THE ESTABLISHMENT SURVEY
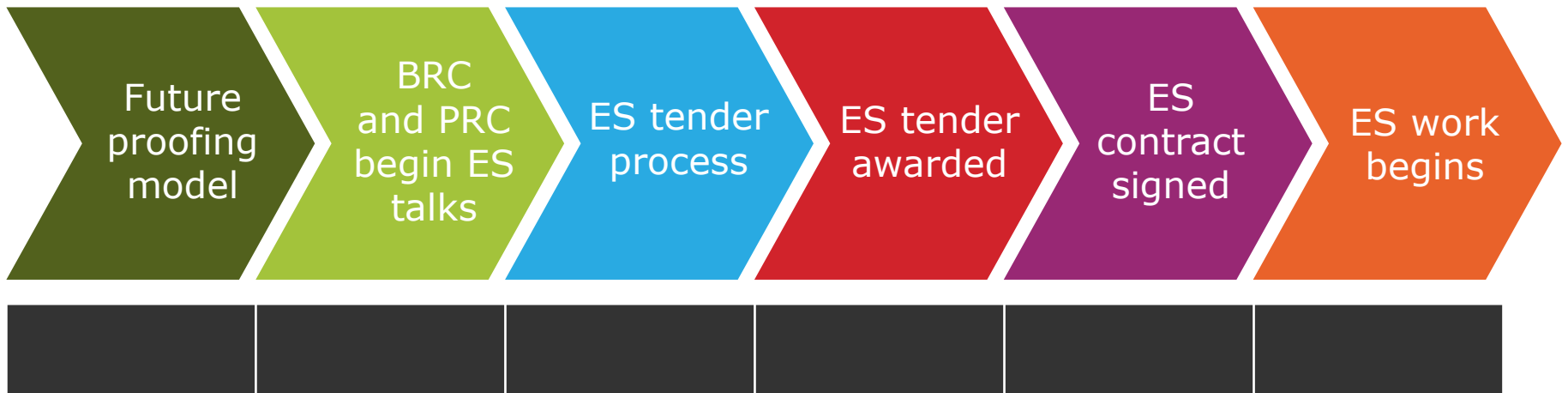
SEP 2017 FULL YEAR RELEASE
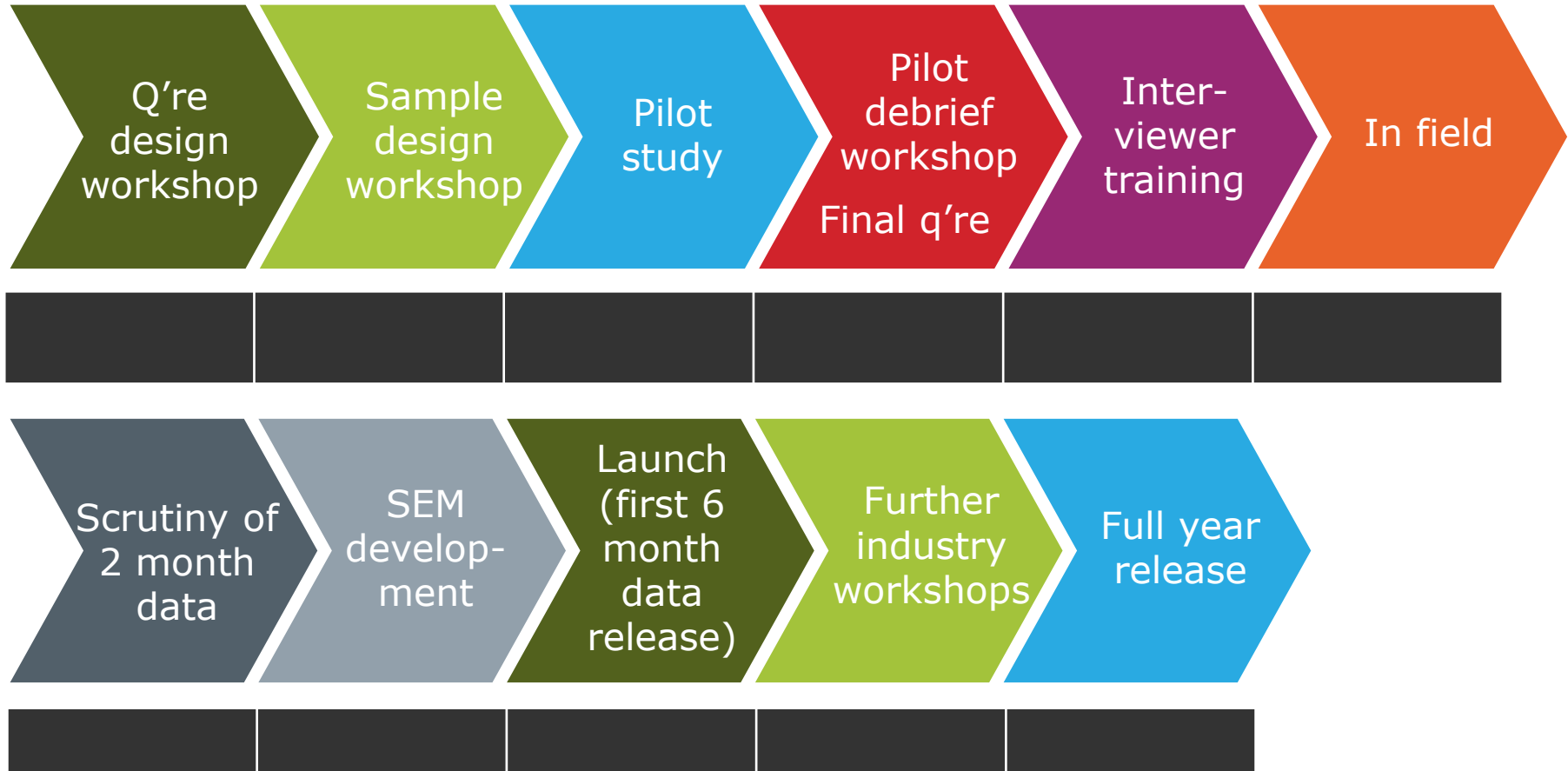
Publisher Research Council

THE ES JOURNEY...

THE ES JOURNEY...

Future proofing model	BRC and PRC begin ES talks	ES tender process	ES tender awarded	ES contract signed	ES work begins

THE ES JOURNEY CONTINUED...

Q're design workshop	Sample design workshop	Pilot study	Pilot debrief workshop Final q're	Inter-viewer training	In field

Scrutiny of 2 month data	SEM develop-ment	Launch (first 6 month data release)	Further industry workshops	Full year 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)

HUB & DONOR

NEW SEGMENTATION MODEL

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

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AREA DEFINITIONS...

Metro

Example:
Craighall Park, City of JHB
Plumstead, City of CT
Berea, Durban
New Brighton, NMMP

Definition:

Within the borders of one of the **8 Metropolitan Municipalities** and defined as an **Urban Geography Type**

Urban

Examples:
Polokwane Central, Polokwane
Willowton, Pietermaritzburg
Jouberton, Klerksdorp

Definition:

Within the borders of an **Other Municipality a**nd defined as an **Urban Geography Type**

OR

Within the borders of one of **the 8 Metropolitan Municipalities** and defined as a **Farm or Traditional Geography Type**

Rural

Example:
Khakhala, Greater Giyani
**Amelia, Zamdela**

Definition:

Within the borders of an **Other Municipality** and defined as a **Farm or Traditional Geography Type**

---

8 Metropolitan Municipalities: These are defined by the Municipal Demarcation Board and include the municipalities of Ekurhuleni, City of Johannesburg, City of Tshwane, Mangaung (Bloemfontein), Buffalo City (East London), Nelson Mandela Bay (Port Elizabeth), eThekwini (Durban), City of Cape Town

Geography Types (Geo-types): Based on Stats SA classifications using input from the Surveyor General. These include three classifications i.e. i. Urban, ii. Farm and iii. Traditional.

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ES – VITAL SIGNS...

NATIONAL SAMPLE

ES Area Classification
- Metro
- Rural
- Urban
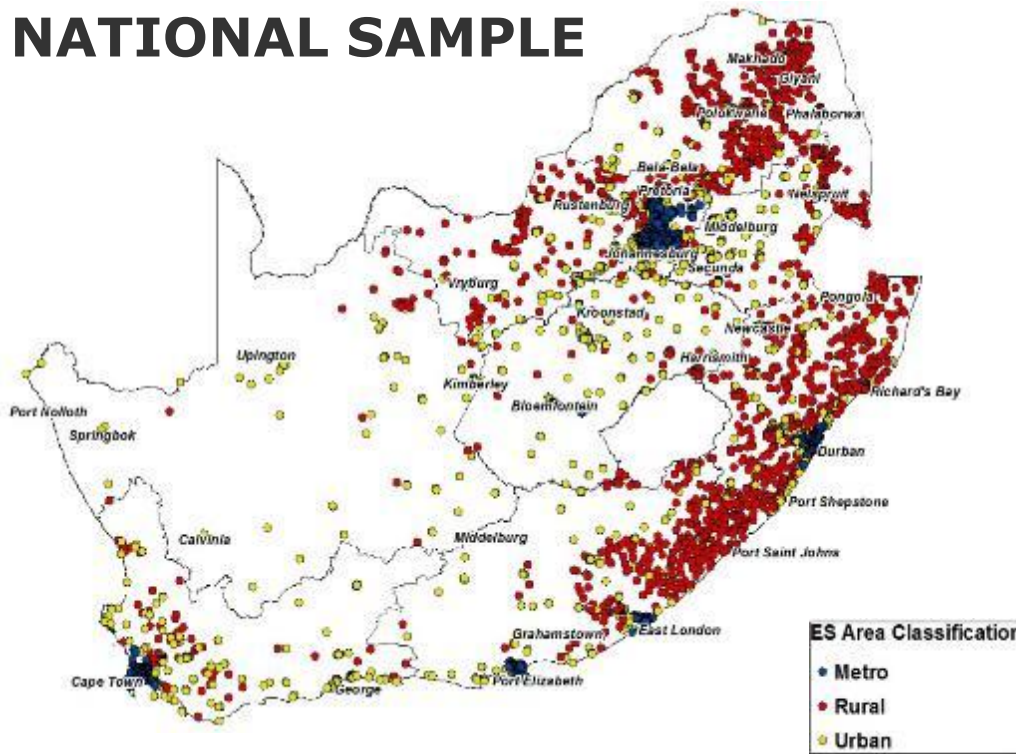
25,082 sample

JUL 2016 – JUN 2017

41% Metro

28% Urban

31% Rural

Universe: Population aged 15+
39.5 million

CURRENCY – VITAL SIGNS...

	ES	BRC RAM™	BRC TAMS	PAMS
(metro)	41% Metro	60% Metro	46% Metro	50% Metro
(urban)	28% Urban	20% Urban	30% Urban	30% Urban
(rural)	31% Rural	20% Rural	24% Rural	20% Rural

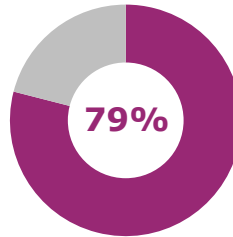# DEMOGRAPHIC LANDSCAPE...

DEMOGRAPHIC LANDSCAPE...
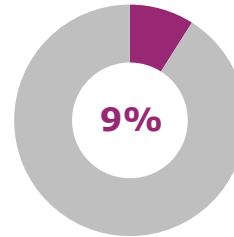
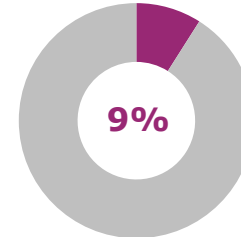**15.8 million**
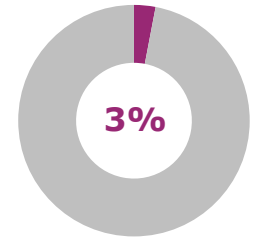HOUSEHOLDS

39.5 million
ADULTS 15 YEARS+

BLACK 79%

WHITE 9%

COLOURED 9%

INDIAN 3%

AGE %

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

8 / 24 / 15 / 25 / 28

52% 48%
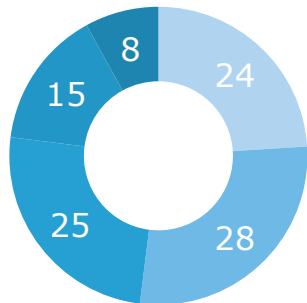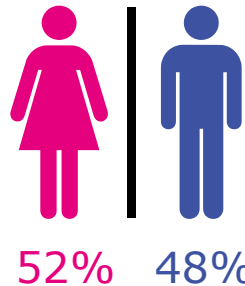
LANGUAGES SPOKEN IN HOME %

Language	%
Zulu	31
English	29
Xhosa	18
Afrikaans	18
Sesotho	14
Sepedi	13
Setswana	12
Tsonga	5
Swati	3
Ndebele	2
Venda	2

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DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R10,497

Donut chart values: 10, 24, 10, 26, 18, 9, 2, 1

- 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+

Below Matric **44**
Matric **42**
Tertiary **14**

Working full-time **38**
Working part-time **11**
Unemployed **21**
Not looking for work **4**
Student **13**
Retired **9**
Home executive **4**

49% WORKING
51% NOT WORKING
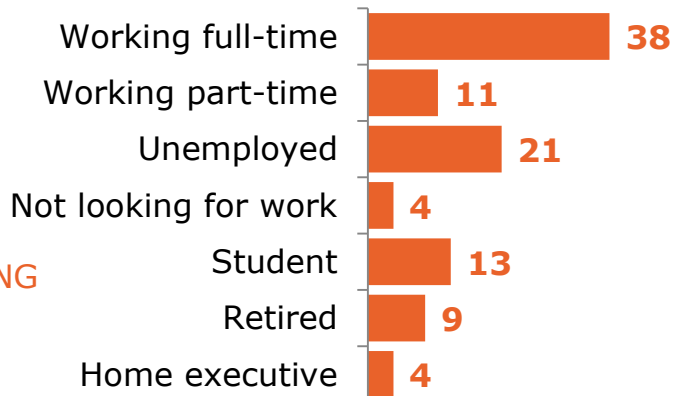
CHILDREN UNDER 15 YEARS
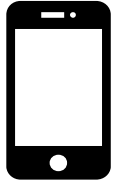## LIVING AT HOME %

45% CHILDREN

55% NONE

PRODUCTS AND LIFESTYLES...

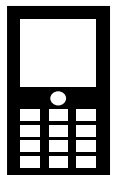# ALMOST EVERY HOME (98%) HAS A CELLPHONE

50%
Smartphone
(a cellphone that has a touchscreen and that can access the internet)

24%
Feature phone
(not a smartphone; a cellphone that can access the internet. It has no touchscreen)

46%
Ordinary cellphone
(used only for calls and SMS. It has no internet capability)

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LIFESTYLES...

Past week destinations

11%
Restaurant

%

Black 61

Coloured 6

Indian/Asian 4

White 29
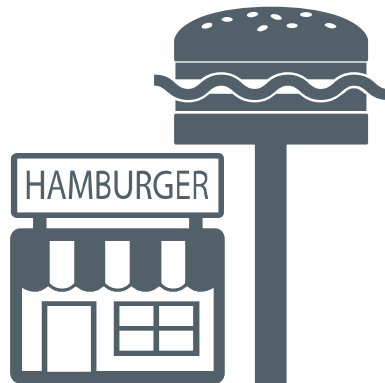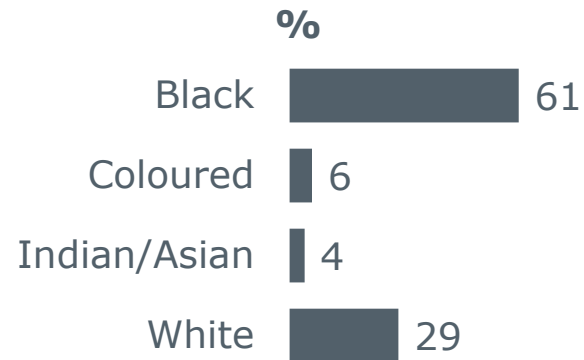
PRODUCT...

25%
Motor car in home

	%
Black	46
Coloured	14
Indian/Asian	7
White	33
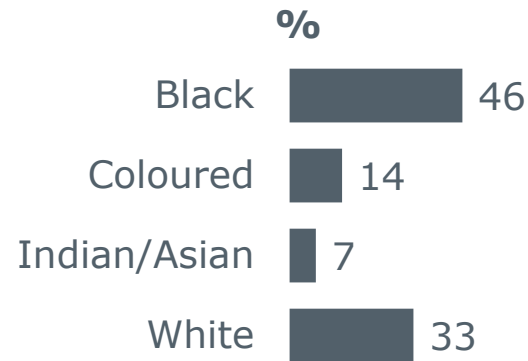
MEDIA LANDSCAPE...

QUESTIONNAIRE...

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

Questionnaire introduction

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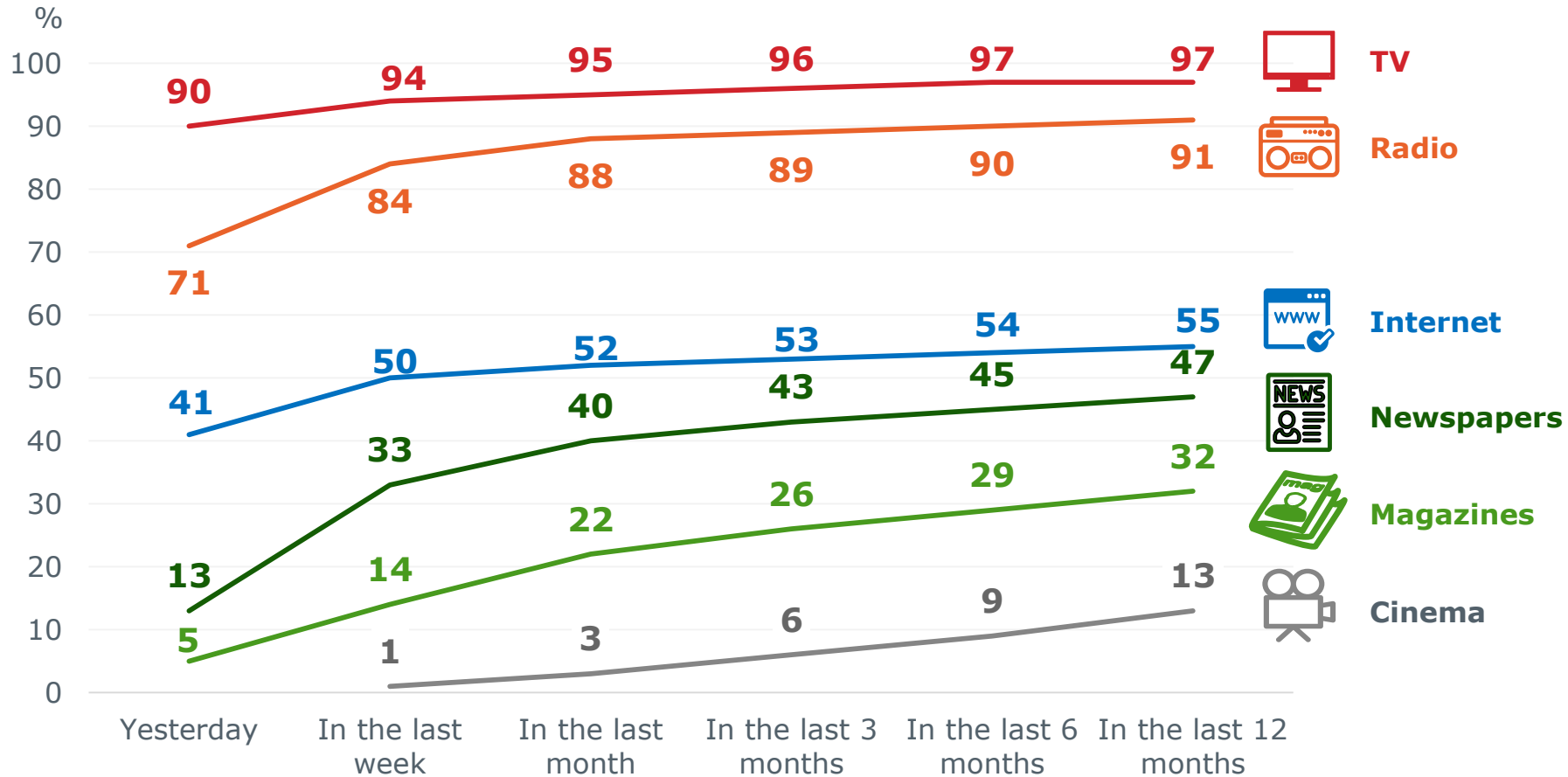- Multi-media screener
- Equipment in home

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
- Geographic's
- Lifestyles
- Products
- SEM variables

MEDIA LANDSCAPE...
REACH

%

	Yesterday	In the last week	In the last month	In the last 3 months	In the last 6 months	In the last 12 months
TV	90	94	95	96	97	97
Radio	71	84	88	89	90	91
Internet	41	50	52	53	54	55
Newspapers	13	33	40	43	45	47
Magazines	5	14	22	26	29	32
Cinema		1	3	6	9	13

P4WEEK MEDIA LANDSCAPE... DEVICE

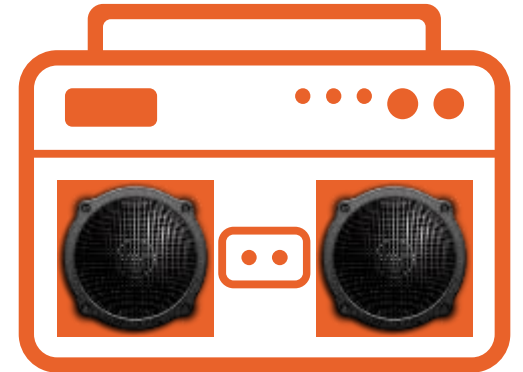| %	TV set	Cellphone	Paper/ printed copy	Radio set/ hi-fi	Car/Taxi/ Bus radio	Desktop/ laptop	Tablet	Games console
📺	**97**	9	-	-	-	3	2	1
📻	24	43	-	**88**	**76**	3		-
NEWS	-	17	**91**	-	-	7	6	-
mag	-	17	**83**	-	-	8	7	-
www	-	**95**	-	-	-	23	11	-

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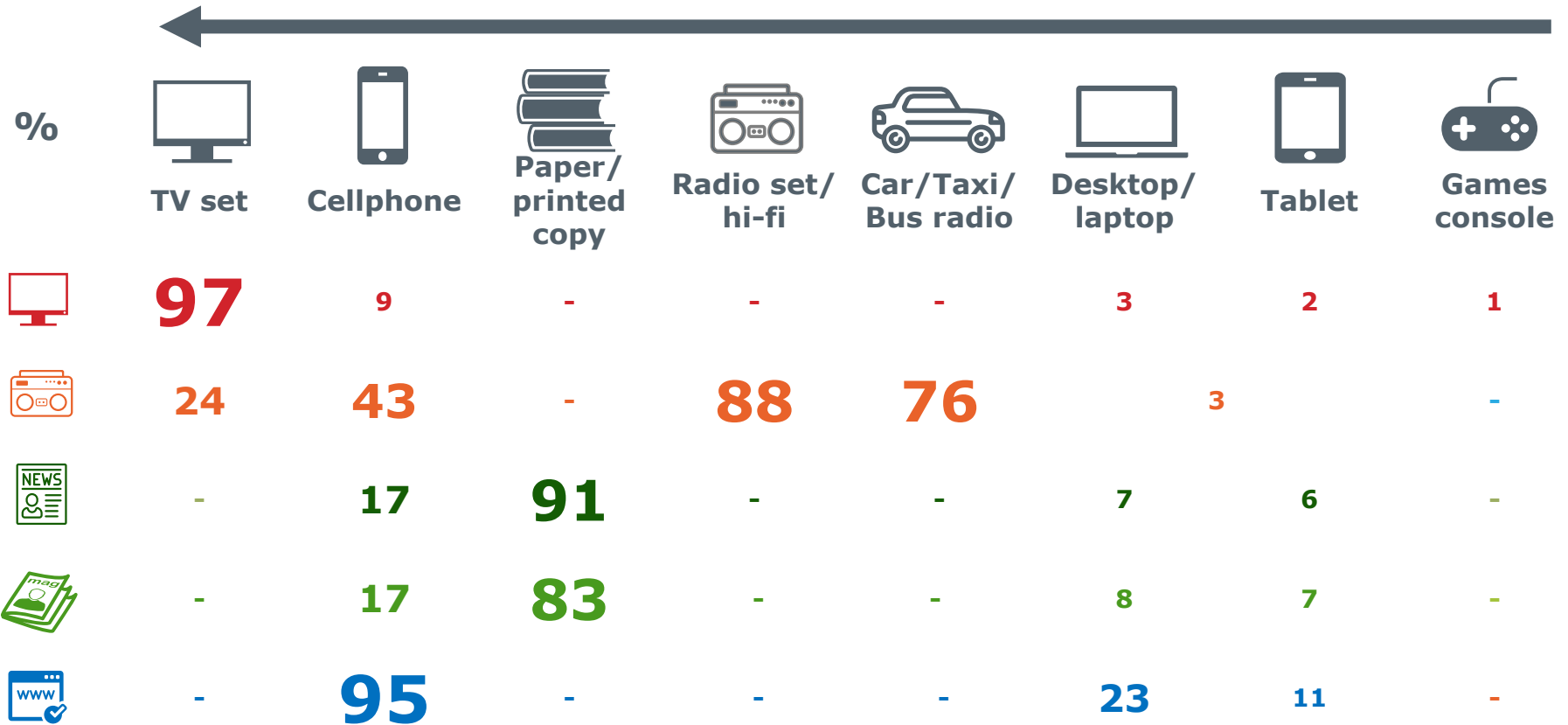
SNAPSHOTS BY MEDIA TYPE...

LISTENING...

Past 7 days

LISTENING REACH...

71%
of the population
in a **day**

84%
of the population
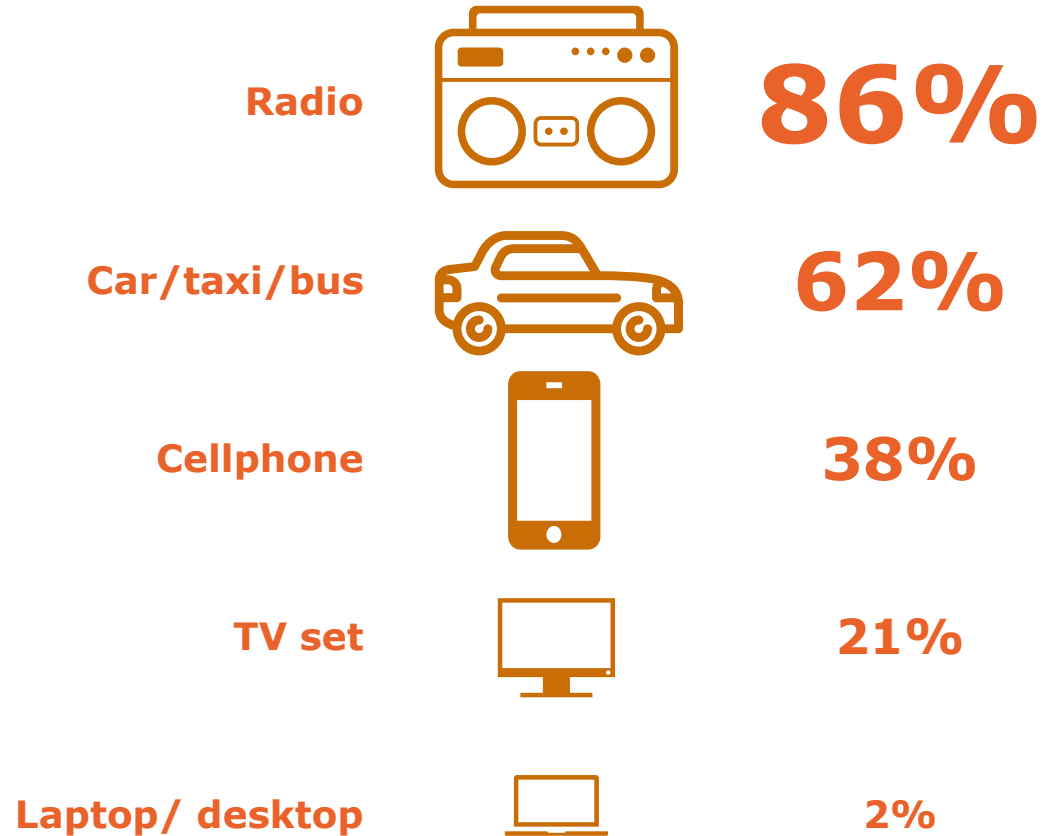in a **week**

88%
of the population
in a **month**

LISTENING DEVICE...

Radio		**86%**
Car/taxi/bus		**62%**
Cellphone		**38%**
TV set		**21%**
Laptop/ desktop		**2%**

VIEWING...

Past 7 days

VIEWING REACH...

90%

of the population
in a **day**

94%

of the population
in a **week**

95%
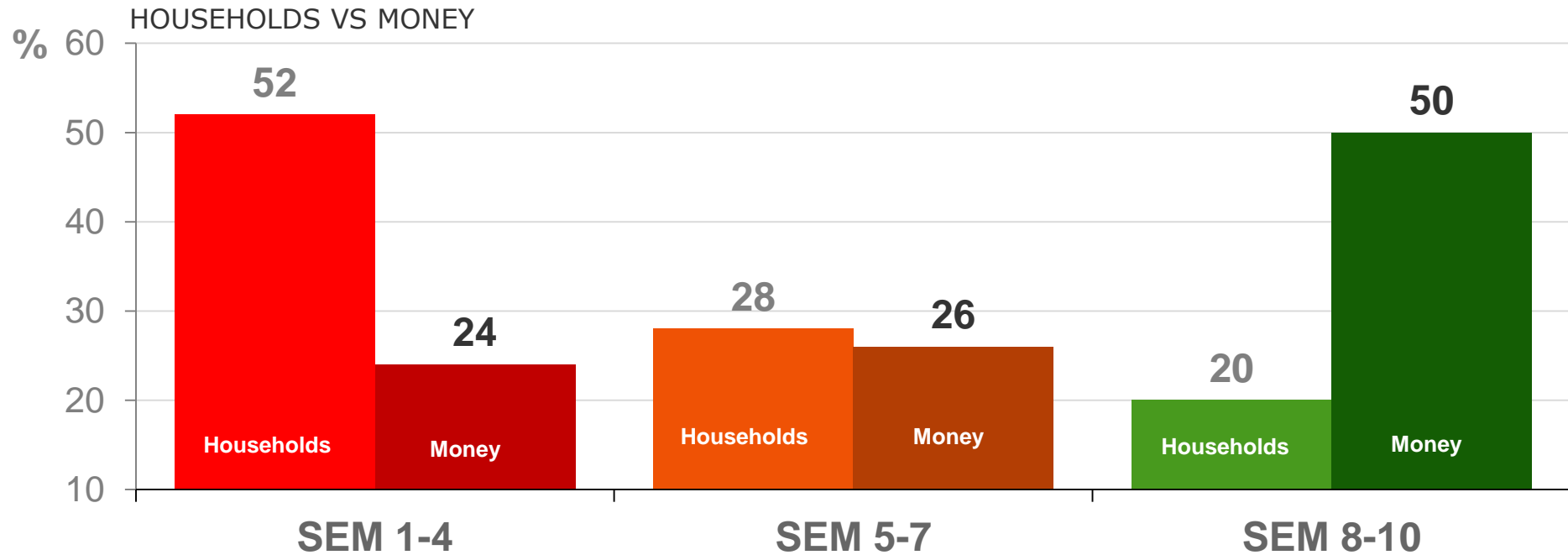
of the population
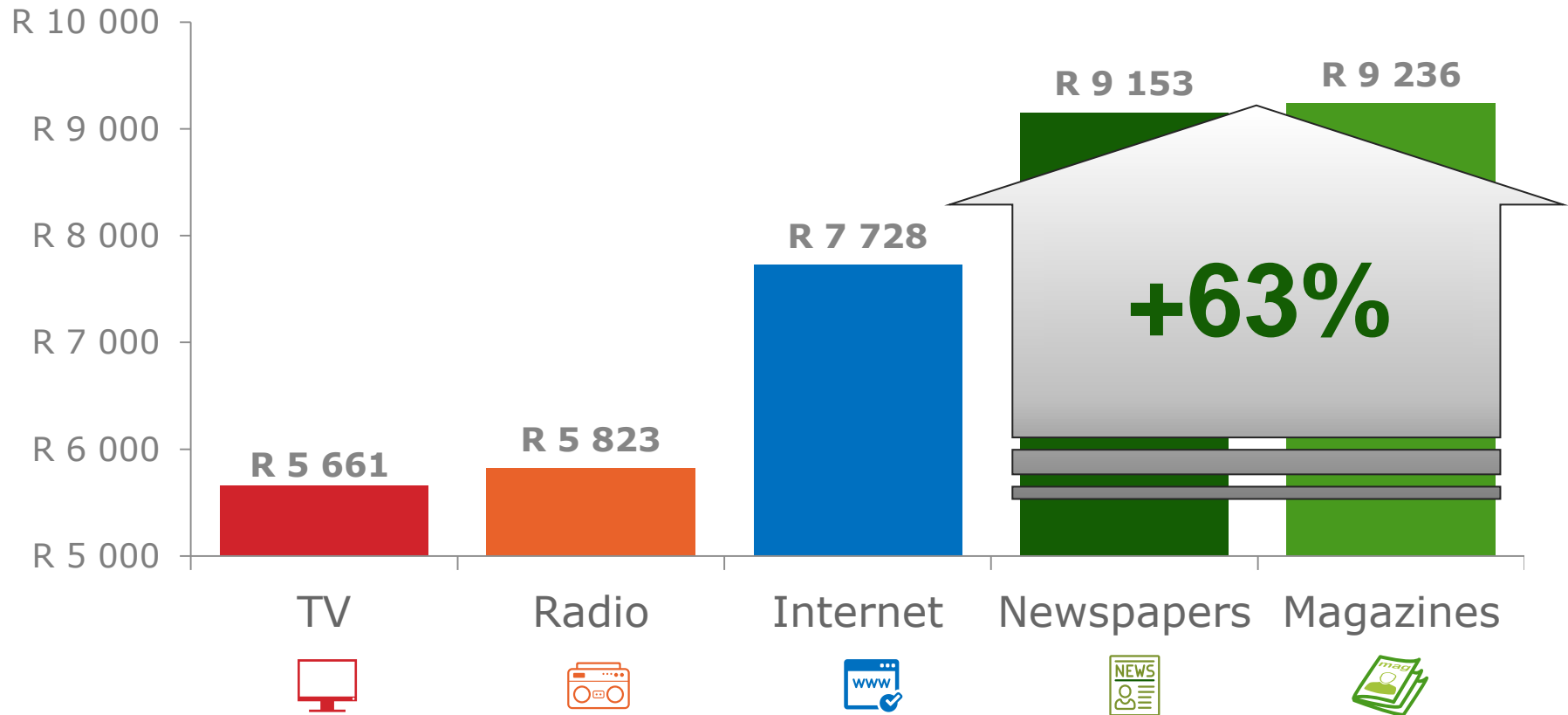in a **month**

READING…

Past 7 days

READERS EARN 63% MORE THAN VIEWERS OR LISTENERS

Personal monthly income – Rand per month

	TV	Radio	Internet	Newspapers	Magazines
Income	R 5 661	R 5 823	R 7 728	R 9 153	R 9 236

+63%

ES Jul 2016 – Jun 2017 (n=25,082) filtered on A1 Yesterday audience per medium

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READERS EARN MORE THAN NON-READERS ACROSS THE ENTIRE SPECTRUM OF SOCIETY

TYPE OF DWELLING : Average HH Income

HH monthly income – Rand per month

Earning Index

Type of Dwelling	NON READERS	READERS	INDEX
Single Room in Dwelling/Backyard	R5 110	R7 267	142
Traditional hut	R5 096	R8 688	170
Formal House	R8 252	R13 871	168
Gated Community	R12 304	R22 053	179

NON READERS   READERS   INDEX : READERS vs NON READERS

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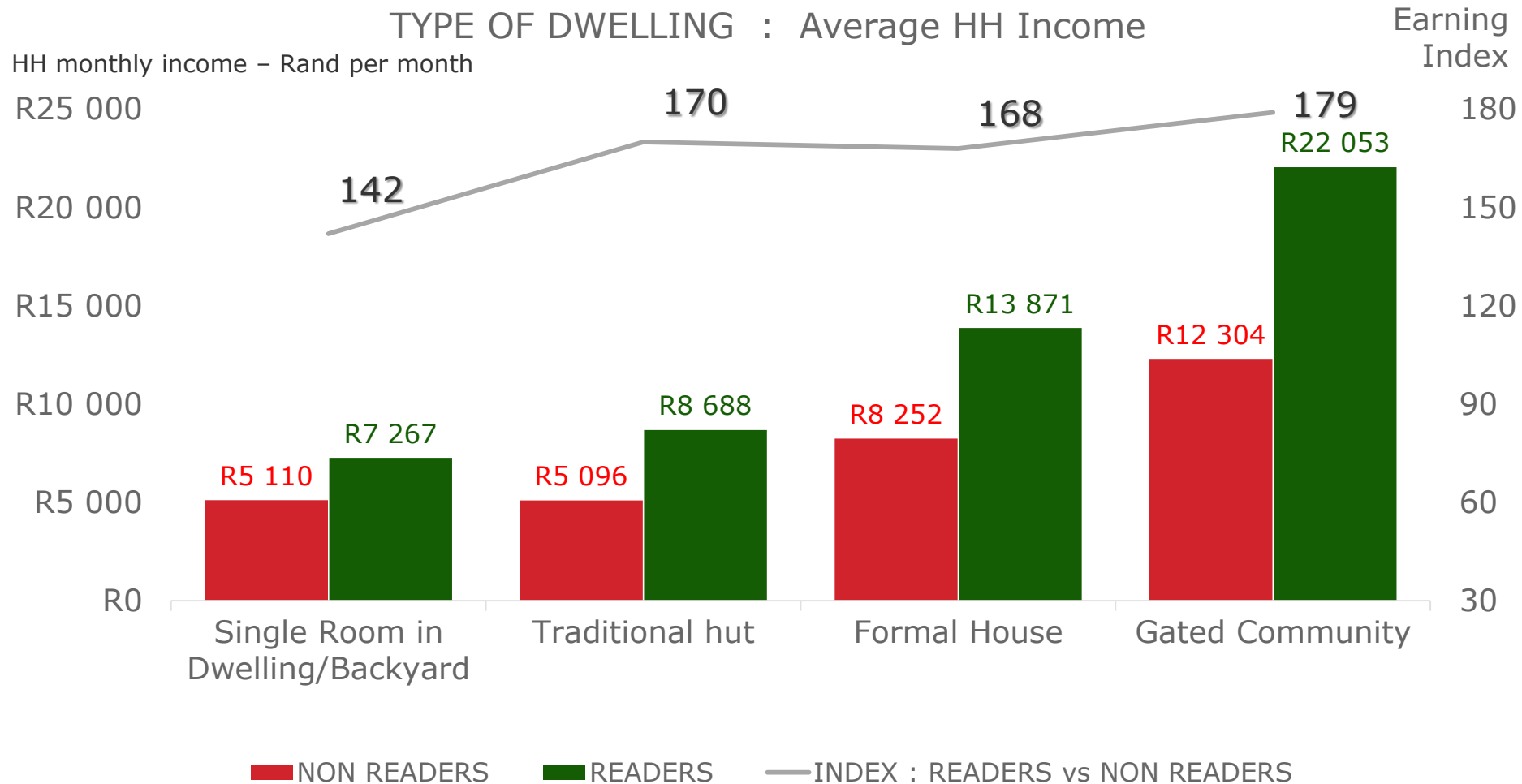
JUST OVER 4 IN 10 SOUTH AFRICANS READ, BUT ALMOST TWO-THIRDS OF SEM 8-10 DO

Total Market: Non-readers 56%, Readers 44%

SEM 8-10: Non-readers 37%, Readers 63%

Legend:
- Non-readers
- Readers
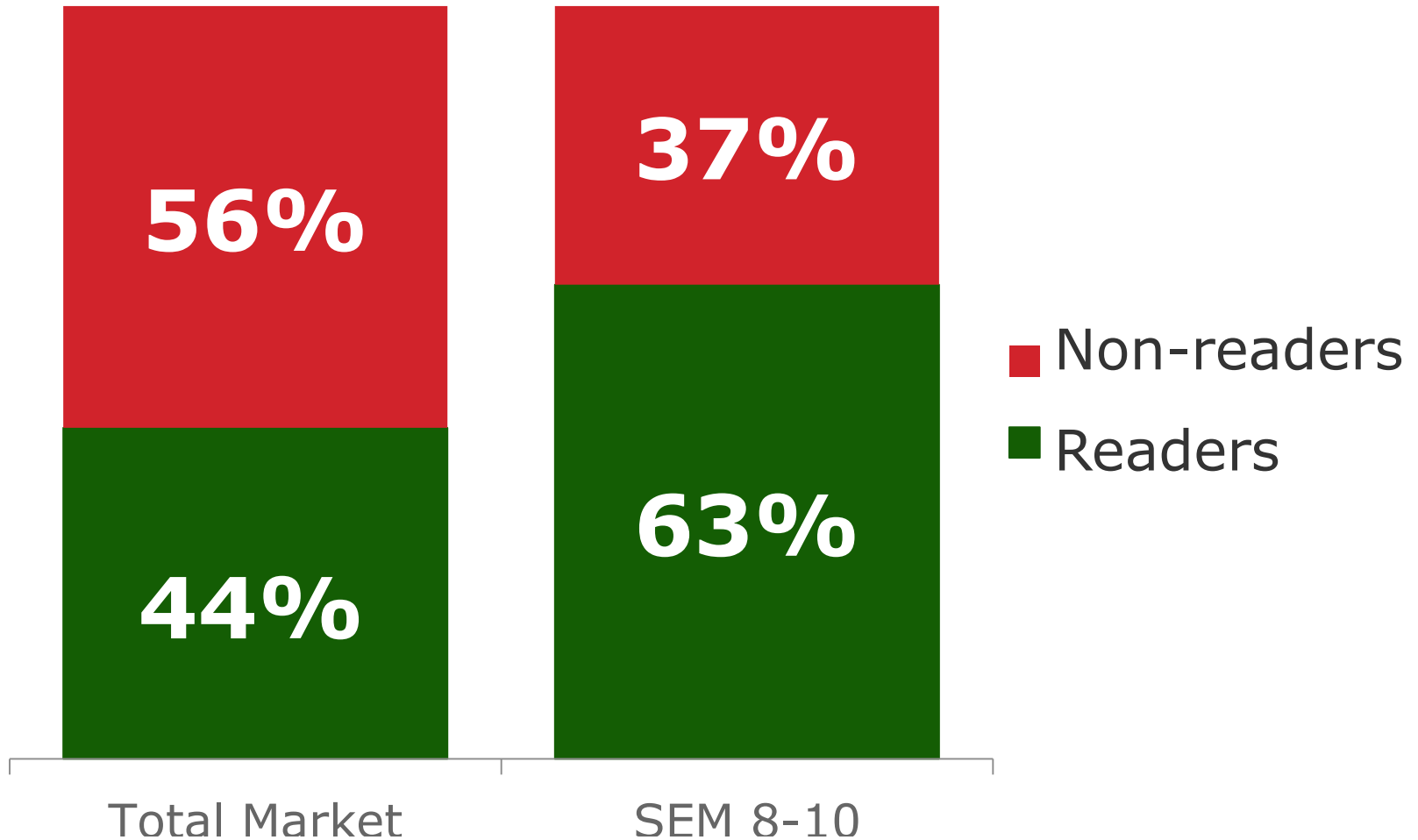
READERS VS. NON-READERS
PROFILE BY SEM™
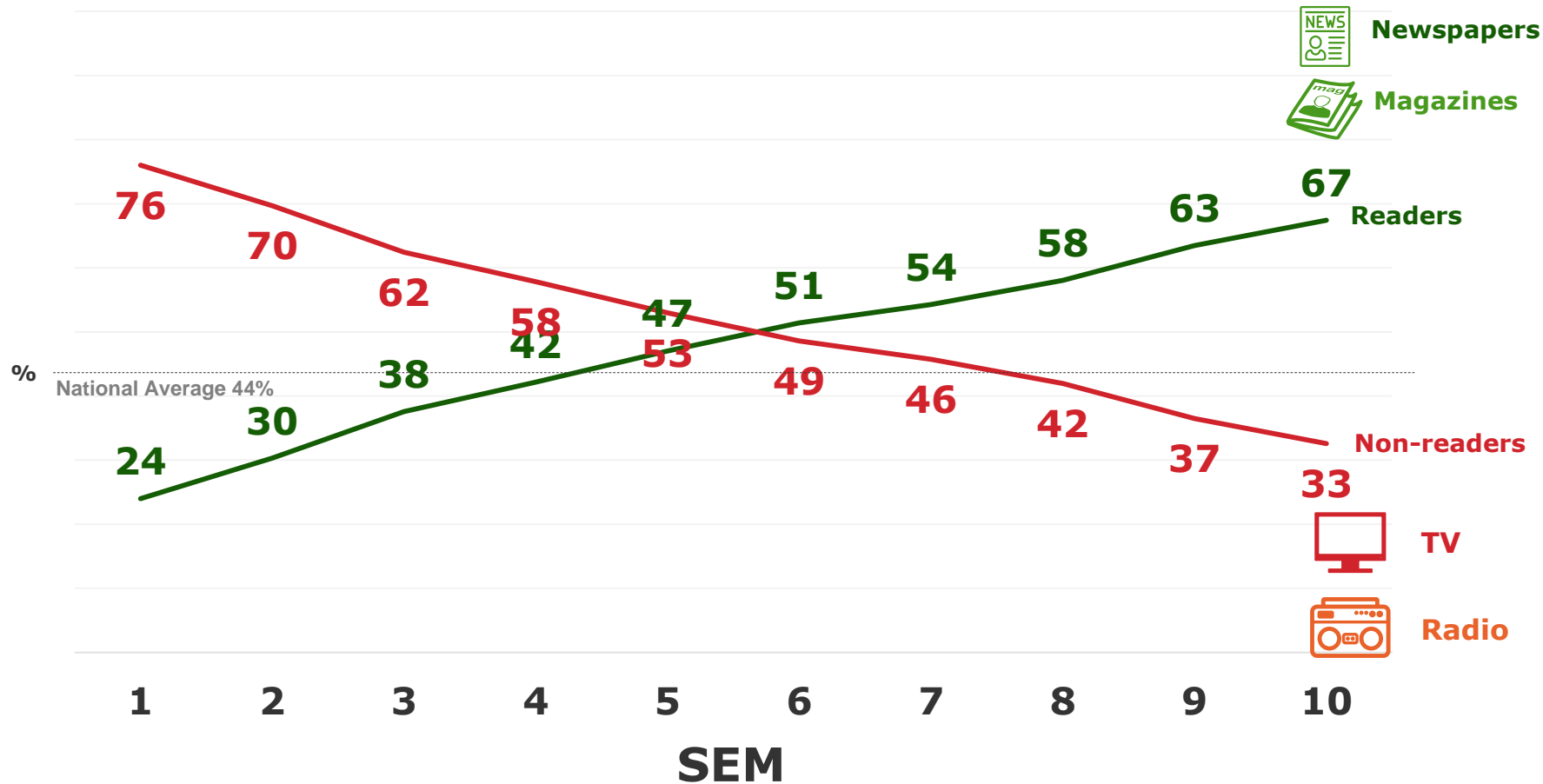
THE MORE YOU READ, THE MORE YOU EARN

Personal monthly income – Rand per month

Education Level	Personal monthly income
No schooling or Some primary	R 1 512
Primary school completed	R 1 775
Some high school	R 2 617
Matriculated	R 5 331
University incomplete	R 10 439
University completed	R 22 331

National Average R5,485
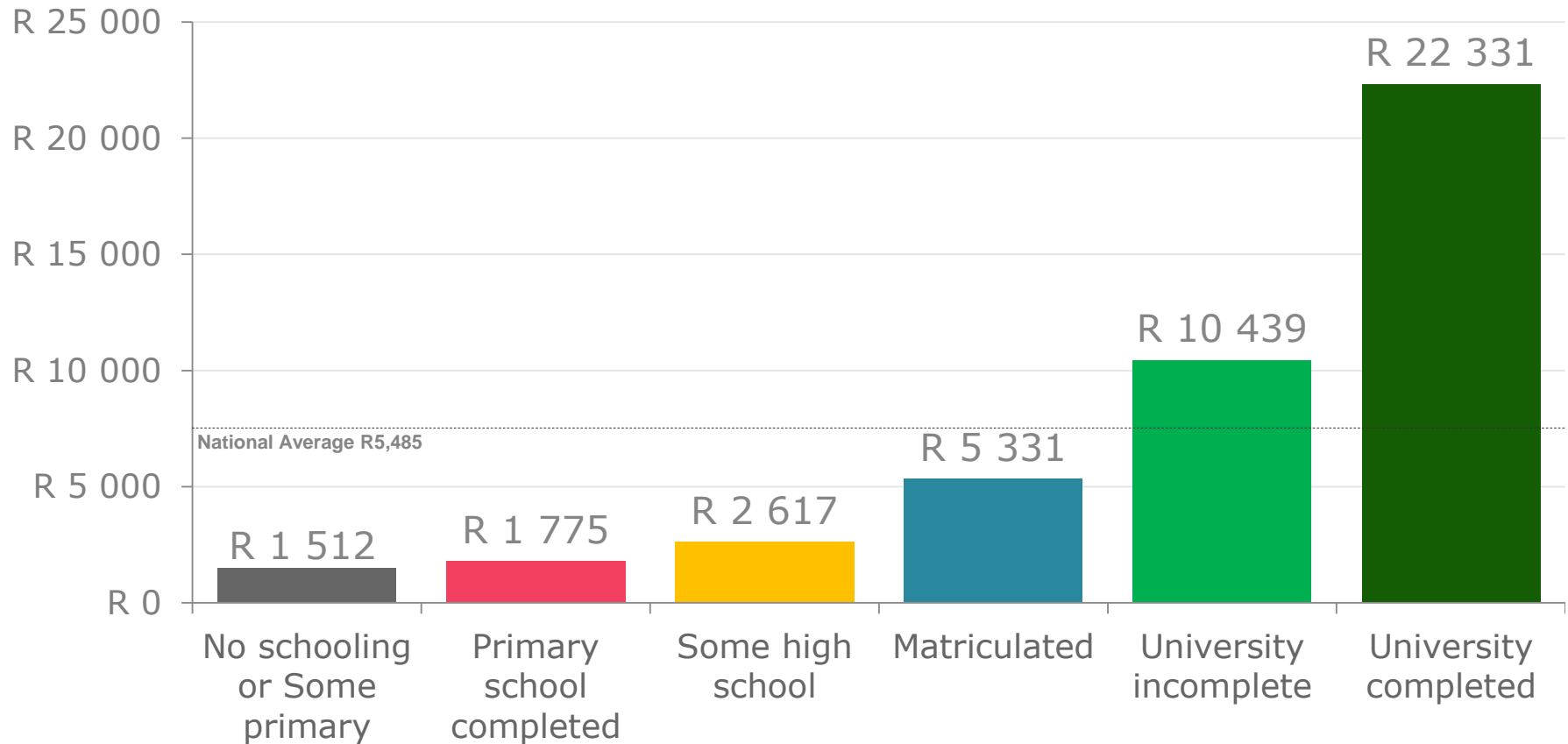
THE MORE YOU LISTEN TO RADIO, THE LESS YOU EARN

SEM 8 - 10

Personal monthly income – Rand per month

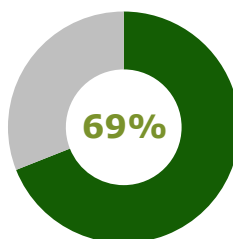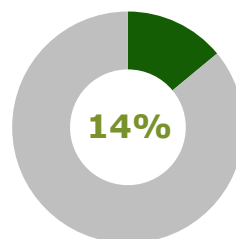|	<30 mins	30 mins - 1 hour	1-6 hours	>6 hours
	R 16 857	R 16 454	R 14 272	R 11 776

51
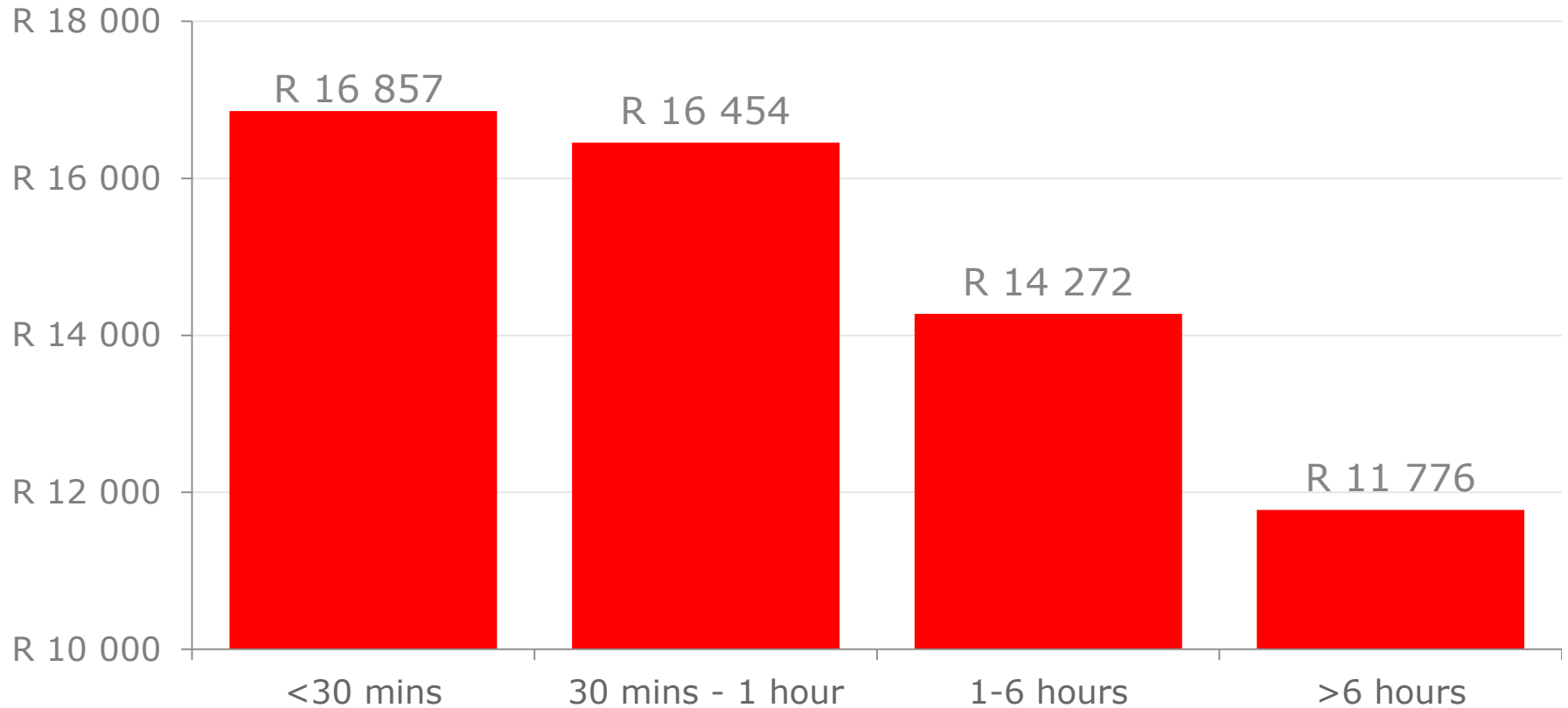
P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...
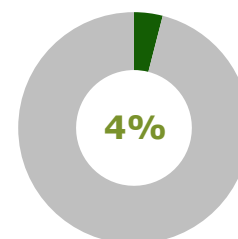
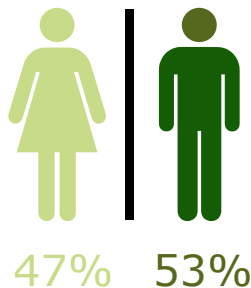**13.1 million**
ADULTS 15 YEARS+

BLACK 69%
WHITE 14%
COLOURED 13%
INDIAN 4%

AGE %

- 7 — 15 - 24
- 20 — 25 - 34
- 28 — 35 - 49
- 28 — 50 - 64
- 17 — 65 +

15 - 24: 20
25 - 34: 28
35 - 49: 28
50 - 64: 17
65 +: 7

47%   53%

LANGUAGES READ AND UNDERSTAND %

Language	%
English	93
Afrikaans	33
Zulu	31
Xhosa	15
Sesotho	14
Setswana	12
Sepedi	11
Swati	3
Tsonga	3
Ndebele	2
Venda	2

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53

P7D NEWSPAPER READERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R13,951

Donut chart values: 5, 16, 8, 28, 24, 13, 3, 2

- 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+

Education	Value
Below Matric	34
Matric	46
Tertiary	20

56% WORKING
44% NOT WORKING

Employment	Value
Working full-time	46
Working part-time	10
Unemployed	16
Not looking for work	3
Student	11
Retired	10
Home executive	5

MARITAL STATUS

61% SINGLE/ DIVORCED/ WIDOWED

39% MARRIED/ PARTNER

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54

NEWSPAPER PLATFORM OVERLAP...

PAST 7 DAY READERS any platform (Universe 12.5m)

ONLINE 2.5m 20%

PAPER 11.6m 93%

ONLINE ONLY
0.9m
7%

BOTH
1.6m
13%
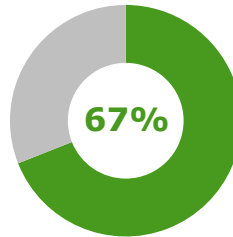
PAPER ONLY
10.1m
80%
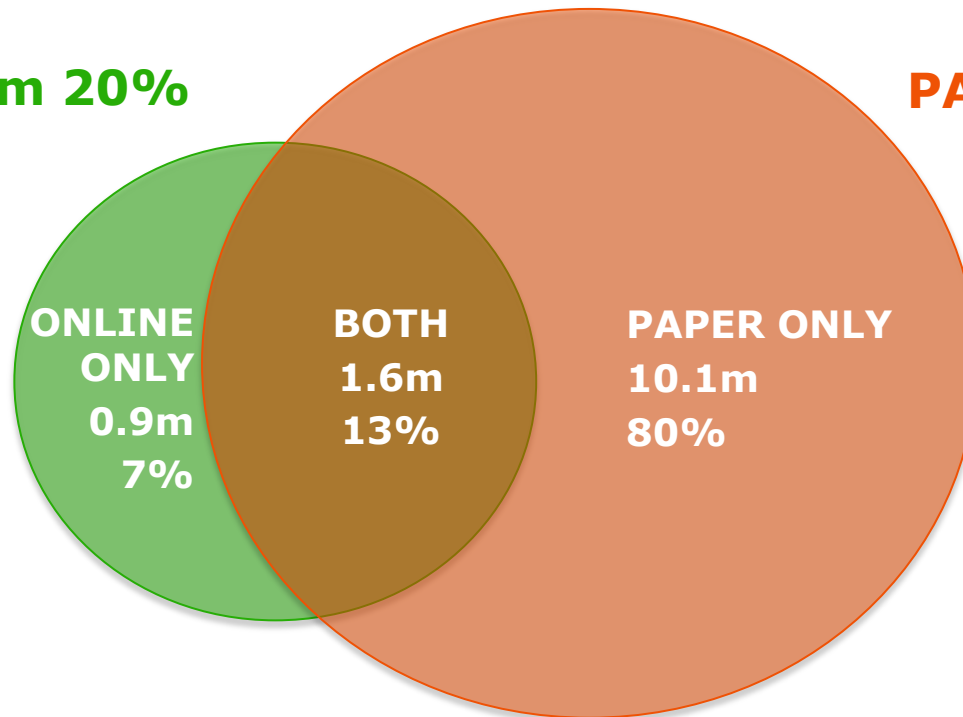
Average Age   35   35   39

P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...

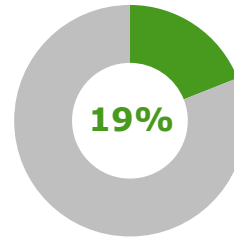**5.7 million**
ADULTS 15 YEARS+
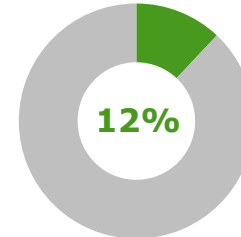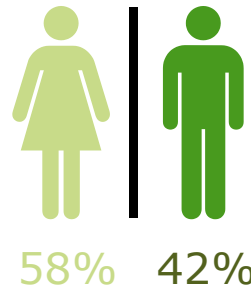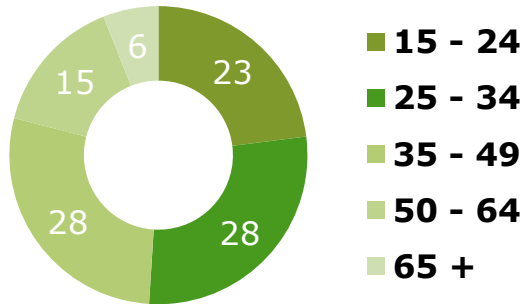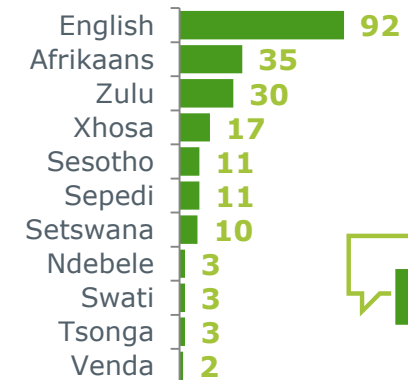
BLACK 67%

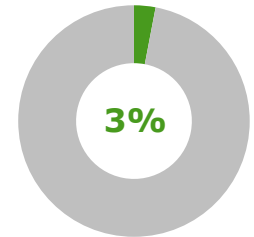**WHITE** 19%

COLOURED 12%

INDIAN 3%

AGE %

- 15 - 24 → 23
- 25 - 34 → 28
- 35 - 49 → 28
- 50 - 64 → 15
- 65 + → 6

58% 42%

LANGUAGES READ AND UNDERSTAND %

Language	%
English	92
Afrikaans	35
Zulu	30
Xhosa	17
Sesotho	11
Sepedi	11
Setswana	10
Ndebele	3
Swati	3
Tsonga	3
Venda	2

P7D MAGAZINE READERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R15,519

Pie chart values: 2, 5, 15, 7, 25, 25, 16, 5

- 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+

Education	%
Below Matric	29
Matric	47
Tertiary	24

56% WORKING
44% NOT WORKING

Employment	%
Working full-time	47
Working part-time	10
Unemployed	15
Not looking for work	3
Student	12
Retired	9
Home executive	5

MARITAL STATUS

62% SINGLE/ DIVORCED/ WIDOWED

38% MARRIED/ PARTNER

TNS

Publisher Research Council
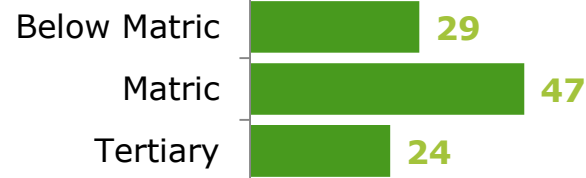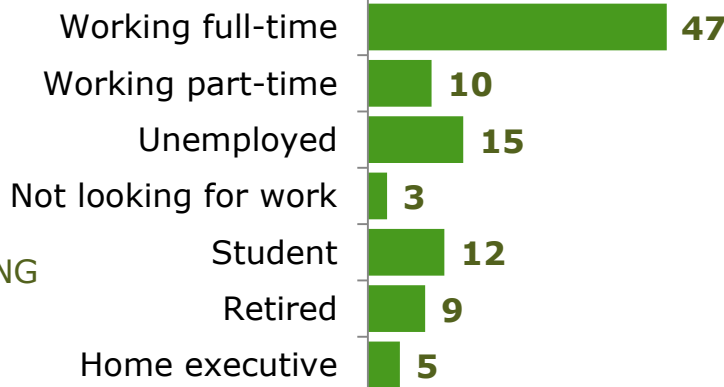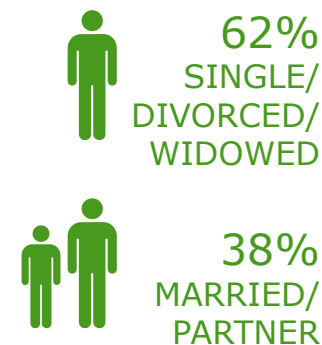
MAGAZINE PLATFORM OVERLAP...

PAST MONTH READERS any platform (Universe 7.8m)

ONLINE 1.9m 24% **PAPER 7.2m 93%**

ONLINE ONLY 0.6m 7% **BOTH 1.3m 17%** **PAPER ONLY 5.9m 76%**

Average Age **34** **34** **37**

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DIGITAL...

Past 7 days

P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...
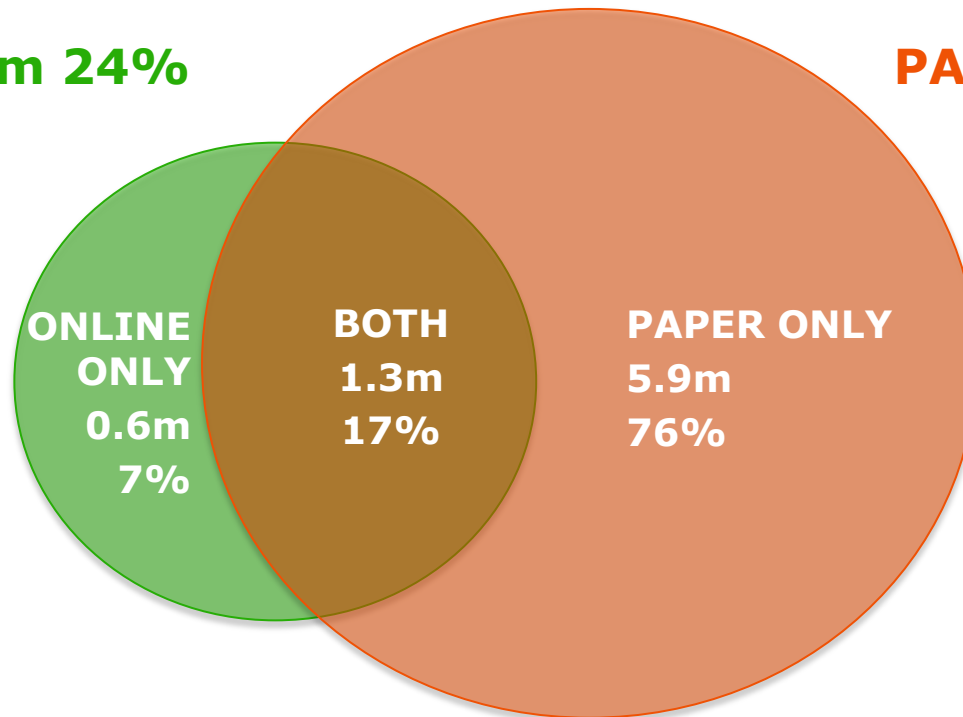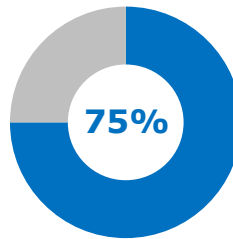
19.6 million
ADULTS 15 YEARS+
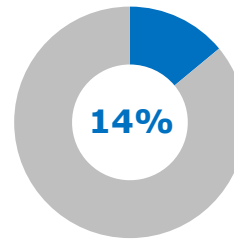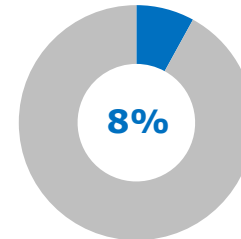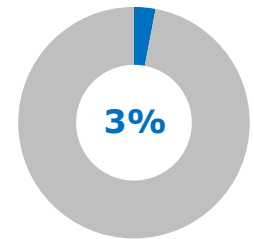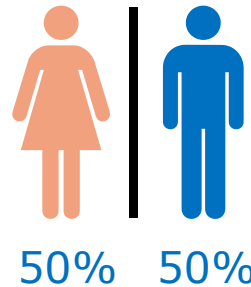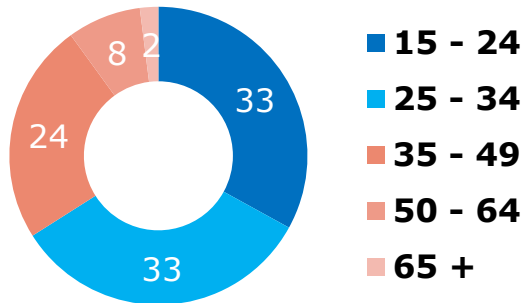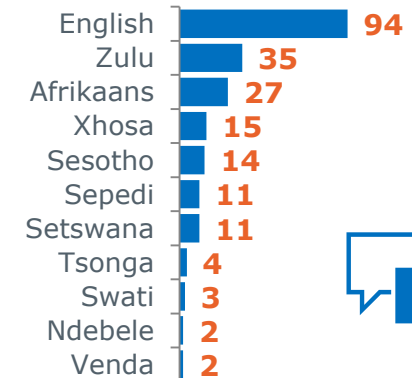
BLACK
75%

WHITE
14%

COLOURED
8%

INDIAN
3%

AGE %

33 — 15 - 24
33 — 25 - 34
24 — 35 - 49
8 — 50 - 64
2 — 65 +

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

50% 50%

LANGUAGES READ AND UNDERSTAND %

Language	%
English	94
Zulu	35
Afrikaans	27
Xhosa	15
Sesotho	14
Sepedi	11
Setswana	11
Tsonga	4
Swati	3
Ndebele	2
Venda	2

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64

P7D INTERNET USERS DEMOGRAPHIC LANDSCAPE...

MONTHLY HOUSEHOLD INCOME %
AVERAGE: R14,114

Pie chart values: 16, 8, 28, 24, 14, 4, 2, 5

- 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+

Below Matric — 24
Matric — 54
Tertiary — 23
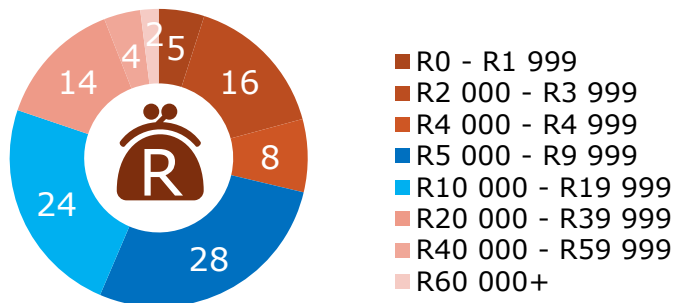
55% WORKING
45% NOT WORKING

Working full-time — 46
Working part-time — 9
Unemployed — 19
Not looking for work — 2
Student — 19
Retired — 3
Home executive — 3

MARITAL STATUS

71% SINGLE/ DIVORCED/ WIDOWED

29% MARRIED/ PARTNER

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DIGITAL DEVICE

%

Cellphone   Desktop/ laptop   Tablet

94   **18**   **9**

Note: Device used to access internet in past 7 days

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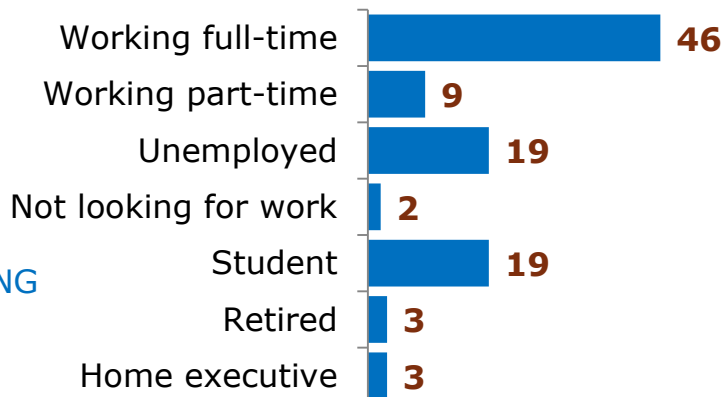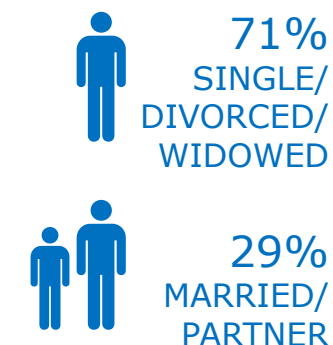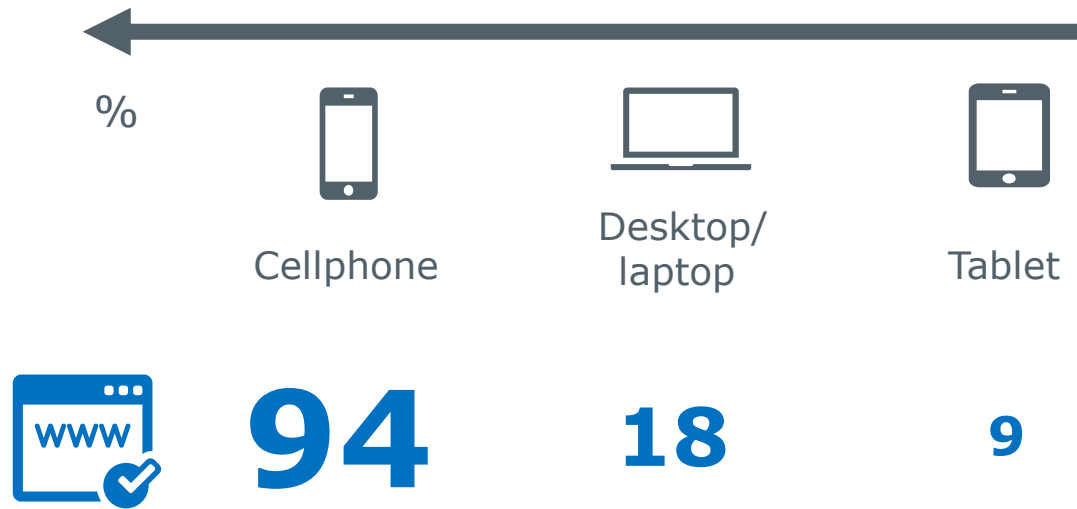
DIGITAL ACTIVITY BY DEVICE

%		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

Note: Activities by device used to access internet in past 7 days

ONLINE ACCESS BY DEVICE

PAST MONTH USERS any platform (Universe 19.9m)

COMPUTER 4.7m
24%

CELL PHONE 19.4m
98%

COMPUTER AND CELL PHONE
3.2m   16%

COMPUTER ONLY
0.3m
2%

CELL PHONE ONLY
14.1m
71%

ALL 3
1.2m
6%

COMP AND TABLET
32k   0.2%

CELL AND TABLET
0.9m   5%

TABLET 2.2m
11%

TABLET ONLY
0.1m 0.5%
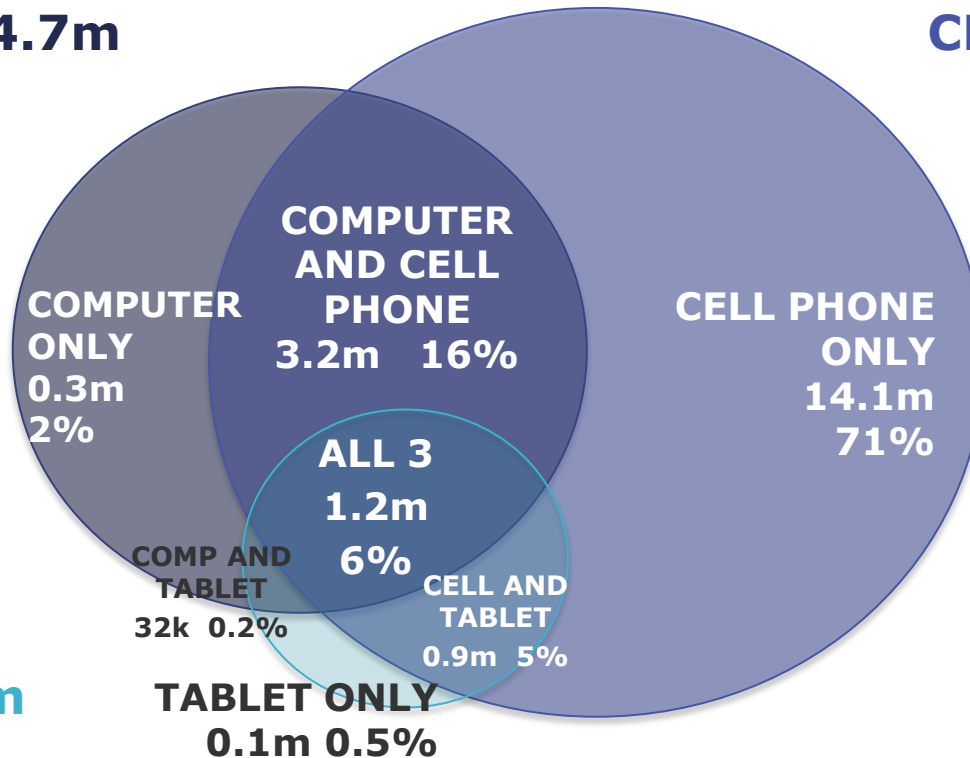
ONLINE ACTIVITY...
MOBILE VS COMPUTER

Activity	Mobile	Computer
Email	60%	40%
Banking	75%	25%
Search for things	76%	24%
Check the weather	84%	16%
Use or download apps	86%	14%
Download music or podcasts	87%	13%
Play games	88%	12%
Use social media	92%	8%
Use Whatsapp or instant messaging or chat	96%	4%

Legend: ▢ Mobile ▪ Computer

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70
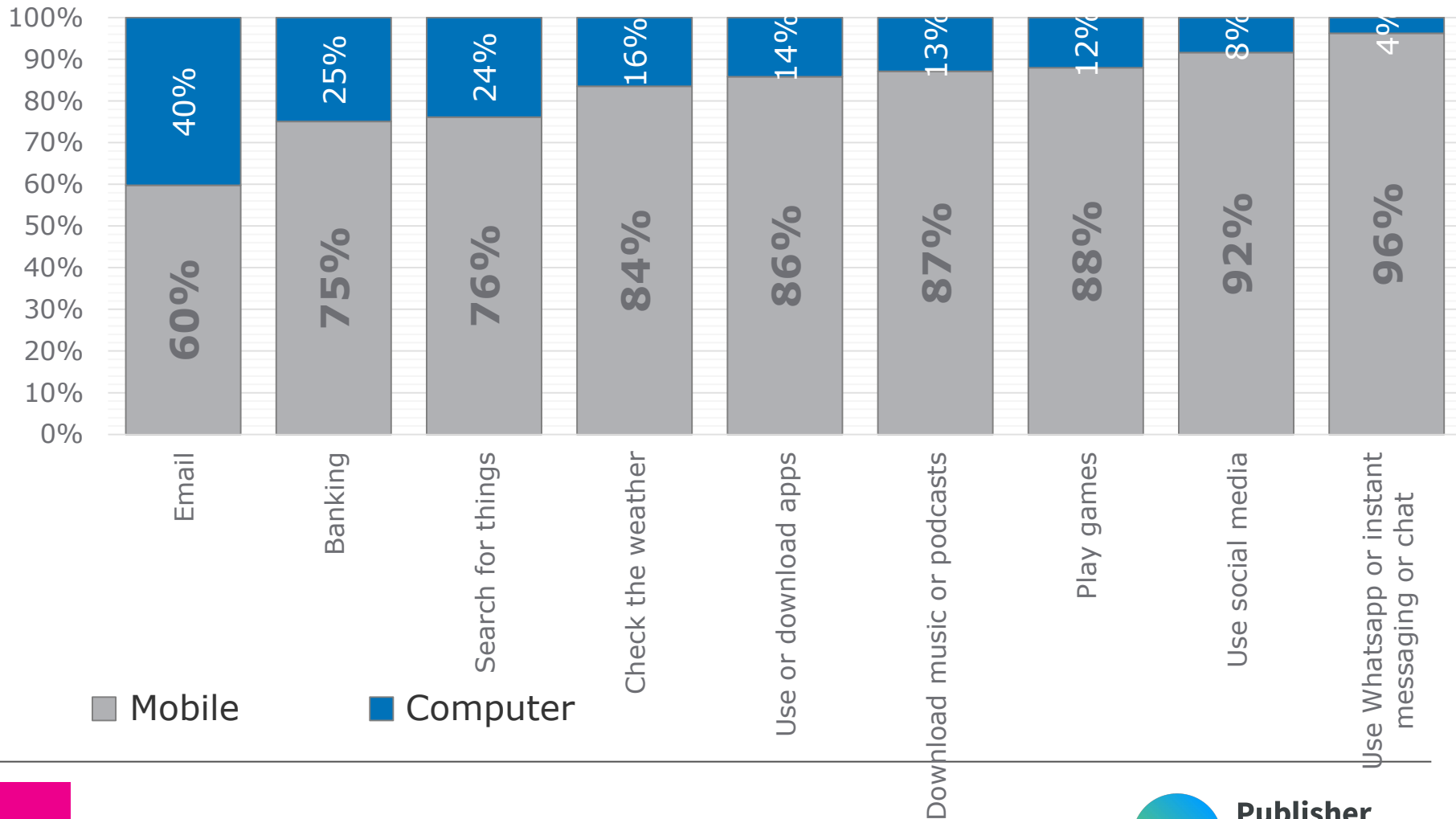
INTERNET FREQUENCY...

	%
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**

THE QUESTION USED TO DERIVE PROPORTIONATE SPEND

Z35. Imagine that these **11 matches represent all the money that you spent in the past month**. Look through this list of items and place these matches according to how you spent your money in the past month.

(Total must add up to 11)

1. Food and drink and other groceries	
2. Other household items e.g. medicine, paraffin, petrol, gas and other fuel	
3. Other household expenses e.g. rent, water, electricity, bond or home loan, school fees, transport, supporting other family, DStv, MNet or other subscriptions	
4. Financial payments e.g. car instalments, insurance and funeral payments	
5. Airtime or internet payments	
6. Personal spending e.g. haircuts, gym, lotto, cigarettes, alcohol, other entertainment, clothes, hobbies, car maintenance or repairs, charity and religious donations	
7. Savings and investments	

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PROPORTIONATE SPEND BY SEM™
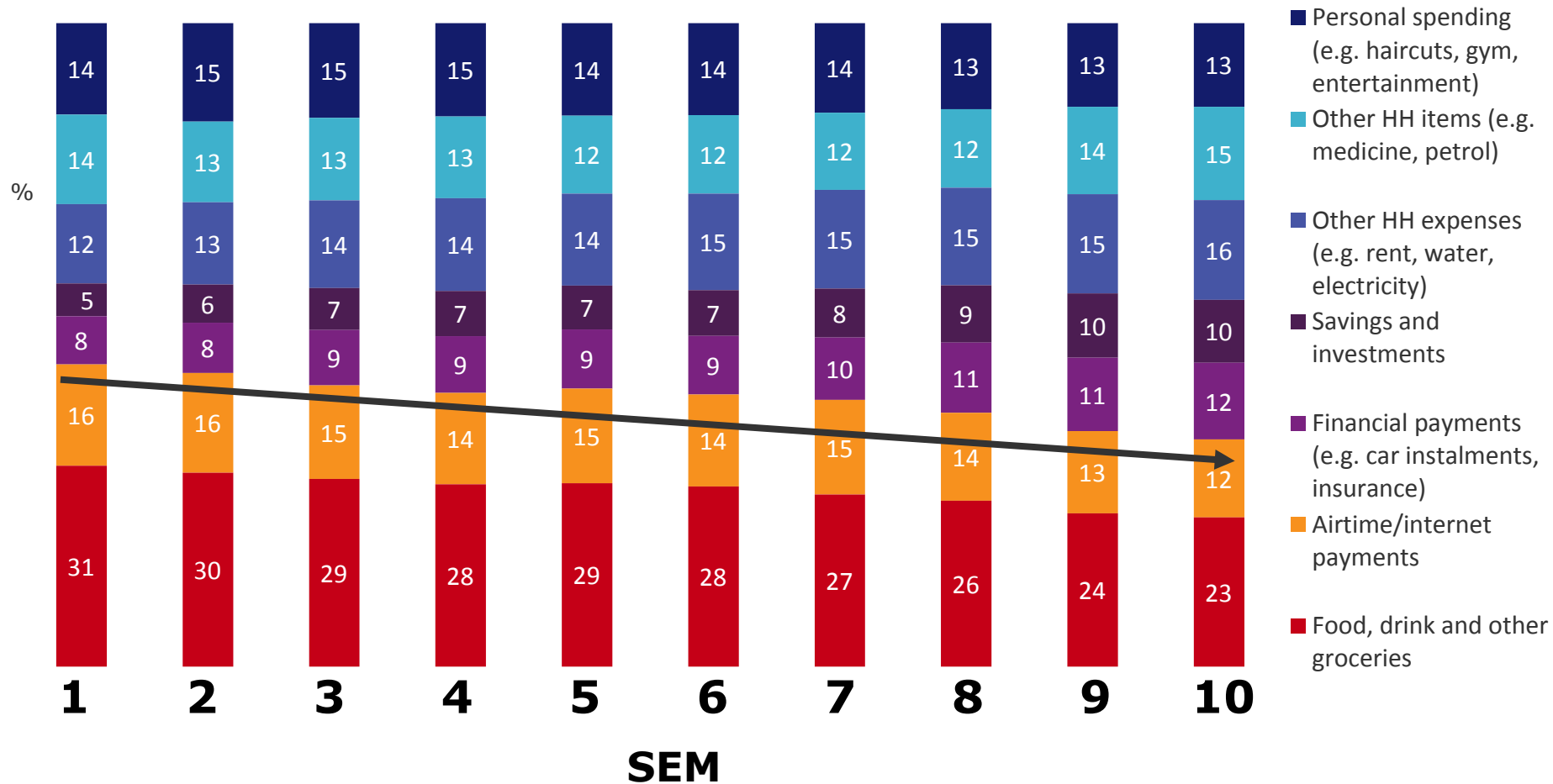
THE 14 ESTABLISHMENT SURVEY SEM™ VARIABLES...

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™:
%

SEM 1	SEM 2	SEM 3	SEM 4	SEM 5	SEM 6	SEM 7	SEM 8	SEM 9	SEM 10
12	16	13	11	11	8	9	7	6	7

LSM:
%

LSM 1	LSM 2	LSM 3	LSM 4	LSM 5	LSM 6	LSM 7	LSM 8	LSM 9	LSM 10
0	1	4	13	21	34	12	5	6	3

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MONTHLY HH INCOME BY SEM™

Bar chart showing monthly household income by SEM category:
- SEM 1: R3 404
- SEM 2: R4 275
- SEM 3: R5 210
- SEM 4: R6 434
- SEM 5: R7 442
- SEM 6: R9 432
- SEM 7: R12 914
- SEM 8: R18 464
- SEM 9: R26 683
- SEM 10: R34 574

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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 |

98 **TV set**

81 **Smart-phone**

74

56 **Desktop/laptop**

22

27 **Tablet**

16 **Wifi/fibre**

1

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

SEM

MEDIA CONSUMPTION BY SEM™

Past 12 month usage:

%

99
95
91
88
66
55
43
33
18
2

SEM

1 2 3 4 5 6 7 8 9 10

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ESTABLISHMENT SURVEY SEM™
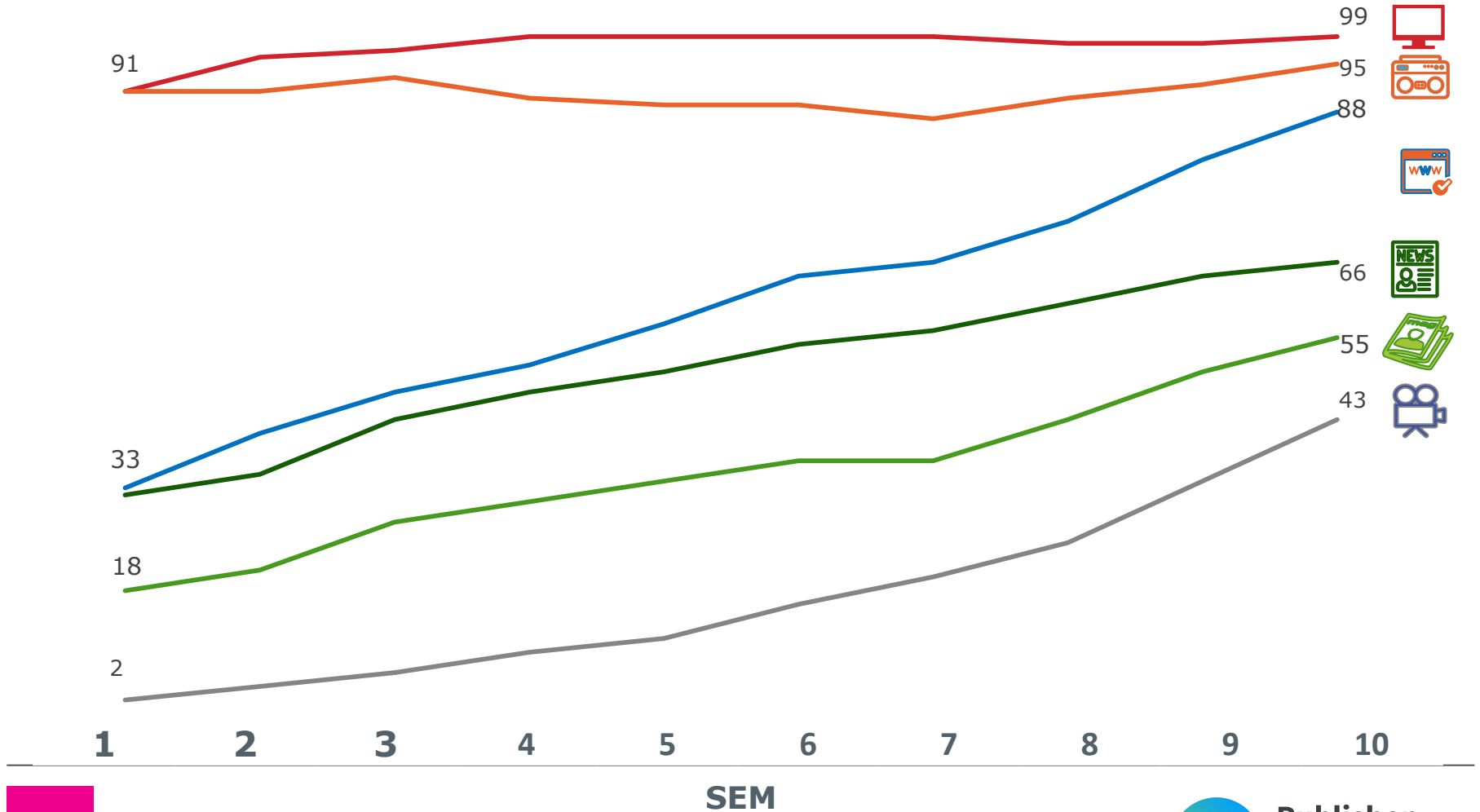
VISUAL REPRESENTATIONS...

Language (Top 5)

Language	Value
Zulu	28
Xhosa	22
Sepedi	15
Setswana	11
Sesotho	8

Area type

Rural	Urban	Metro
74	13	13

Work status

Unemployed	Not working*	Working
29	30	41

*Student/Retired/Home exec./Not looking for work

Education

≤ Primary	Some High	Matric	> Matric
18	52	28	2

SEM 1:
Population: 4.9 million (12%)

Avg HH Income R3,404

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Language (Top 5)
- Zulu — 32
- Xhosa — 22
- Sepedi — 12
- Setswana — 10
- Sesotho — 8

Area type

62	21	17
Rural	Urban	Metro

Work status

31	29	40
Unemployed	Not working*	Working

*Student/Retired/Home exec./Not looking for work

Education

14	46	37	3
< Primary	Some High	Matric	> Matric

SEM 2:
Population: 6.7 million (17%)

Avg HH Income R4,275

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Language (Top 5)

Zulu	29
Xhosa	19
Sepedi	12
Setswana	11
Sesotho	11

Area type

45	31	24

■ Rural ■ Urban ■ Metro

Work status

28	30	42

■ Unemployed ■ Not working* ■ Working

*Student/Retired/Home exec./Not looking for work

Education

10	42	42	5

■ ≤ Primary ■ Some High ■ Matric ■ > Matric
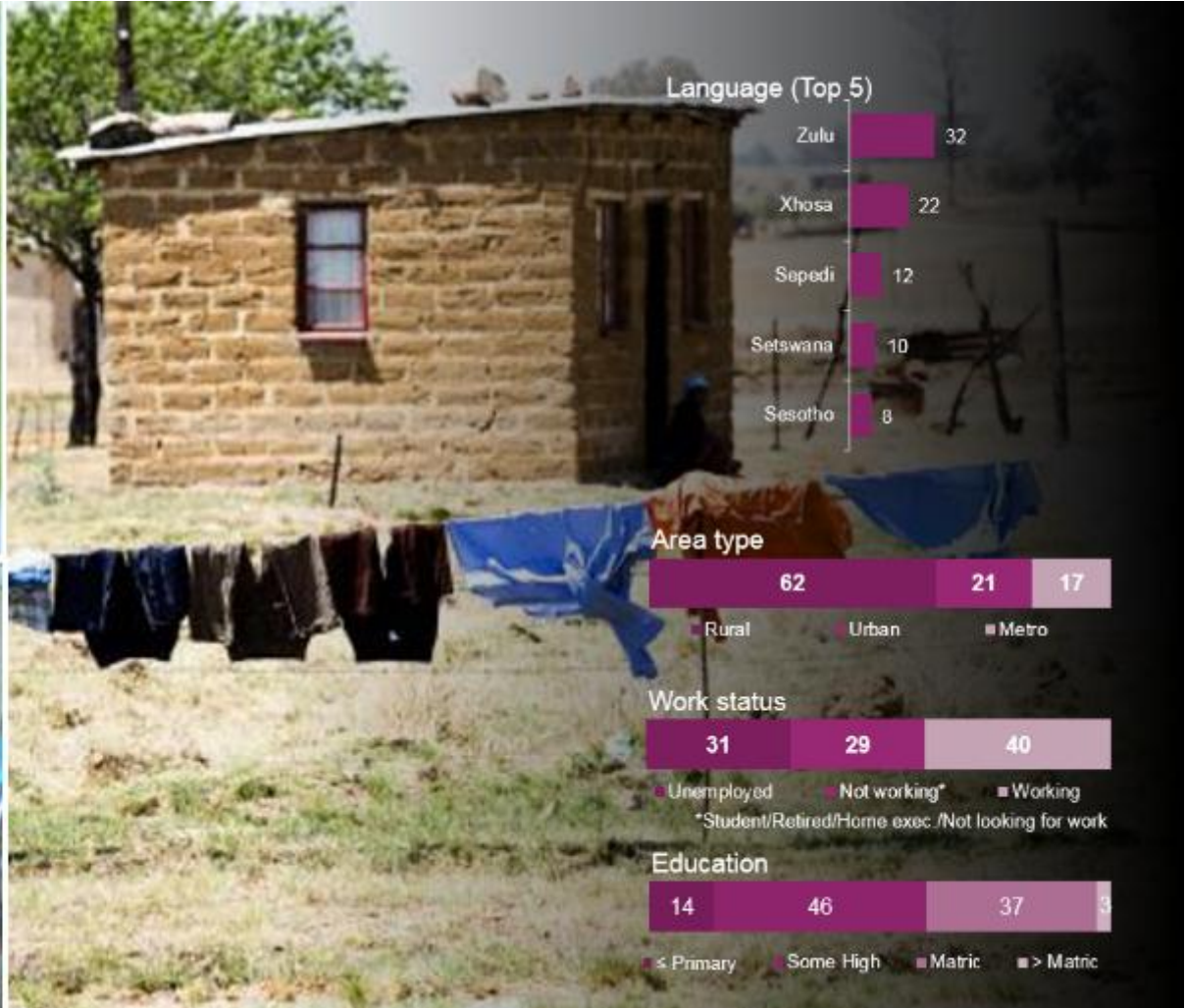
SEM 3:
Population: 5.2 million (13%)

Avg HH Income R5,210

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Language (Top 5)

Language	Value
Zulu	30
Xhosa	16
Sesotho	12
Sepedi	11
Setswana	10

Area type

Rural	Urban	Metro
24	37	38

Work status

Unemployed	Not working*	Working
25	29	47

*Student/Retired/Home exec./Not looking for work

Education

≤ Primary	Some High	Matric	> Matric
7	41	45	7

SEM 4:
Population: 4.1 million (10%)

Avg HH Income R6,434

Language (Top 5)

Language	Value
Zulu	31
Xhosa	19
Sesotho	12
Afrikaans	11
Sepedi	8

Area type

Rural	Urban	Metro
12	36	53

Work status

Unemployed	Not working*	Working
21	29	50

*Student/Retired/Home exec./Not looking for work

Education

≤ Primary	Some High	Matric	> Matric
6	37	49	8

SEM 5:
Population: 4.2 million (11%)

Avg HH Income R7,442

SEM 6:
Population: 3.3 million (8%)

Avg HH Income R9,432

Language (Top 5)
- Zulu 28
- Afrikaans 17
- Xhosa 15
- Sesotho 10
- English 9

Area type
| 8 | 33 | 60 |
Rural | Urban | Metro

Work status
| 16 | 30 | 54 |
Unemployed | Not working* | Working
*Student/Retired/Home exec./Not looking for work

Education
| 4 | 33 | 49 | 14 |
≤ Primary | Some High | Matric | > Matric

Language (Top 5)

Zulu	23
Afrikaans	19
English	16
Xhosa	13
Sesotho	10

Area type

5	31	64
Rural	Urban	Metro

Work status

14	33	53
Unemployed	Not working*	Working

*Student/Retired/Home exec./Not looking for work

Education

4	27	51	18
≤ Primary	Some High	Matric	> Matric

SEM 7:
Population: 3.5 million (9%)

Avg HH Income R12,914

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Language (Top 5)
- English: 28
- Afrikaans: 24
- Zulu: 19
- Sesotho: 8
- Xhosa: 7

Area type
3	33	64
Rural	Urban	Metro

Work status
9	33	59
Unemployed	Not working*	Working

*Student/Retired/Home exec./Not looking for work

Education
2	19	48	32
< Primary	Some High	Matric	> Matric
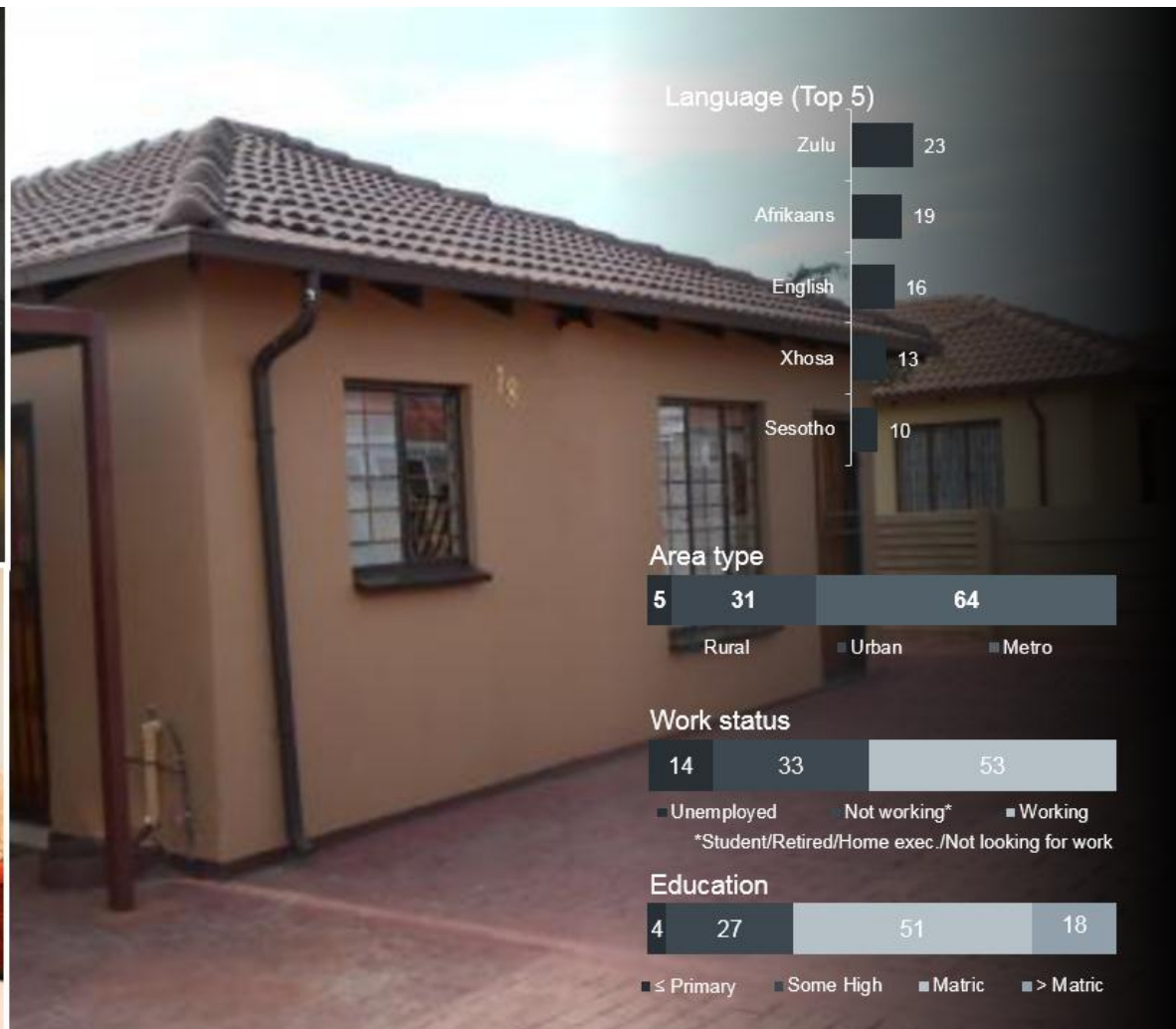
SEM 8:
Population: 2.8 million (7%)

Avg HH Income R18,464

Language (Top 5)

Language	Value
English	36
Afrikaans	34
Zulu	11
Xhosa	5
Sesotho	5

Area type

| 1 | 29 | 69 |

■ Rural   ■ Urban   ■ Metro

Work status

| 5 | 34 | 61 |

■ Unemployed   ■ Not working*   ■ Working

*Student/Retired/Home exec./Not looking for work

Education

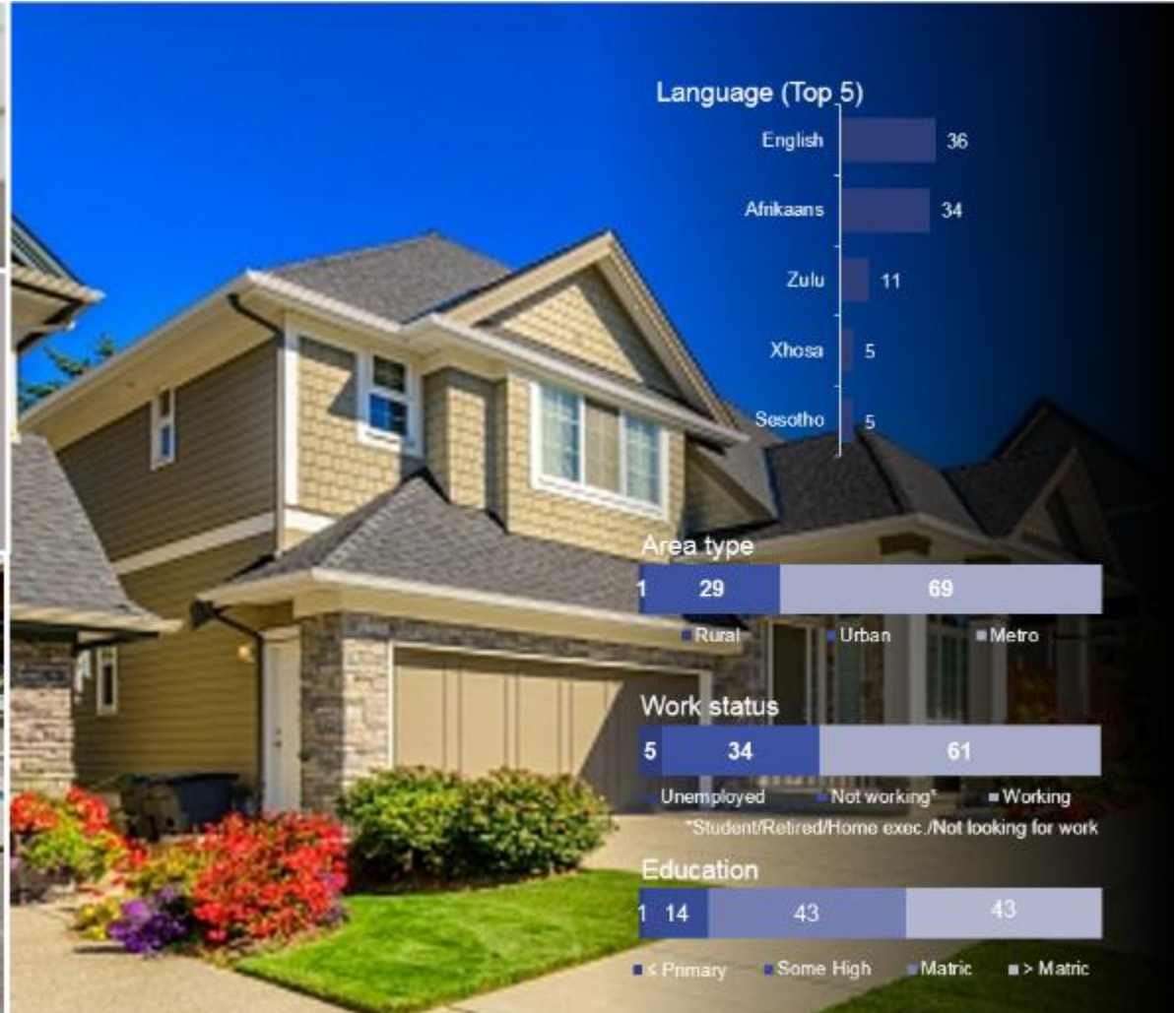| 1 | 14 | 43 | 43 |

■ < Primary   ■ Some High   ■ Matric   ■ > Matric

SEM 9:
Population: 2.2 million (6%)

Avg HH Income R26,683

SEM 10:
Population: 2.6 million (6%)

Avg HH Income R34,574

Thank you. Questions?