



PUBLISHER
RESEARCH COUNCIL

READ RESEARCH PRESENTATION

APRIL 19-21 2017

KANTAR TNS



nielsen
.....

BrandMapp

Today's Presentation

Rich

Engaged

Action

Depth

- **Introduction** *Finish 9,40am*
- **The Establishment Survey** *10,00am*
- **KANTAR TNS MediaView Study** *10,20am*
- **GfK nielsen Synergy Study** *10,35am*
- **BrandMapp BrandMapp Study** *10,45am*
- **Print – Multiple OTS. Buy 1 Get 1 Free** *11,00am*



You have to begin to lose your memory, if only in bits & pieces, to realise that memory is what makes our lives.

Life without memory is no life at all... Our memory is our coherence, our reason, our feeling, even our action.

Without it, we are nothing

So just as memory is central to an individual

The **written word and reading** forms the collective memory of our species.

Without the ability to write down and share our experiences, knowledge & collective learnings in a form that can be consumed by any literate person at any other time or place in any language, we would still be gathering nuts.

Our ability to **share, read, remember and learn** is what separates us from all other creatures. Knowledge transfer and civilisation would not be possible without reading.

Reading gives humanity a memory.



The “Killer App” in our electronic democracy is unquestionably Television, which is moving relentlessly towards 60% of AdSpend.

Research from all around the world, over the past 5 decades, has proved conclusively that reading is the best medium to complement and synergise messages and brand recall in conjunction with TV.



**Reading is the best way to remember anything
To Pin down TV's fleeting Image.**



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READ TO REMEMBER

INSIGHTS FROM THE ESTABLISHMENT SURVEY





INTRODUCING THE NEW SOCIO-ECONOMIC SEGMENTATION SYSTEM:

SEM

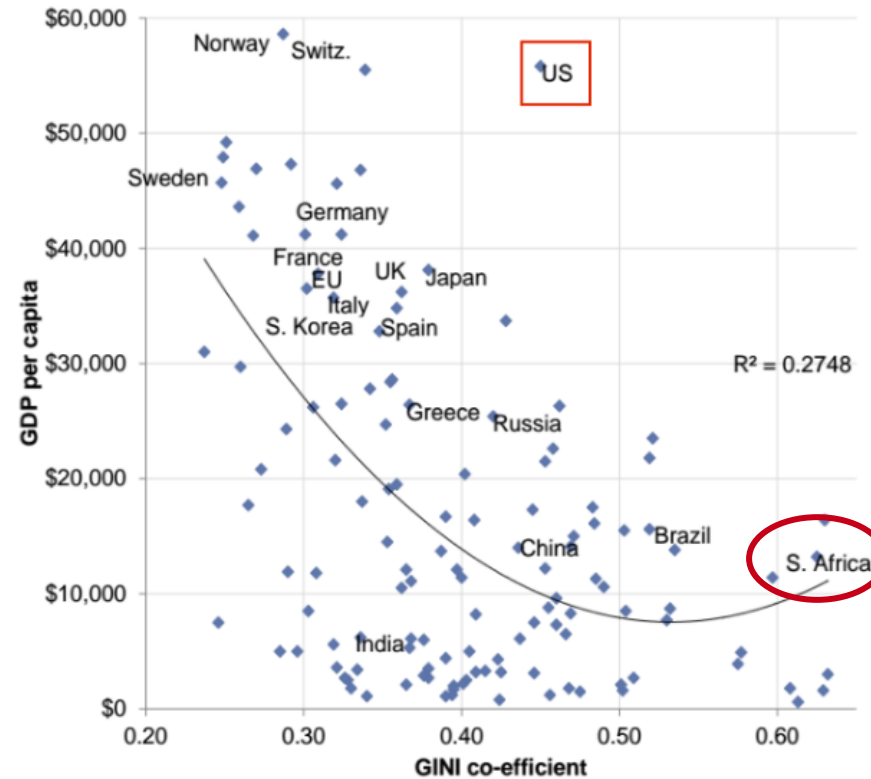


THE SEM CONCEPTUAL STARTING POINT



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

NEEDS TO REFLECT SA SOCIETY



Perfectly
equal
society

0

















1

Perfectly
unequal
society

THE 14 SEM VARIABLES...

Final variables:

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

 **Focus on structural items**

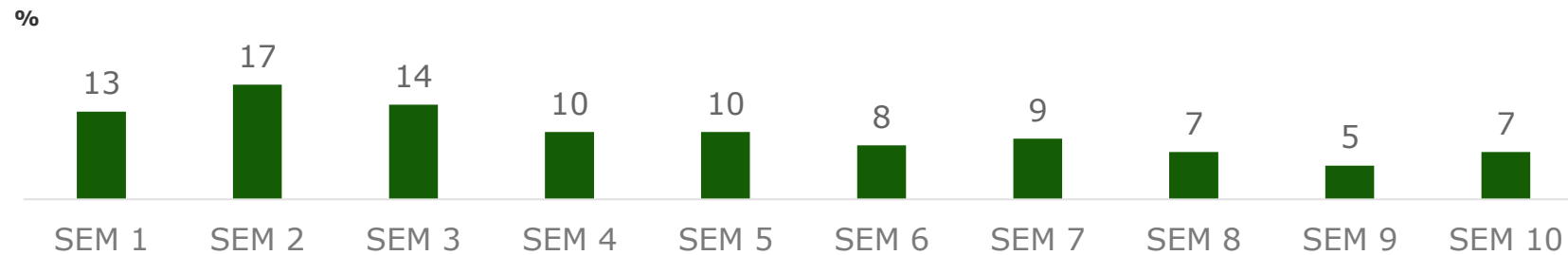
 **Low reliance on durables**

 **No reliance on technology items**

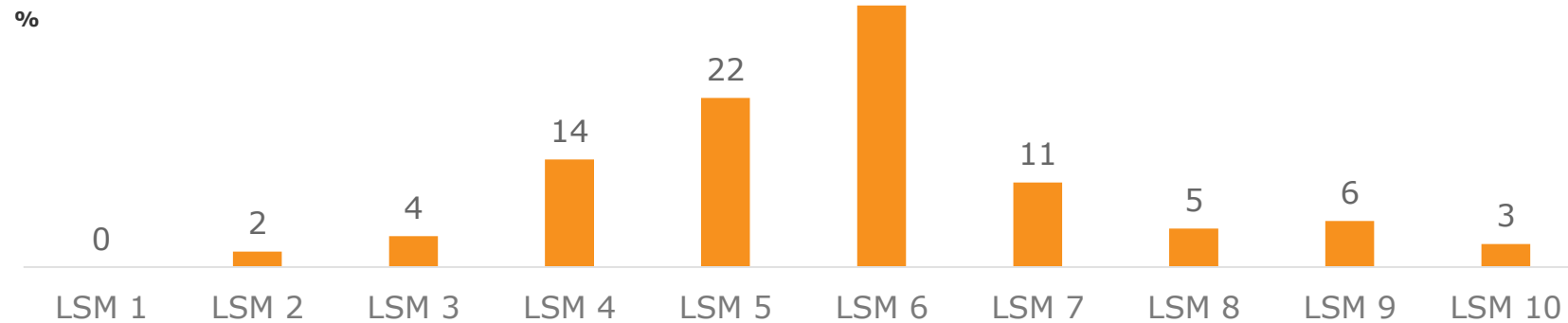
 **Short and easy to use**

SEM VS LSM

SEM:

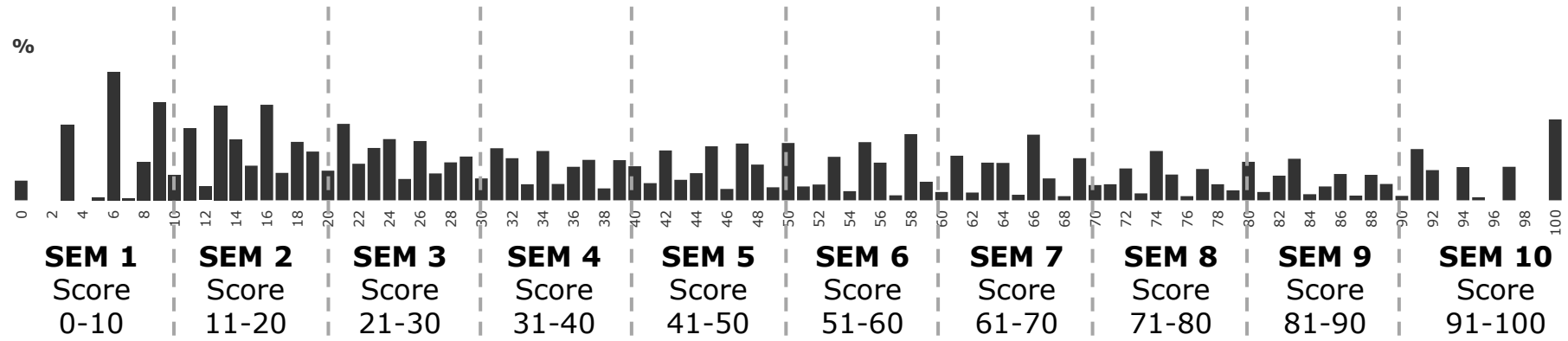


LSM:



Source ES 6 months Jul-Dec 2016

THE SEM CONTINUUM






Low socio-economic living



High socio-economic living

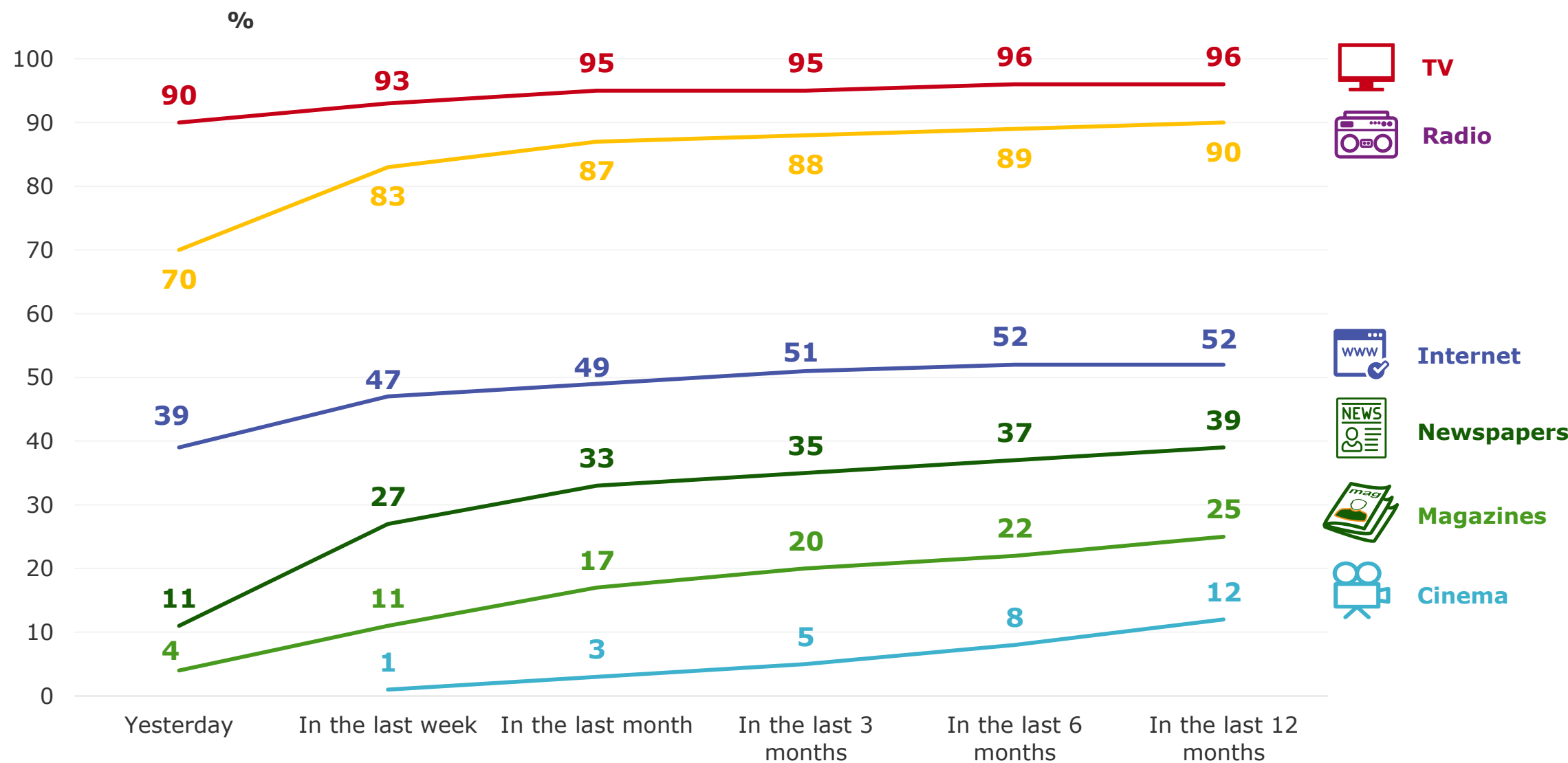
Currently divided into ten groups, but users have the flexibility to define the scores in any percentages they wish

DEMOGRAPHIC LANDSCAPE BY SEM...

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

Note: Individual weights

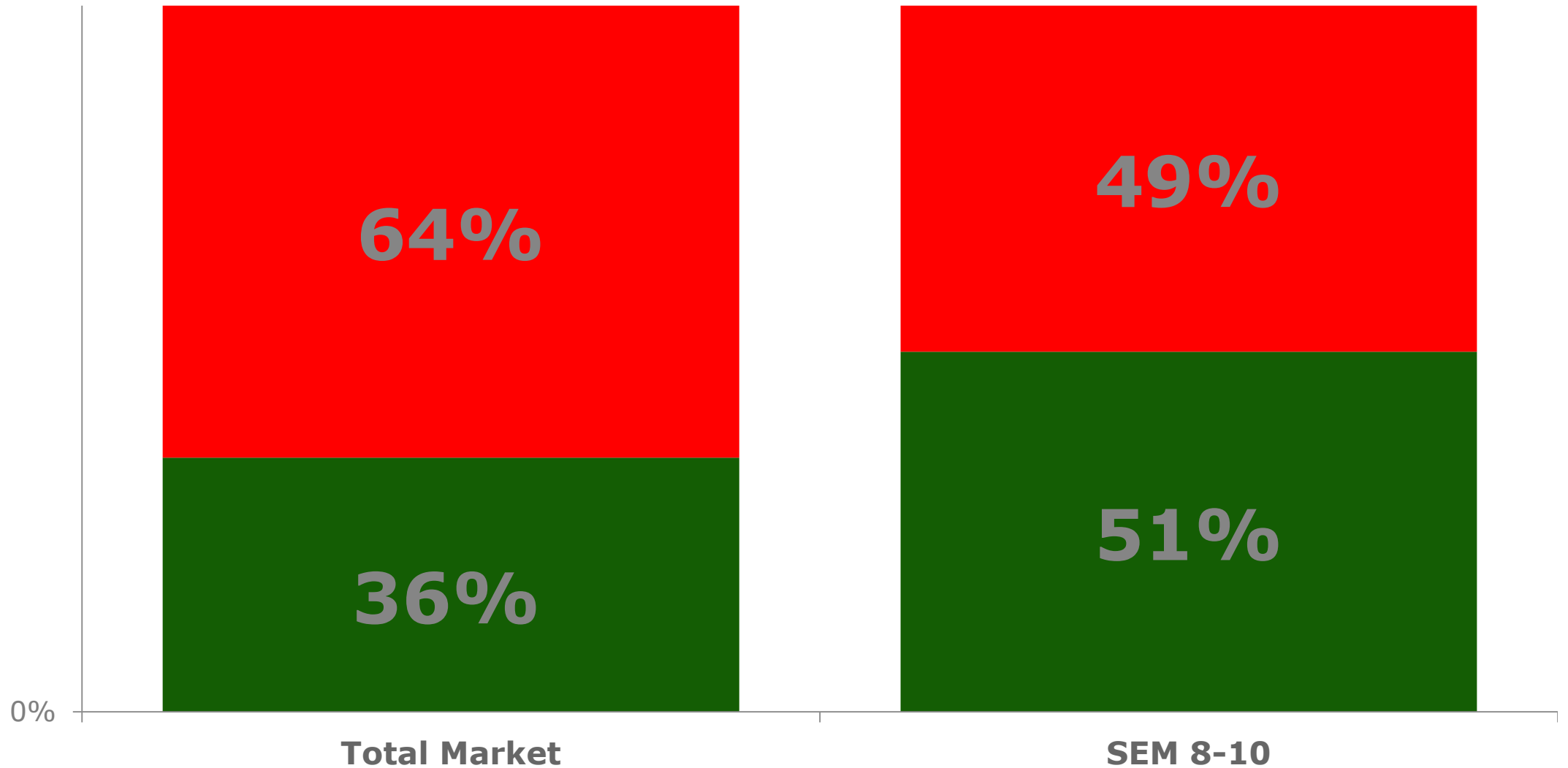
MEDIA LANDSCAPE... REACH



Don't Count the People you Reach **Reach the People that Count**

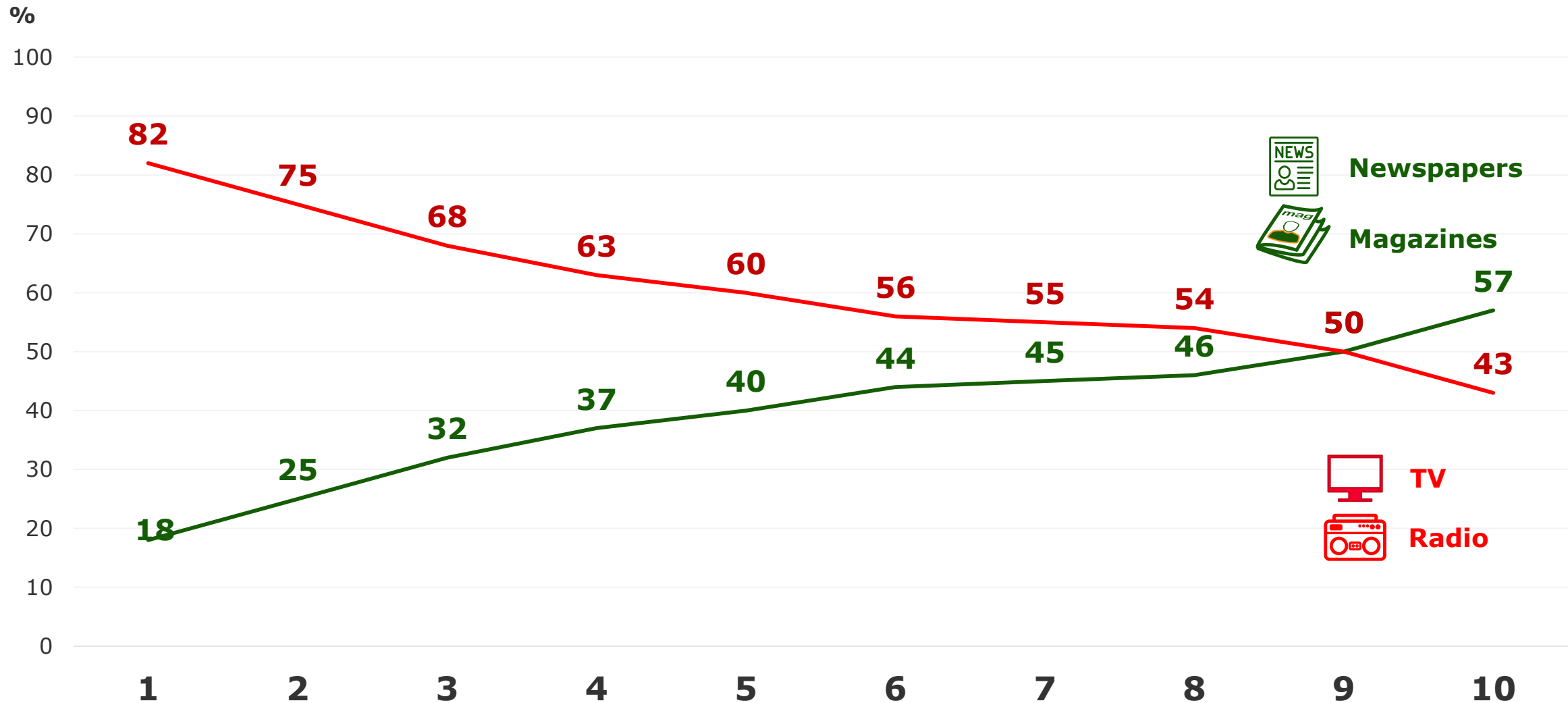


Only 1/3 of South Africans Read but the majority of SEM 8-10 do



Reach by SEM

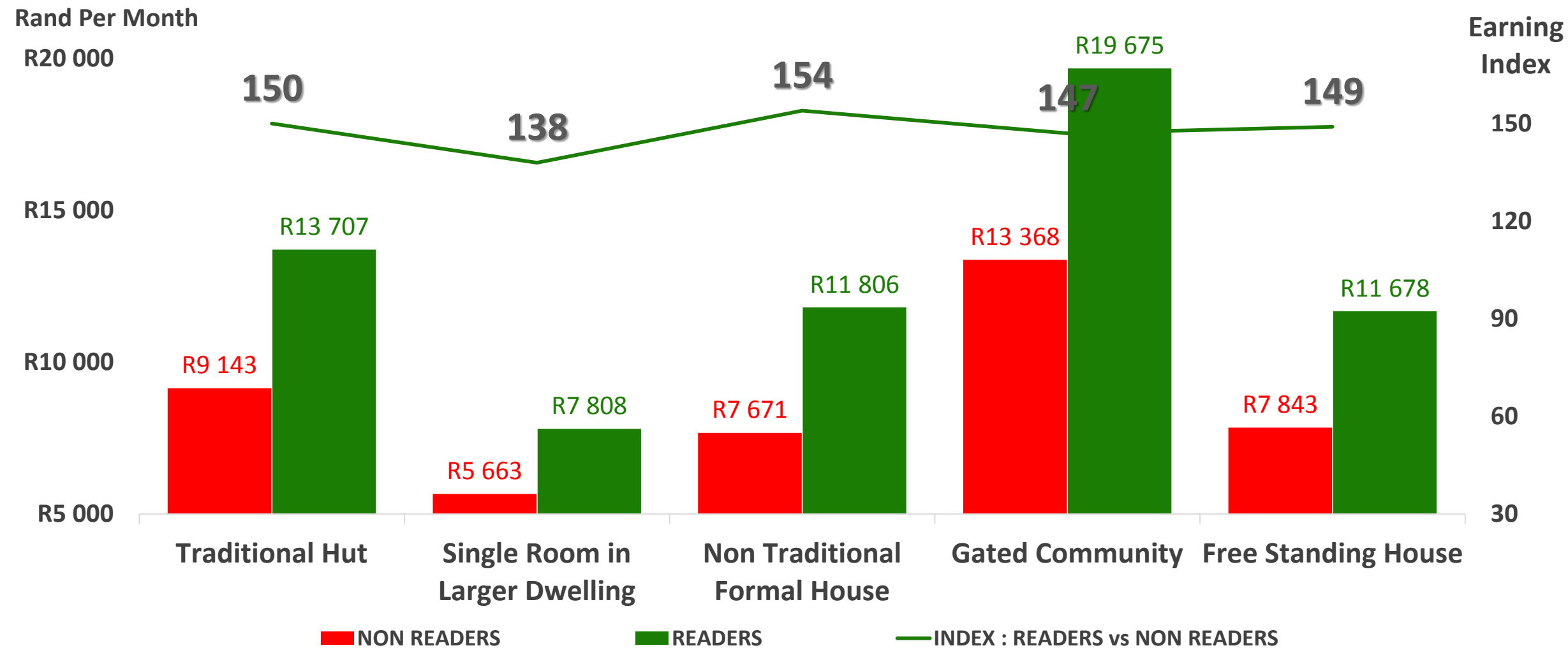
Readers vs. Non-Readers



SOURCE: ES 6 months ended Dec 2016. Past Month cumulative readers of Newspapers or Magazines vs. those who have not read any Newspapers or Magazines.

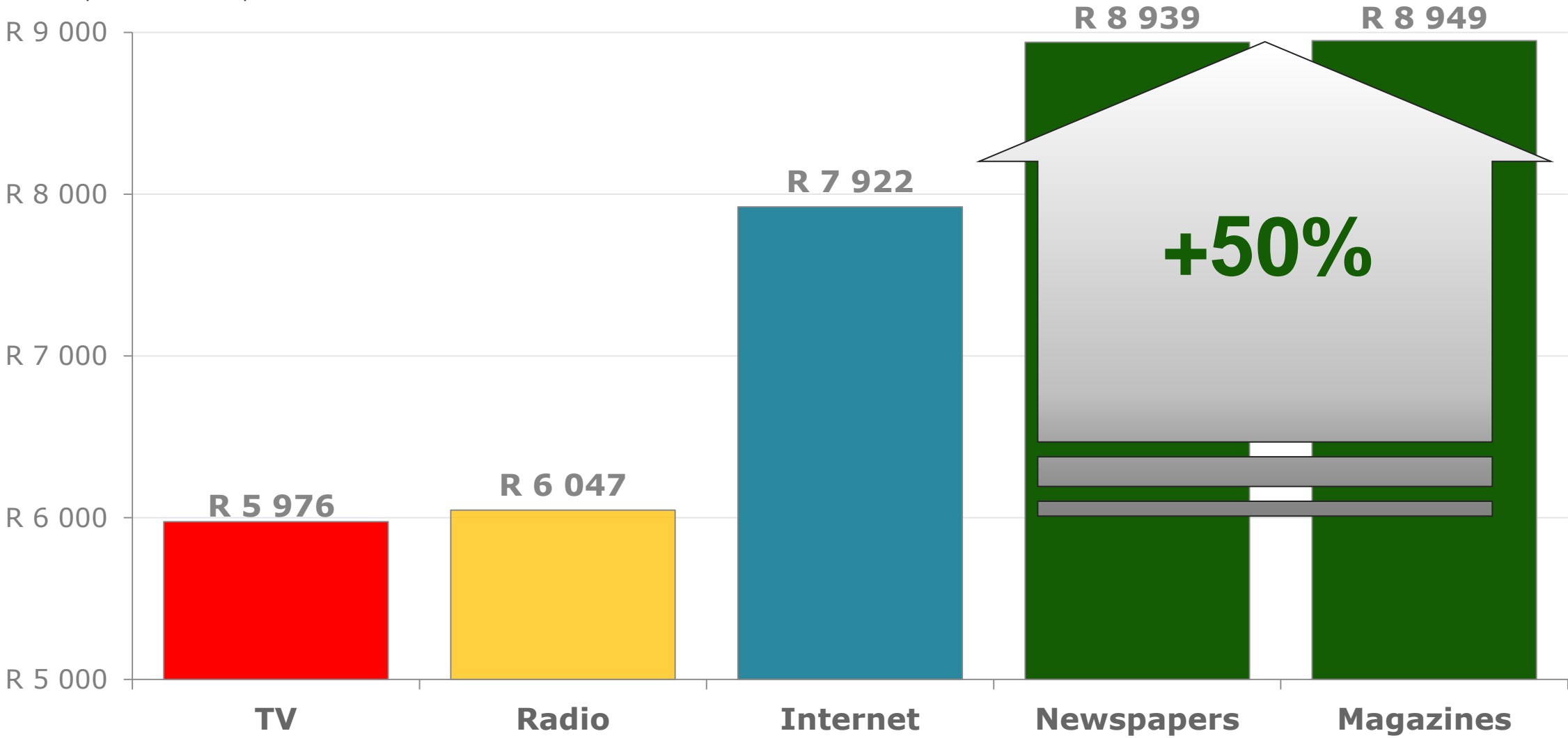
Readers earn more than **non-readers** across the entire spectrum of society

TYPE OF DWELLING : Ave. HHold Income

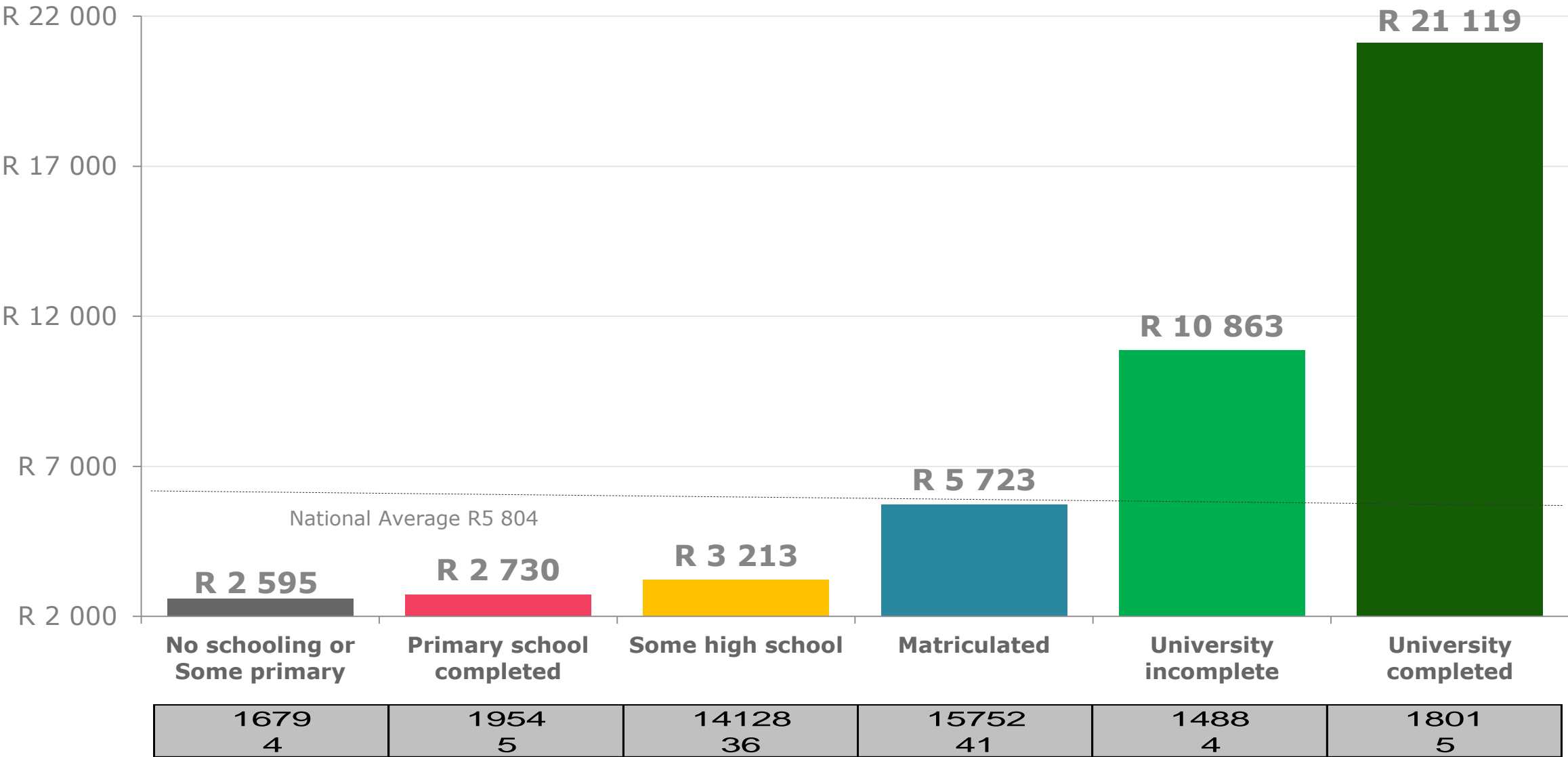


Readers Earn 50% More than Viewers or Listeners

Monthly income – rand per month



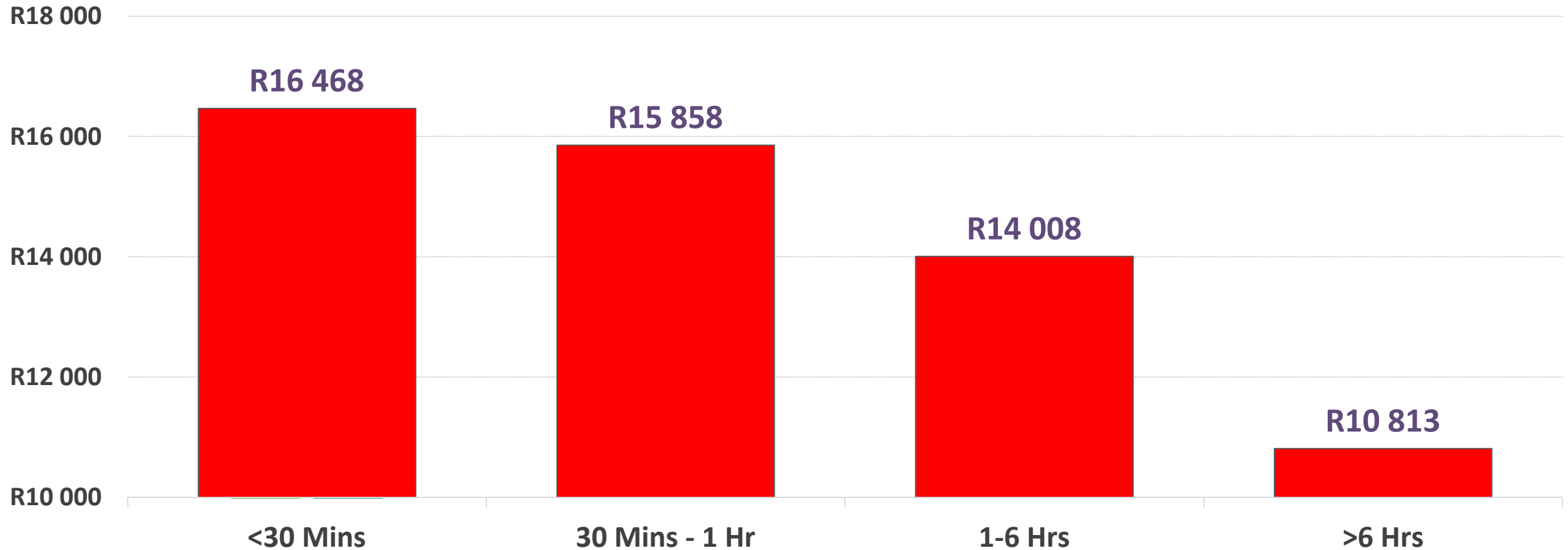
The More you Read The More you Earn



The **More** you **Listen to Radio** The **Less** you **Earn**

SEM 8-10

Pers Rand Per Month



Time Spent

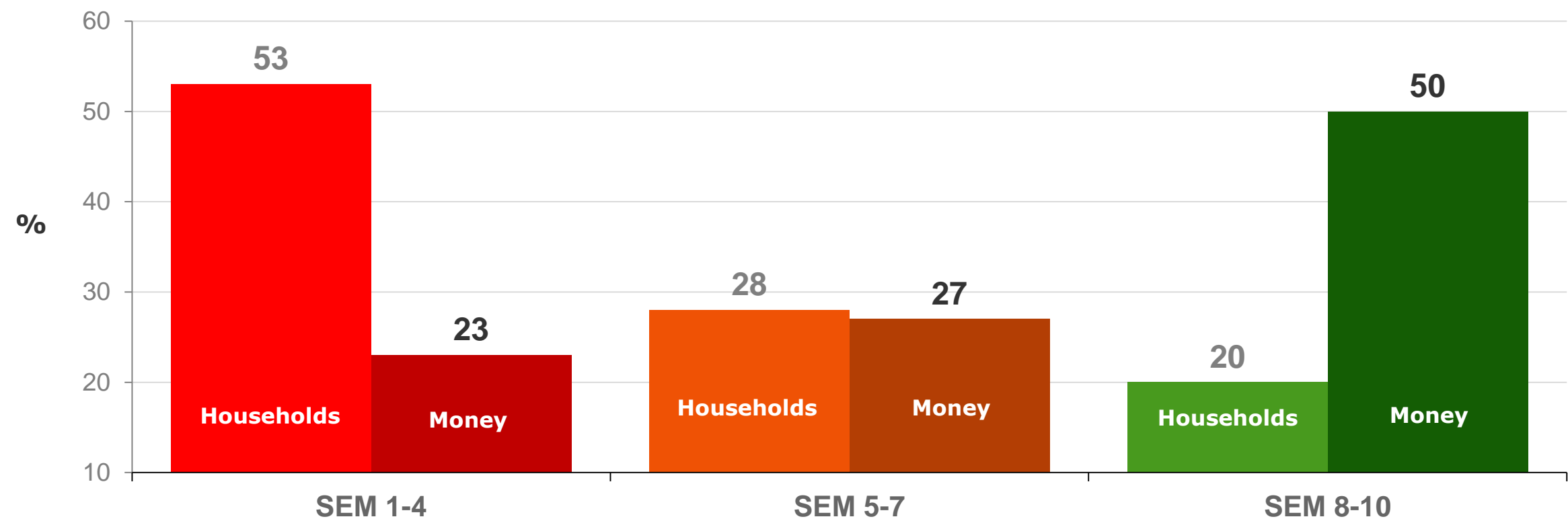
Reading/Online beats broadcast across the board

| Mon-Fri Minutes | Total | SEM 1 to 4 | SEM 5 -7 | SEM 8 - 10 |
|-------------------|------------|------------|------------|------------|
| Magazines | 72 | 67 | 70 | 76 |
| Newspapers | 63 | 62 | 62 | 68 |
| Reading | 135 | 128 | 132 | 144 |
| Internet | 104 | 91 | 112 | 114 |
| TV | 202 | 206 | 204 | 185 |
| Radio | 162 | 171 | 157 | 144 |
| TV VS READING | 67 | 78 | 72 | 41 |
| RADIO VS READING | 27 | 43 | 25 | 0 |

Advertise to Households who can afford your Brand

| | SEM 1-4 | SEM 5-7 | SEM 8-10 |
|------------|---------|---------|----------|
| NO. HH: | 8.4m | 4.5m | 3.1m |
| AVG INCOME | R4,328 | R9,561 | R25,252 |

HOUSEHOLDS VS MONEY



Advertise to people who can afford your Brand

18,7m Full or Part time workers

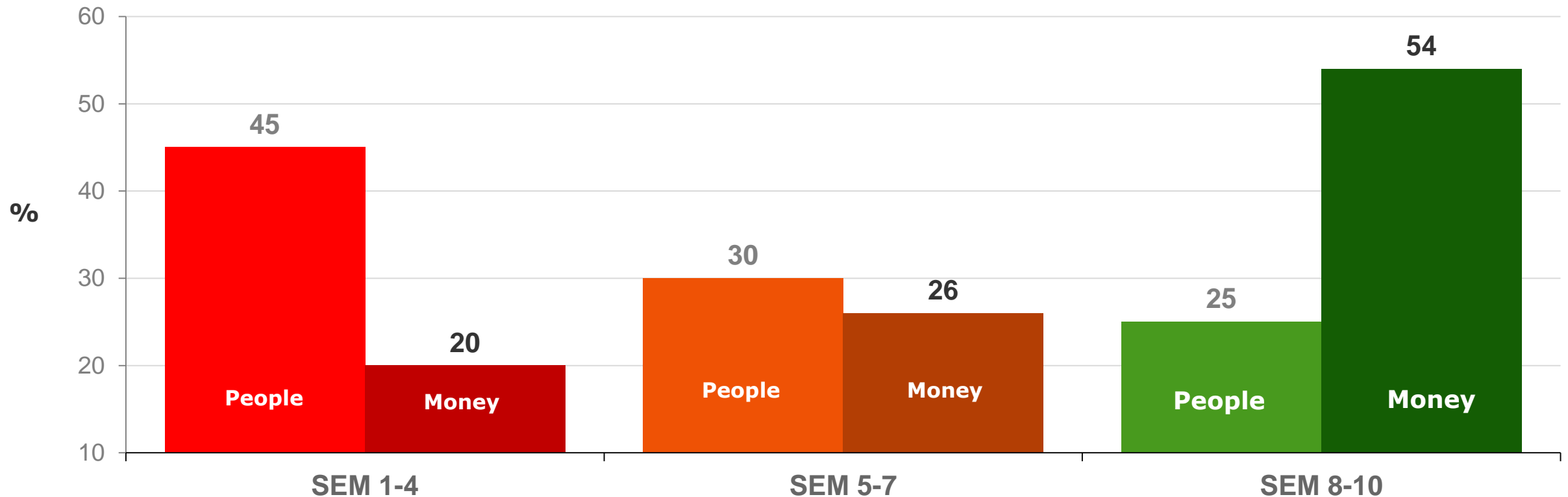
NO. People
AVG PERS
INCOME

SEM 1-4
8.4m
R3,646

SEM 5-7
5.6m
R7,273

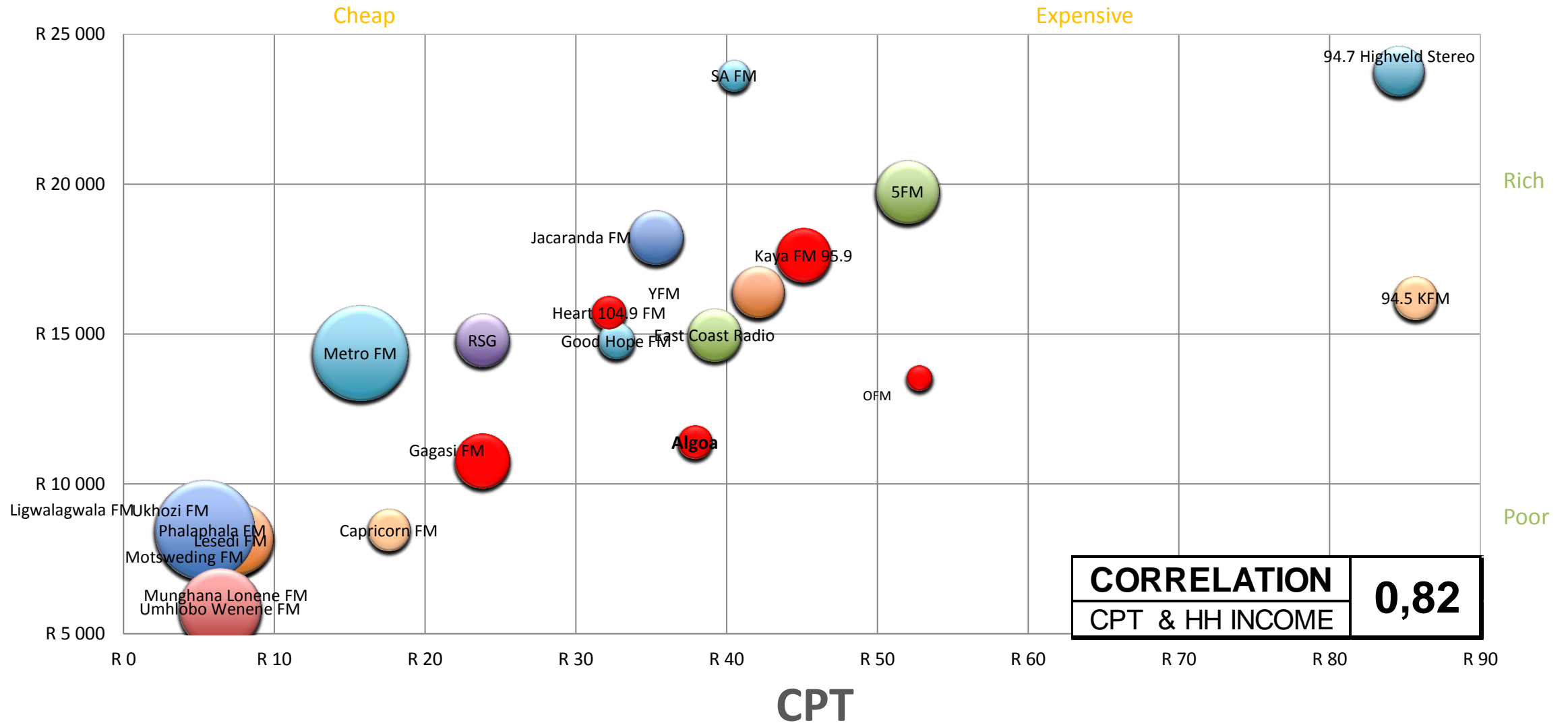
SEM 8-10
4.7m
R17,474

PEOPLE VS MONEY



Radio CPT Vs. HH Income

THE MORE LISTENERS CAN BUY THE MORE YOU PAY TO REACH THEM



Magazine Platform Overlap...



PAST MONTH READERS (Universe 6.9m)

