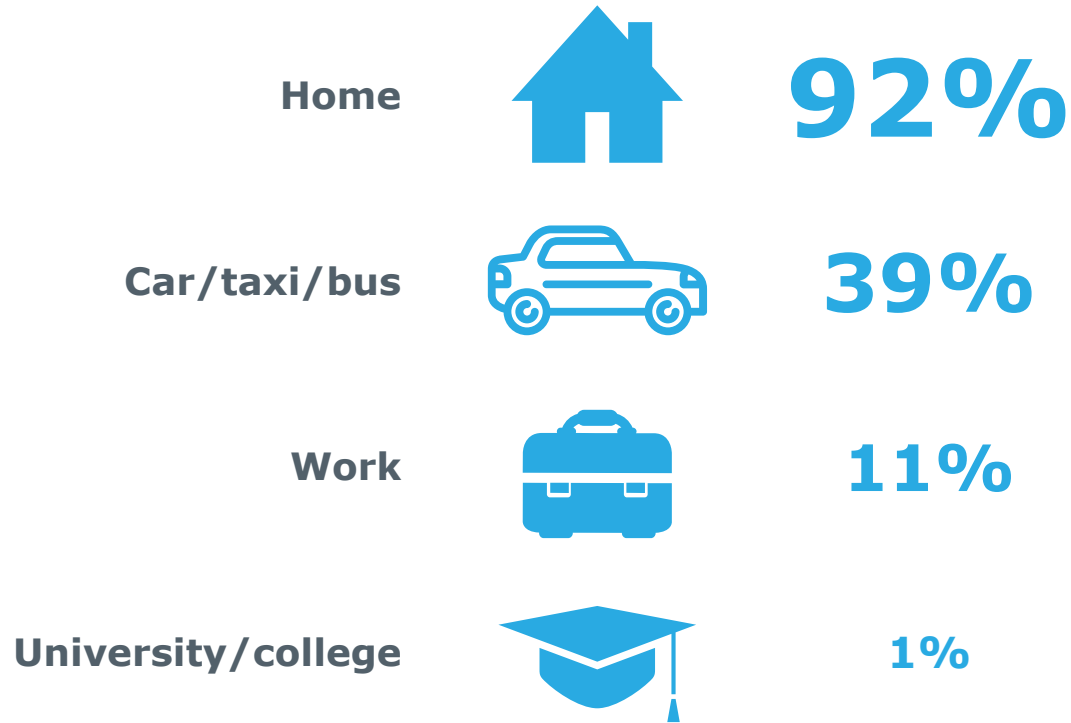


LISTENING DEVICE...





LISTENING LOCATION...





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**

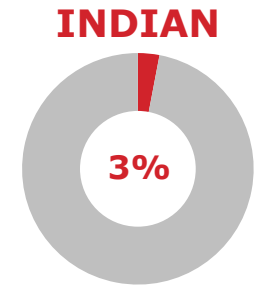
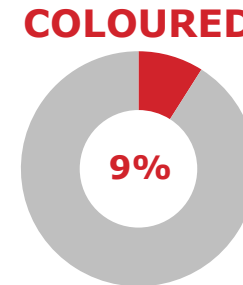
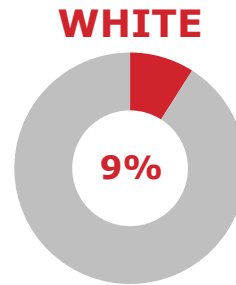
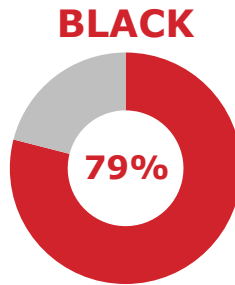




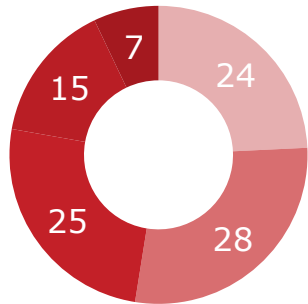
P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



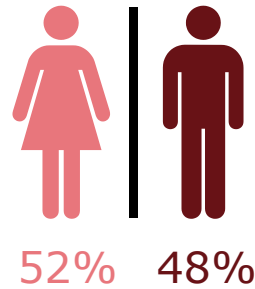
37.1 million
ADULTS 15 YEARS+



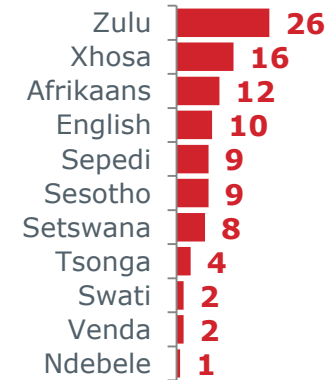
AGE %



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



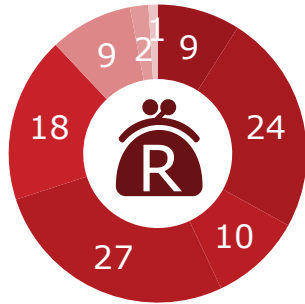
HOME LANGUAGE %



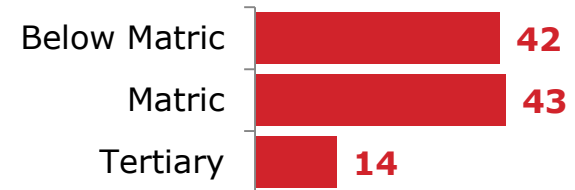


P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,778

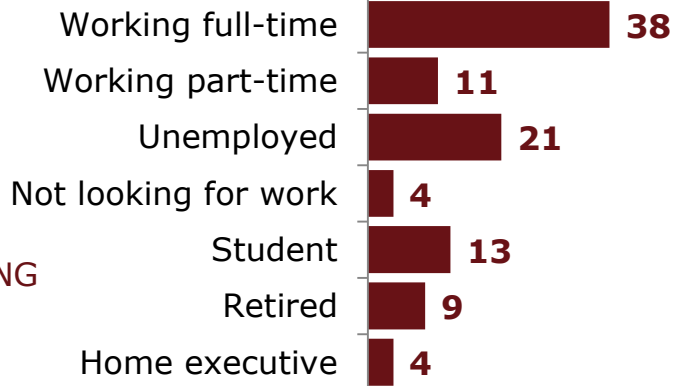


- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



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



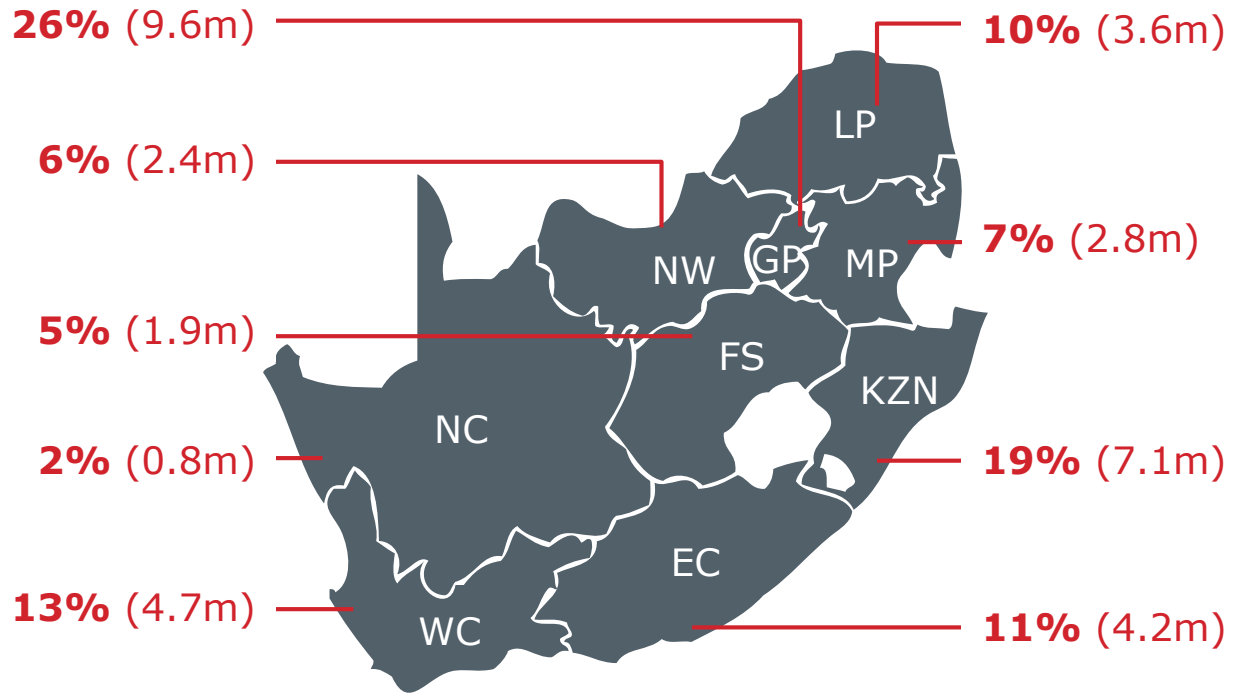
42%
METRO



28%
URBAN

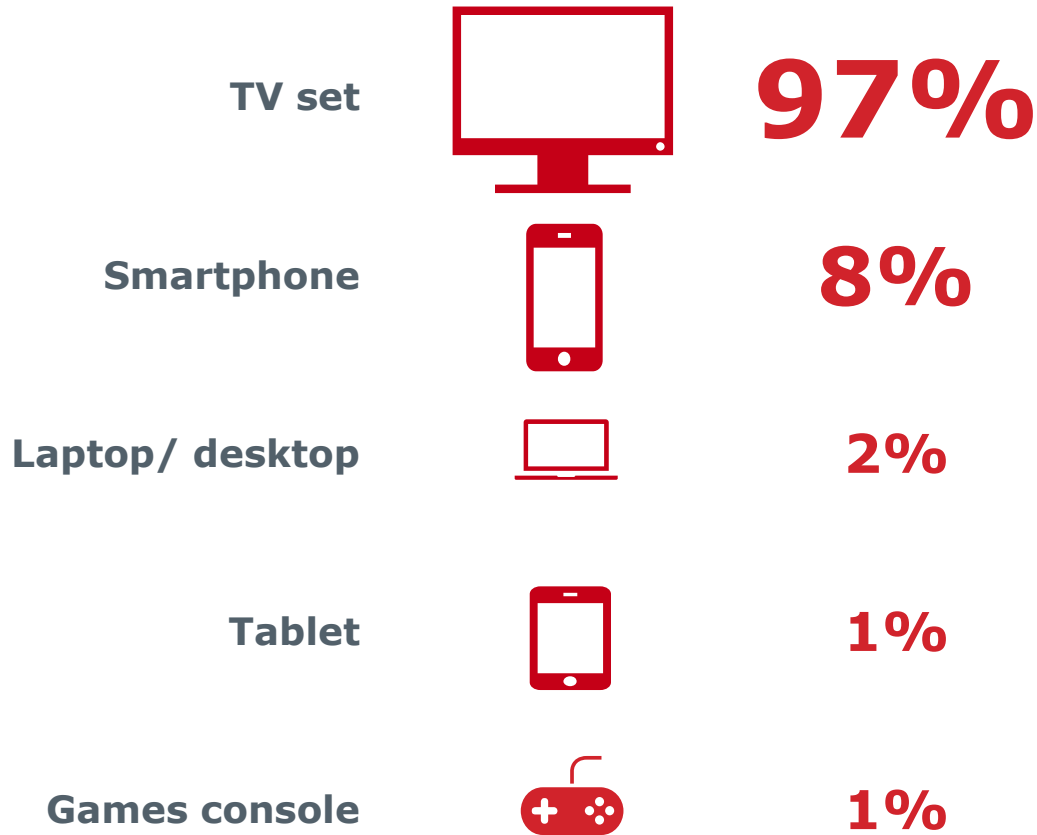


30%
RURAL





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





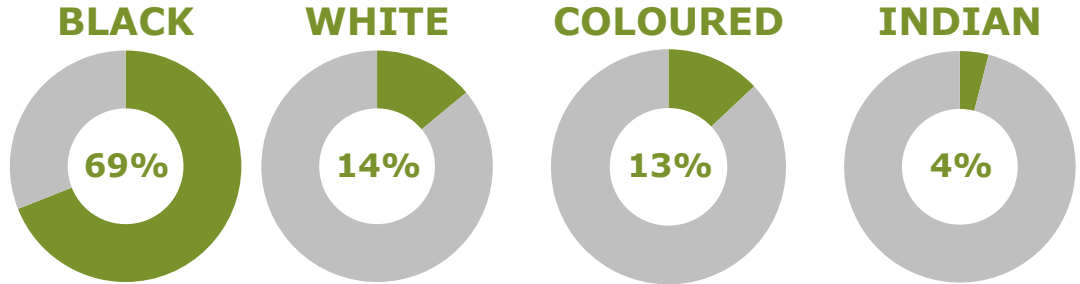
READING... Past 7 days



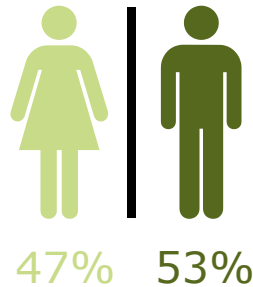
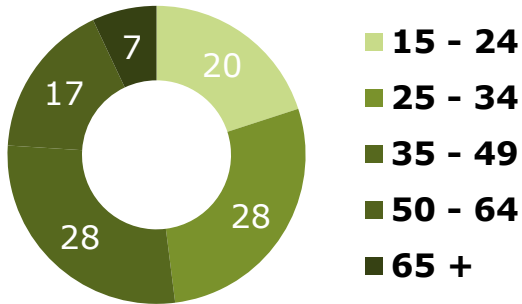
P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...



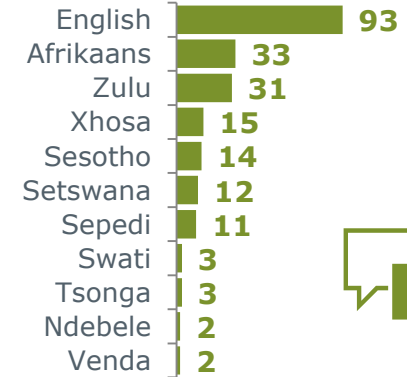
13.1 million
ADULTS 15 YEARS+



AGE %



LANGUAGES READ AND UNDERSTAND %



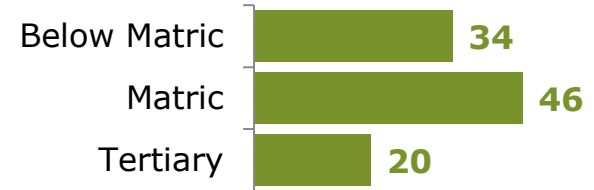


P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...

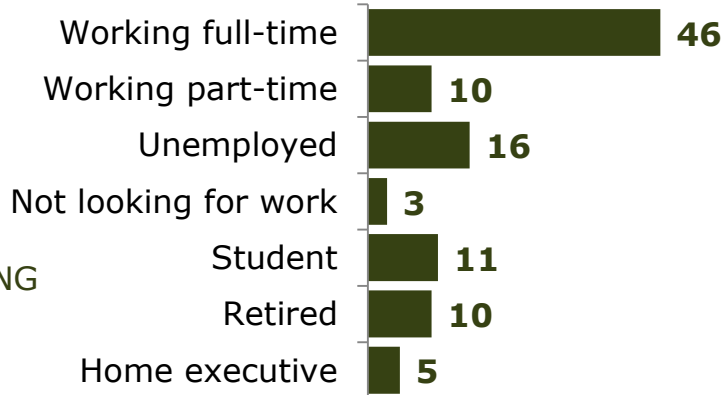
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R13,951



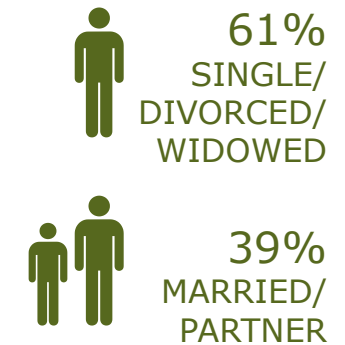
- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



56% WORKING
44% NOT WORKING



MARITAL STATUS





P7D NEWSPAPER READERS GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



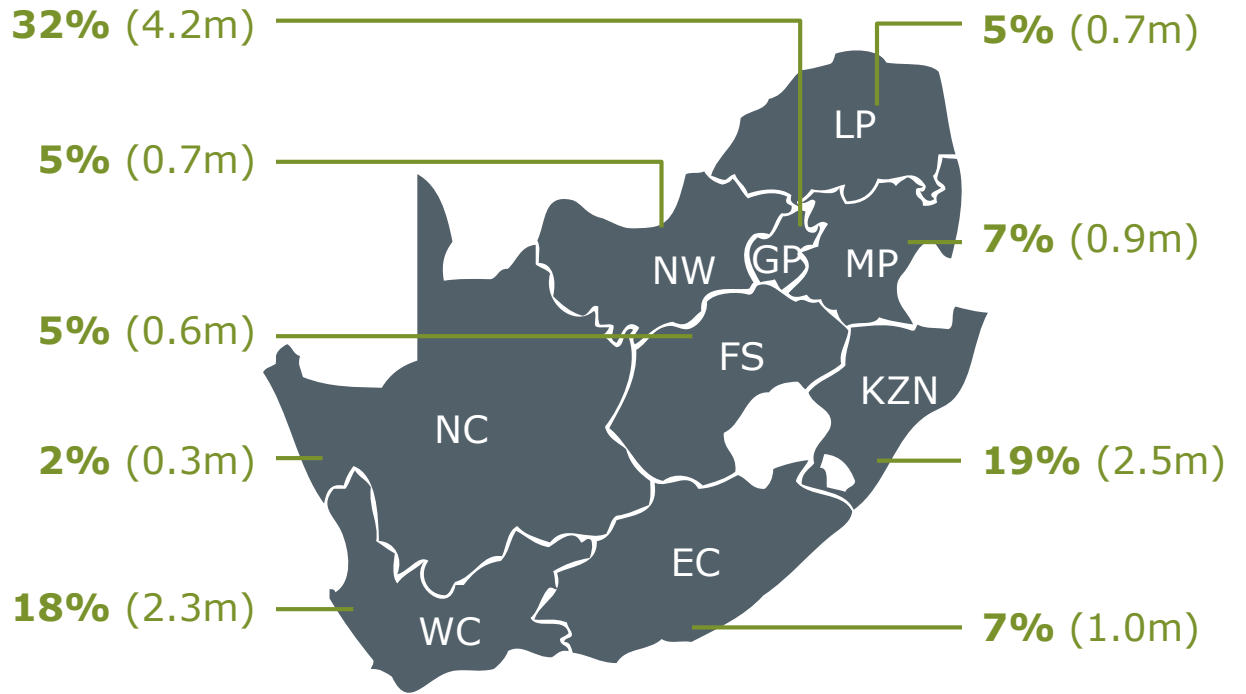
54%
METRO



30%
URBAN



16%
RURAL





NEWSPAPER PLATFORM USAGE...

Multiple platforms

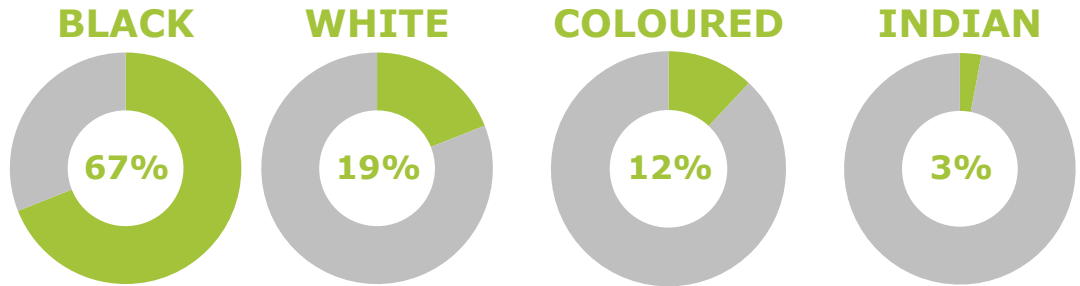




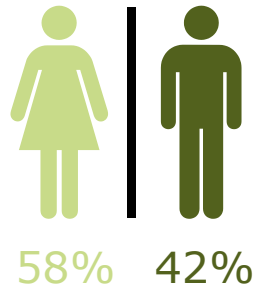
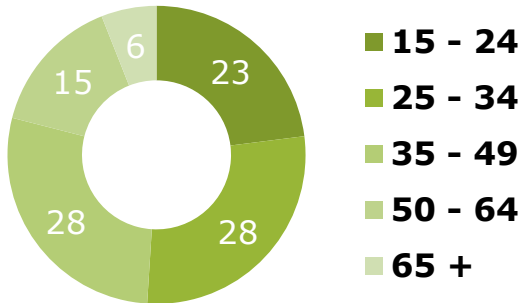
P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...



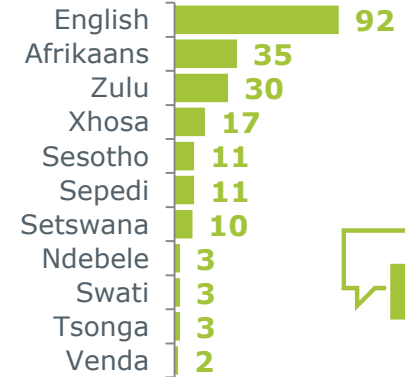
5.7 million
ADULTS 15 YEARS+



AGE %



LANGUAGES READ AND UNDERSTAND %



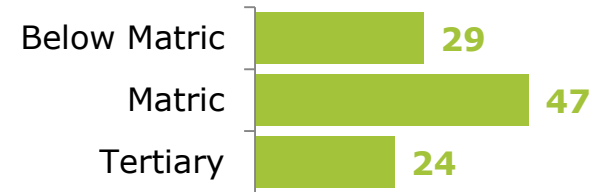


P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...

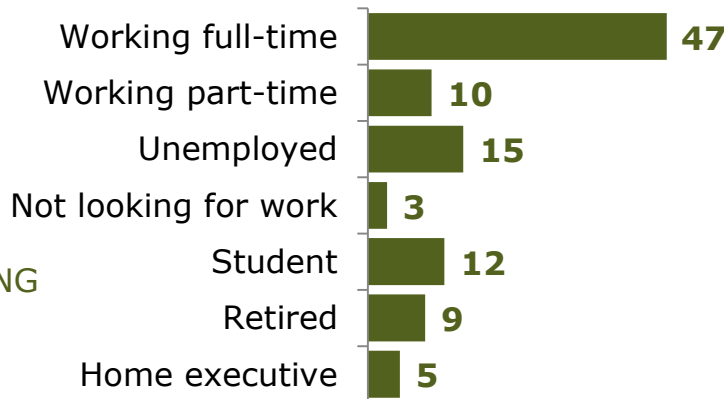
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R15,519



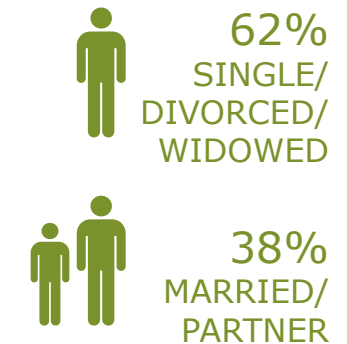
- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



56% WORKING
44% NOT WORKING



MARITAL STATUS





P7D MAGAZINE READERS GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



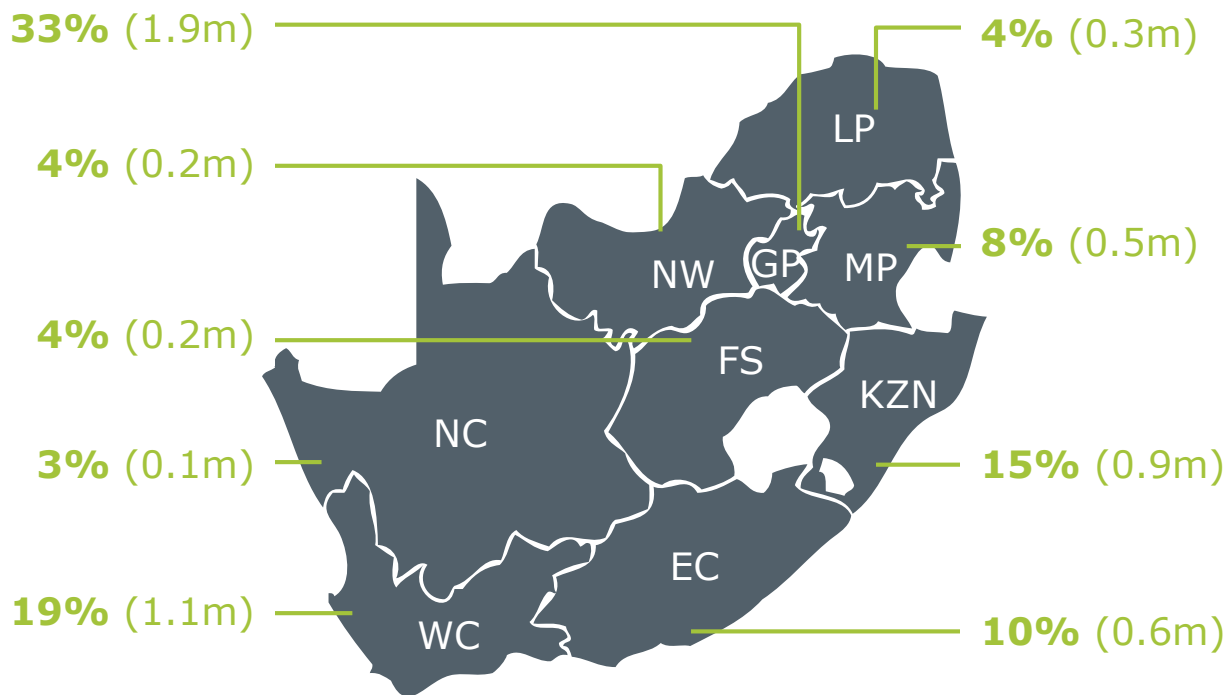
55%
METRO



31%
URBAN



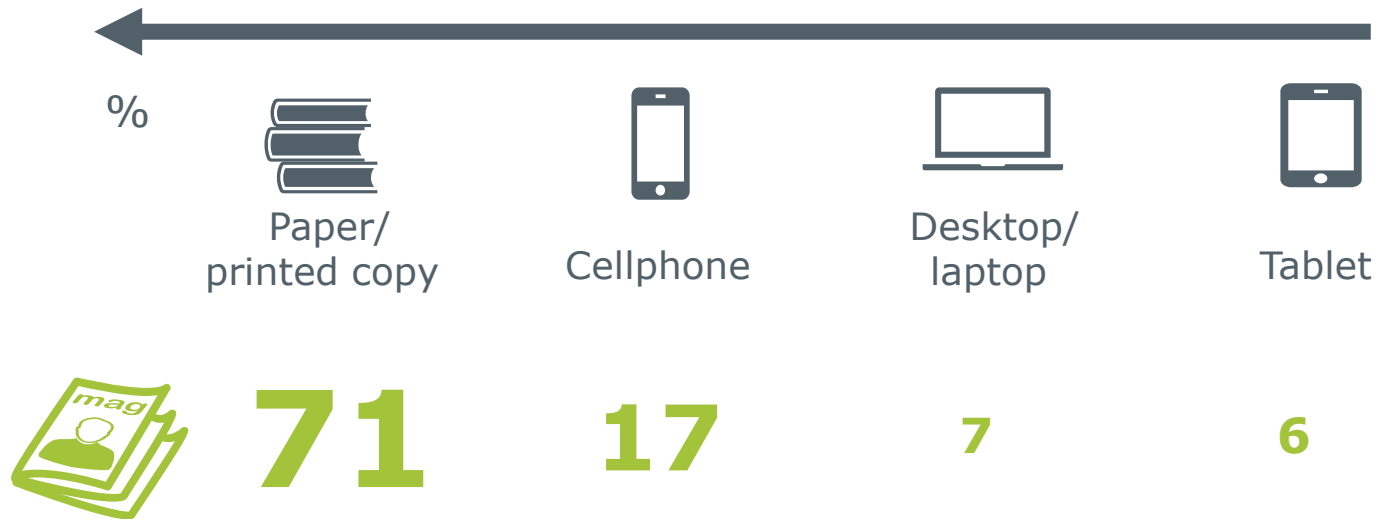
14%
RURAL





MAGAZINE PLATFORM USAGE...

Multiple platforms





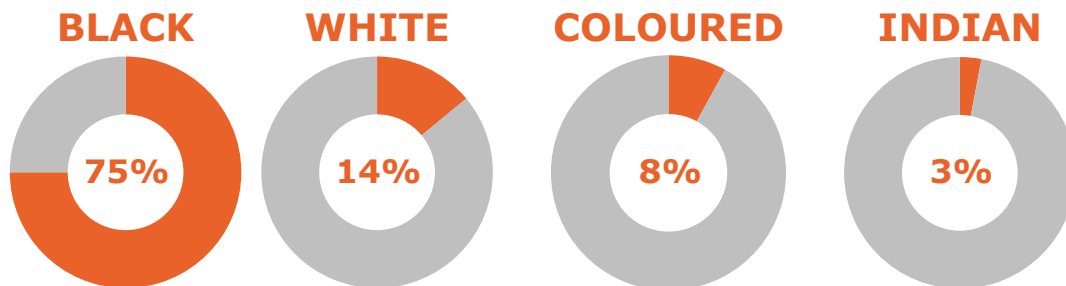
DIGITAL Past 7 days



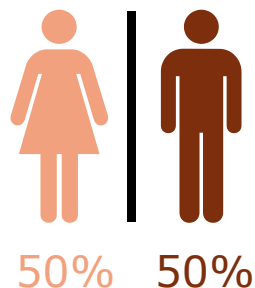
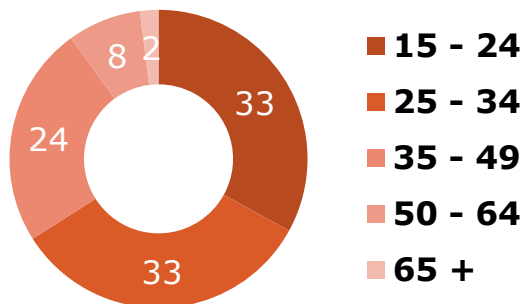
P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...



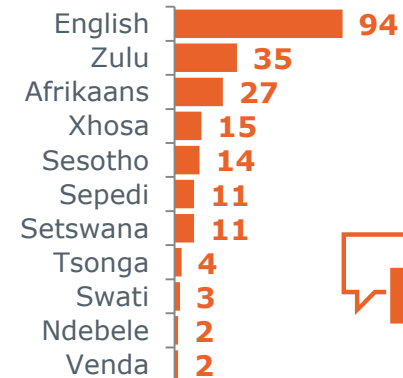
19.6 million
ADULTS 15 YEARS+



AGE %



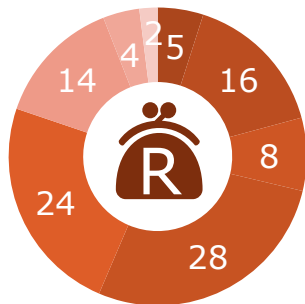
LANGUAGES READ AND UNDERSTAND %



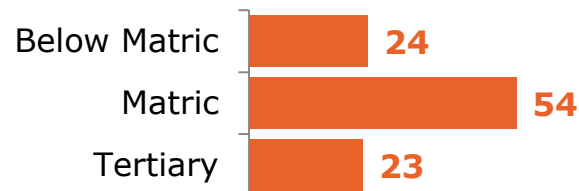


P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...

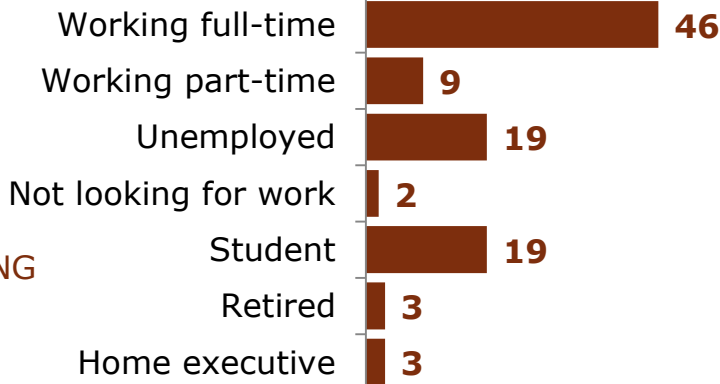
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R14,114



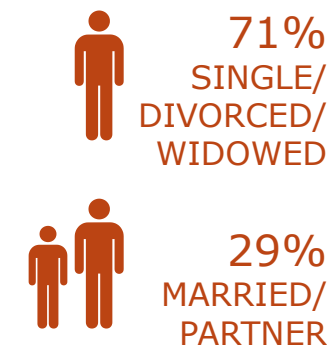
- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



55% WORKING
45% NOT WORKING



MARITAL STATUS





P7D INTERNET USERS GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



50%
METRO



28%
URBAN

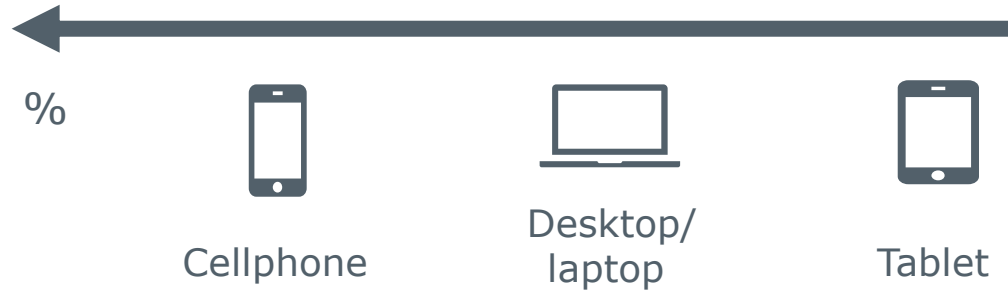


22%
RURAL





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





INTERNET FREQUENCY...

	%
Several times a day	69
Once a day	10
Several times a week	14
Once a week	3
Several times a month	2
Average no. of times per month	56.9





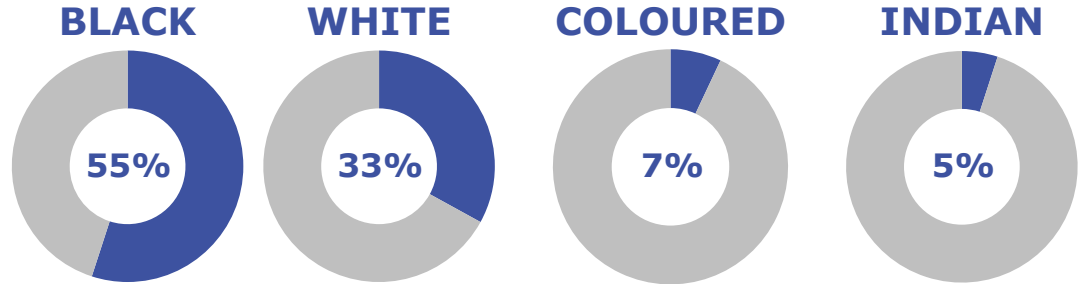
CINEMA... Past month



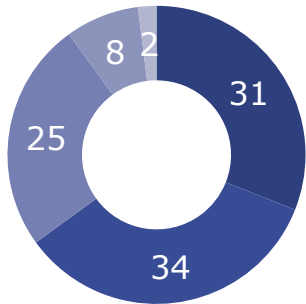
PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...



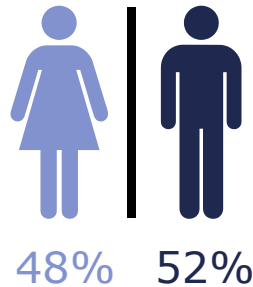
1.2 million
ADULTS 15 YEARS+



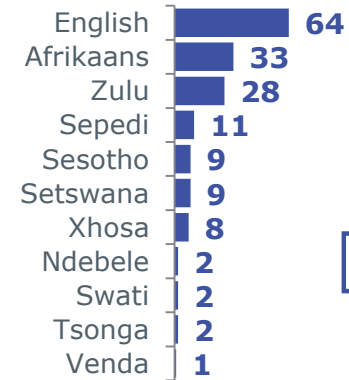
AGE %



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



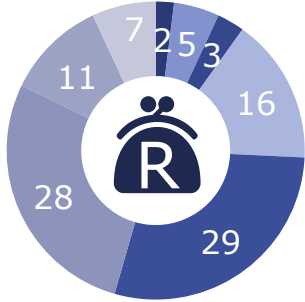
LANGUAGES SPOKEN IN HOME %



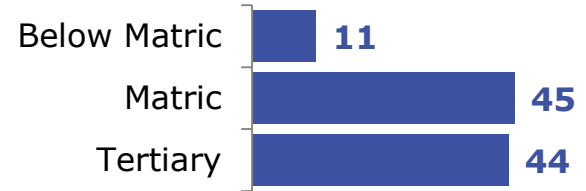


PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...

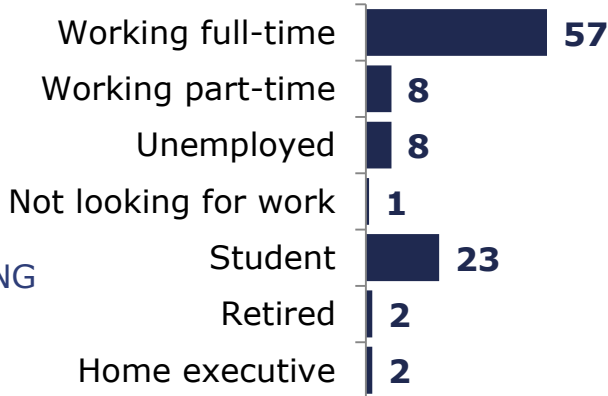
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R25,040



- 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+



65% WORKING
35% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %





PAST MONTH CINEMA GOERS GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



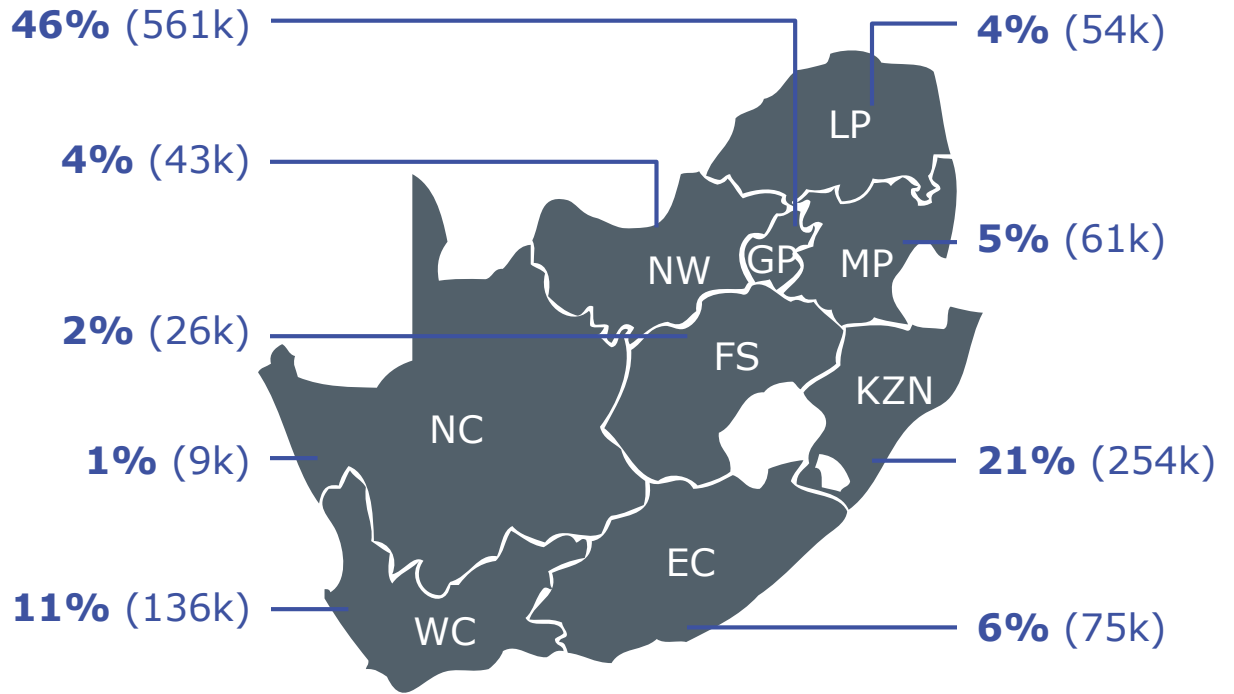
70%
METRO



25%
URBAN



5%
RURAL





CINEMA FREQUENCY...

	%
Once a week	1
2-3 times a month	6
Once a month	14
Once every 3 months	24
Once every 6 months	24
Once every 12 months	19
Less than once every 12 months	13
Average no. of visits per year	5.4



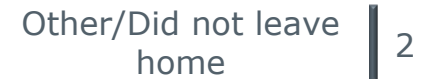
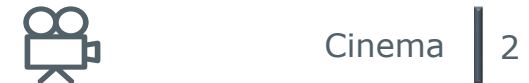
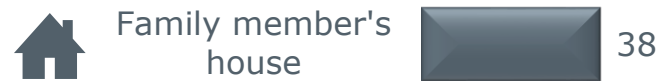
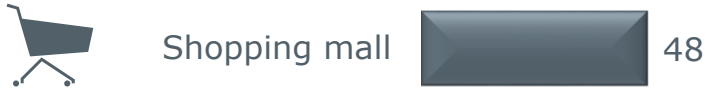


ON THE GO...

Past 7 days

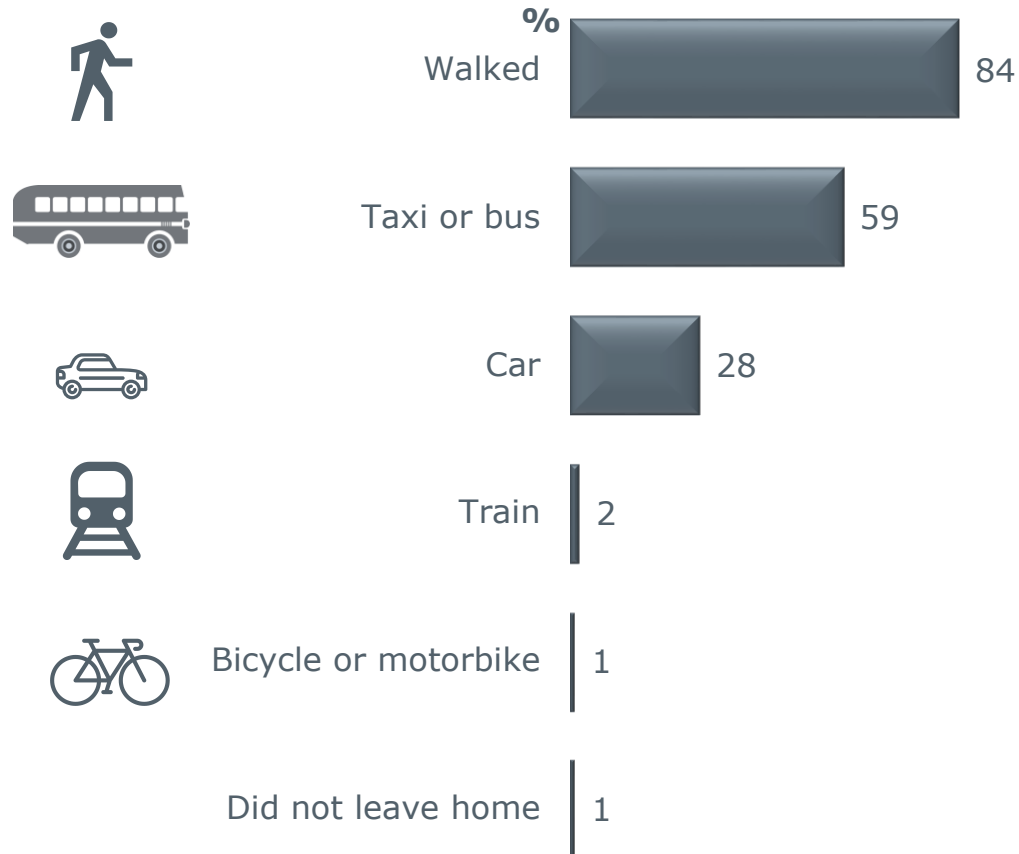


PAST WEEK DESTINATIONS...





MODES OF TRANSPORT





ESTABLISHMENT SURVEY SEM™

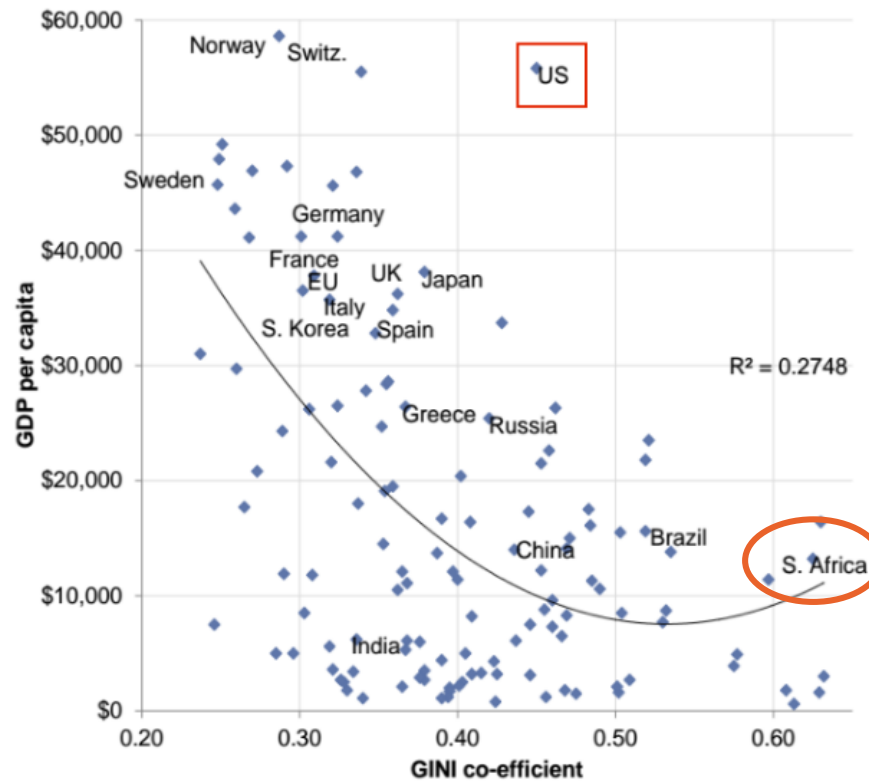
A
SOCIO-ECONOMIC
SEGMENTATION
SYSTEM...

THE ESTABLISHMENT SURVEY 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 ESTABLISHMENT SURVEY

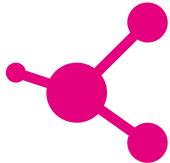
SEM™ IS...



Relevant and differentiating



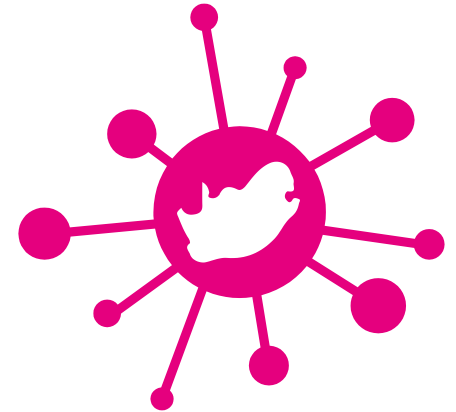
Stable



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



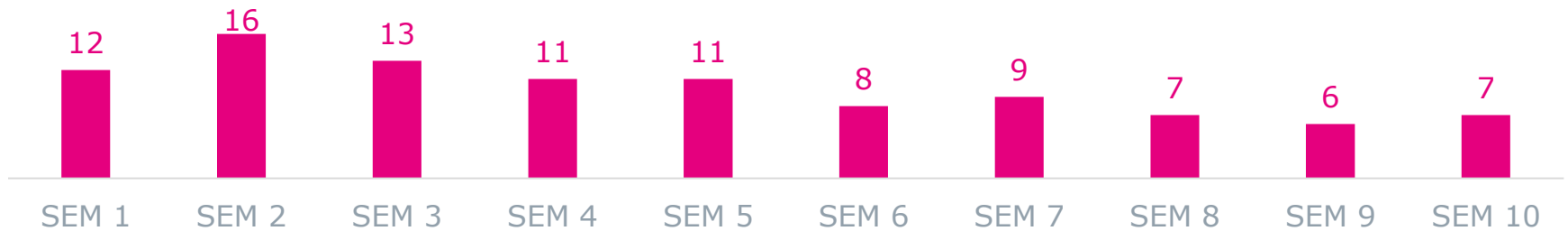
Short and easy to use



ES SEM VS ES LSM...

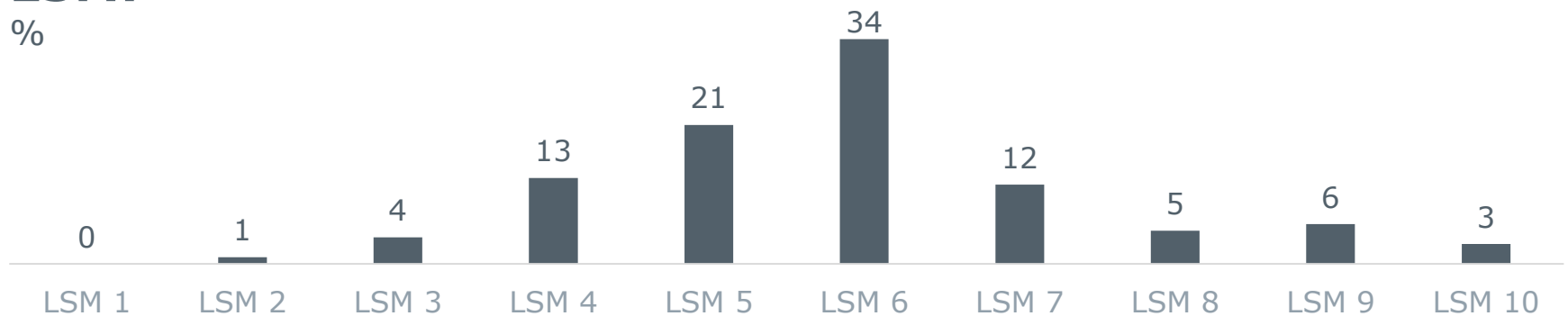
SEM:

%

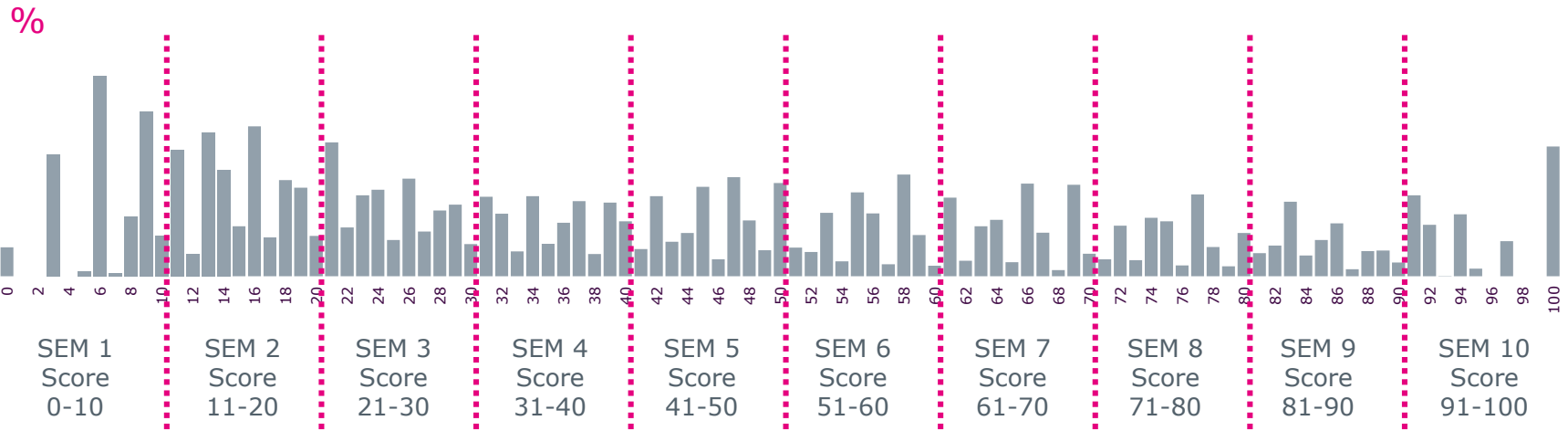


LSM:

%



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

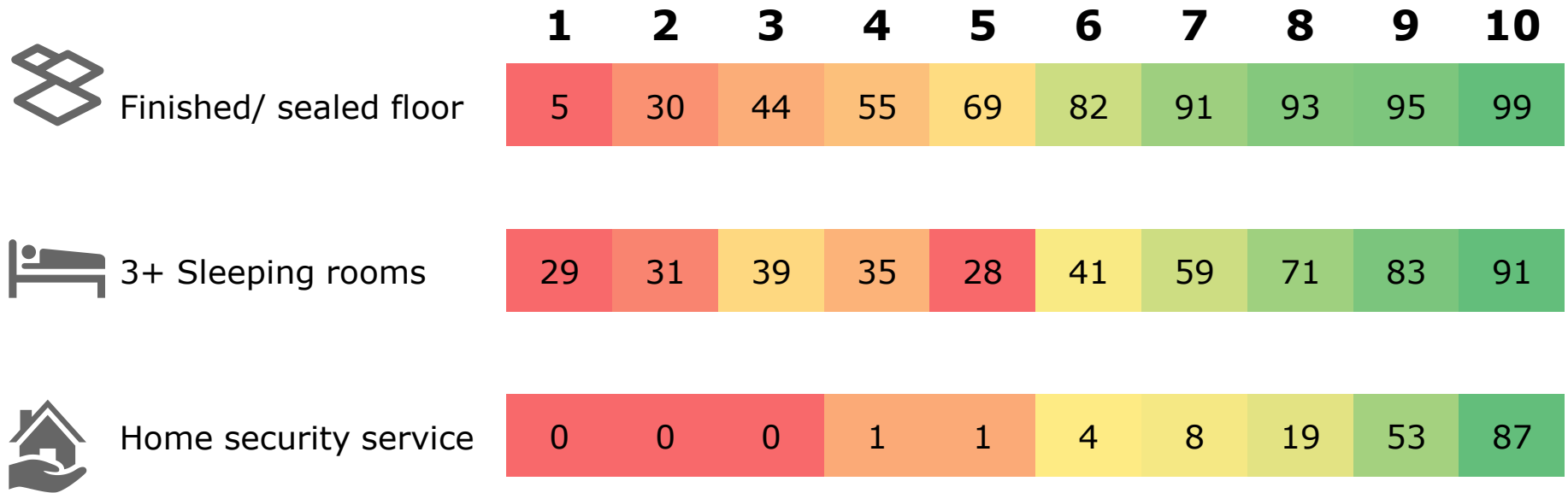


SEM INPUT VARIABLES...

STRUCTURAL



SEM



SEM INPUT VARIABLES...

DURABLES

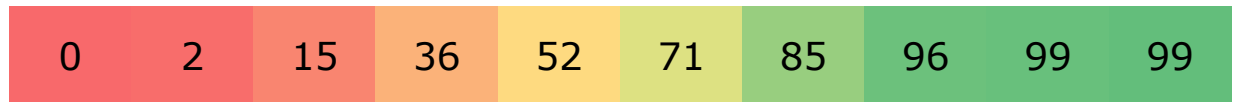


SEM

1 2 3 4 5 6 7 8 9 10



Washing machine



Motor car

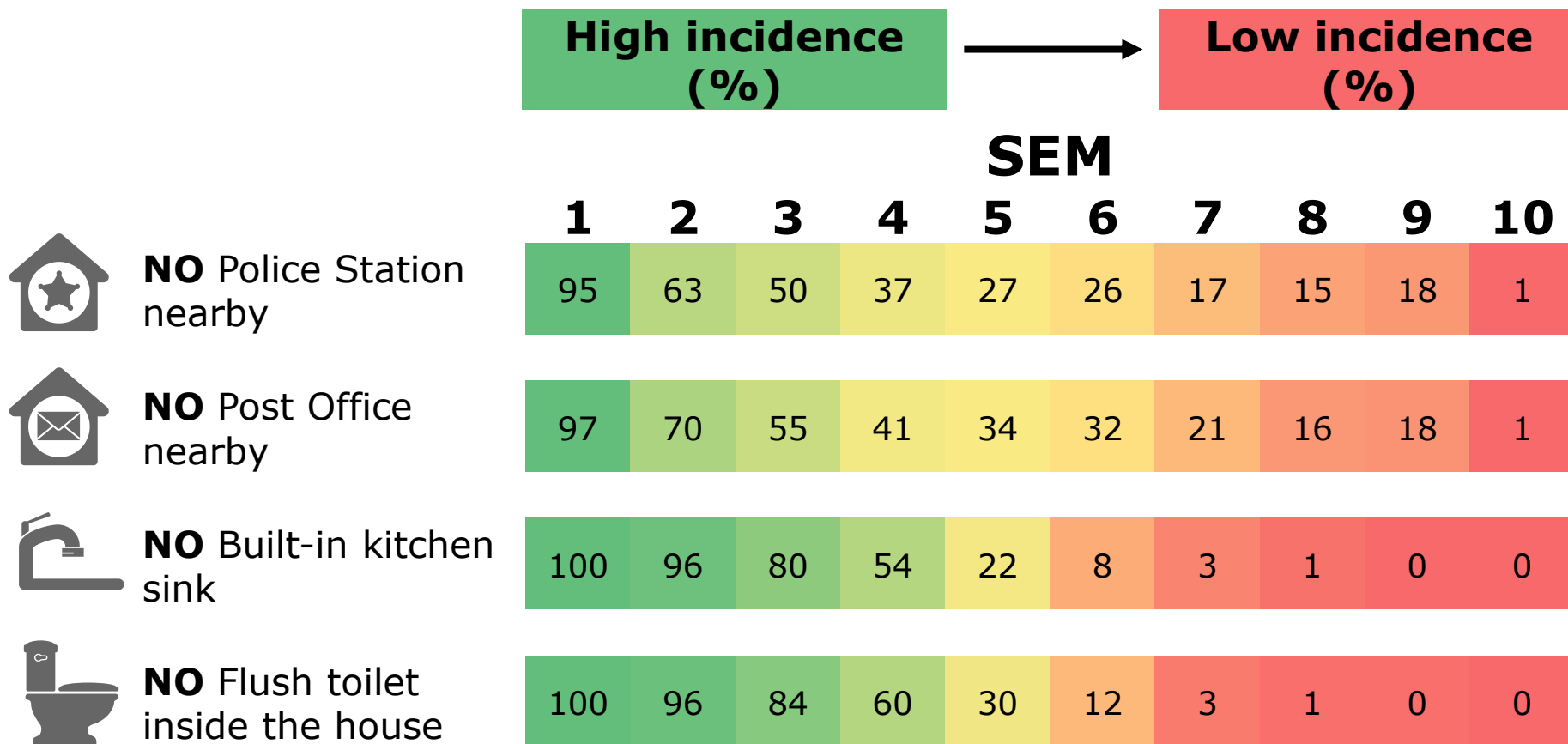


Microwave






SEM INPUT VARIABLES...

INFRASTRUCTURE AND BASIC AMENITIES

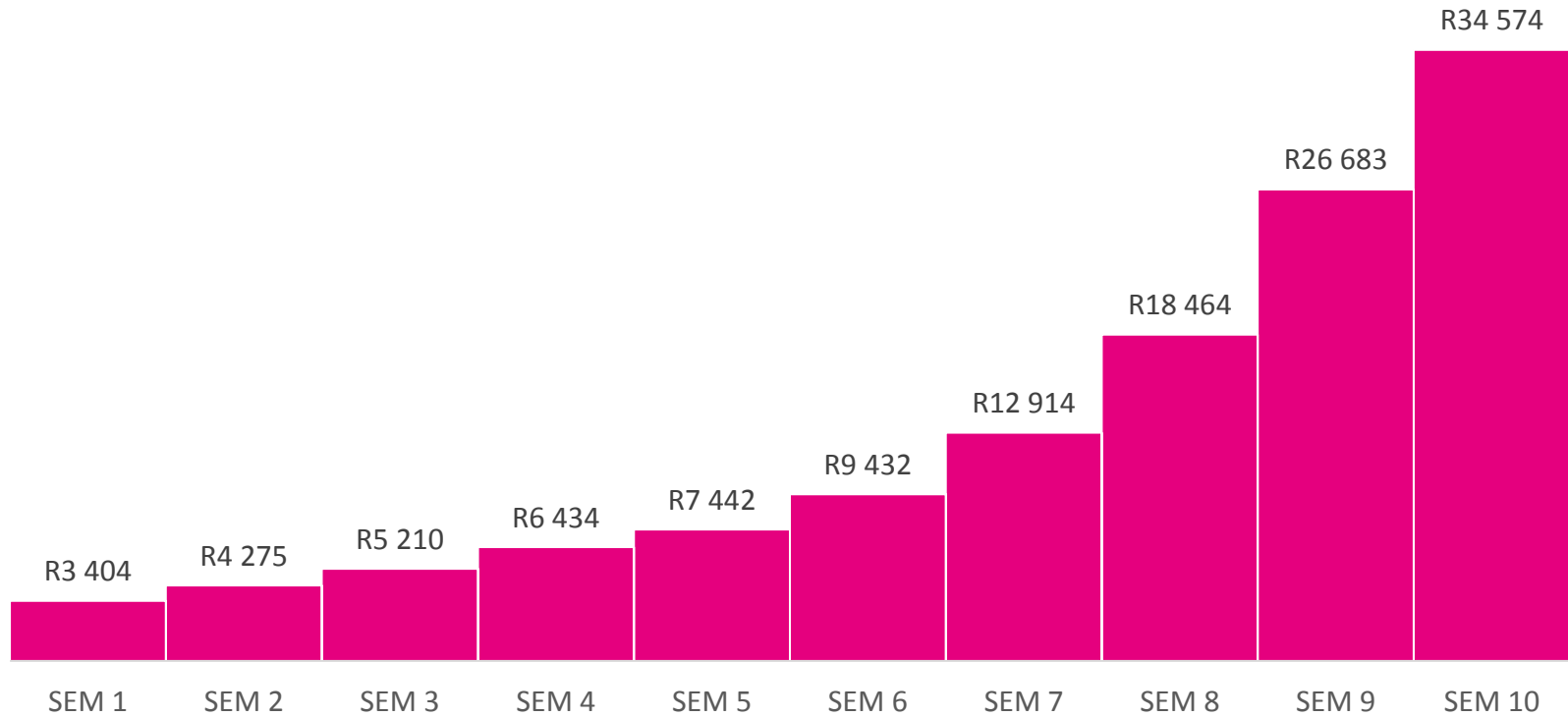


DEMOGRAPHIC LANDSCAPE BY SEM...

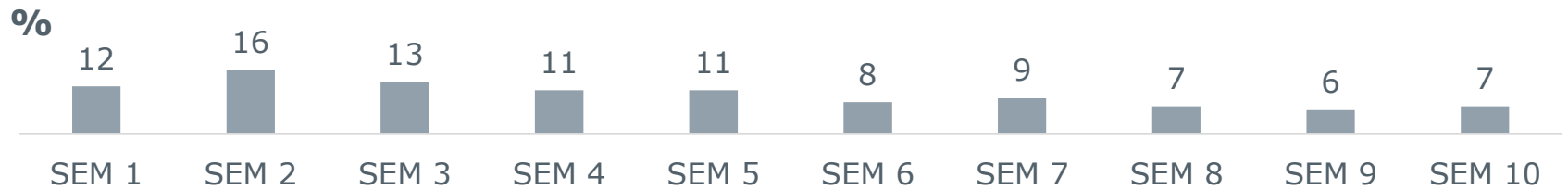
		SEM									
		1	2	3	4	5	6	7	8	9	10
	Metro	14	19	25	40	54	60	65	64	71	71
	Urban	14	21	32	37	35	32	31	33	28	28
	Rural	72	60	43	23	11	7	5	2	1	1



MONTHLY HH INCOME BY SEM...



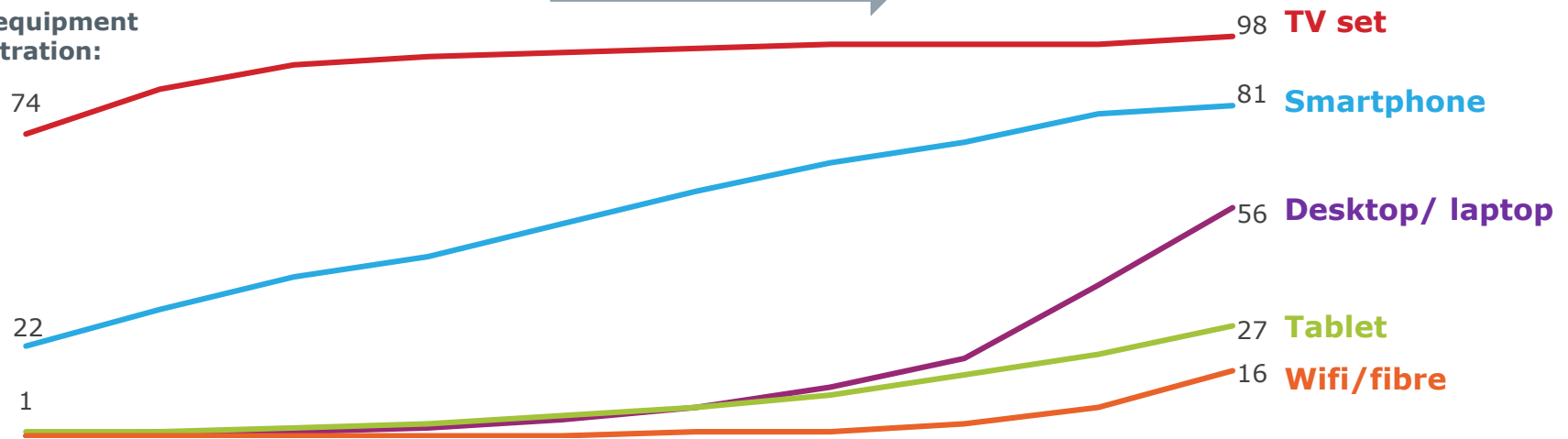
EQUIPMENT IN HOME BY SEM...



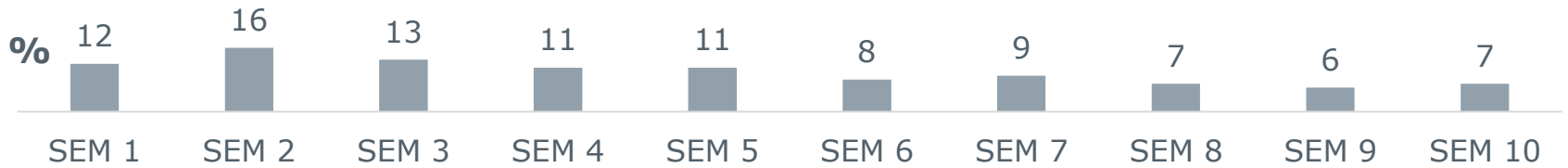
Avg. no. of equipment items in home:

2.5 2.7 2.8 2.9 2.9 3.0 3.2 3.3 3.6 4.2

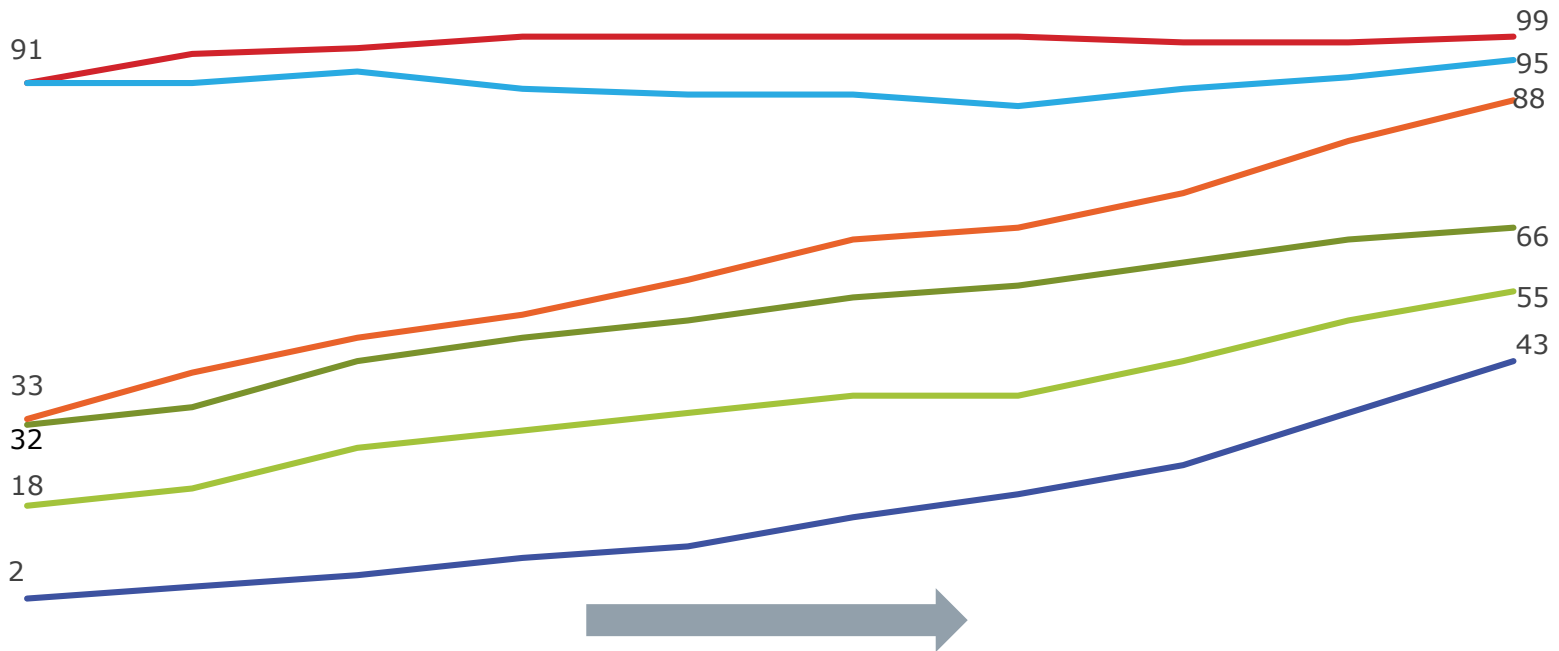
Key equipment penetration:



MEDIA CONSUMPTION BY SEM...



Past 12 month usage:





www.brcsa.org.za

