

THE ESTABLISHMENT SURVEY

MARCH / APRIL
2018 RELEASE



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 (SEGMENTATION MODEL)

**PRODUCTS & BRANDS MODULE
(SEP 2018)**



ES SAMPLE... CLOSELY REFLECTS THE SA POPULATION

ES (unweighted)



■ Black	82%
■ Coloured	10%
■ Indian / Asian	2%
■ White	7%

Source: ES Jul - Dec 2017 (n=12,518)

IHS Population



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

Source: IHS Individual Population estimates Jun 2016



WEIGHTING EFFICIENCY...



HOUSEHOLD 96.0%
INDIVIDUAL 83.1%

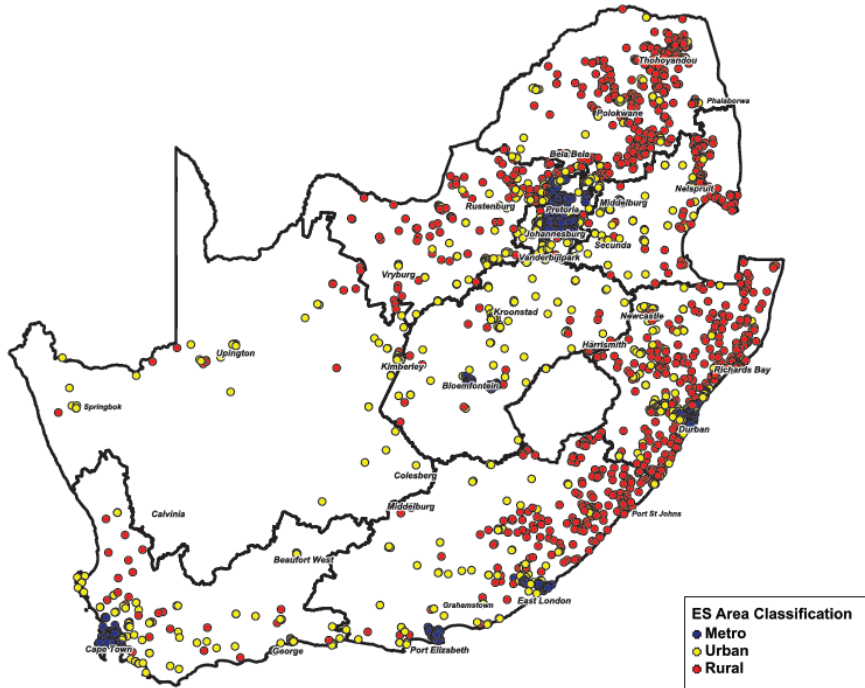


ES – VITAL SIGNS...

NATIONAL SAMPLE

12,518 sample

JUL - DEC 2017



41% Metro



28% Urban



31% Rural

Universe: Population aged 15+

39.5 million



CURRENCY – VITAL SIGNS...



	ES	BRC RAM™	BRC TAMS
41% Metro		60% Metro	44% Metro



28% Urban		20% Urban	29% Urban
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31% Rural		20% Rural	27% Rural
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DEMOGRAPHIC LANDSCAPE...

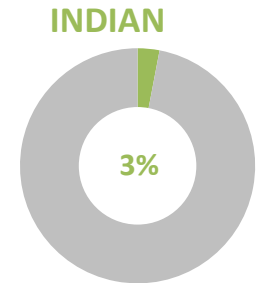
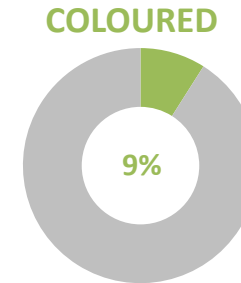
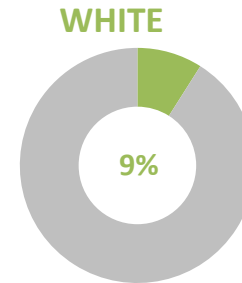
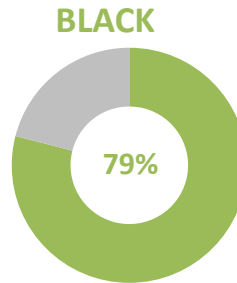
DEMOGRAPHIC LANDSCAPE...



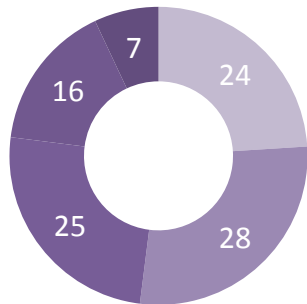
15.8 million
HOUSEHOLDS



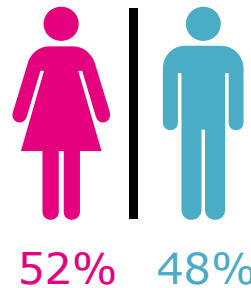
39.5 million
ADULTS 15 YEARS+



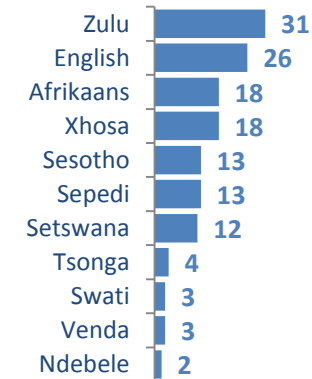
AGE %



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

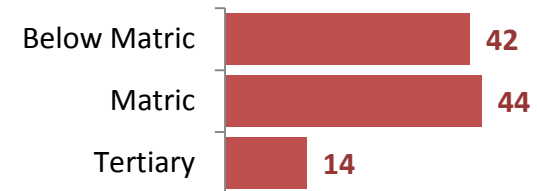


LANGUAGES SPOKEN IN HOME %

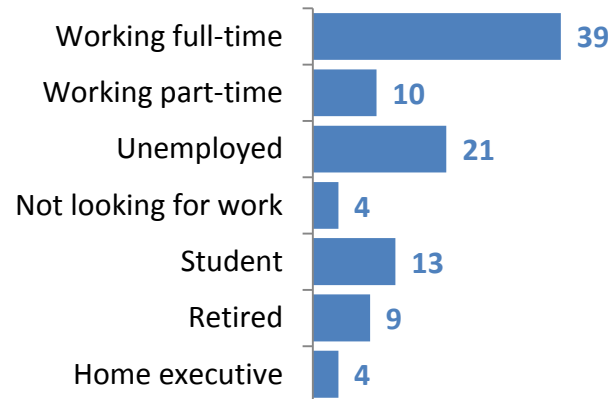


DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R11,386



49% WORKING
51% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



42%
CHILDREN



58%
NONE





GEOGRAPHIC LANDSCAPE...

GEOGRAPHIC LANDSCAPE...

PROVINCE % and population figures



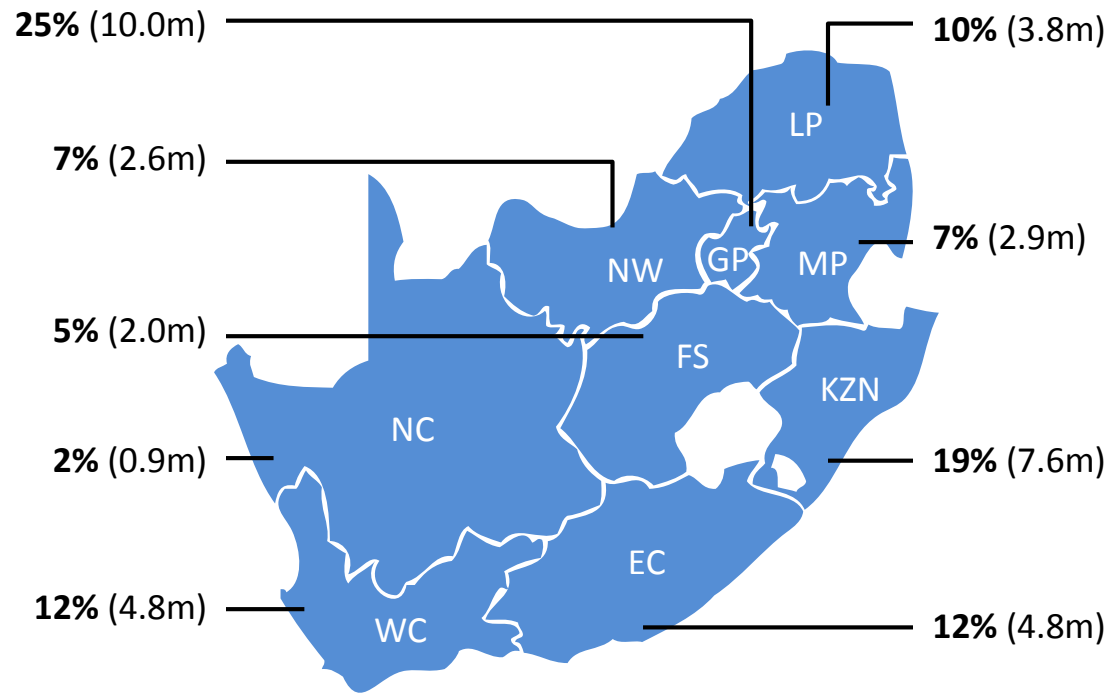
41%
(16.1m)



28%
(11.2m)



31%
(12.1m)





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

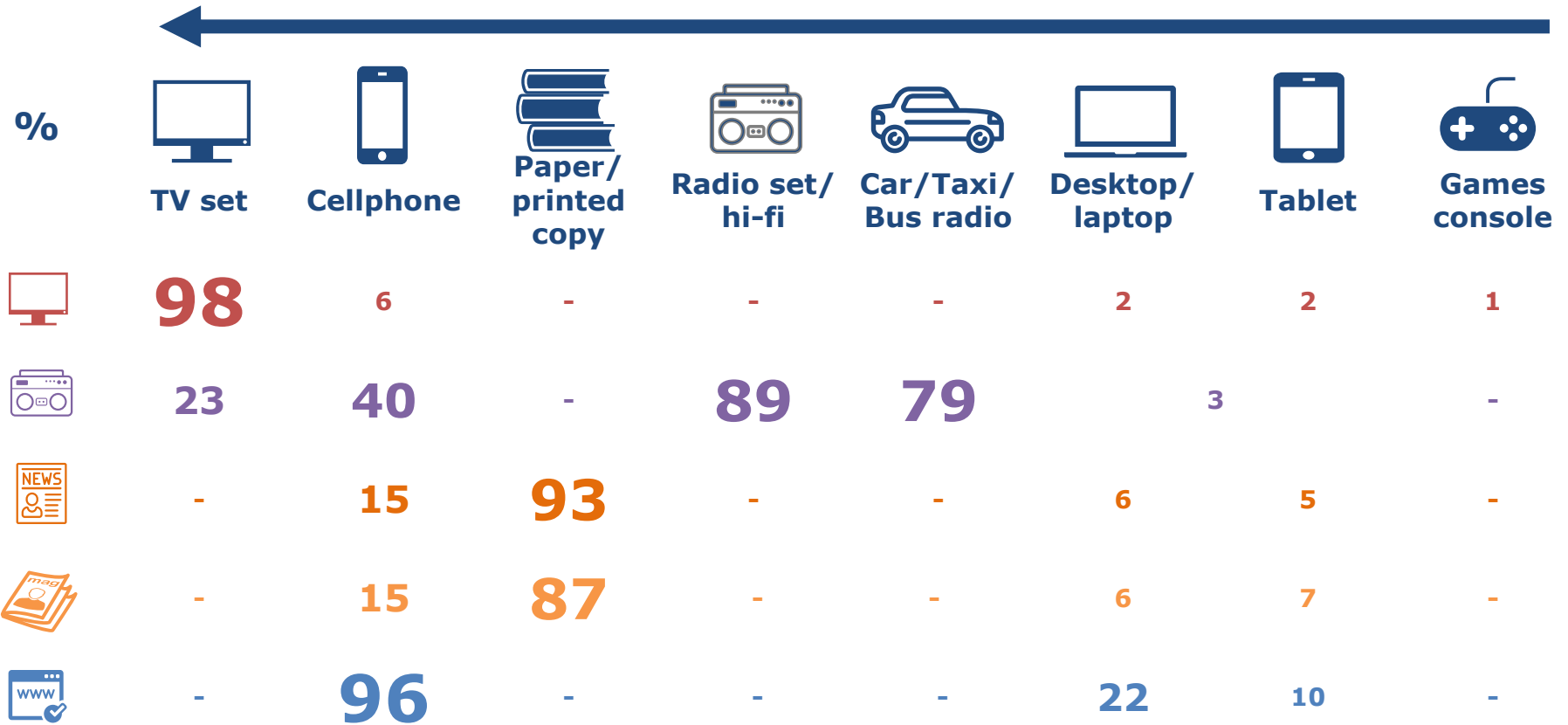


Profiling

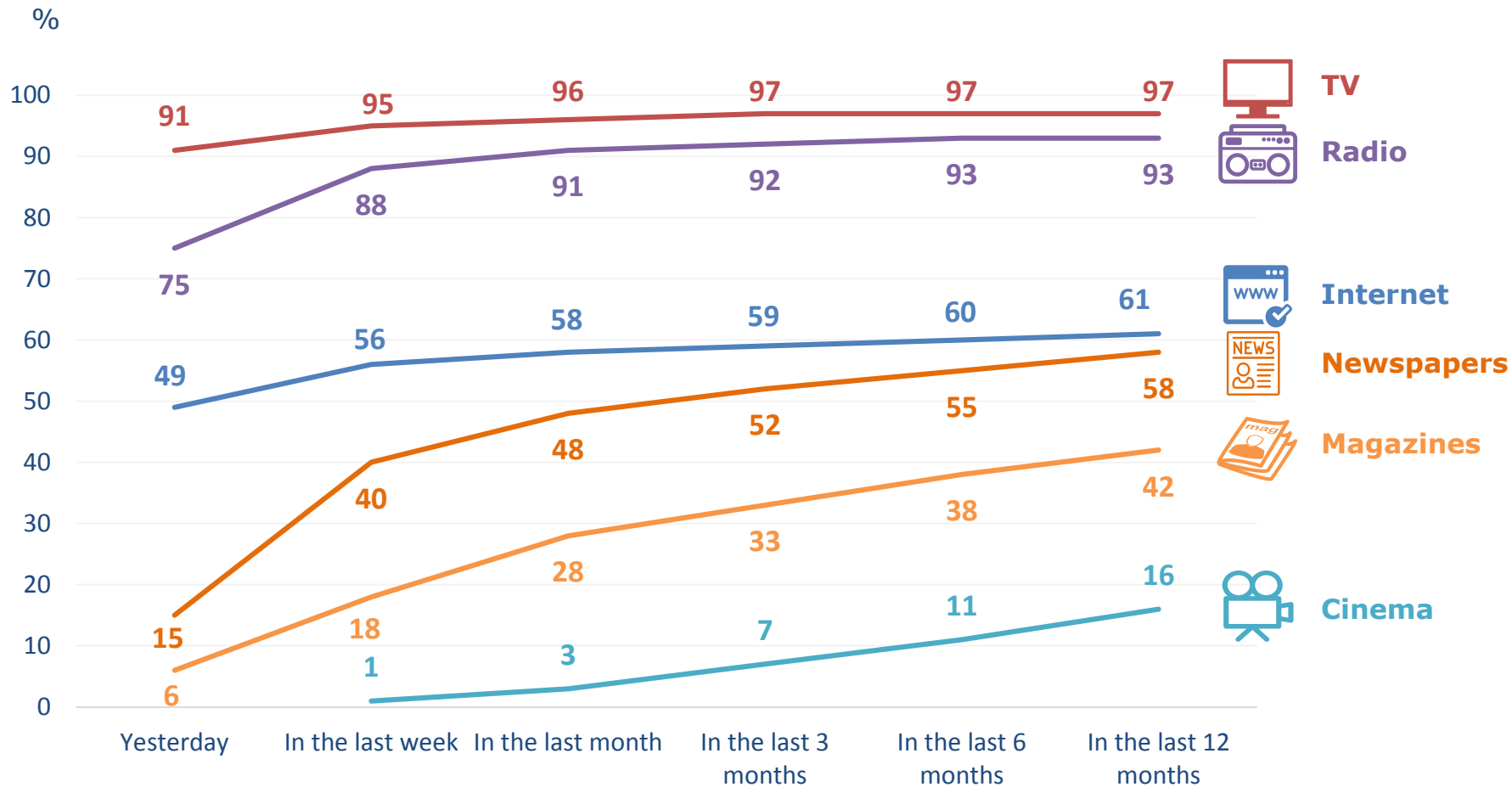
- Demographics
- Geographics
- Lifestyles
- Products
- SEM variables



P4WEEK MEDIA LANDSCAPE DEVICE...



MEDIA LANDSCAPE... REACH





SNAPSHOTS BY MEDIA TYPE...

LISTENING REACH...



75%

of the population
in a **day**



88%

of the population
in a **week**



91%

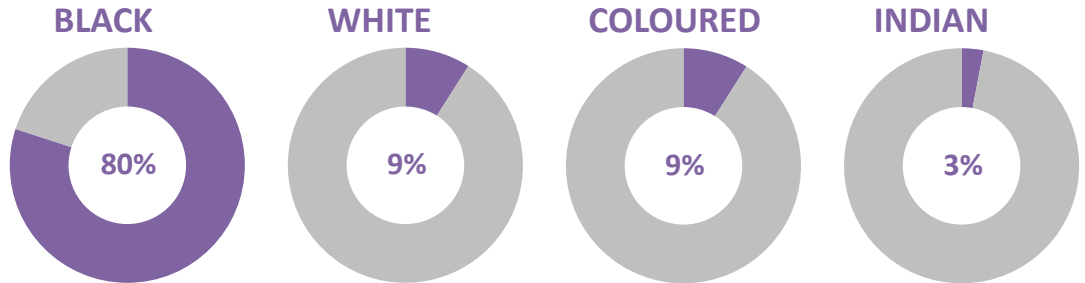
of the population
in a **month**



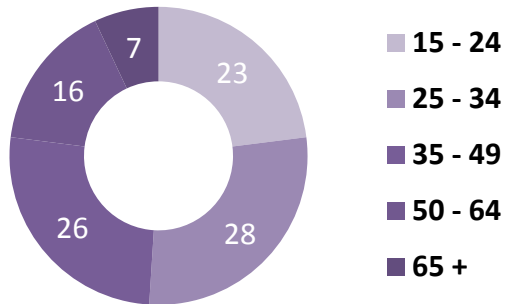
P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...



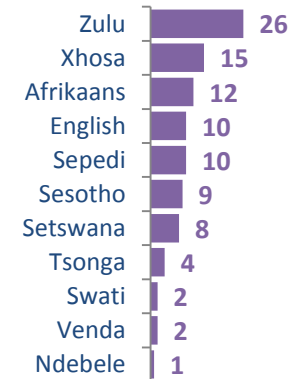
34.8 million
ADULTS 15 YEARS+



AGE %



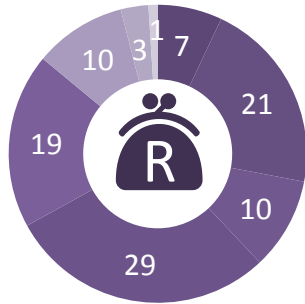
HOME LANGUAGE %



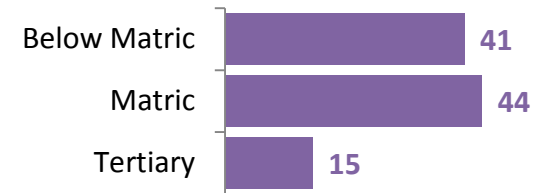
P7D RADIO LISTENERS DEMOGRAPHIC LANDSCAPE...



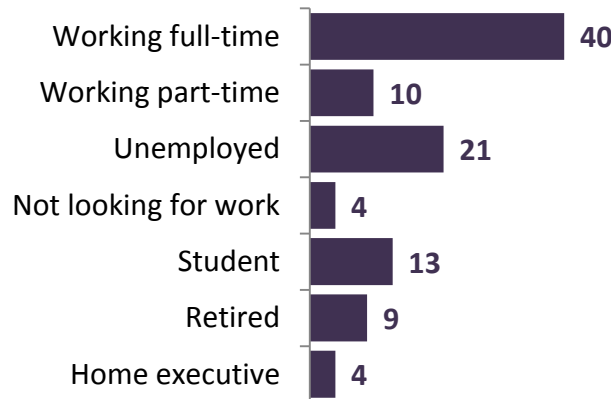
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R11,601



- 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 %



42%
CHILDREN



58%
NONE



P7D RADIO LISTENERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



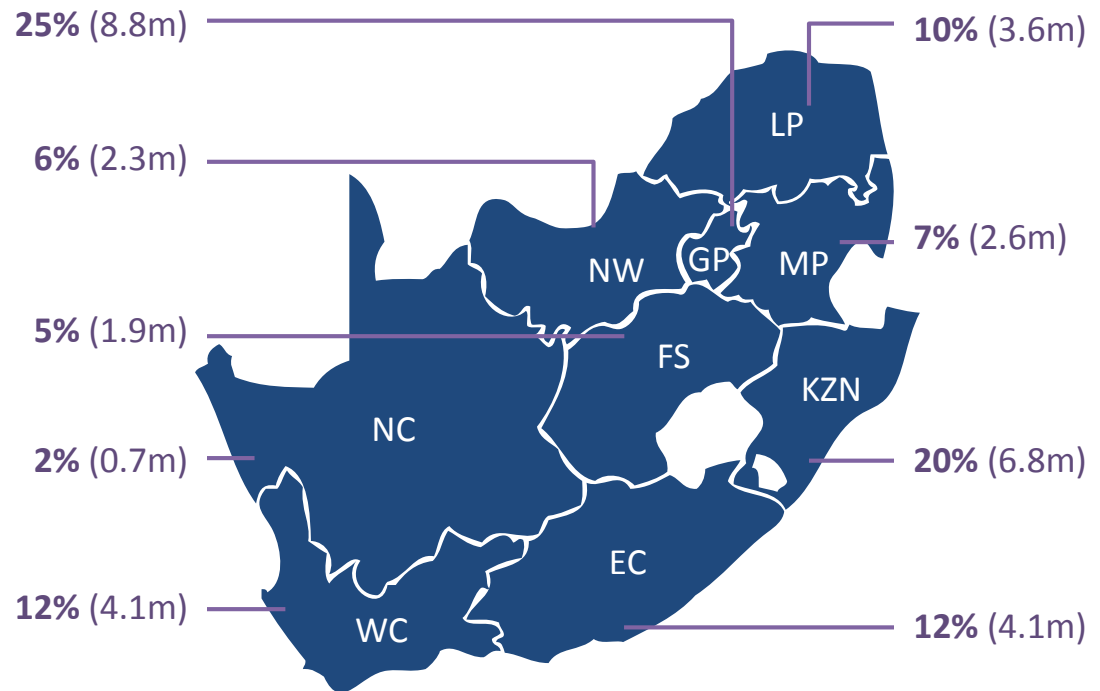
40%
METRO



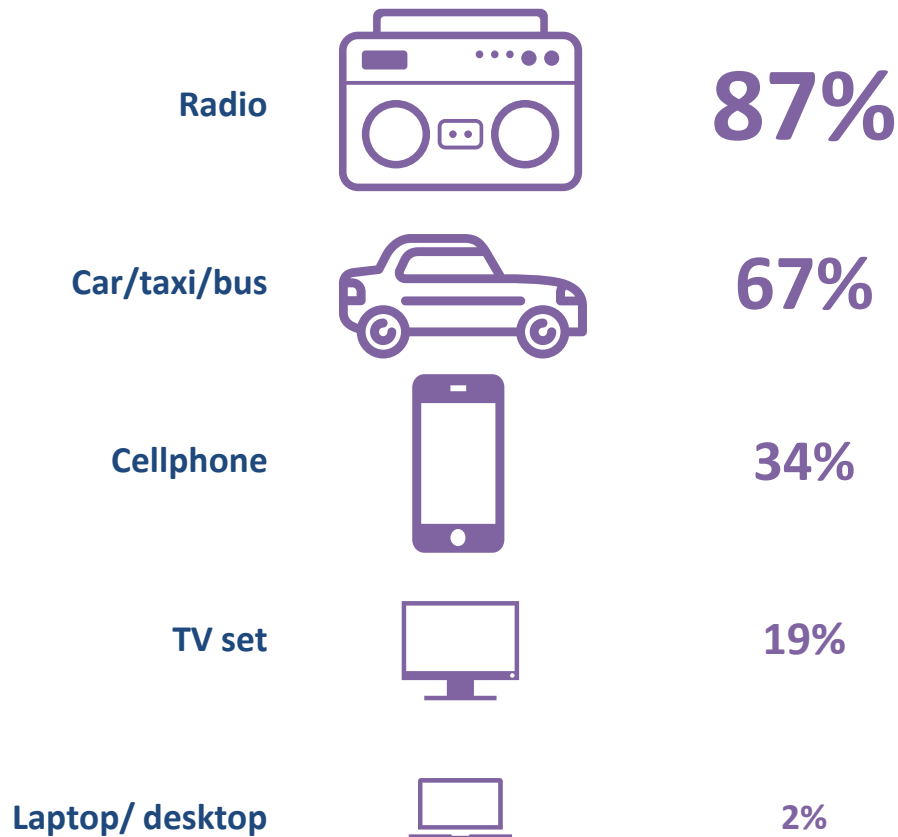
28%
URBAN



32%
RURAL



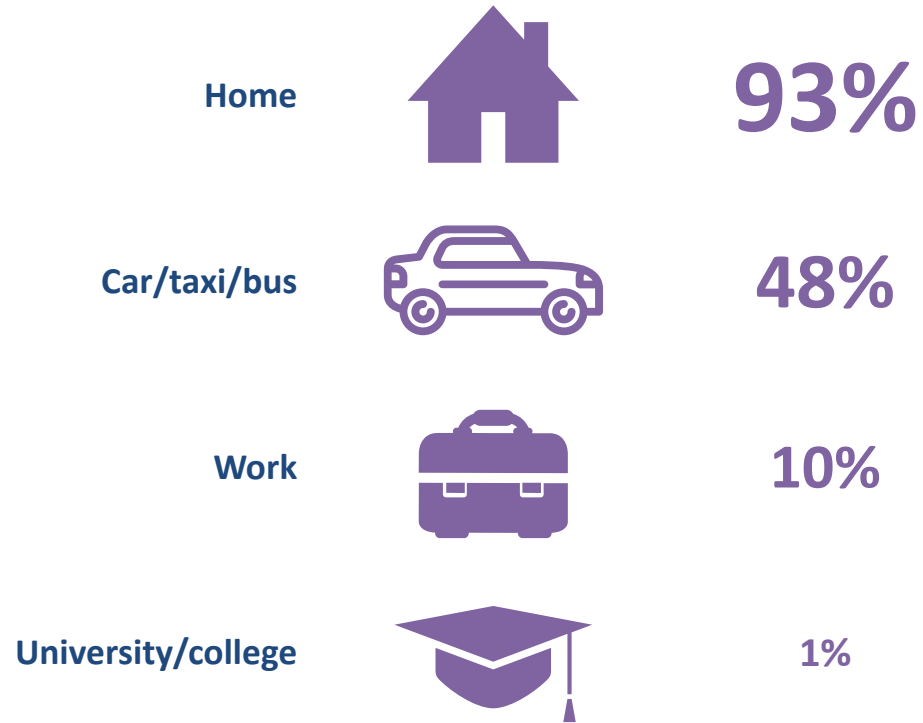
LISTENING DEVICE...



78% via phone's FM transmitter
4% via streaming
9% both
9% don't know



LISTENING LOCATION...



VIEWING REACH...



91%

of the population
in a **day**



95%

of the population
in a **week**



96%

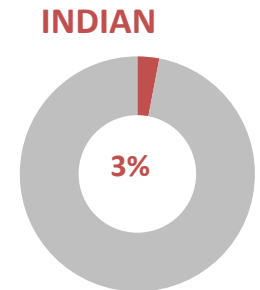
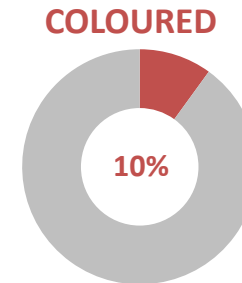
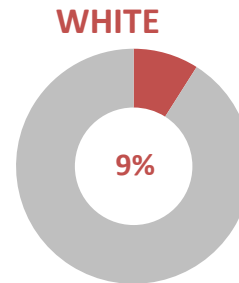
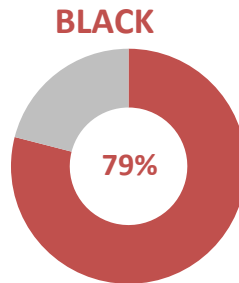
of the population
in a **month**



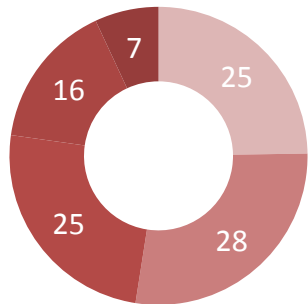
P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



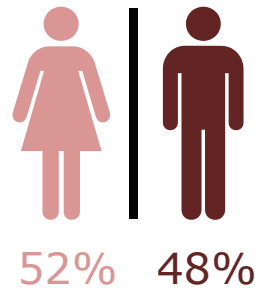
37.3 million
ADULTS 15 YEARS+



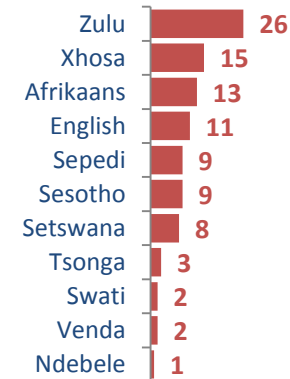
AGE %



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



HOME LANGUAGE %

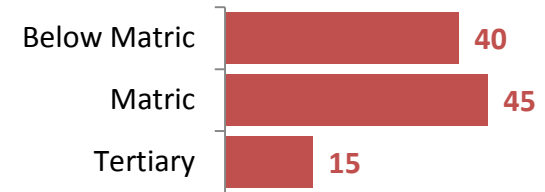
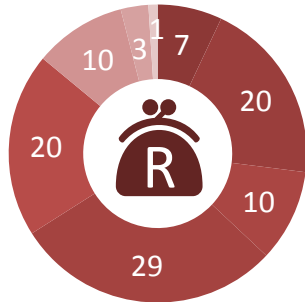


P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



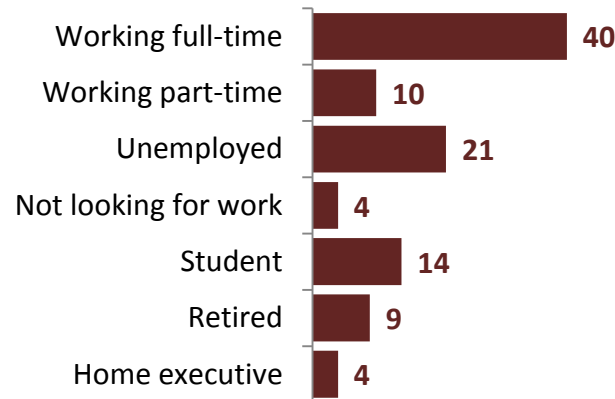
MONTHLY HOUSEHOLD INCOME %

AVERAGE: R11,688



50% WORKING

50% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



42%
CHILDREN



58%
NONE



P7D TV VIEWERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



42%
METRO



29%
URBAN



29%
RURAL



VIEWING DEVICE...

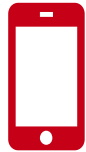


TV set



98%

Smartphone



5%

Laptop/ desktop



1%

Tablet

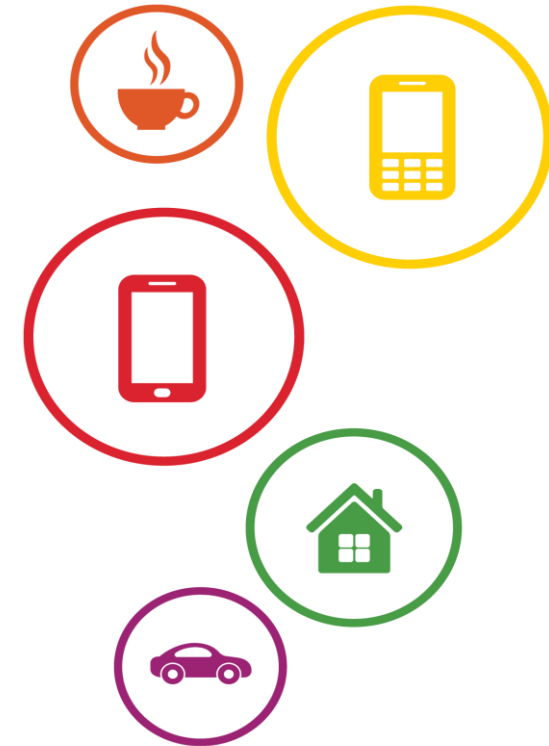


1%

Games console



1%



VIEWING LOCATION...



Location
in past week %

Home/someone else's home



99

Shopping centre/shop/bank



8

Bar/shebeen/pub/café



7

Work



5

Restaurant/coffee shop



5

Car/taxi/bus



4

School/university/college



2





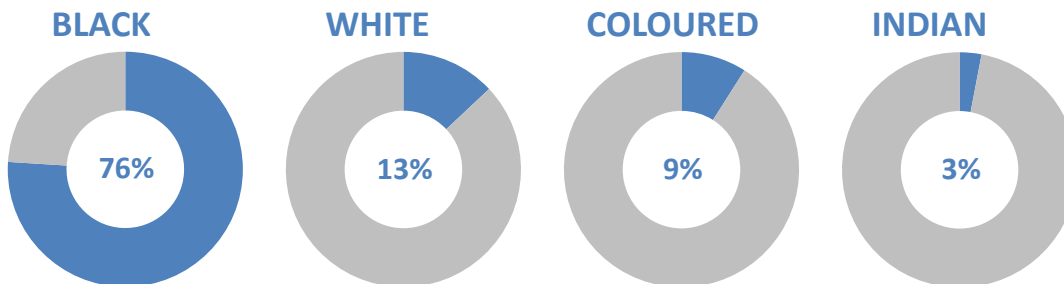
DIGITAL Past 7 days



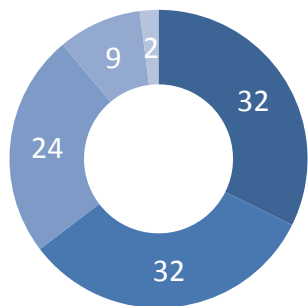
P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...



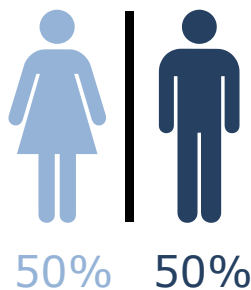
22.1 million
ADULTS 15 YEARS+



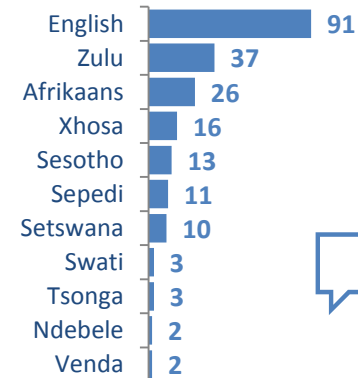
AGE %



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



LANGUAGES READ AND UNDERSTAND %

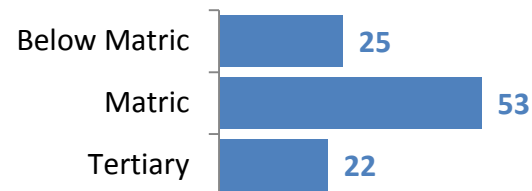
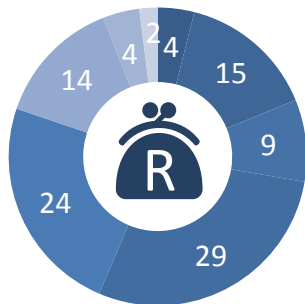


P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...

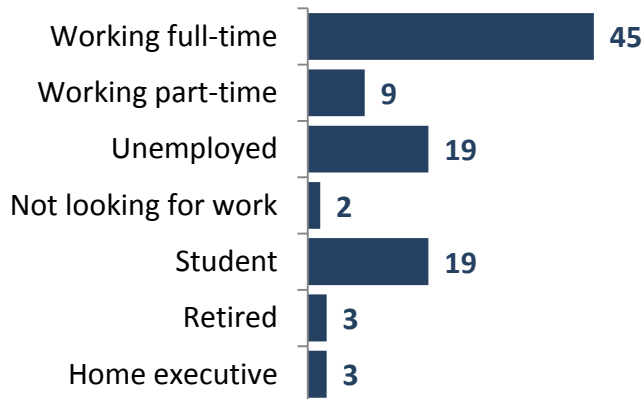


MONTHLY HOUSEHOLD INCOME %

AVERAGE: R14,512



54% WORKING
46% NOT WORKING



MARITAL STATUS



71%
SINGLE/
DIVORCED/
WIDOWED



29%
MARRIED/
PARTNER



P7D INTERNET USERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



49%
METRO



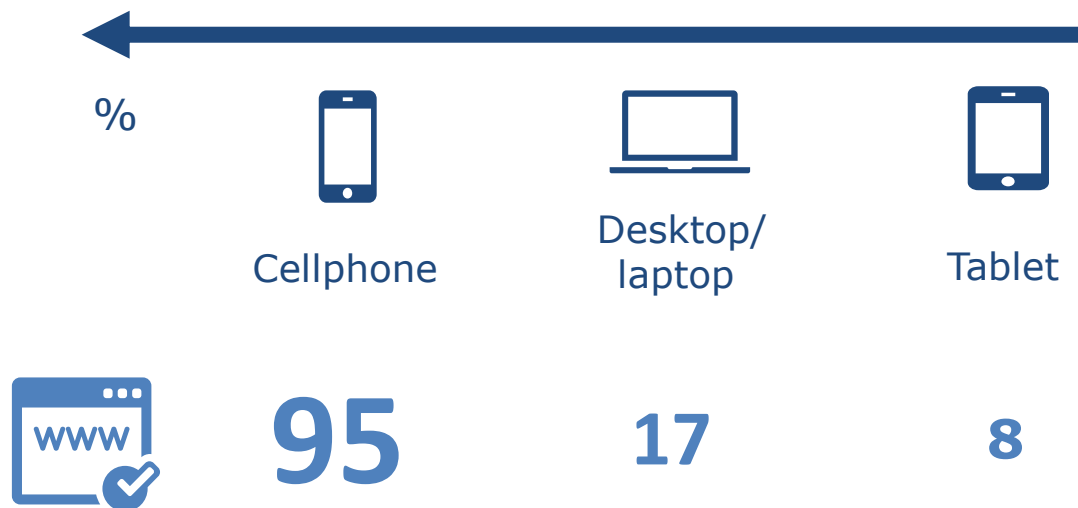
28%
URBAN



23%
RURAL















DIGITAL DEVICE...



DIGITAL ACTIVITY - DEVICE



				
	%	Cellphone	Desktop/ laptop	Tablet
Whatsapp/IM/chat		94	14	49
Social media		79	37	59
Search for things		66	80	71
Use/download apps		48	42	52
Download music/podcasts		41	32	42
Play games		35	20	42
Check the weather		26	25	31
Email		22	68	46
Banking		25	39	32



INTERNET FREQUENCY...










	%
Several times a day	75
Once a day	8
Several times a week	13
Once a week	2
Several times a month	1
Average no. of times per month	60.4



INTERNET CONNECTION...



	%	 Home	 Away from home
Mobile data (GPRS, EDGE, 3G, LTE)		92	90
Public WiFi hotspots (e.g. coffee shop)		-	23
WiFi or network at work, school or college		-	18
ADSL		4	-
Fibre		1	-
I don't connect to the internet at home		5	-
I don't connect to the internet away from home		-	4
Don't know		1	1





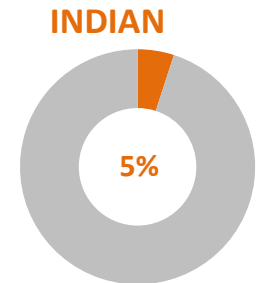
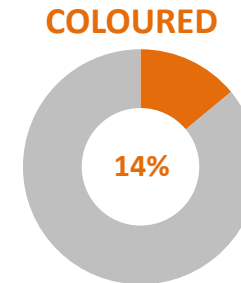
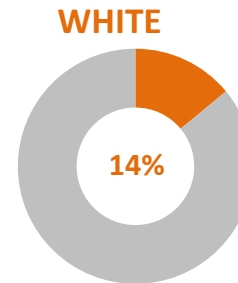
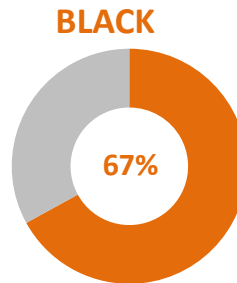
READING... Past 7 days



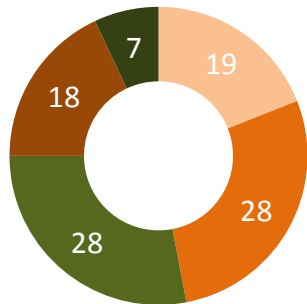
P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...



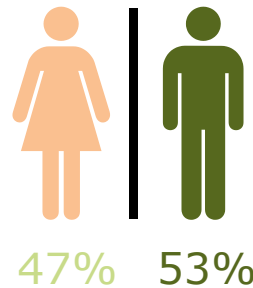
15.8 million
ADULTS 15 YEARS+



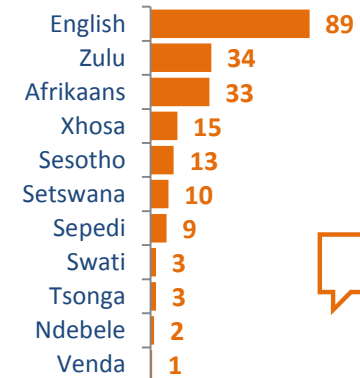
AGE %



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



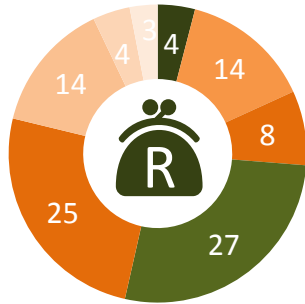
LANGUAGES READ AND UNDERSTAND %



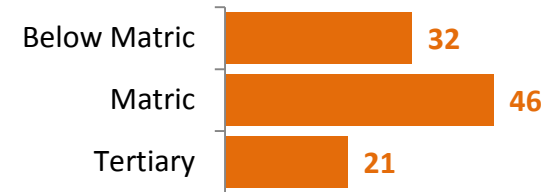
P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...



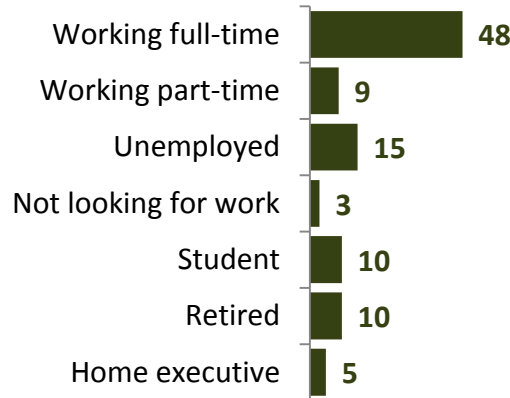
MONTHLY HOUSEHOLD INCOME %
AVERAGE: R15,242



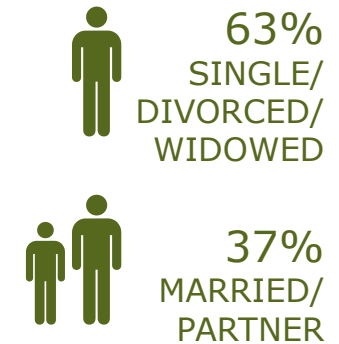
- R0 - R1 999
- R2 000 - R3 999
- R4 000 - R4 999
- R5 000 - R9 999
- R10 000 - R19 999
- R20 000 - R39 999
- R40 000 - R59 999
- R60 000+



57% WORKING
43% NOT WORKING



MARITAL STATUS



P7D NEWSPAPER READERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



54%
METRO



30%
URBAN



16%
RURAL



NEWSPAPER PLATFORM USAGE...



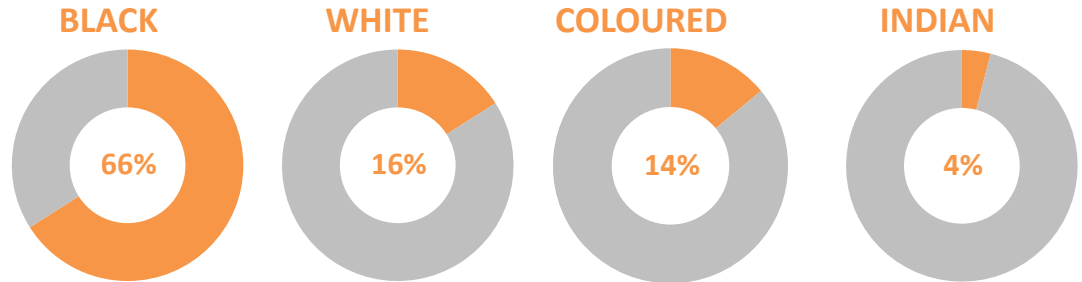
Multiple platforms



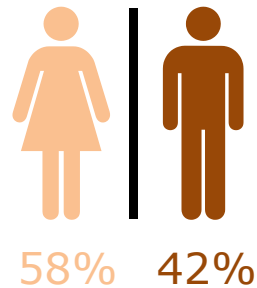
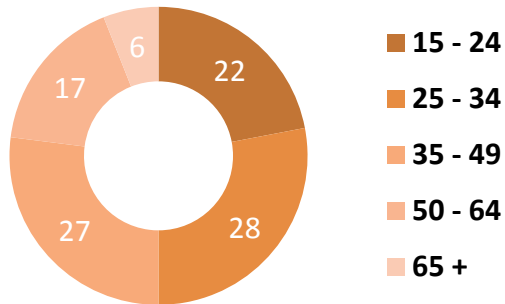
P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...



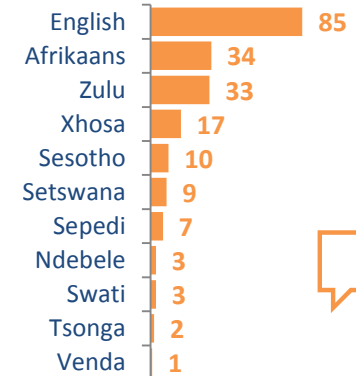
7.3 million
ADULTS 15 YEARS+



AGE %



LANGUAGES READ AND UNDERSTAND %

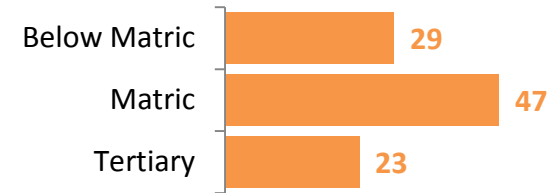
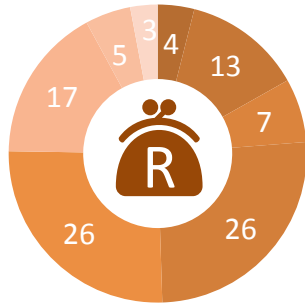


P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...



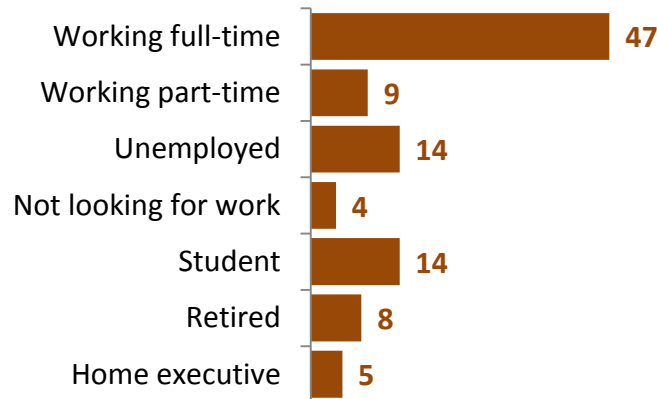
MONTHLY HOUSEHOLD INCOME %

AVERAGE: R16,455



55% WORKING

45% NOT WORKING



MARITAL STATUS



63%
SINGLE/
DIVORCED/
WIDOWED



37%
MARRIED/
PARTNER



P7D MAGAZINE READERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



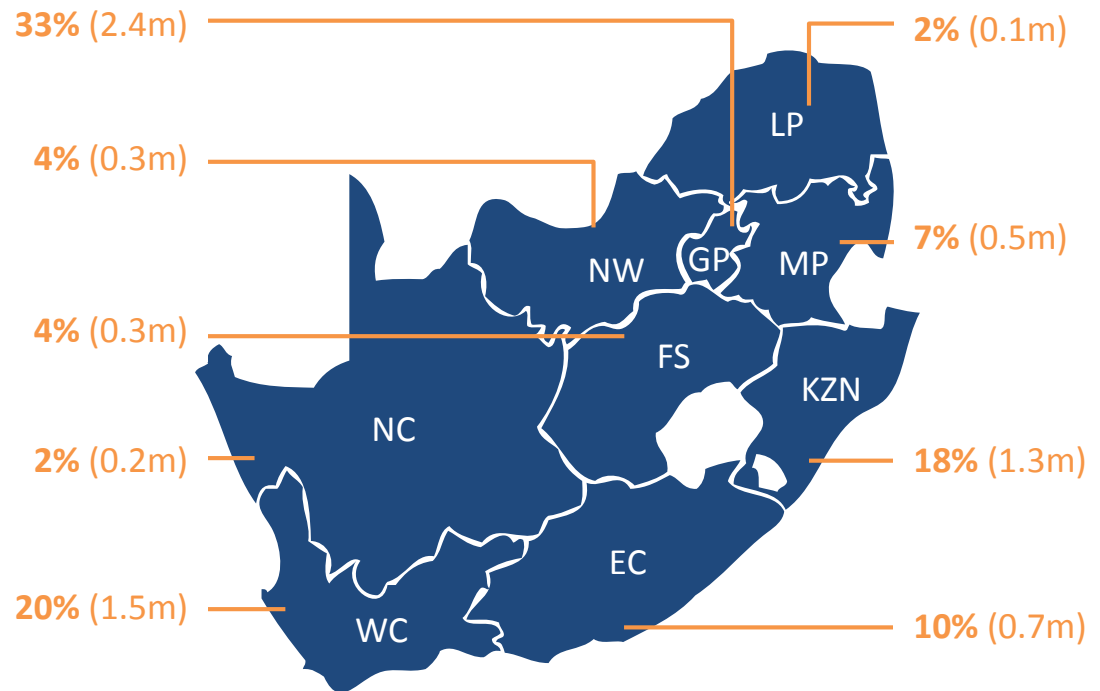
54%
METRO



32%
URBAN



14%
RURAL



MAGAZINE PLATFORM USAGE...



Multiple platforms





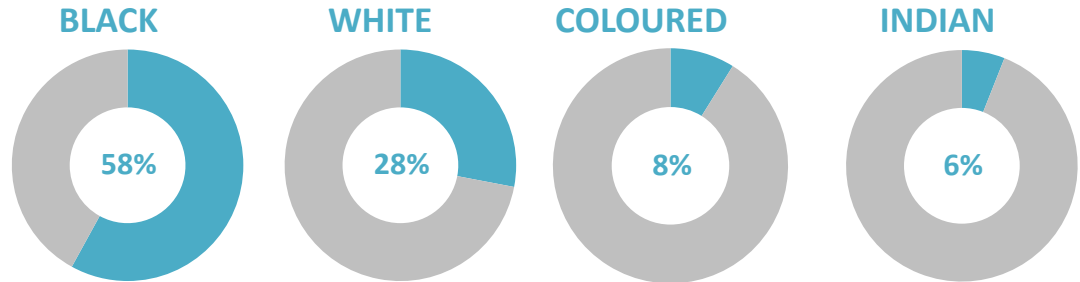
CINEMA... Past month



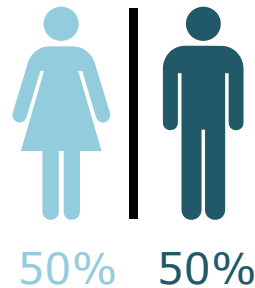
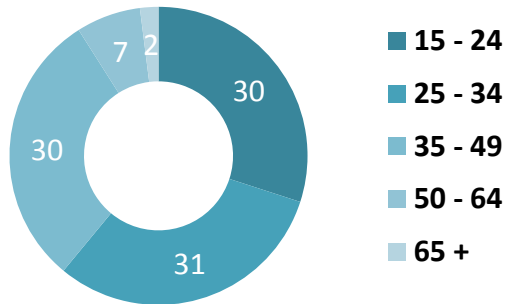
PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...



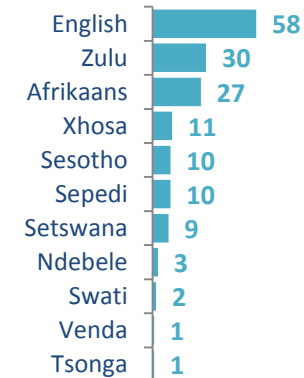
1.4 million
ADULTS 15 YEARS+



AGE %



LANGUAGES SPOKEN IN HOME %

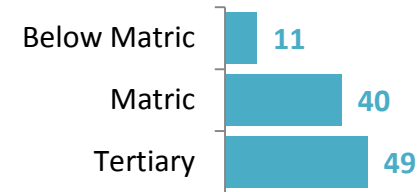
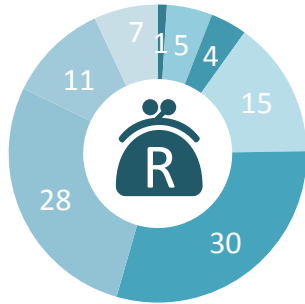


PAST MONTH CINEMA GOERS DEMOGRAPHIC LANDSCAPE...

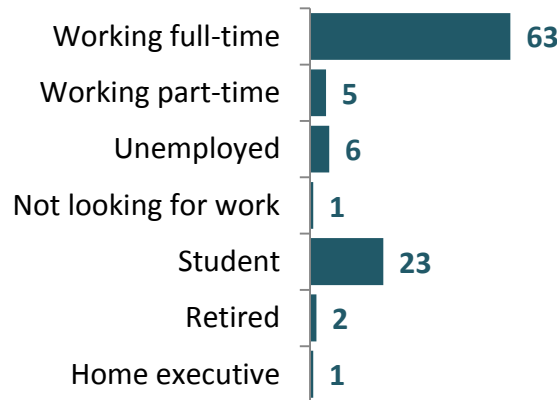


MONTHLY HOUSEHOLD INCOME %

AVERAGE: R25,657



68% WORKING
32% NOT WORKING



CHILDREN UNDER 15 YEARS
LIVING AT HOME %



30%
CHILDREN



70%
NONE



PAST MONTH CINEMA GOERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



77%
METRO



19%
URBAN



4%
RURAL



CINEMA FREQUENCY...



	%
Once a week	1
2-3 times a month	4
Once a month	13
Once every 3 months	24
Once every 6 months	27
Once every 12 months	20
Less than once every 12 months	11
Average no. of visits per year	5.1

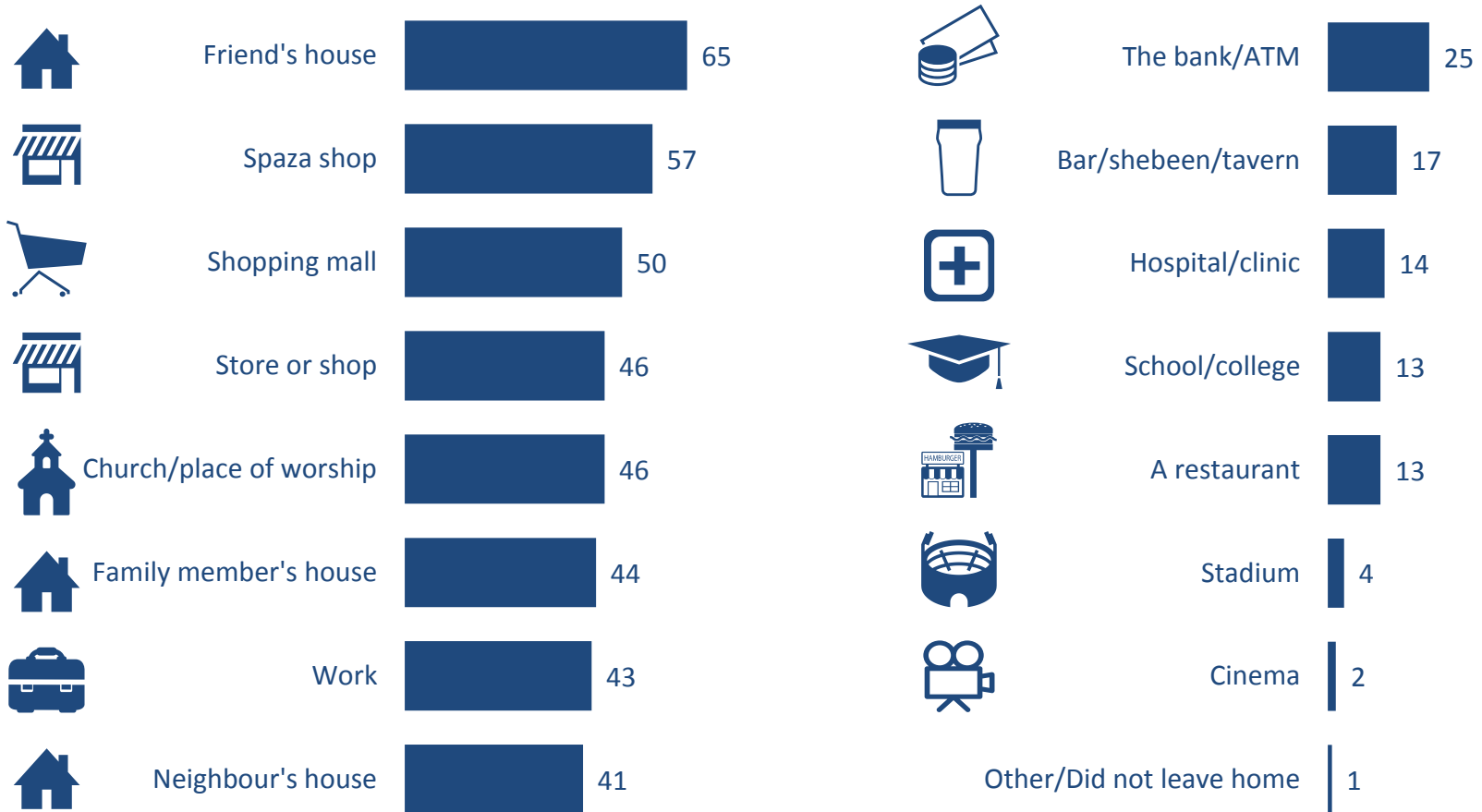




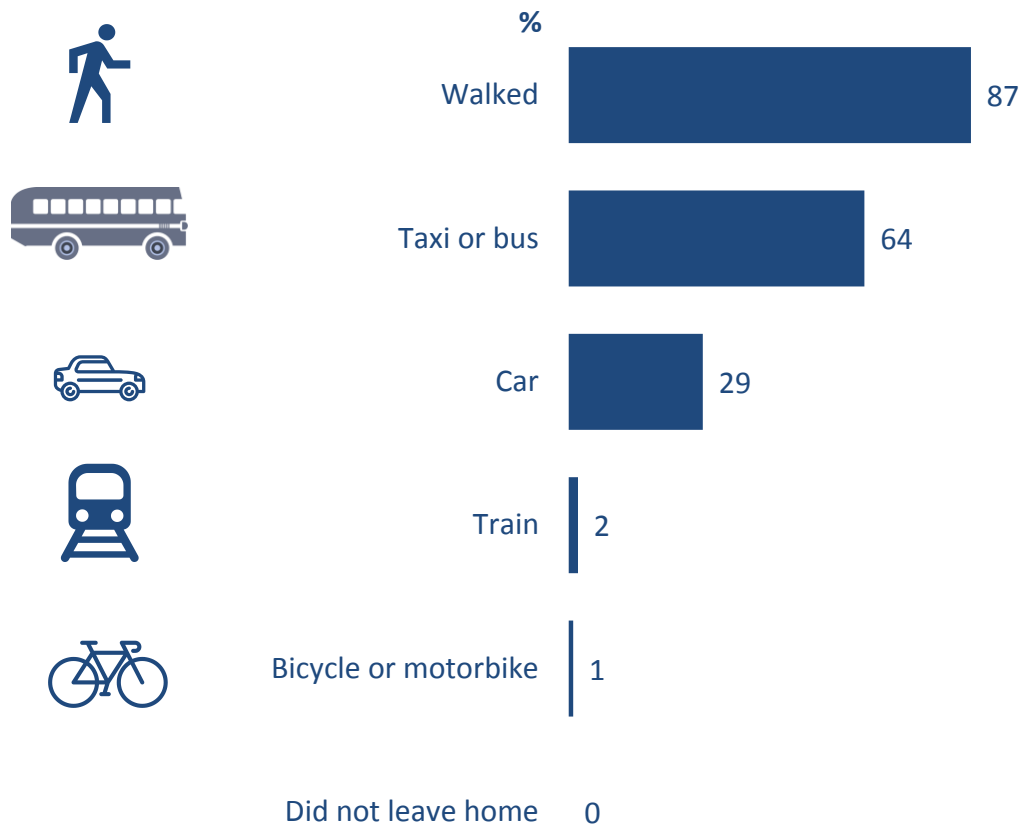
ON THE GO... Past 7 days



PAST WEEK DESTINATIONS...



MODES OF TRANSPORT



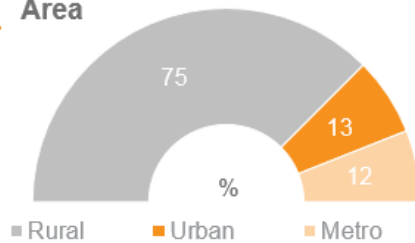
SEM 1 - DEMOGRAPHICS

SEM 1

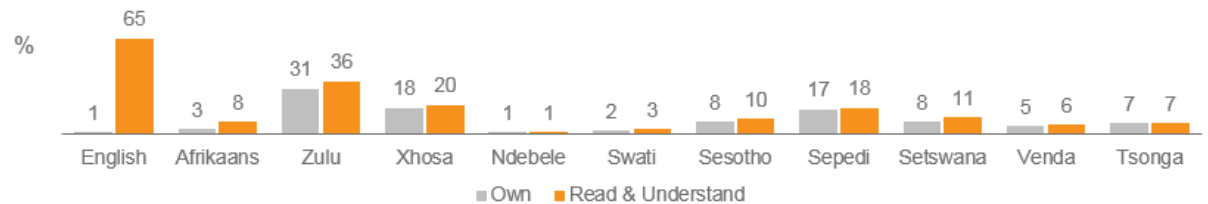
Population: 5.0 million (13%)



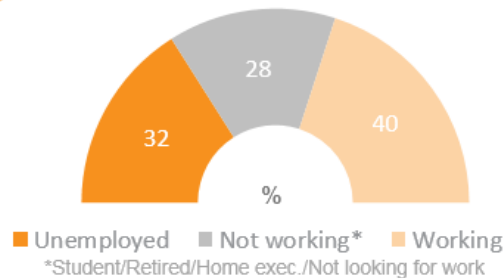
Area



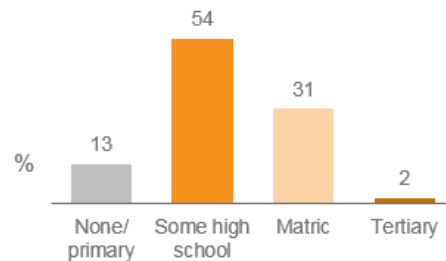
Language



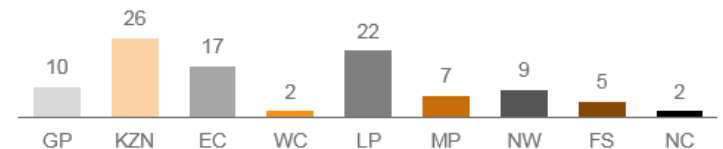
Work status



Education



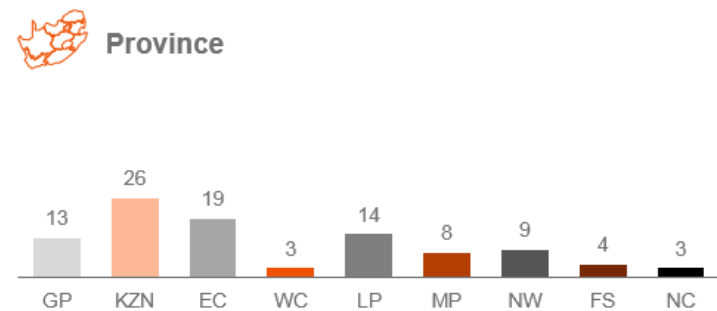
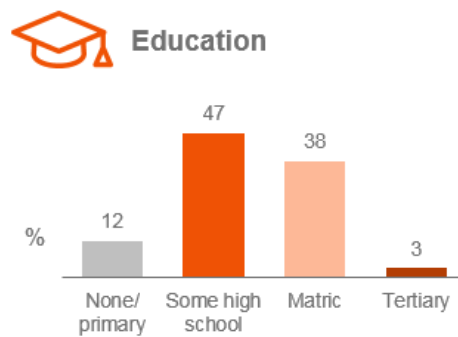
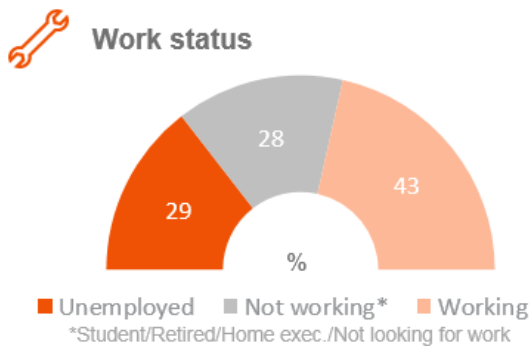
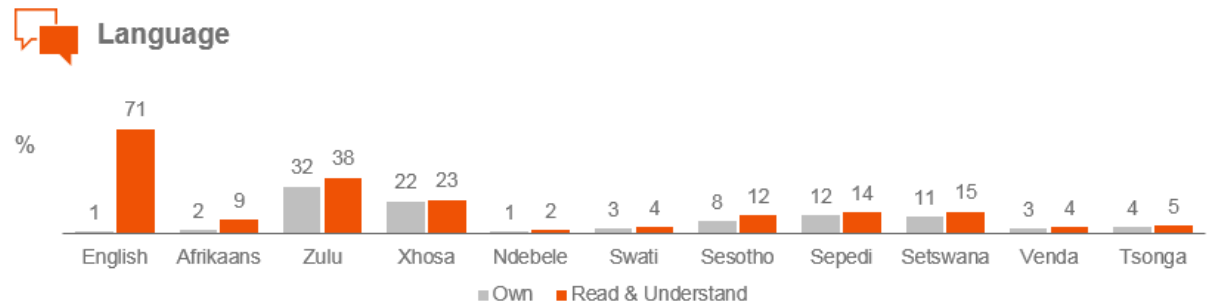
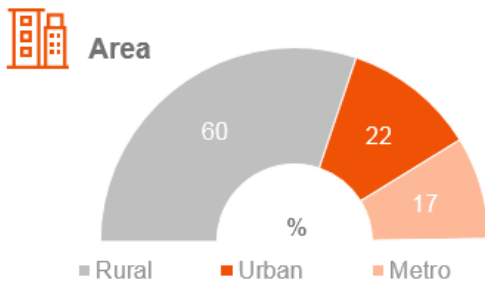
Province



SEM 2 - DEMOGRAPHICS

SEM 2

Population: 6.1 million (16%)



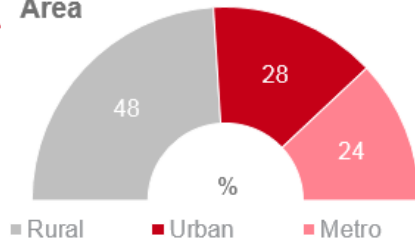
SEM 3 - DEMOGRAPHICS

SEM 3

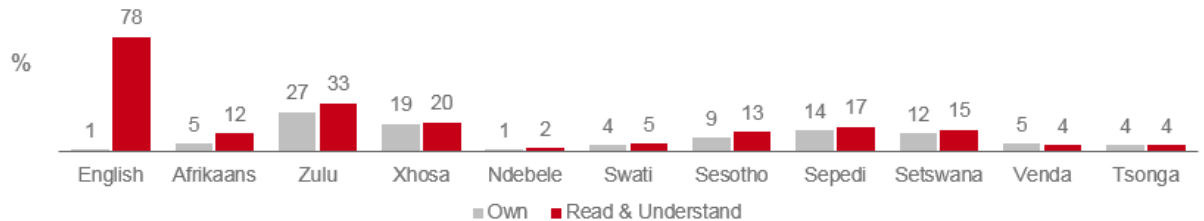
Population: 5.5 million (14%)



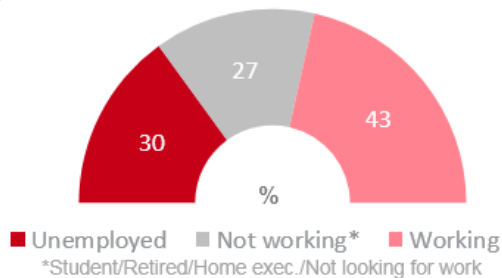
Area



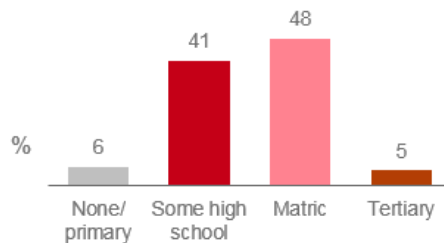
Language



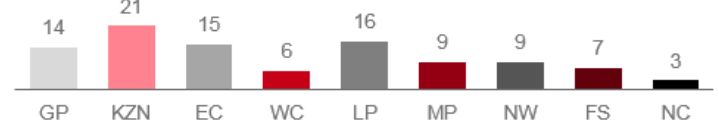
Work status



Education



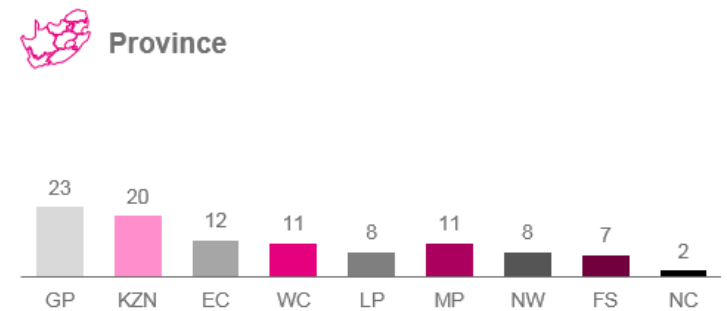
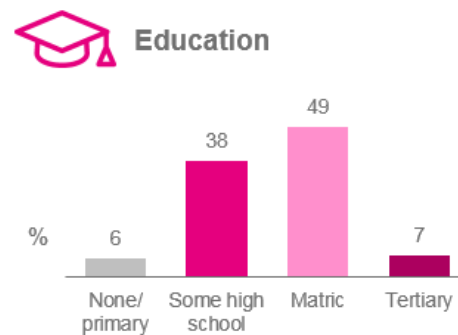
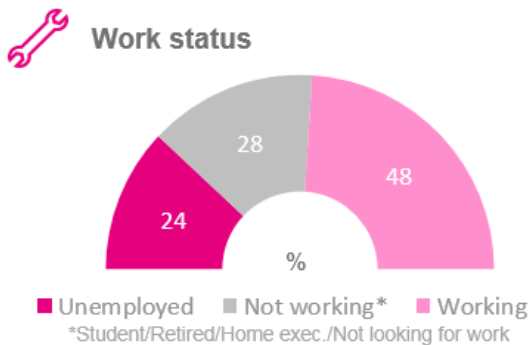
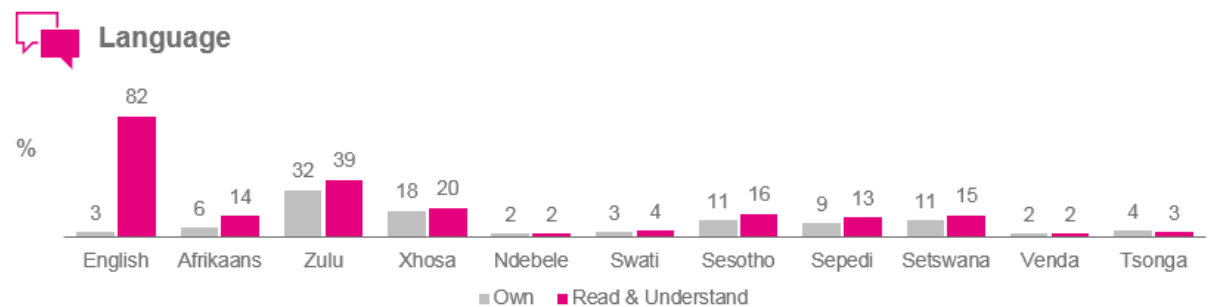
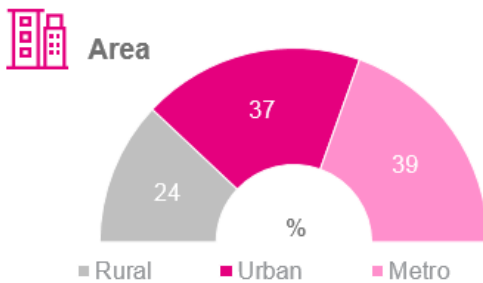
Province



SEM 4 - DEMOGRAPHICS

SEM 4

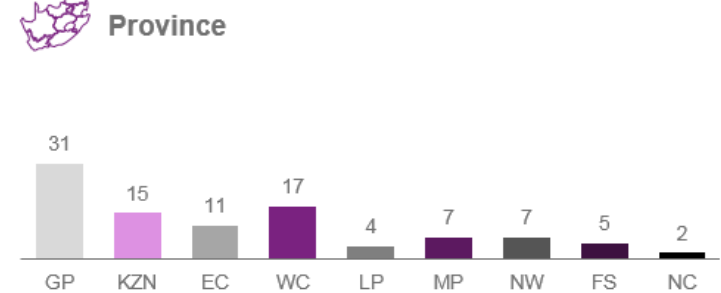
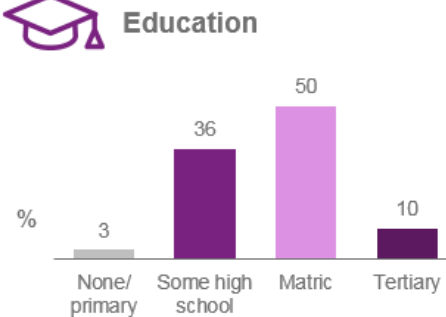
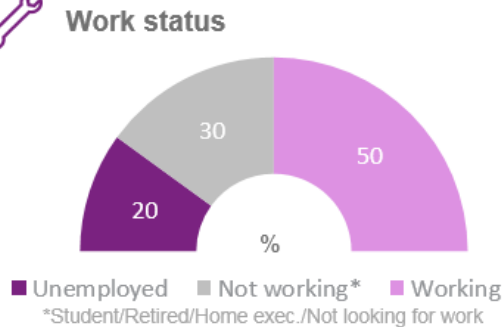
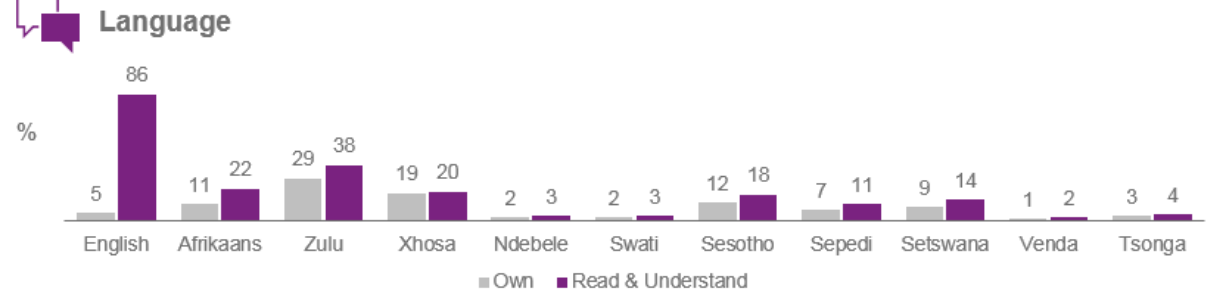
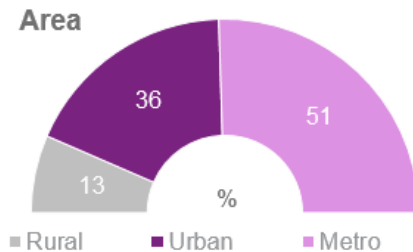
Population: 4.2 million (11%)



SEM 5 - DEMOGRAPHICS

SEM 5

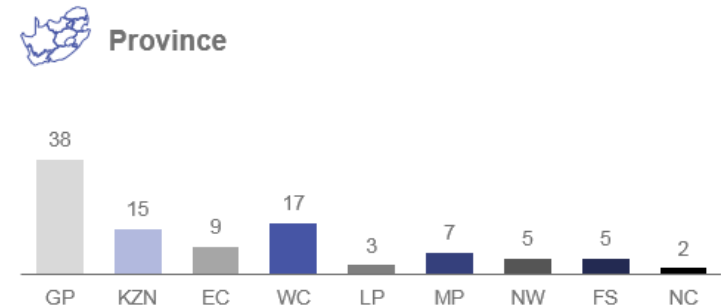
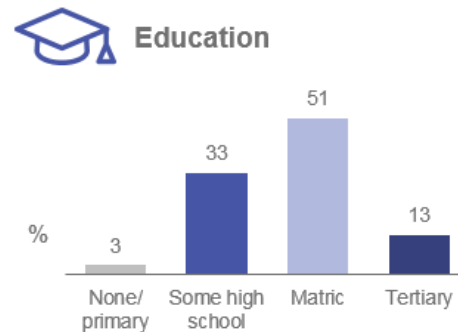
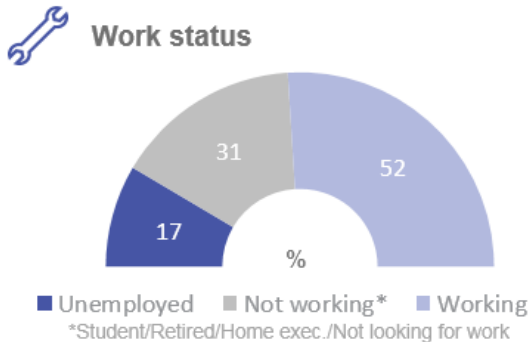
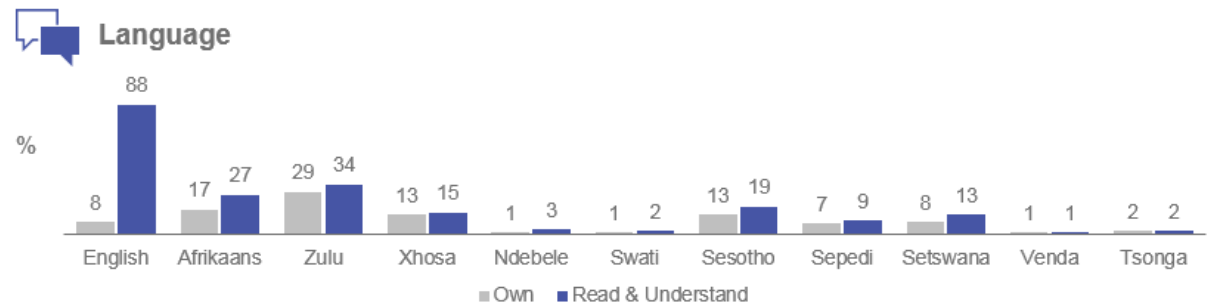
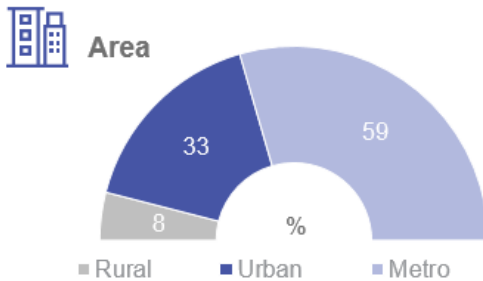
Population: 4.0 million (10%)



SEM 6 - DEMOGRAPHICS

SEM 6

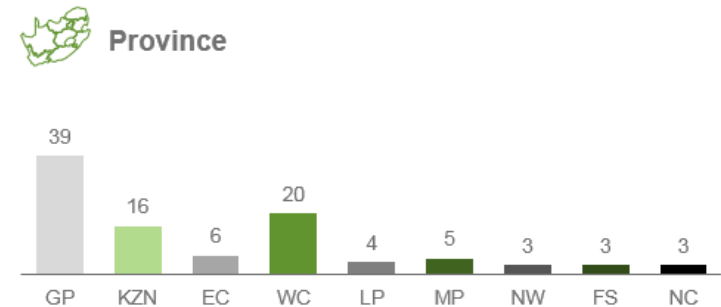
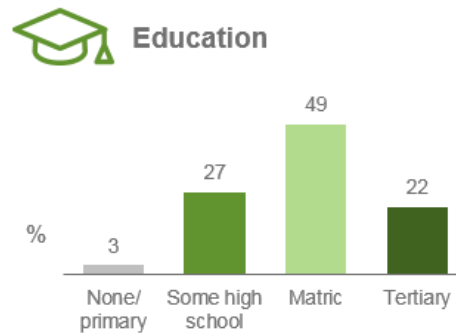
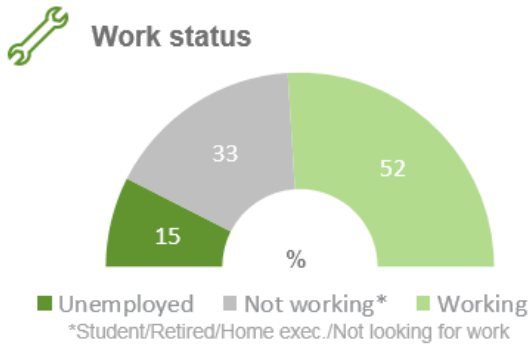
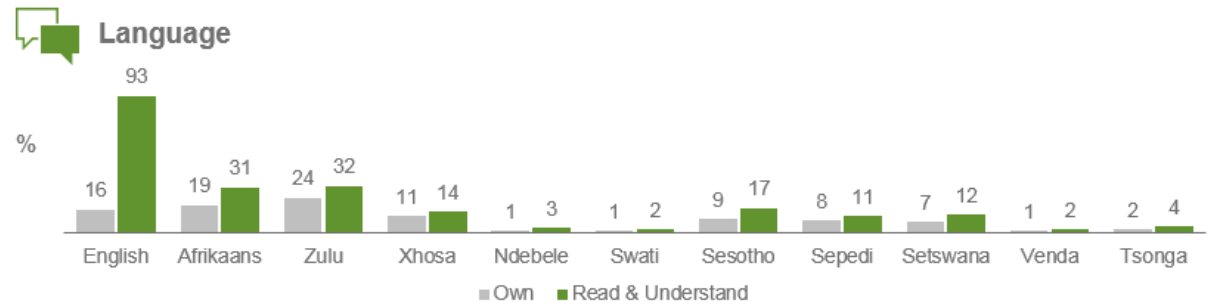
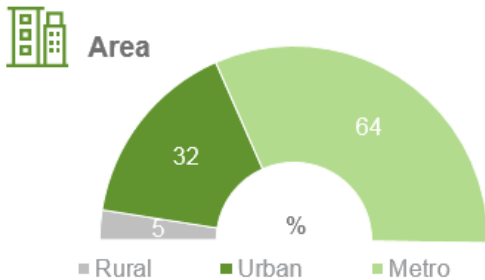
Population: 3.4 million (9%)



SEM 7 - DEMOGRAPHICS

SEM 7

Population: 3.4 million (9%)



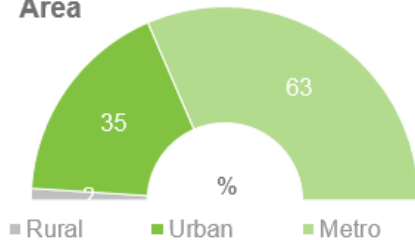
SEM 8 - DEMOGRAPHICS

SEM 8

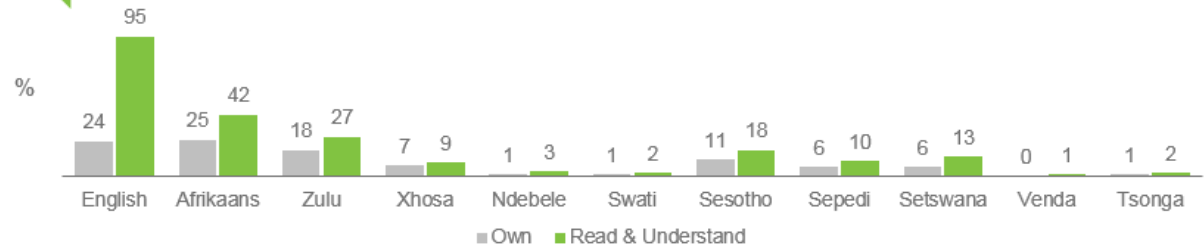
Population: 2.7 million (7%)



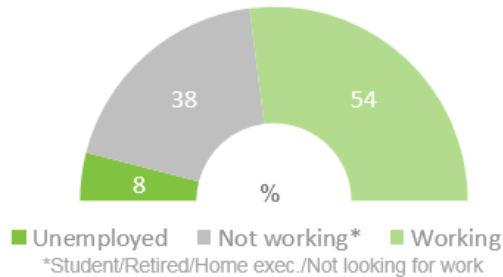
Area



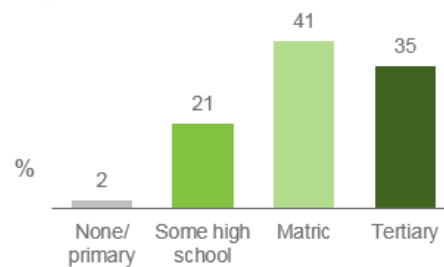
Language



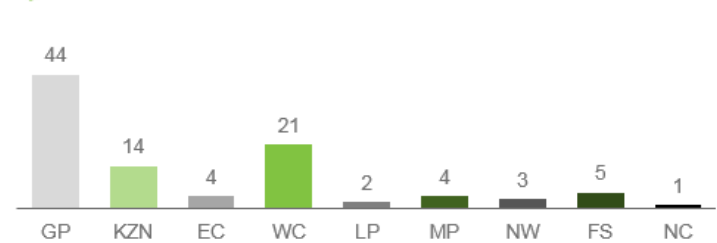
Work status



Education



Province



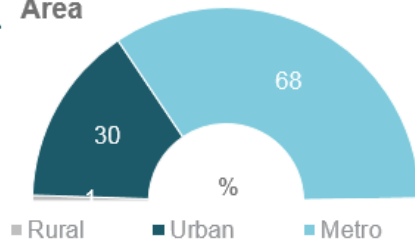
SEM 9 - DEMOGRAPHICS

SEM 9

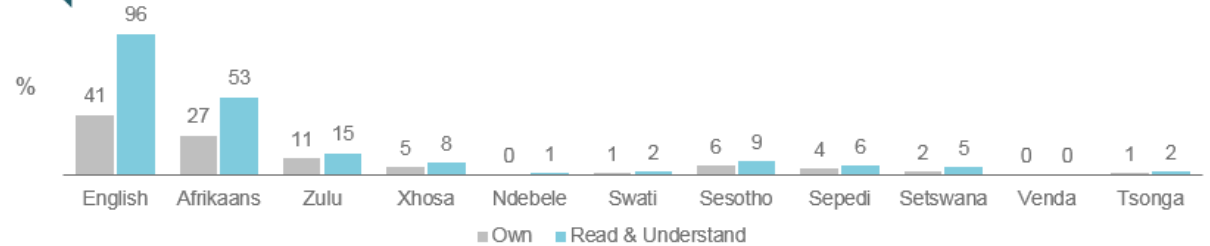
Population: 2.5 million (6%)



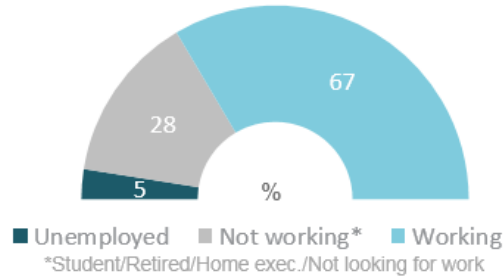
Area



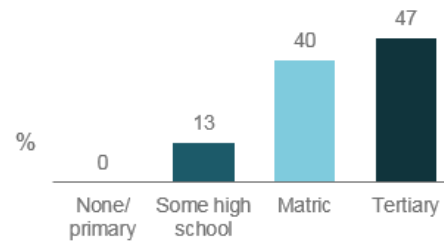
Language



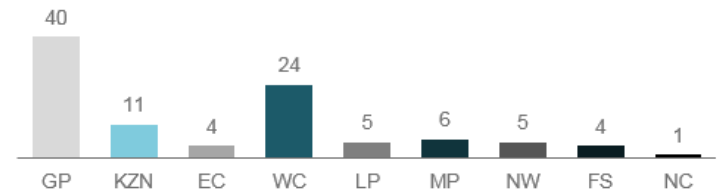
Work status



Education



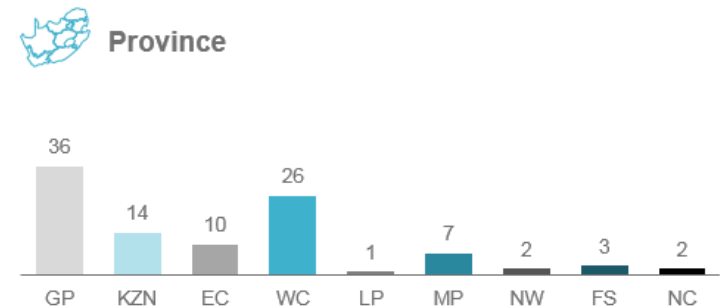
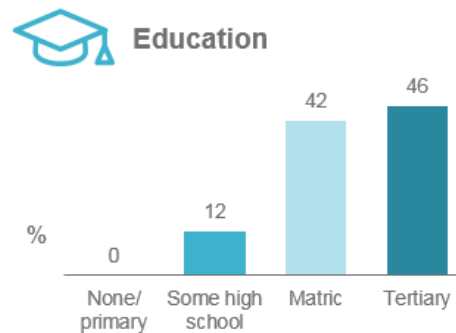
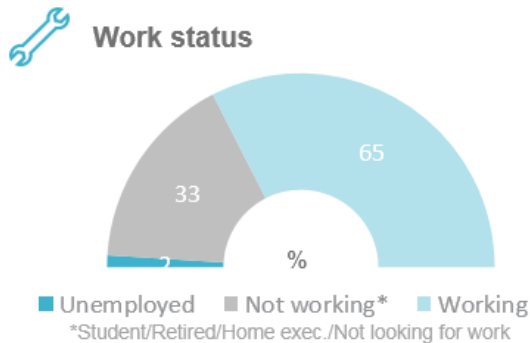
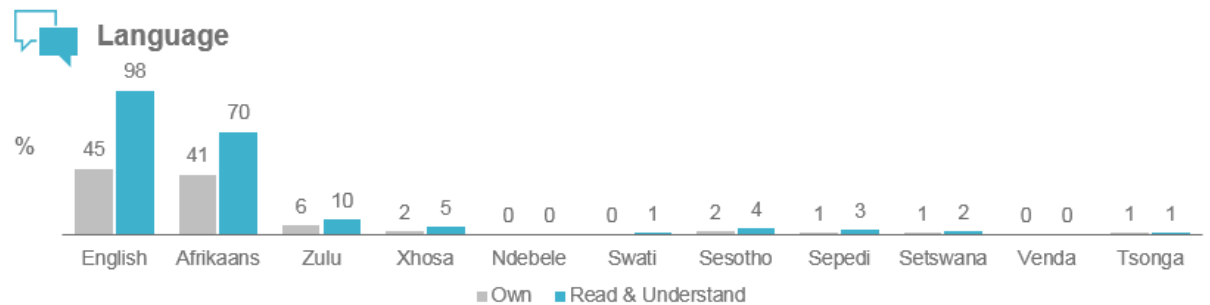
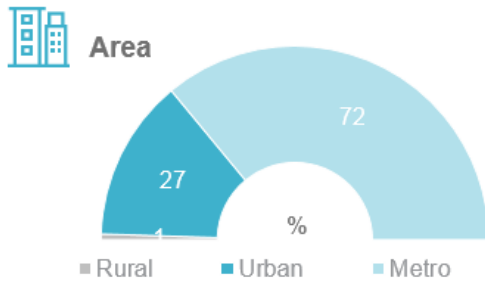
Province



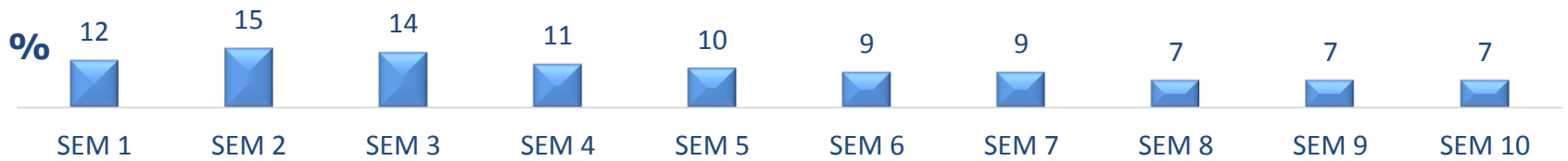
SEM 10 - DEMOGRAPHICS

SEM 10

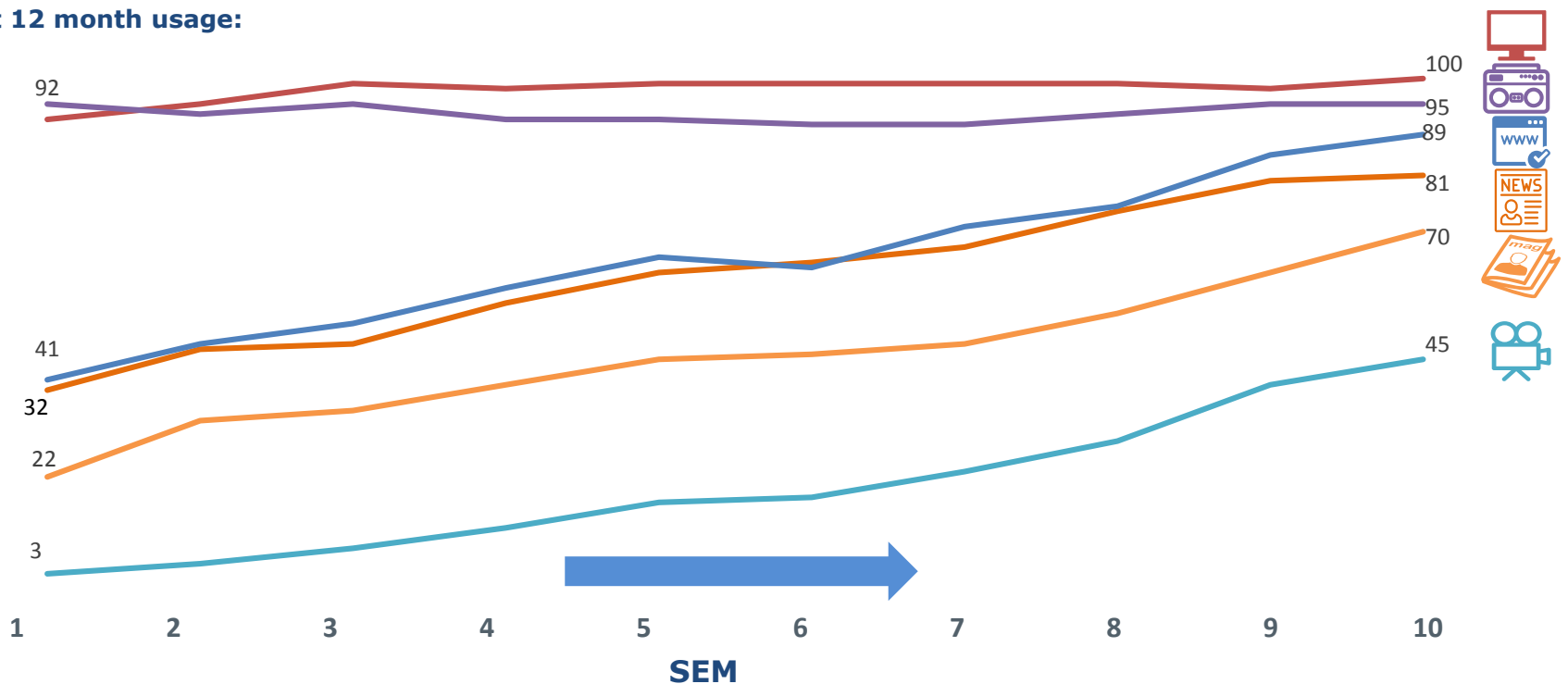
Population: 2.5 million (6%)



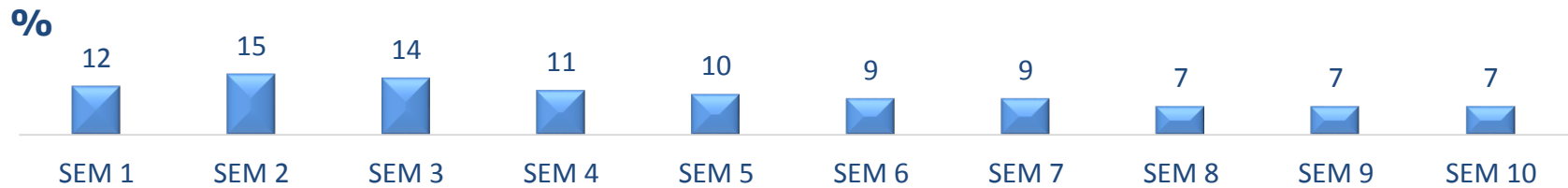
MEDIA CONSUMPTION BY SEM™ ...



Past 12 month usage:



EQUIPMENT IN HOME BY SEM™ ...

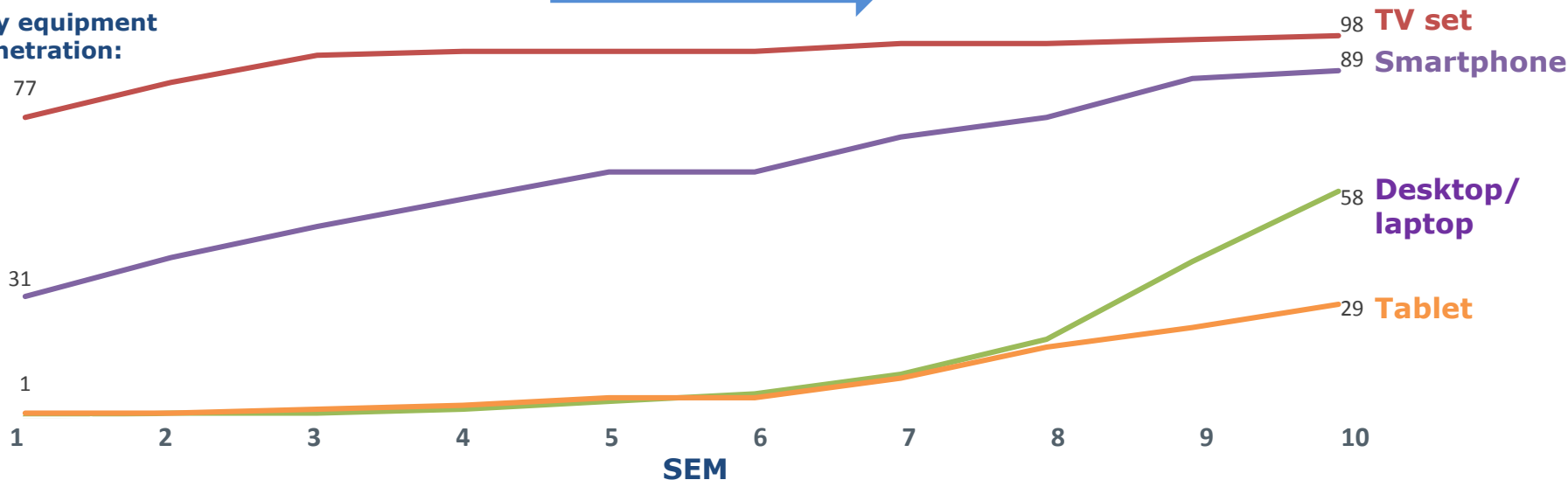


Avg. no. of equipment items in home:

2.5 2.7 2.9 2.9 3.0 3.0 3.2 3.5 3.8 4.1



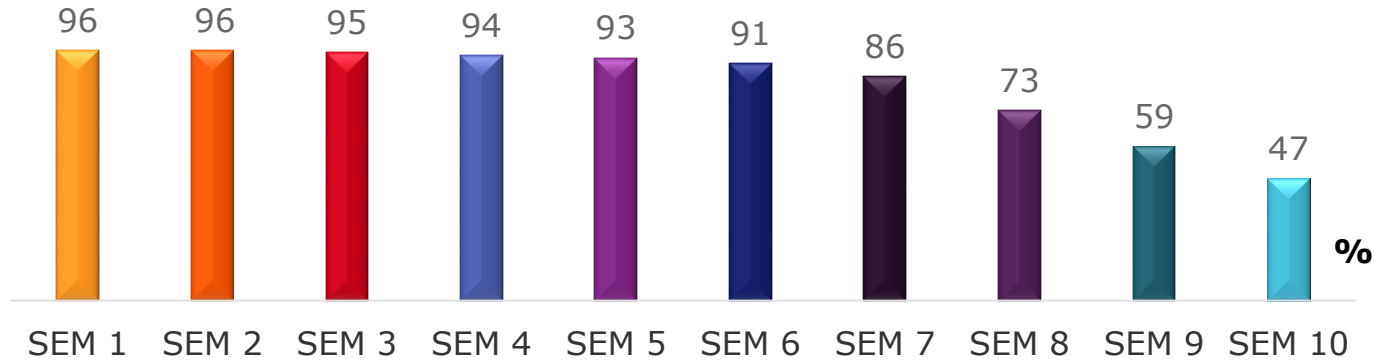
Key equipment penetration:



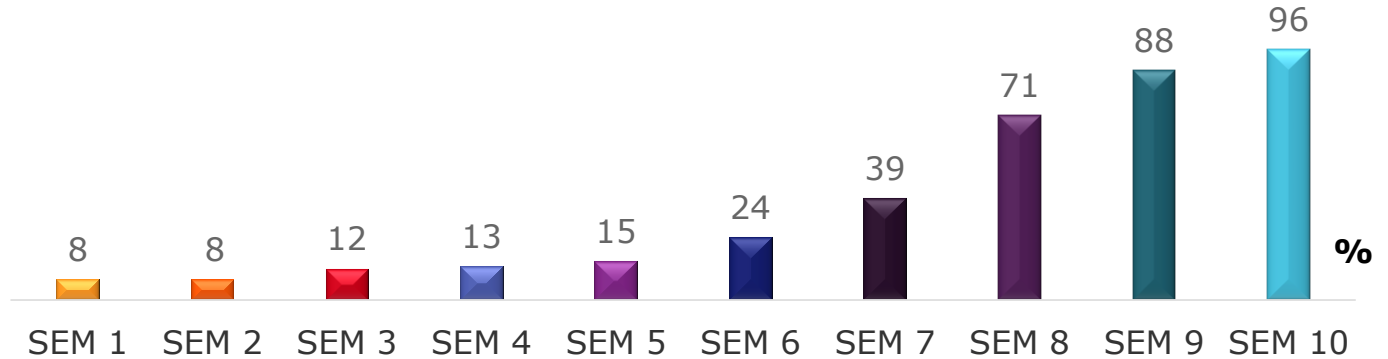
TRANSPORT - PAST WEEK...



Walked



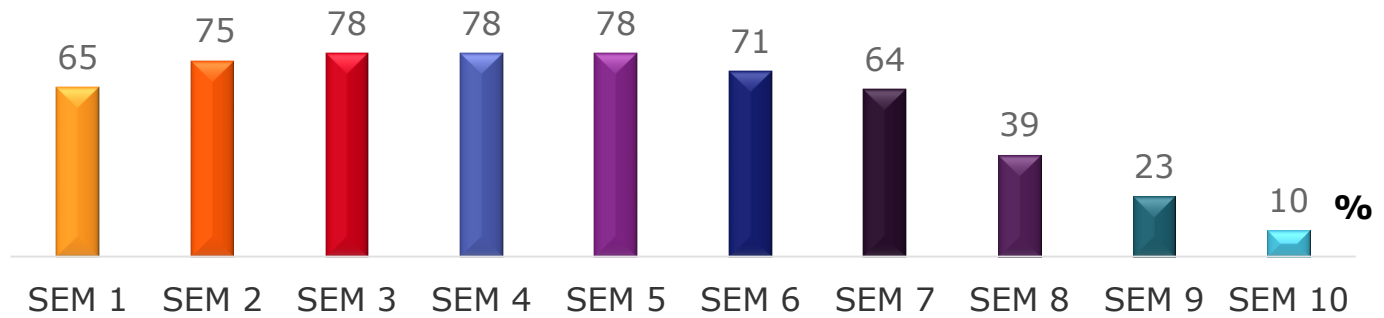
Car



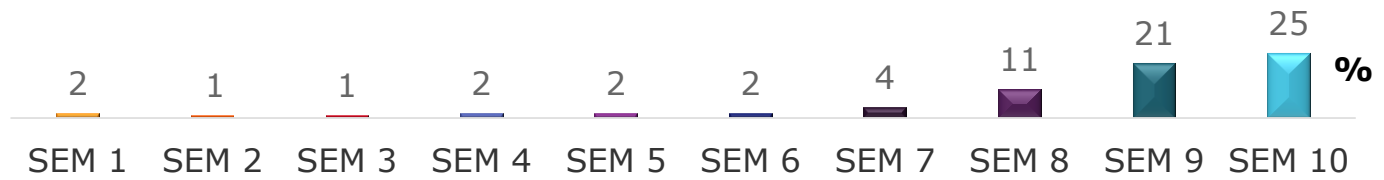
TRANSPORT - PAST WEEK...



Taxi/bus



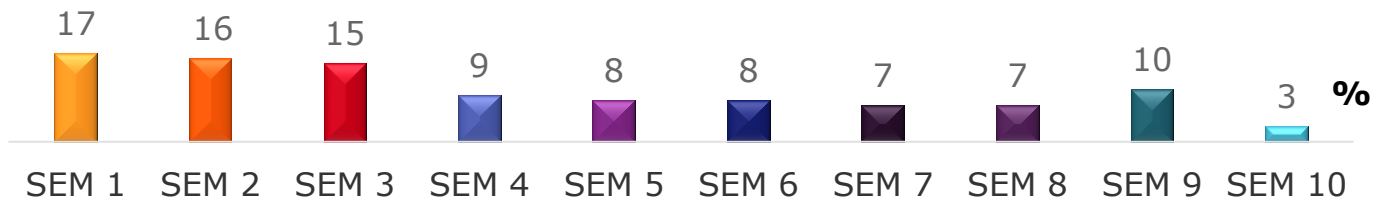
Bicycle in home



PROFILE - INFORMAL TRADERS...



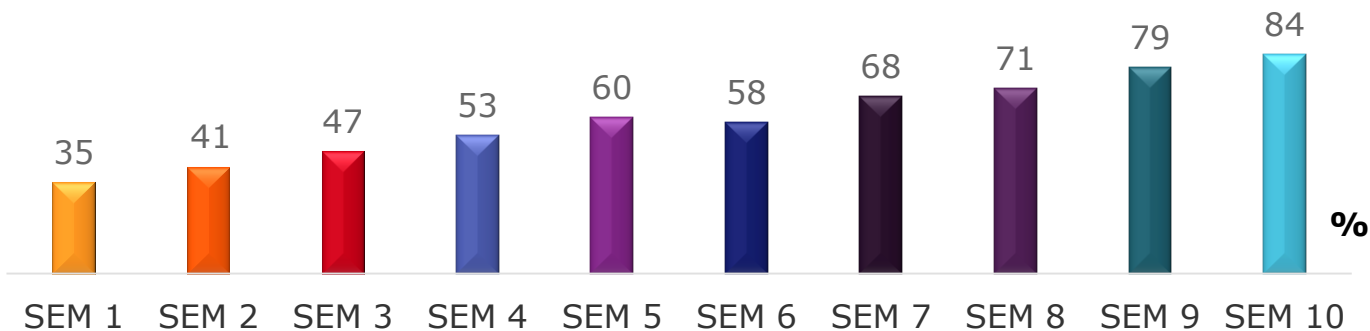
**Selling things/
informal trading**



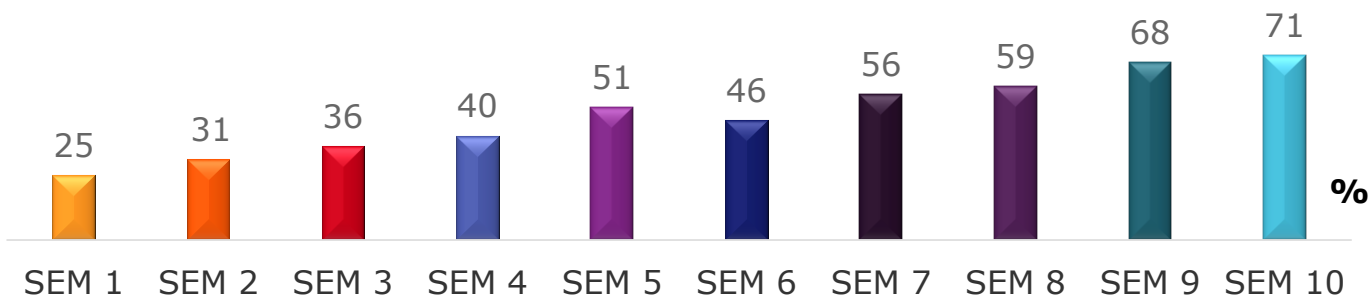
DIGITAL ACTIVITY – PAST WEEK...



**Whatsapp/
instant
messaging
/ chat**



**Social
media**



PROFILE - DIGITAL USERS...



**Make/
receive
calls (e.g.
Skype,
faceTime,
Whatsapp)**



**Watch
video**



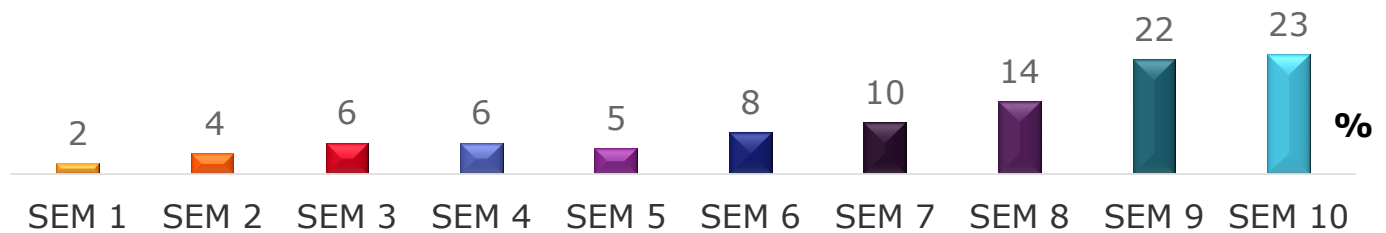
PROFILE - DIGITAL USERS...



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