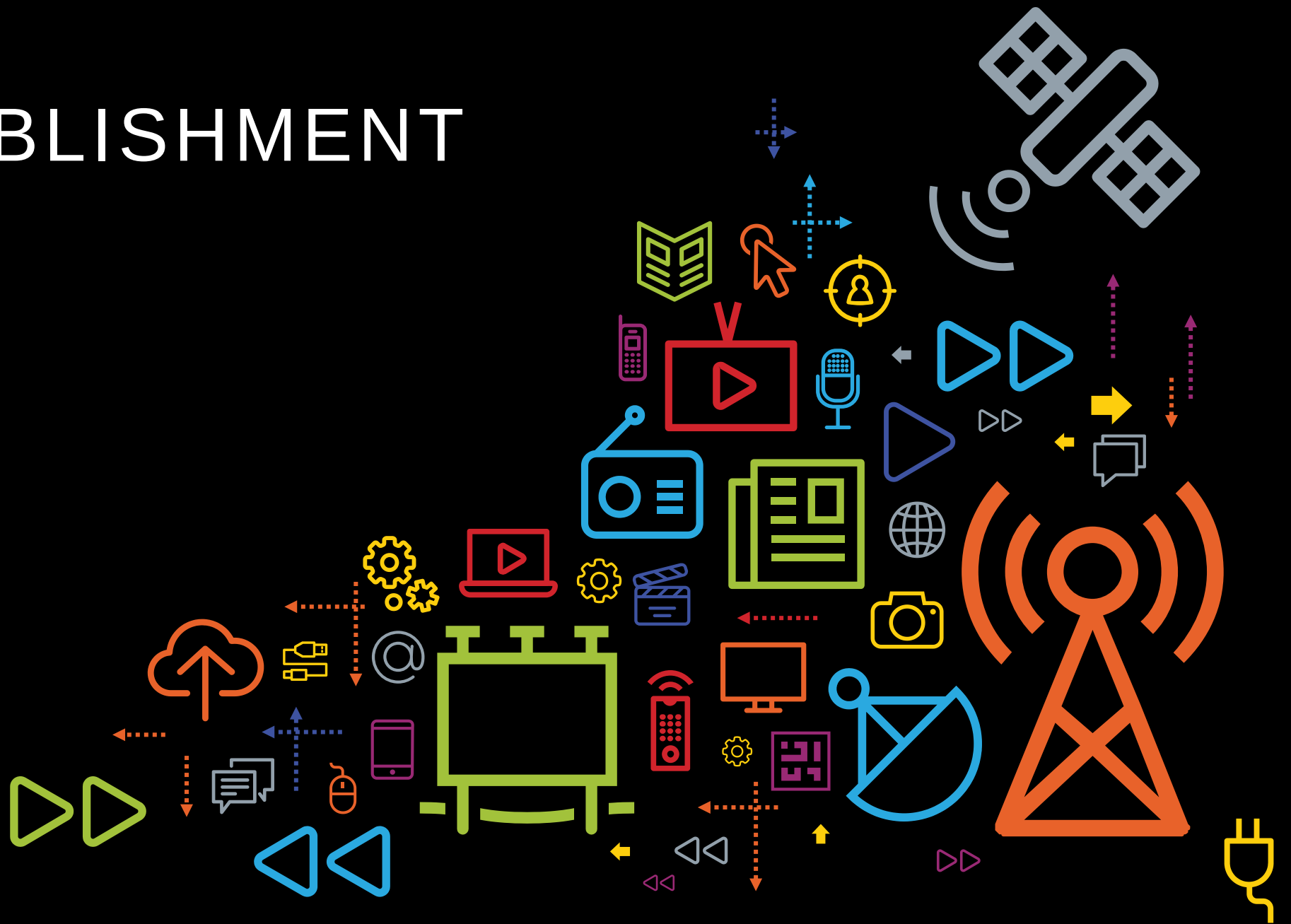
KANTAR TNS

THE ESTABLISHMENT SURVEY

March 2020 release



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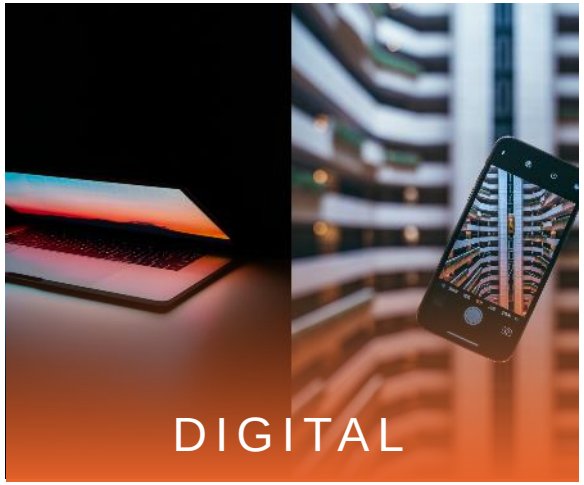

DIGITAL

CINEMA

SEM

ESTABLISHMENT SURVEY BASICS

25,000 annual sample

Representative of the SA population

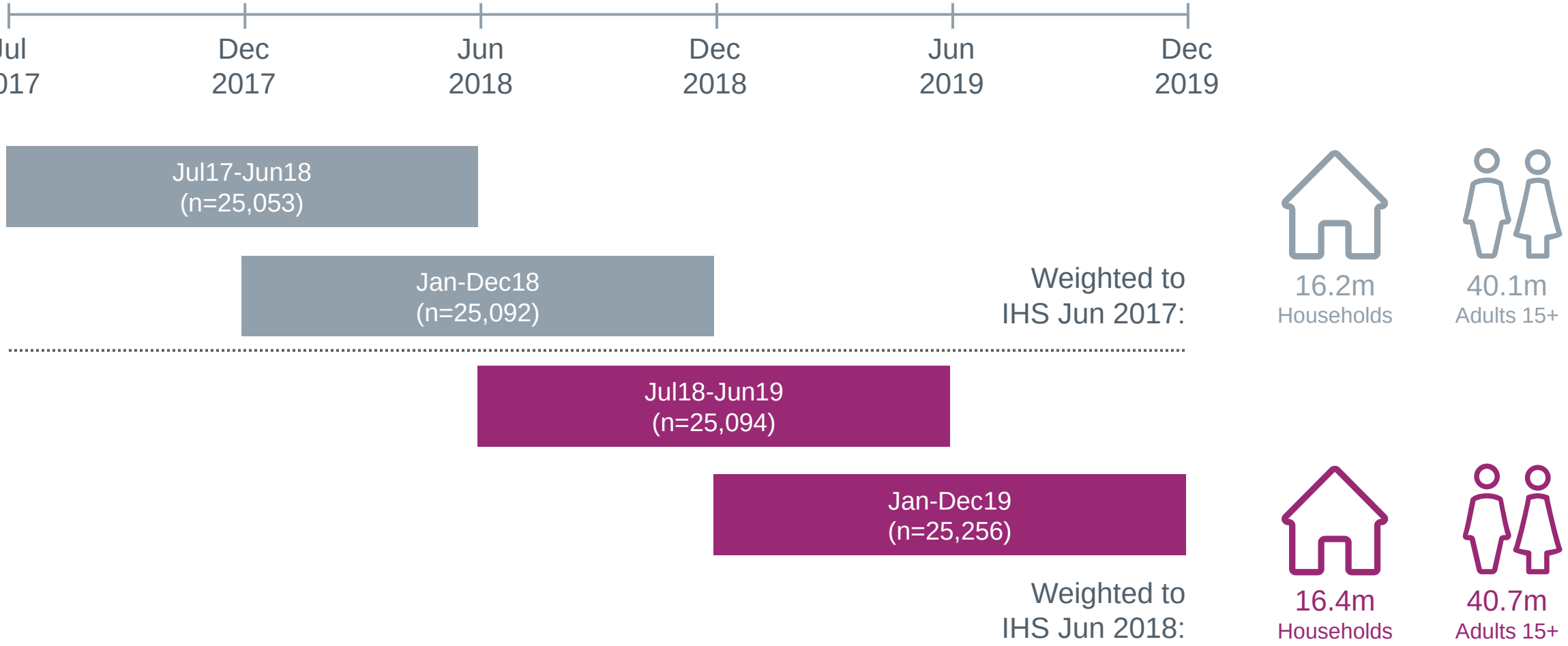
Demographic / geographic / lifestyle / products & multi-media landscape

Cross platform / cross device media consumption

Single source
(IHS population data)

SEM (segmentation model)

Trended ES data (rolling 12 month data) – 4 most recent time periods shown in this deck



ES sample closely reflects the SA population

ES (unweighted)

Black	82%
Coloured	9%
Indian / Asian	2%
White	7%

Source: ES Jan-Dec19 (n=25,256)

IHS Population

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

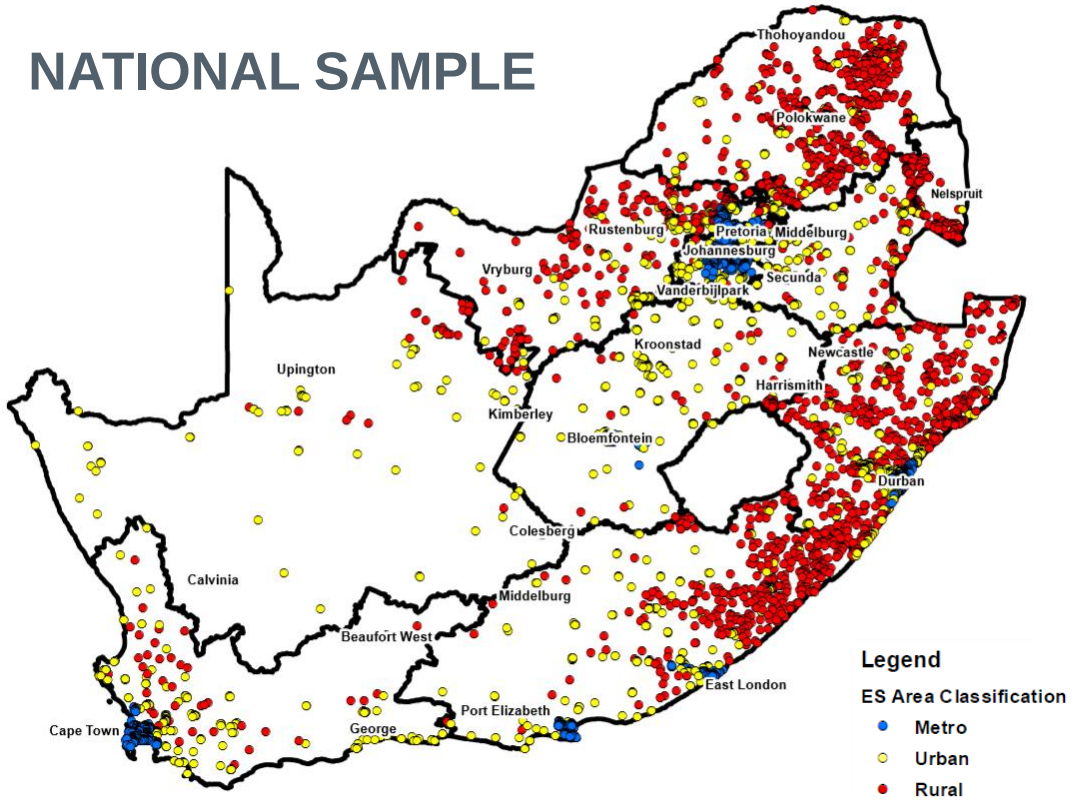
Source: IHS Individual Population estimates Jun 2018

High weighting efficiency

	Household	Individual
Jul17-Jun18	96.1%	83.3%
Jan-Dec18	95.3%	83.2%
Jul18-Jun19	95.0%	84.8%
Jan-Dec19	96.0%	86.3%

Establishment Survey – vital signs

NATIONAL SAMPLE



Universe: Population aged 15+

40.7 million

25,256 sample

JAN-DEC 2019

41% Metro

28% Urban

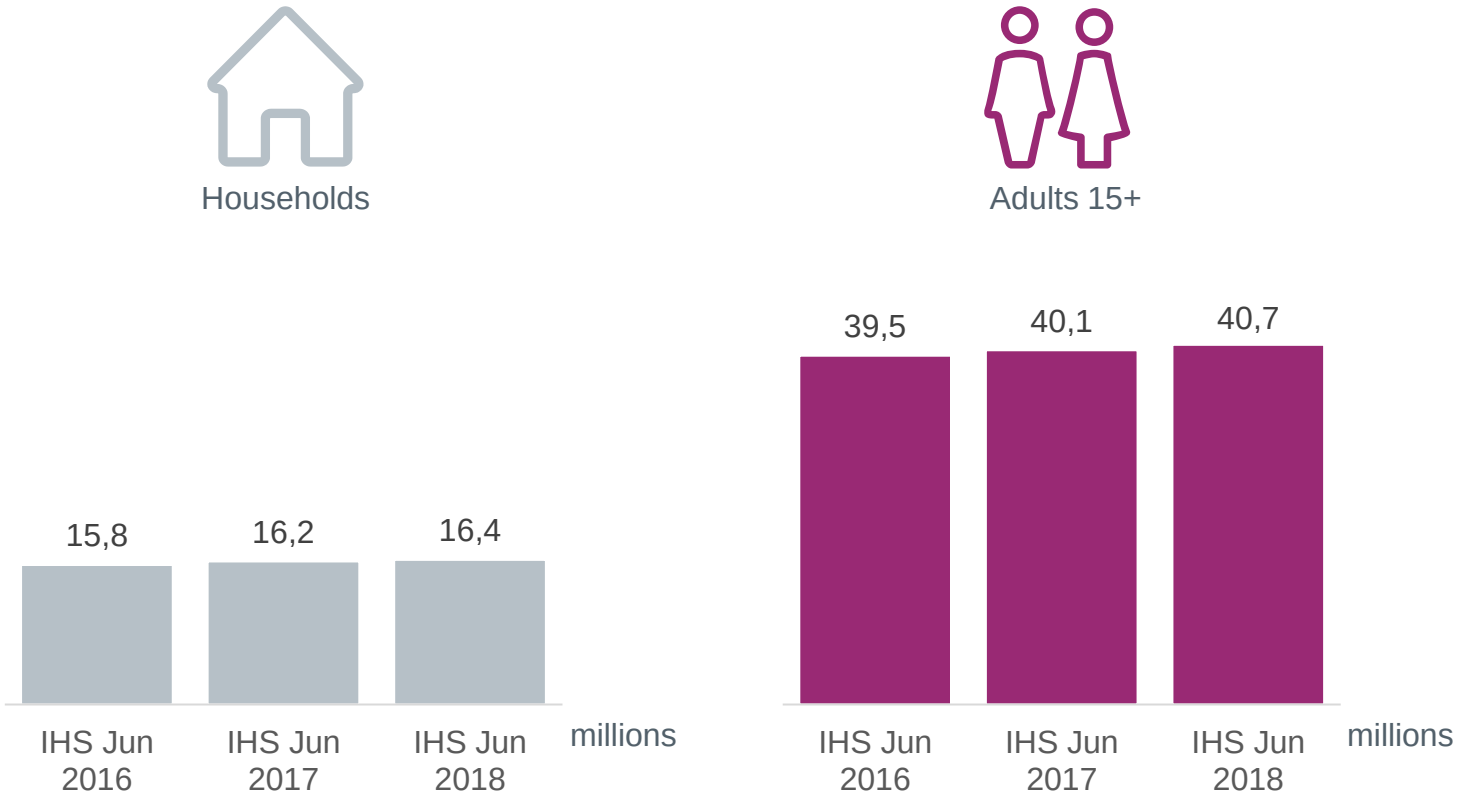
31% Rural

Currency – vital signs

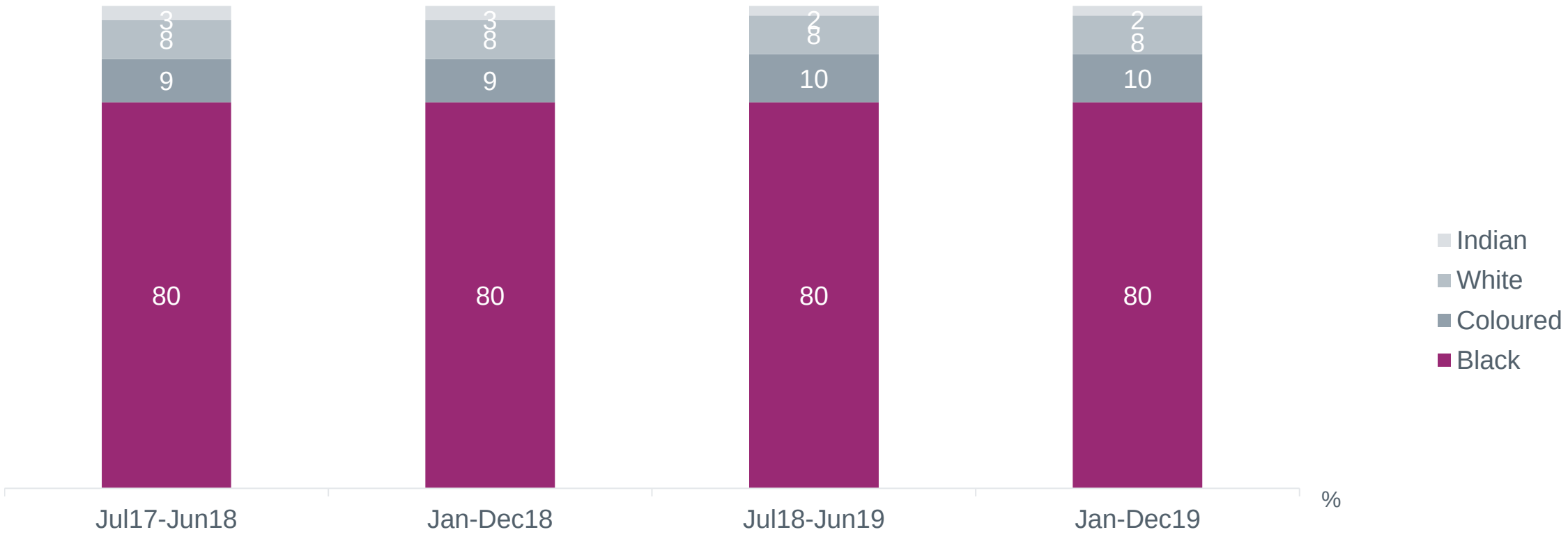
	ES	BRC RAM™	BRC TAMS	PAMS
	41% Metro	60% Metro	44% Metro	50% Metro
	28% Urban	20% Urban	29% Urban	30% Urban
	31% Rural	20% Rural	27% Rural	20% Rural

DEMOGRAPHIC LANDSCAPE

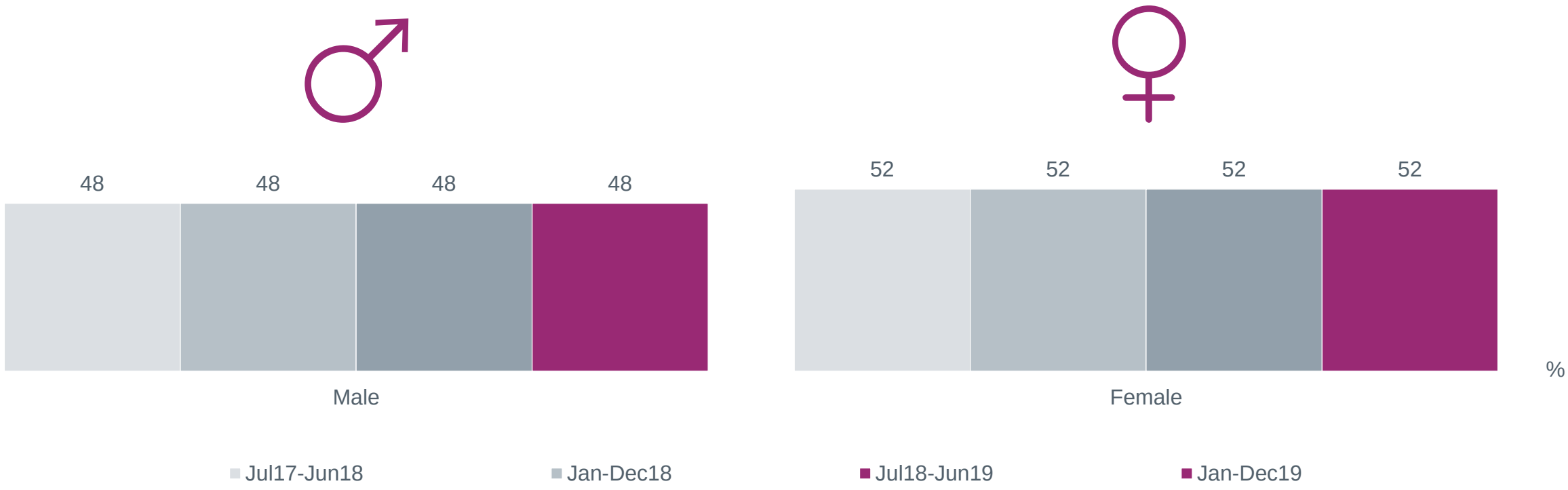
SA’s growing population



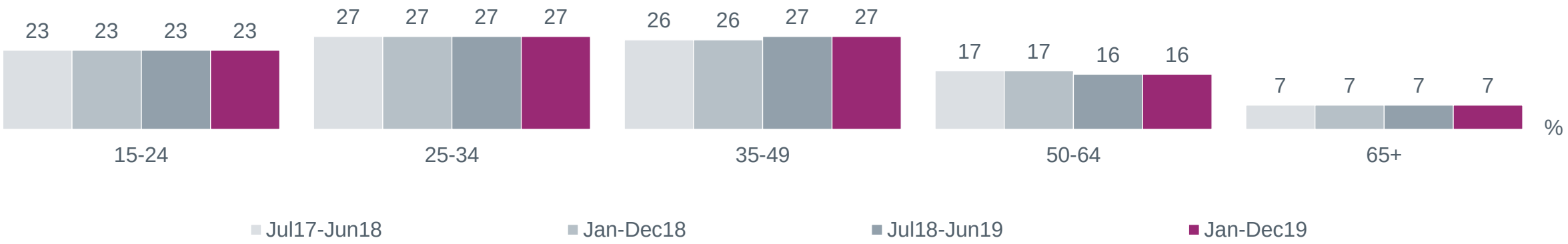
Race profile



Gender profile



Age profile


23
23
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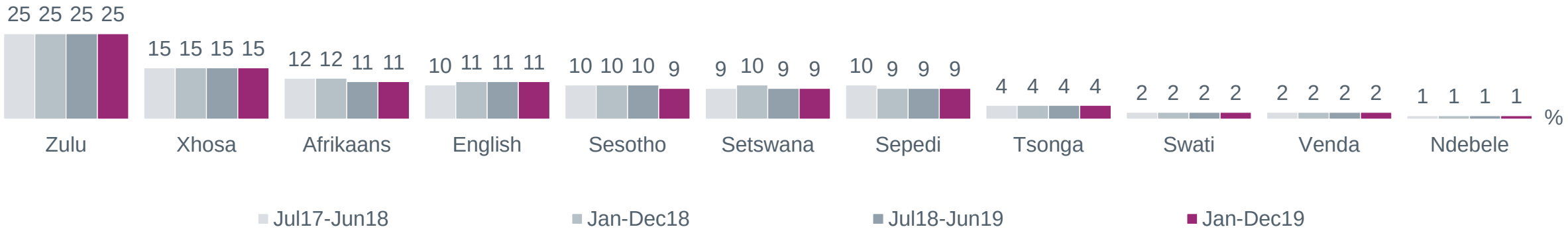
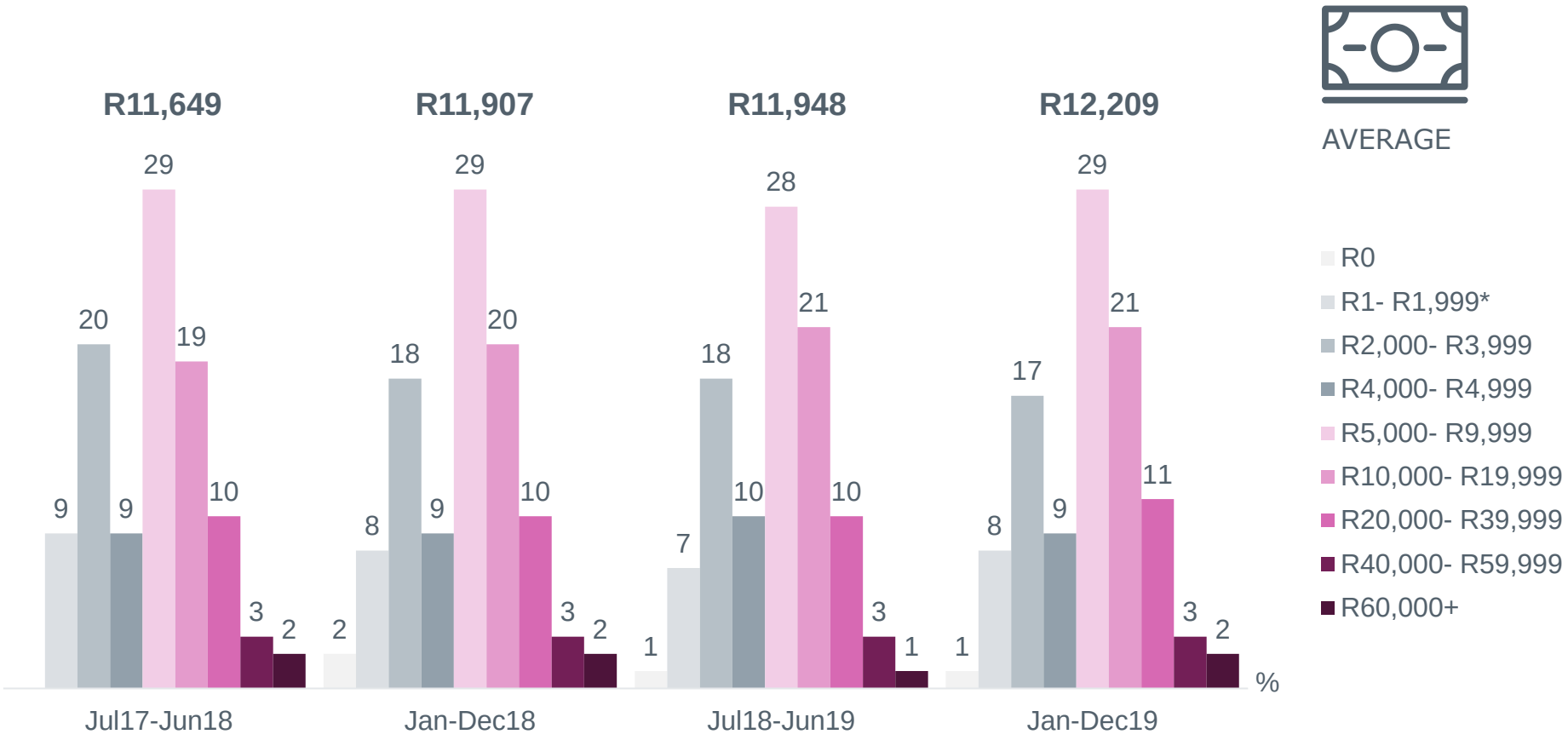
26
26
27
27
17
17
16
16
7
7
7
7
%
15-24
25-34
35-49
50-64
65+
Jul17-Jun18
Jan-Dec18
Jul18-Jun19
Jan-Dec19

Languages spoken most often in SA homes

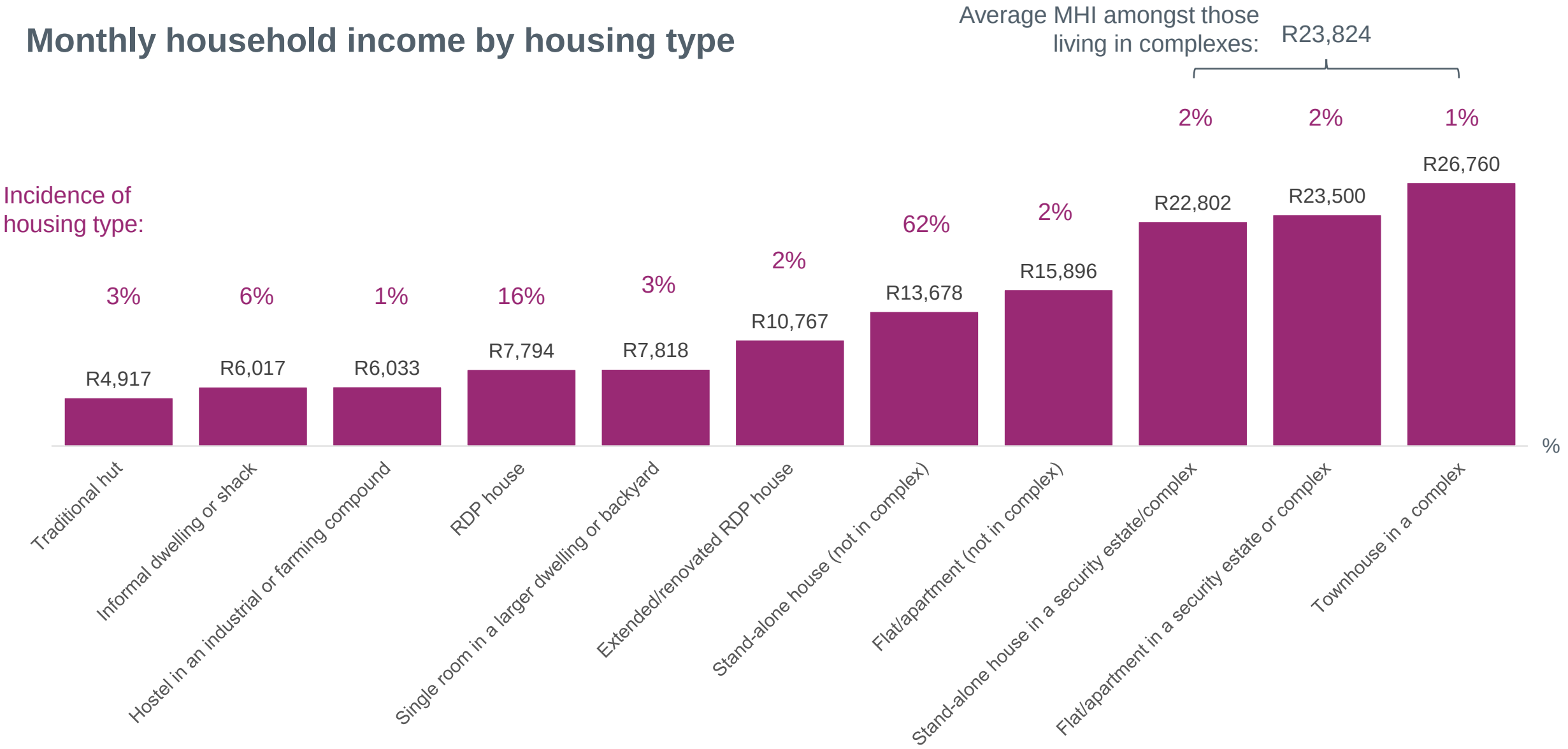


Monthly household income



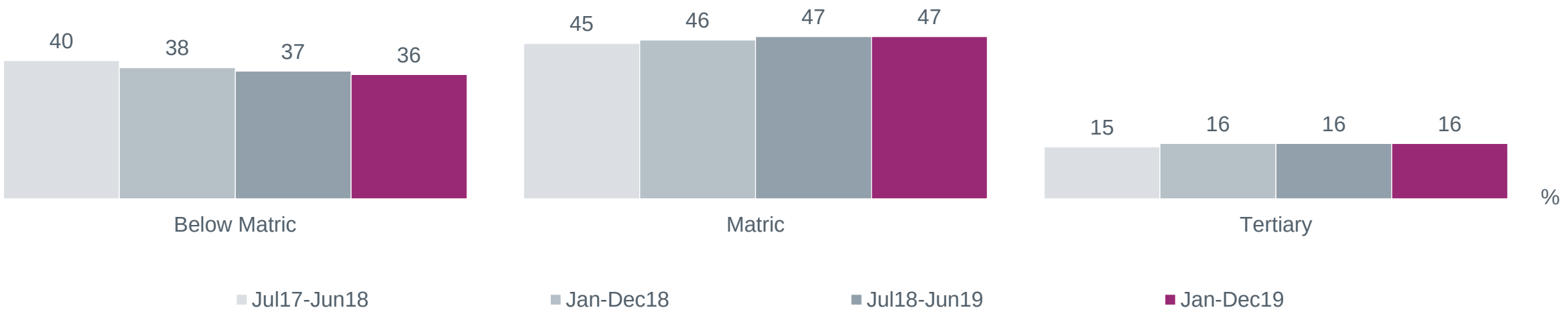
*Note: Was R0-R1,999 prior to Jan 2018

Monthly household income by housing type



Filtered on Z3 Housing type (only housing types with base sizes larger than 50 shown)

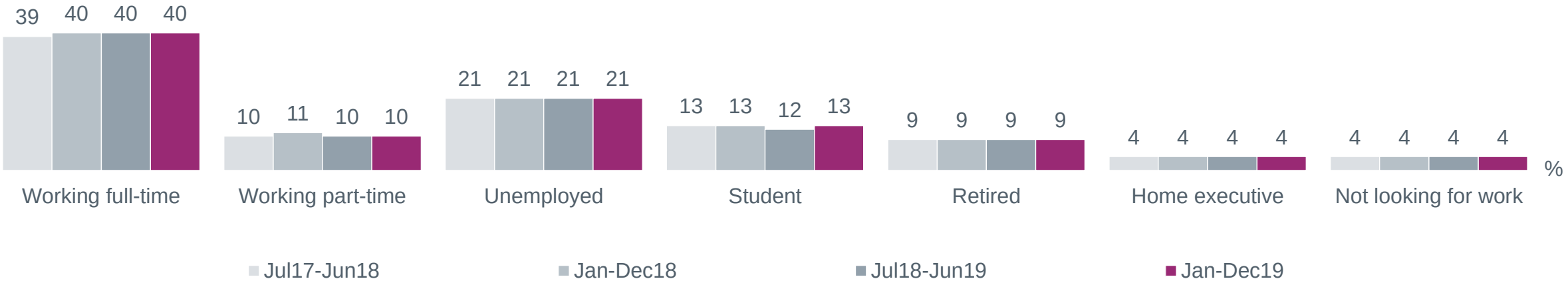
Improvement in education levels



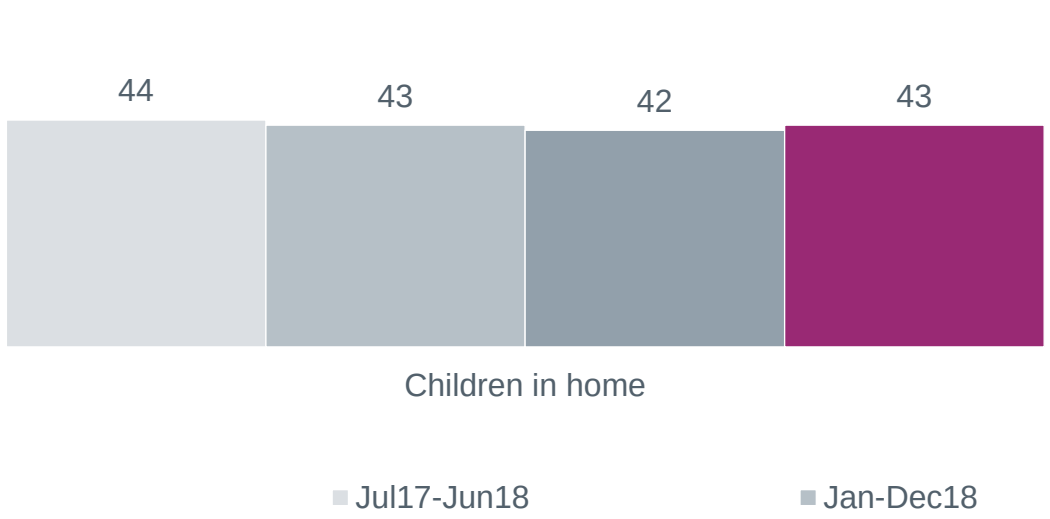
Stable working population

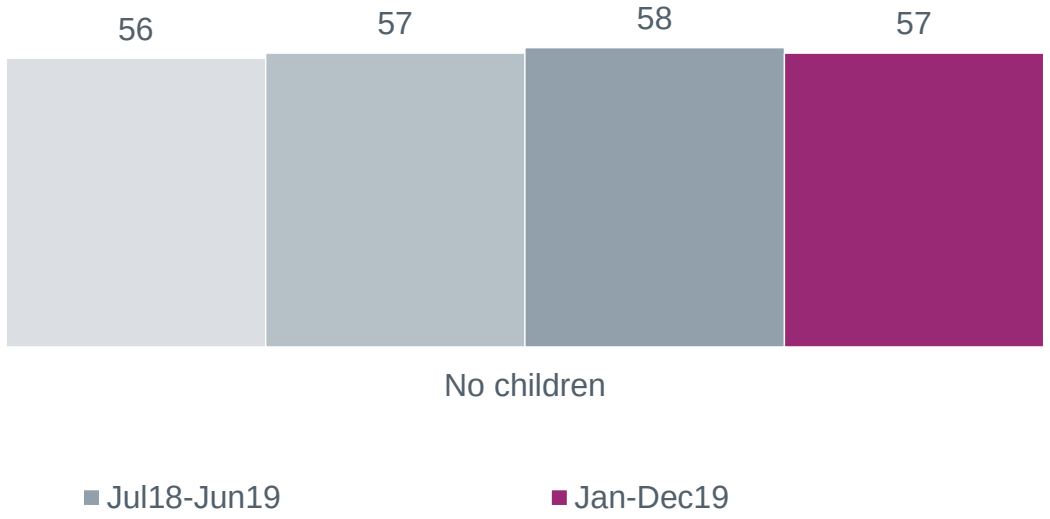
WORKING

Jul17-Jun18	50%
Jan-Dec18	50%
Jul18-Jun19	51%
Jan-Dec19	**50%**



Children under 15 years living at home





%

Area classification

	Jul17 - Jun18		Jan - Dec18		Jul18 - Jun19		Jan - Dec19	
Metro	41%	16.4m	41%	16.4m	41%	16.7m	41%	16.7m
Urban	28%	11.4m	28%	11.4m	28%	11.5m	28%	11.5m
Rural	31%	12.3m	31%	12.3m	31%	12.5m	31%	12.5m

Based on IHS Jun 2017 estimates

Based on IHS Jun 2018 estimates

Shifts in population by province

	Jul17 - Jun18		Jan - Dec18		Jul18 - Jun19		Jan - Dec19	
Gauteng	25%	10.2m	25%	10.2m	26%	10.4m	26%	10.4m
KwaZulu-Natal	19%	7.7m	19%	7.7m	19%	7.8m	19%	7.8m
Western Cape	12%	4.9m	12%	4.9m	12%	5.0m	12%	5.0m
Eastern Cape	12%	4.8m	12%	4.8m	12%	4.9m	12%	4.9m
Limpopo	10%	3.9m	10%	3.9m	10%	3.9m	10%	3.9m
Mpumalanga	7%	3.0m	7%	3.0m	7%	3.0m	7%	3.0m
North West	7%	2.7m	7%	2.7m	7%	2.7m	7%	2.7m
Free State	5%	2.0m	5%	2.0m	5%	2.1m	5%	2.1m
Northern Cape	2%	0.9m	2%	0.9m	2%	0.9m	2%	0.9m

Based on IHS Jun 2017 estimates

Based on IHS Jun 2018 estimates

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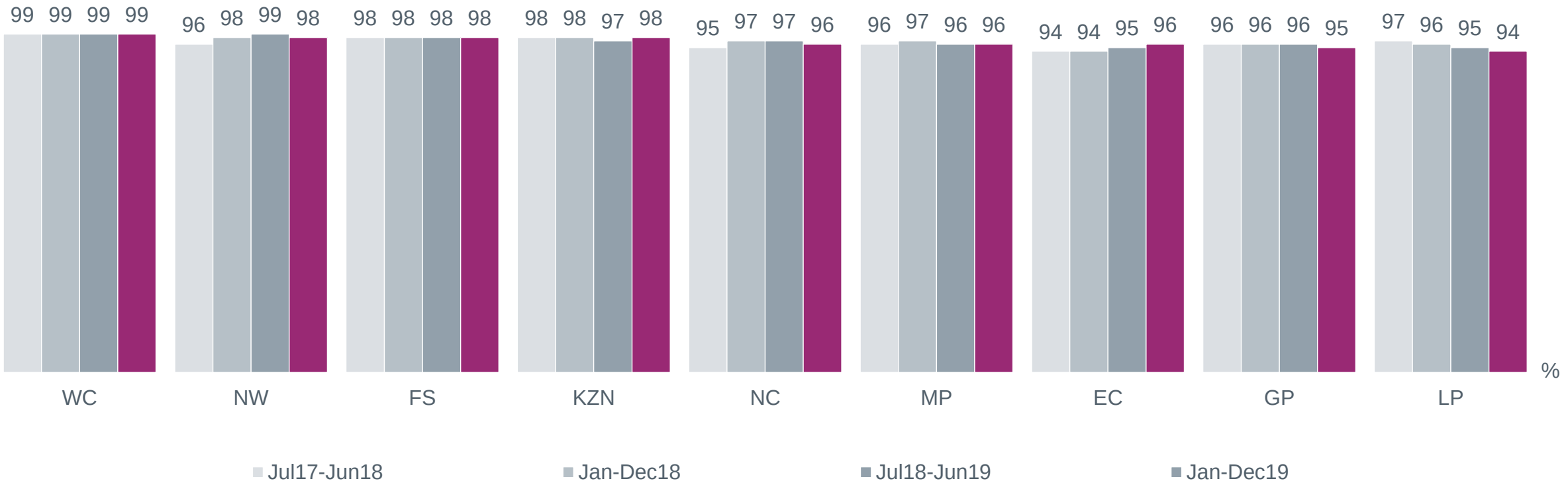
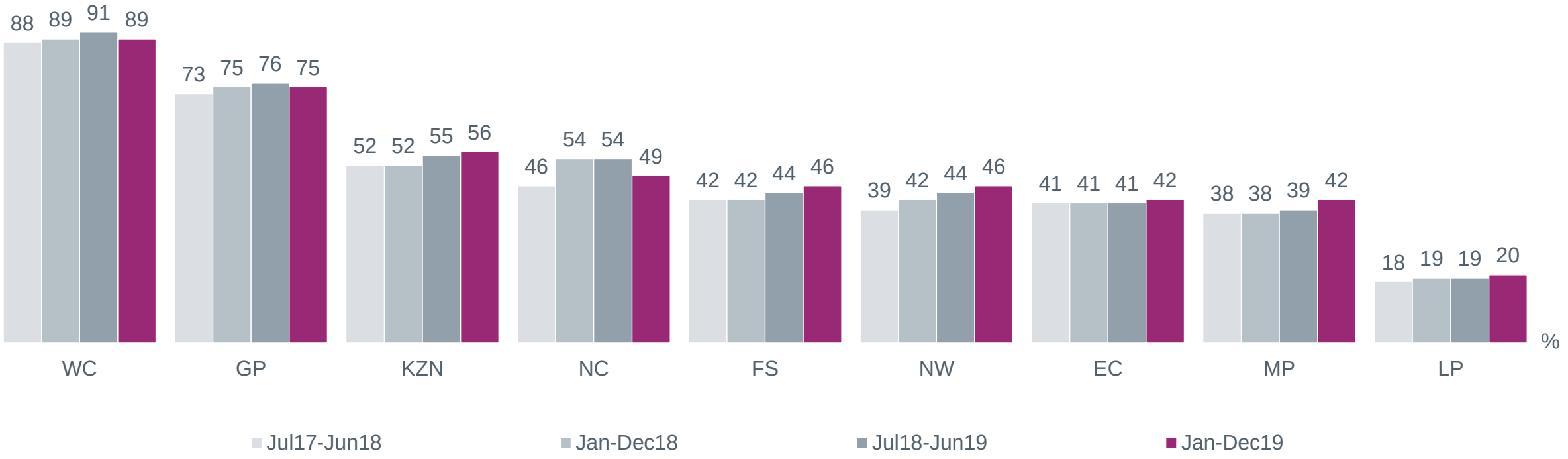
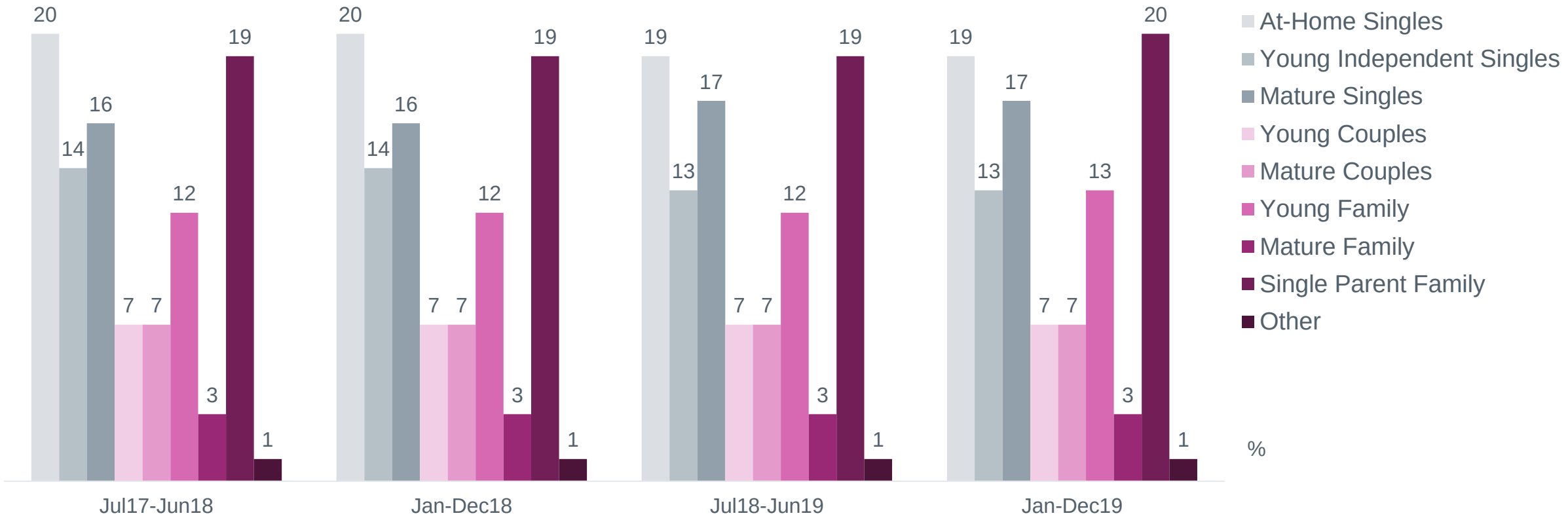
Electrification by province



Water access by province

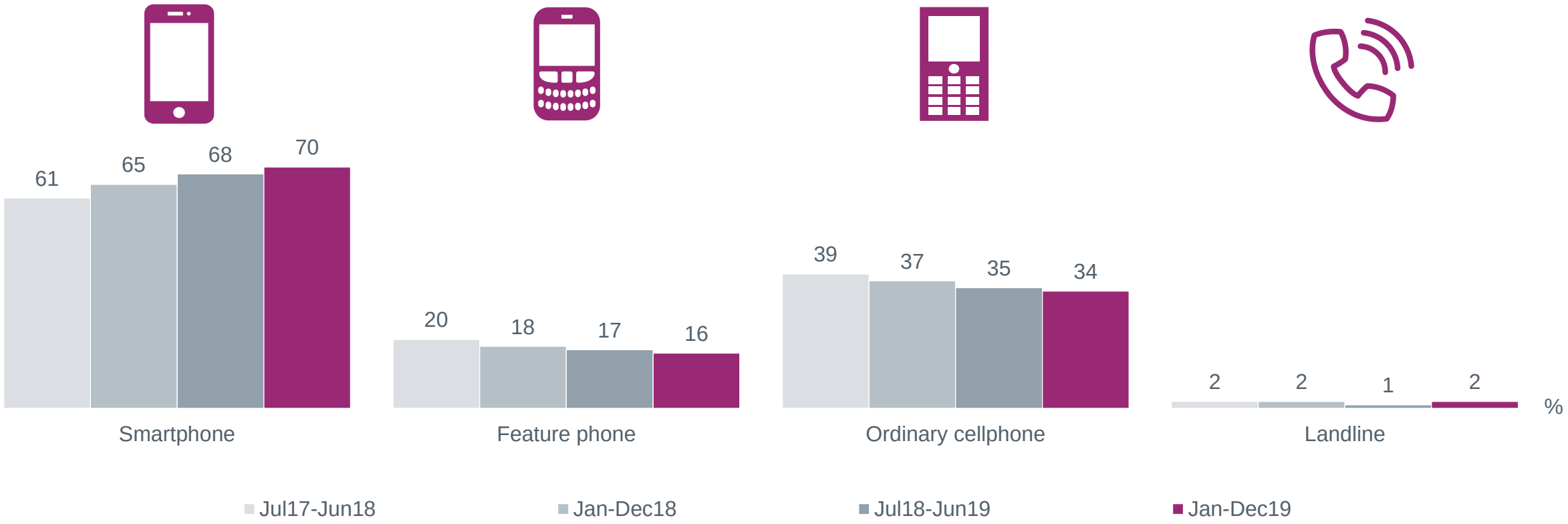


Shifts in life stages

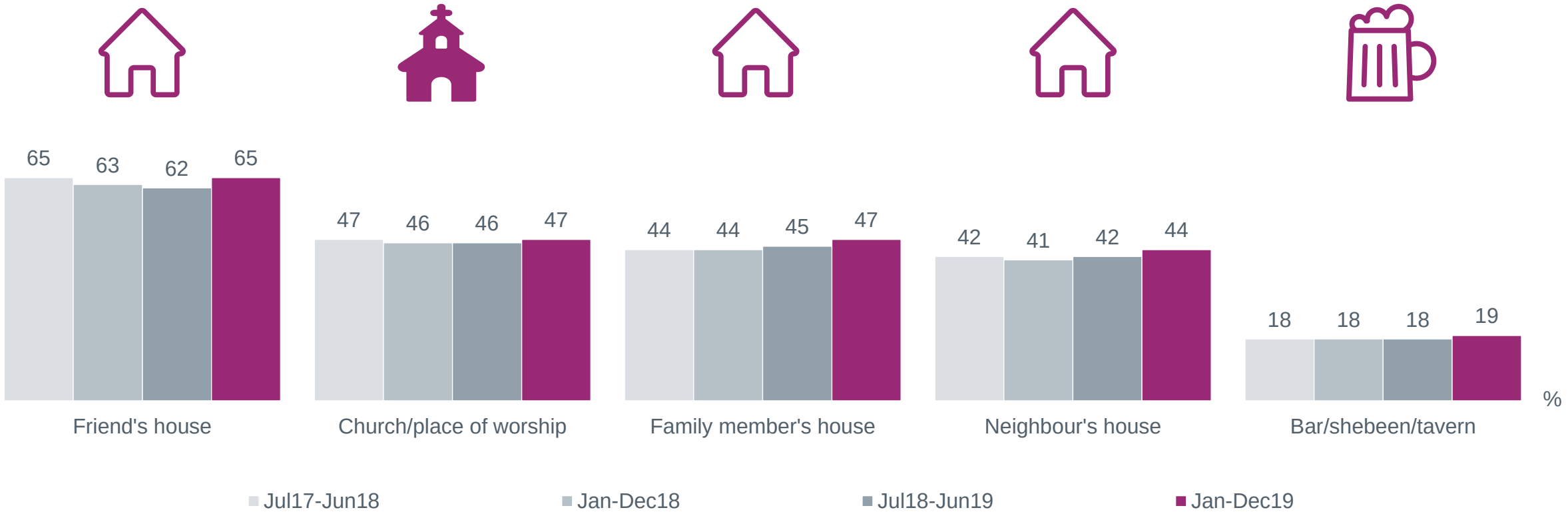


LIFESTYLES

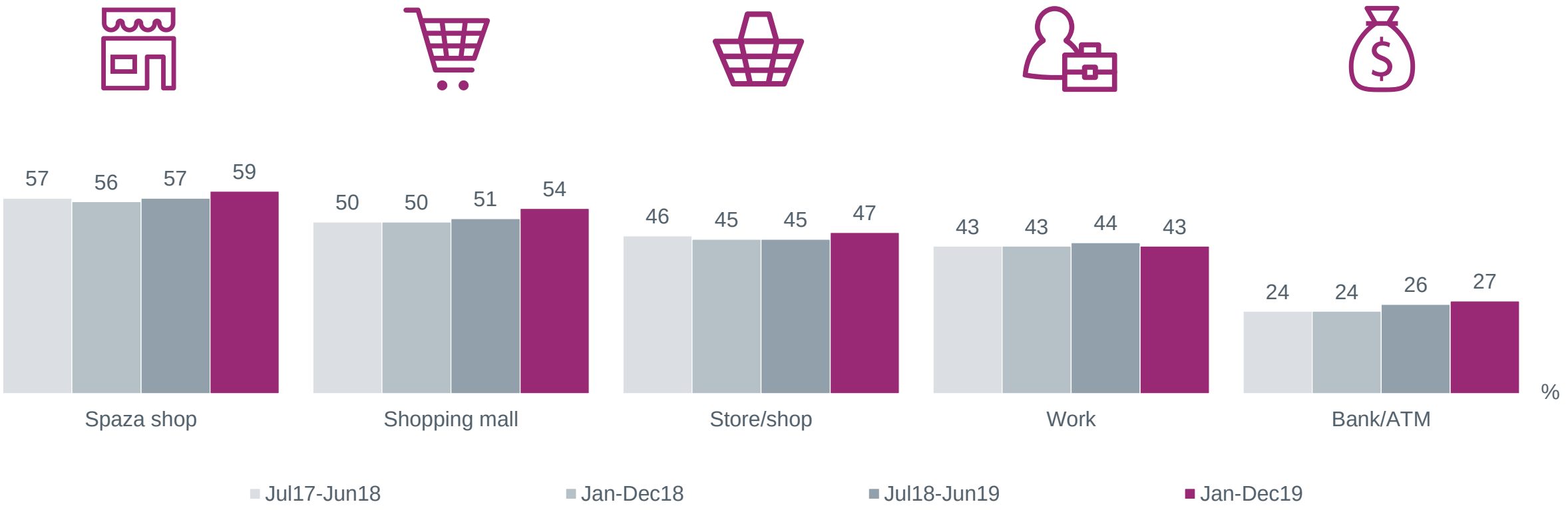
Almost every home has a cellphone, and minimal incidence of landlines



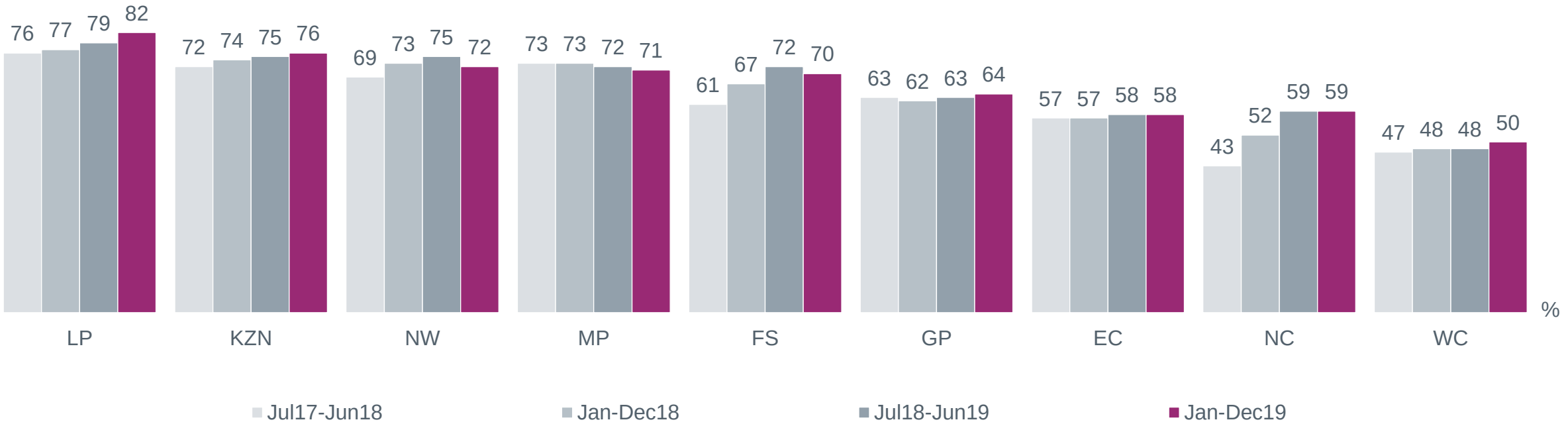
Past week destinations – social



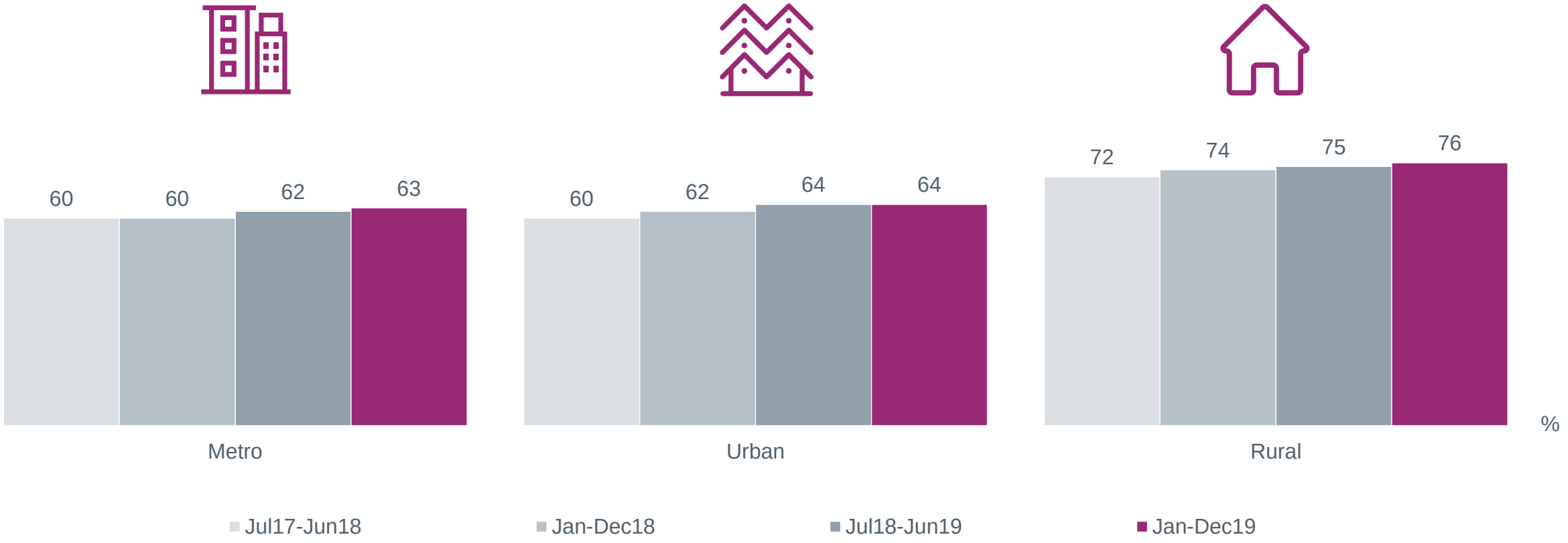
Past week destinations – business



Growth of the taxi/bus industry by province



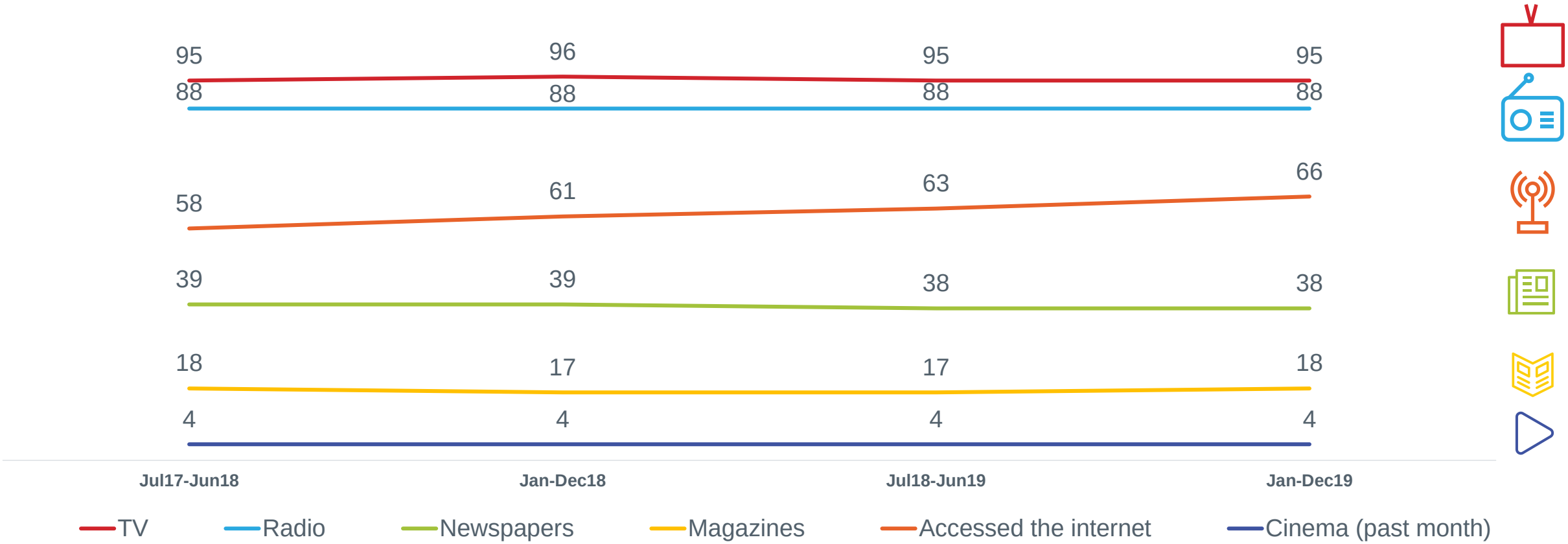
Growth of the taxi/bus industry by area type



MEDIA LANDSCAPE

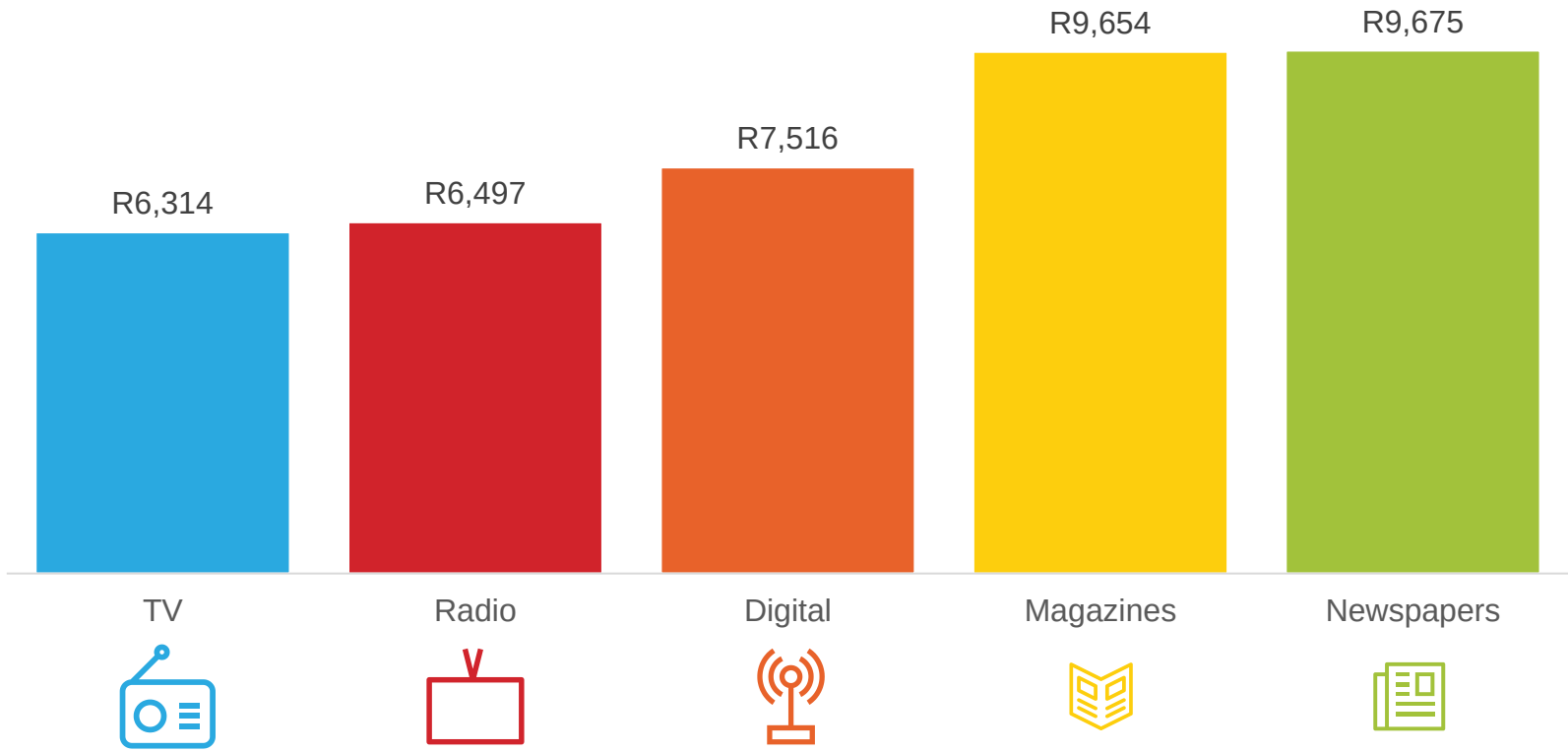
Media landscape

Past 7 day reach trend (%)



Average personal income by media type

Personal monthly income – Rand per month



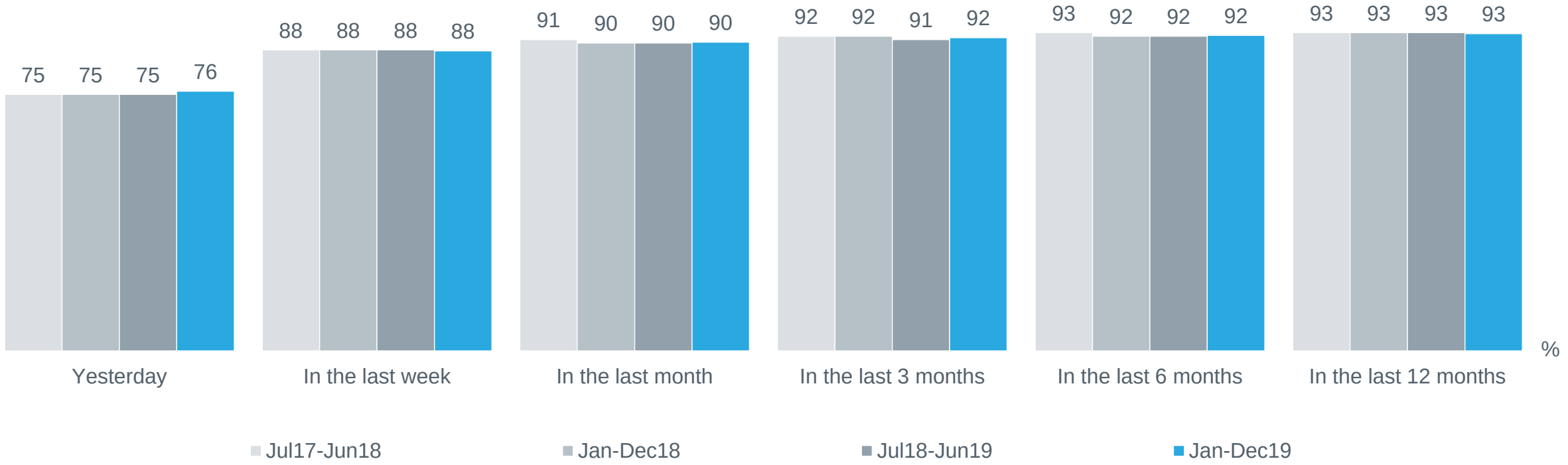
ES Jan-Dec19 (n=25,256) filtered on A1 Yesterday audience per medium

SNAPSHOTS BY MEDIA TYPE

1

CD
AUX
SCAN
AST
MUTE
SETUP
SEEK
1 FF
2 RDM
3 INFO
TRACK
4 REW
5 RPT
6
A/C

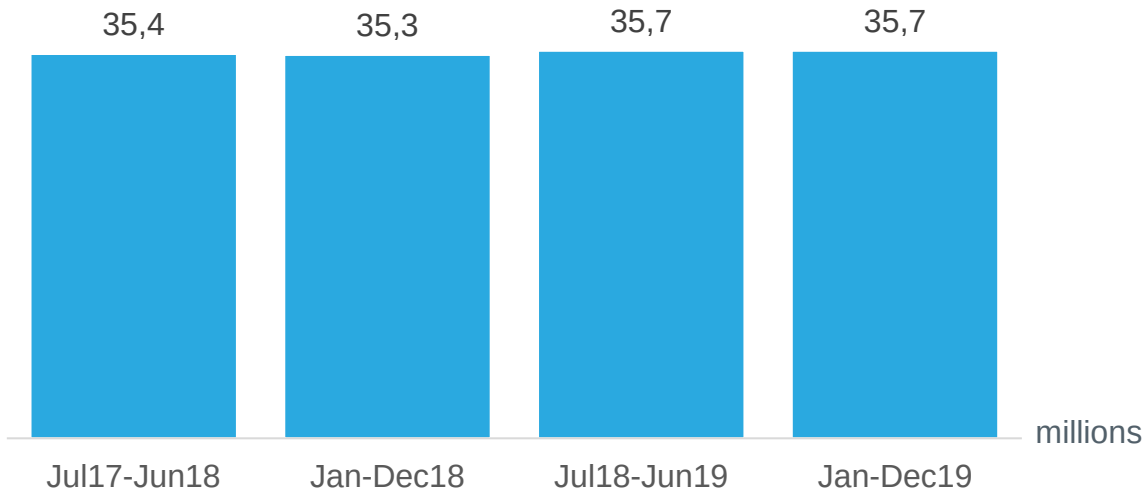
Listening reach



Past 7 day Radio listeners

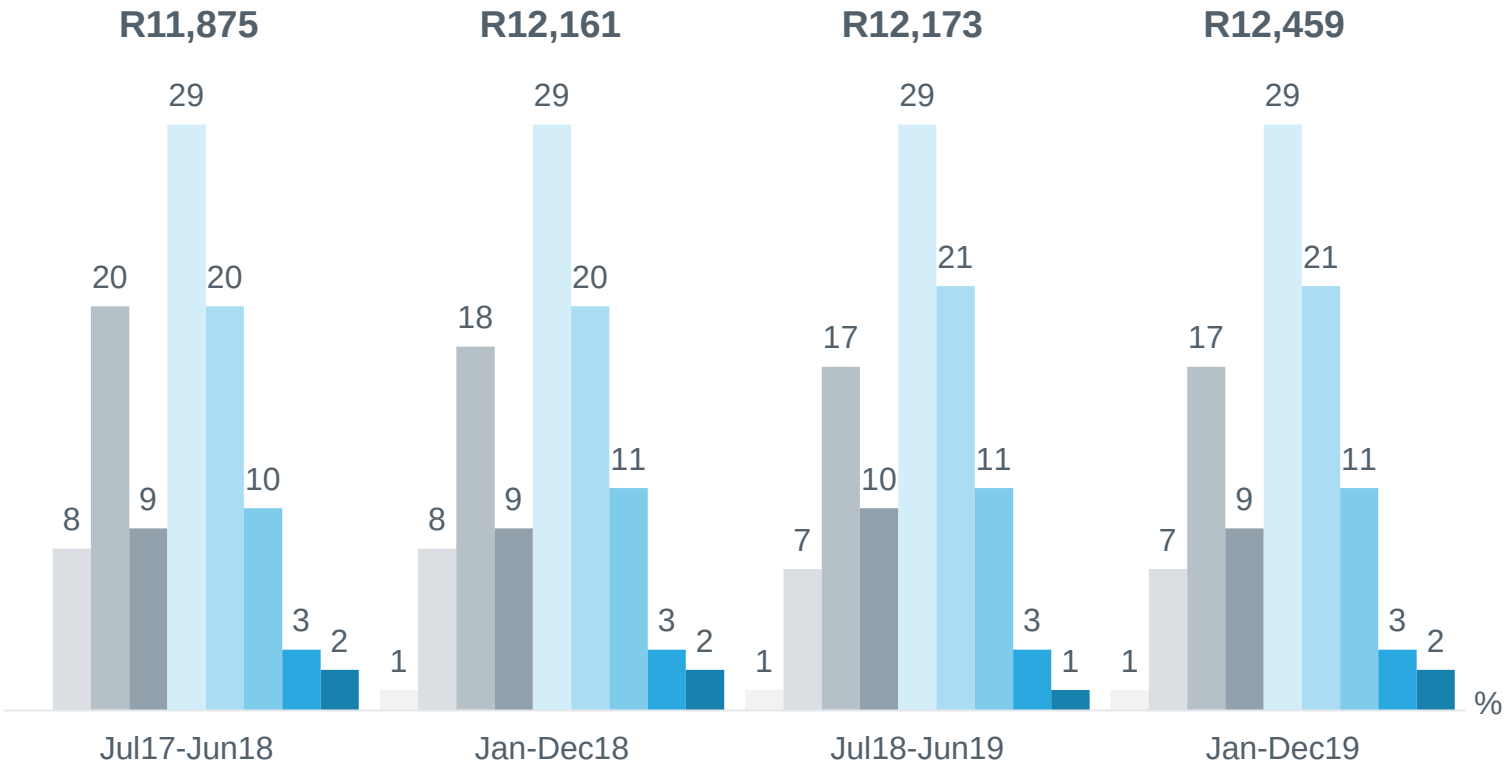
Population

ADULTS 15+



Past 7 day Radio listeners

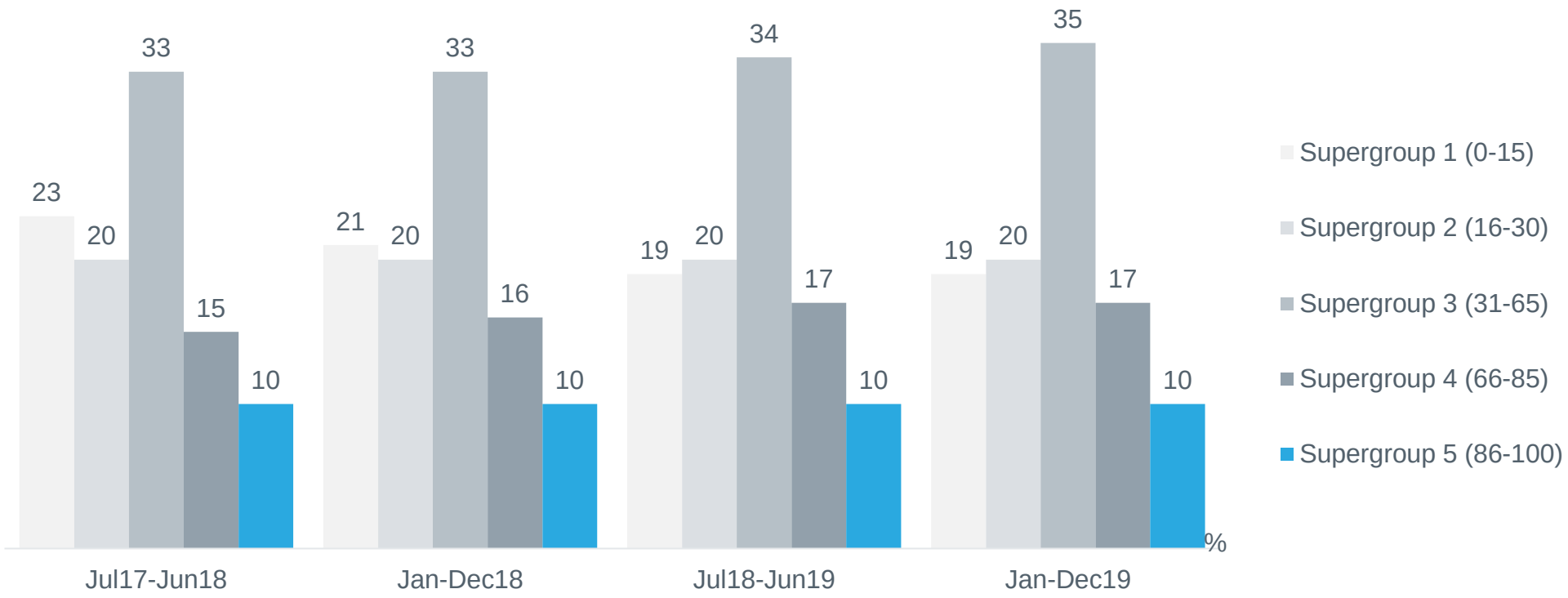
Monthly household income



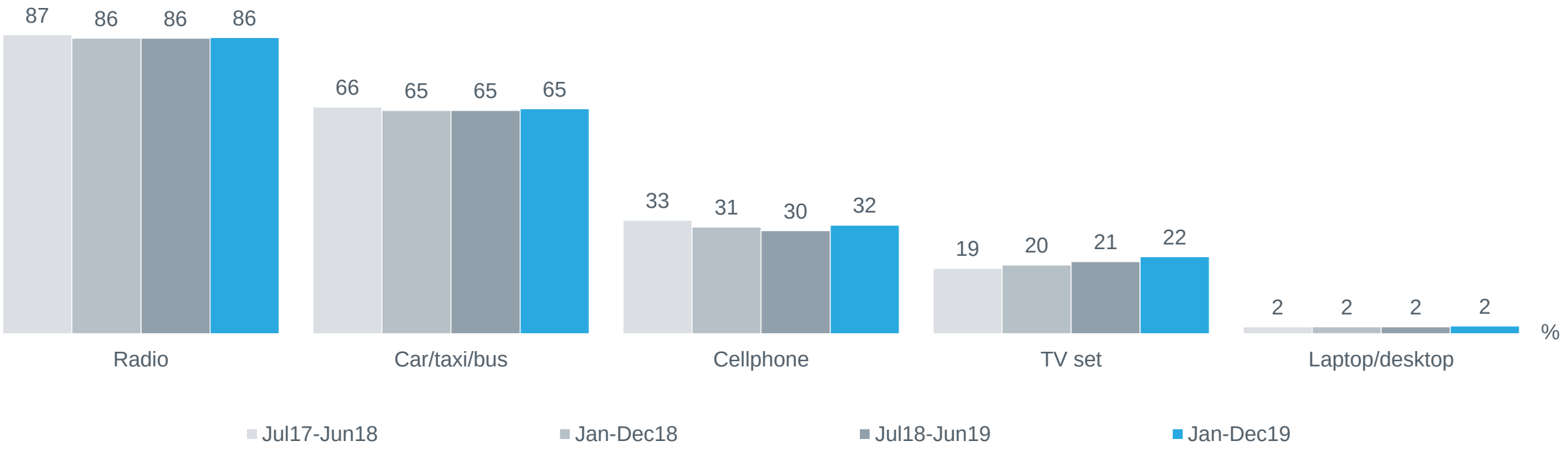
*Note: Was R0-R1,999 prior to Jan 2018

Past 7 day Radio listeners

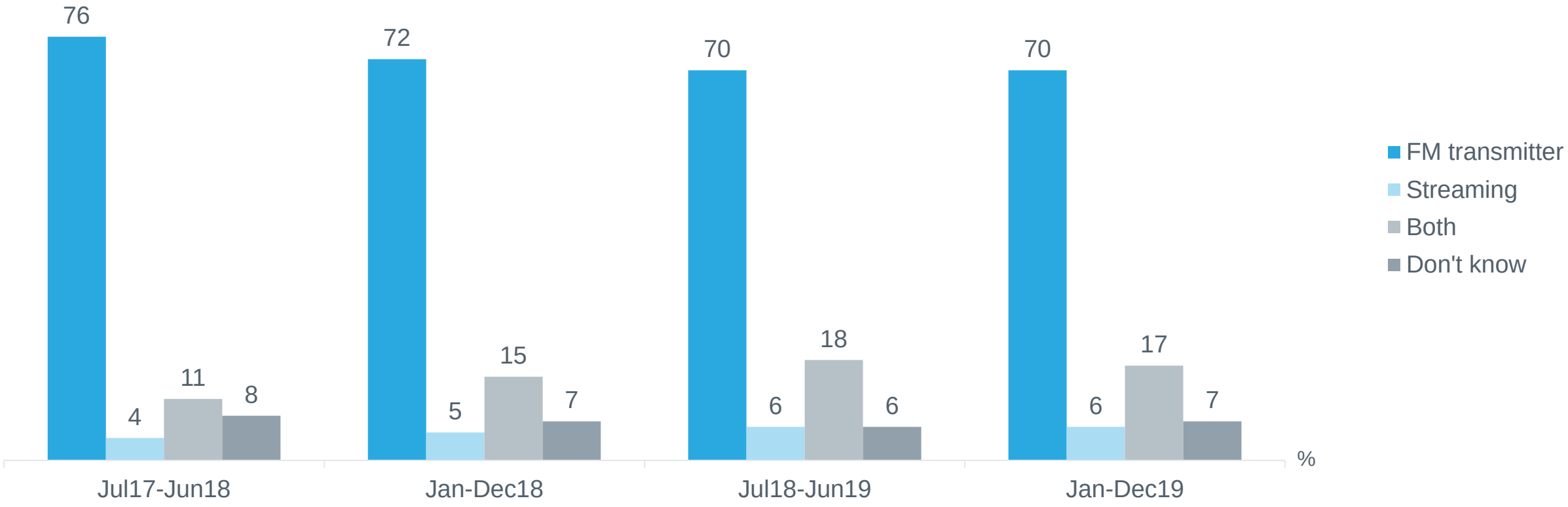
SEM



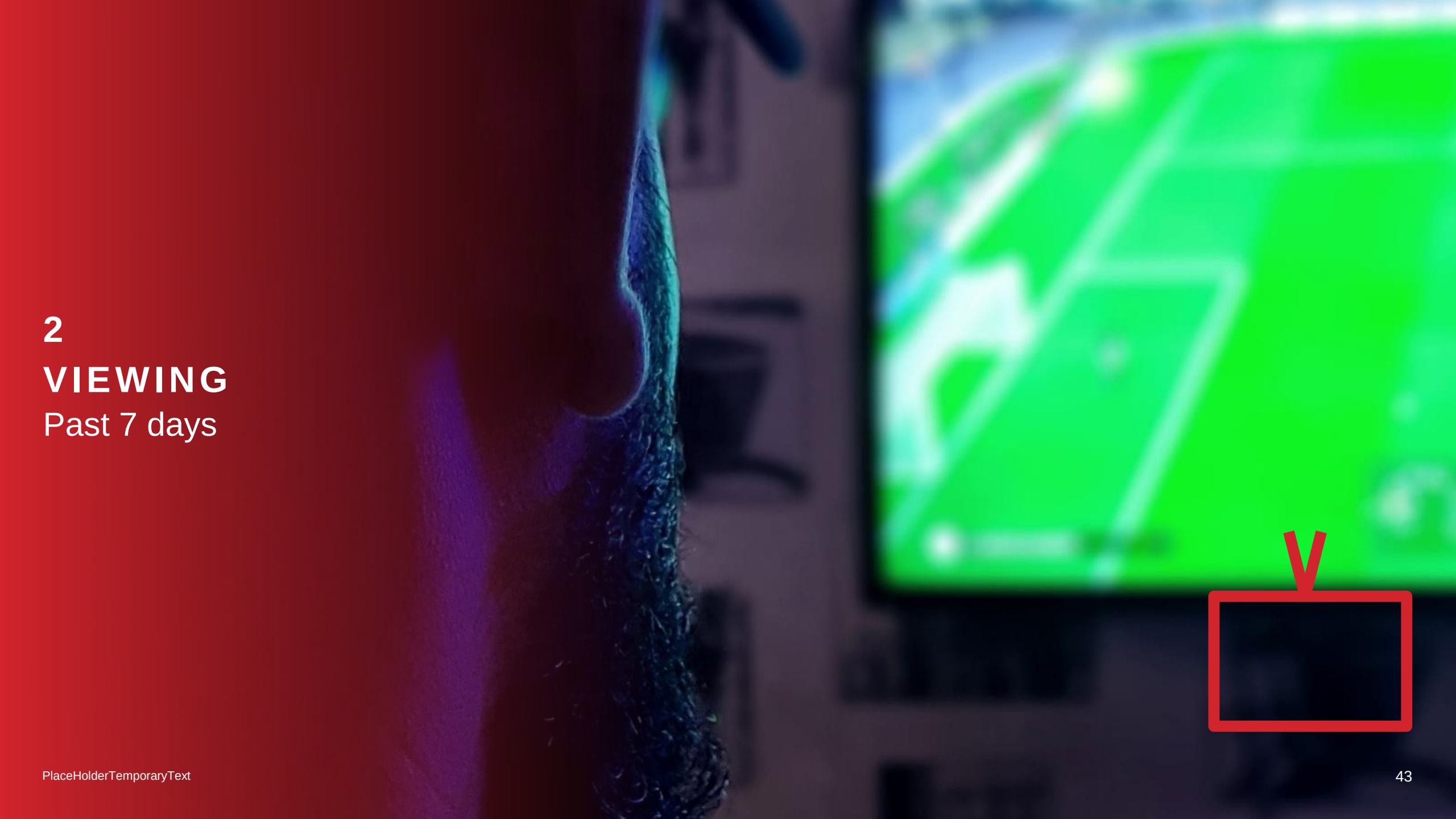
Listening devices



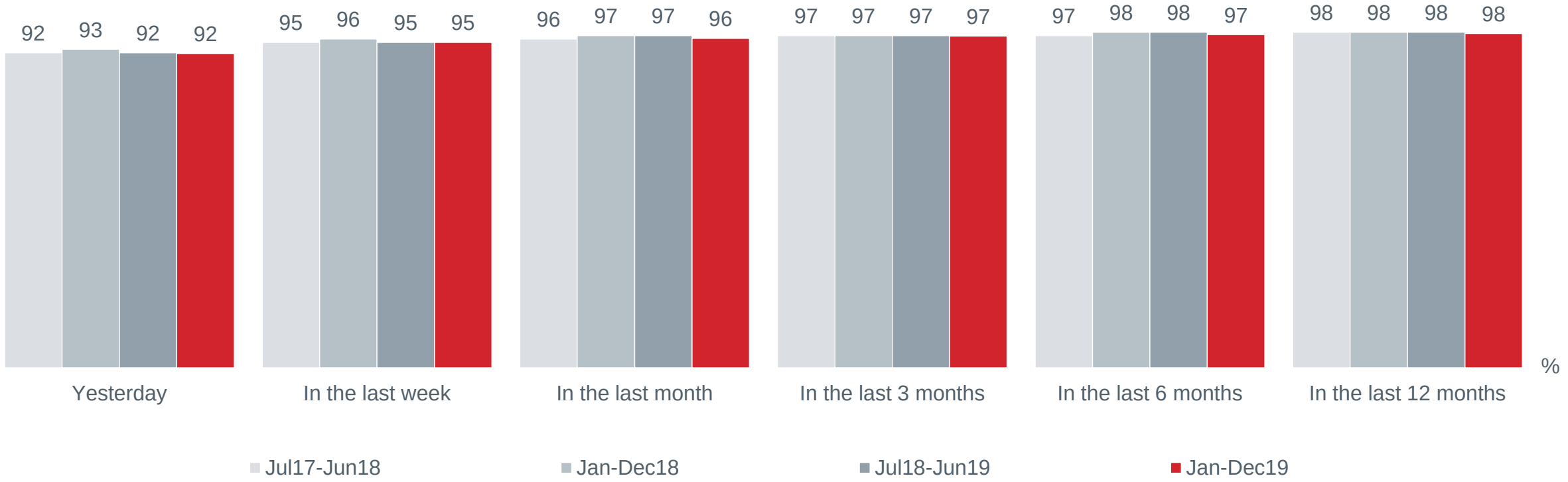
Cellphone listening



2
VIEWING
Past 7 days



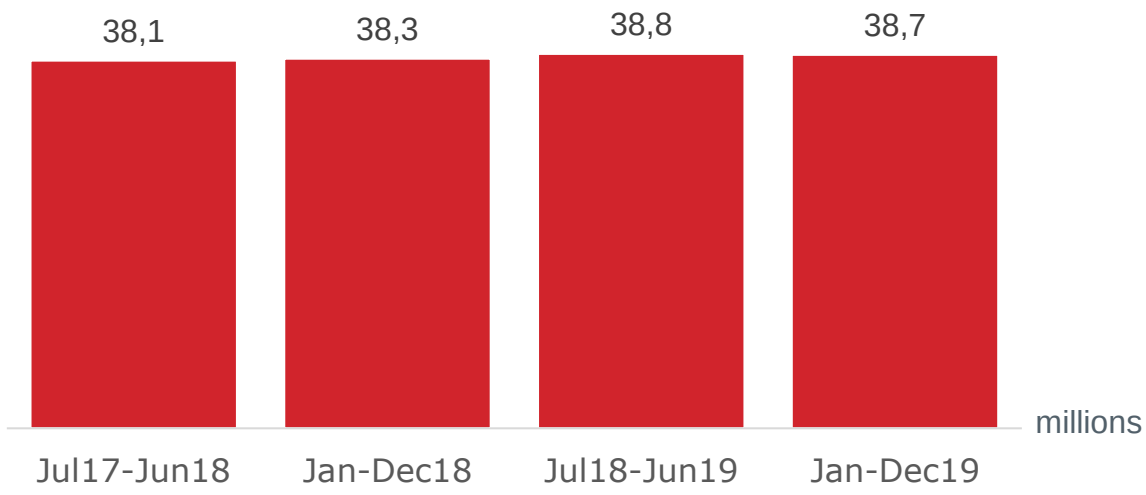
Viewing reach



Past 7 day TV viewers

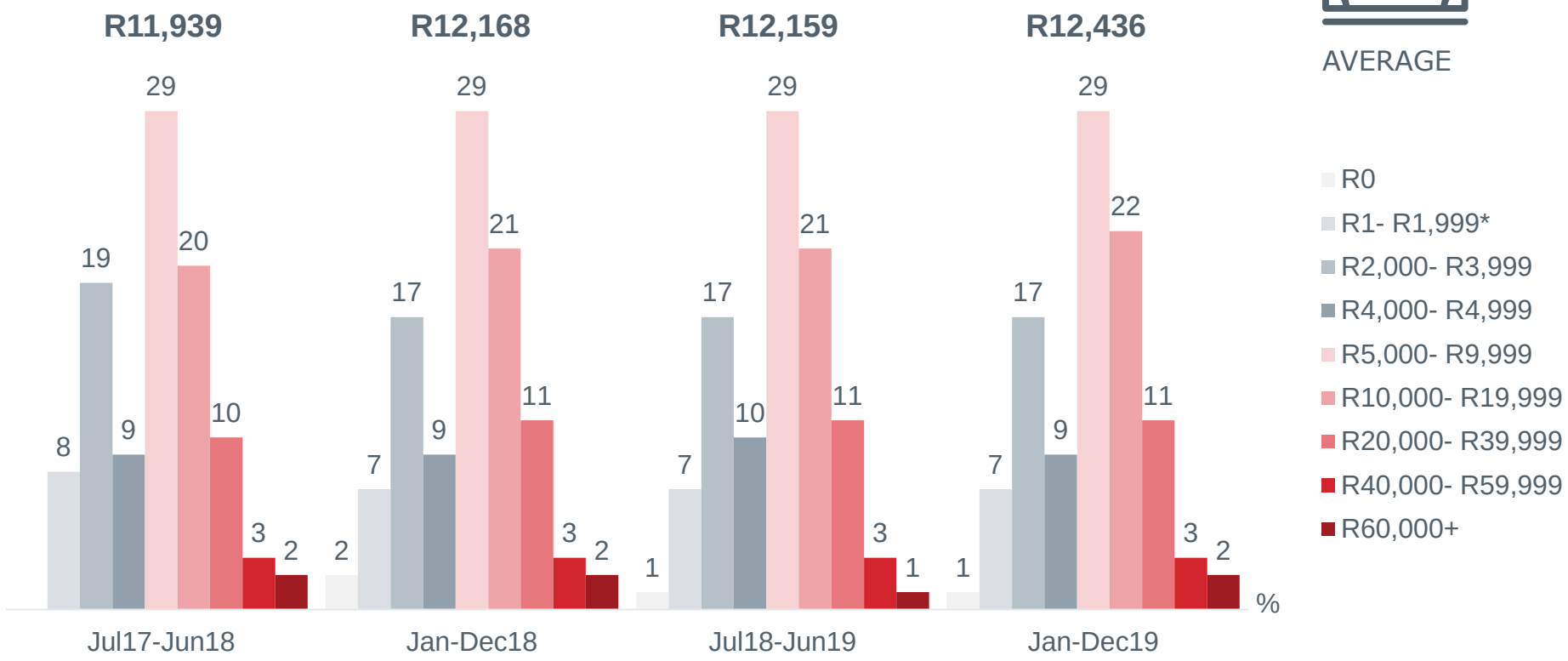
Population

ADULTS 15+



Past 7 day TV viewers

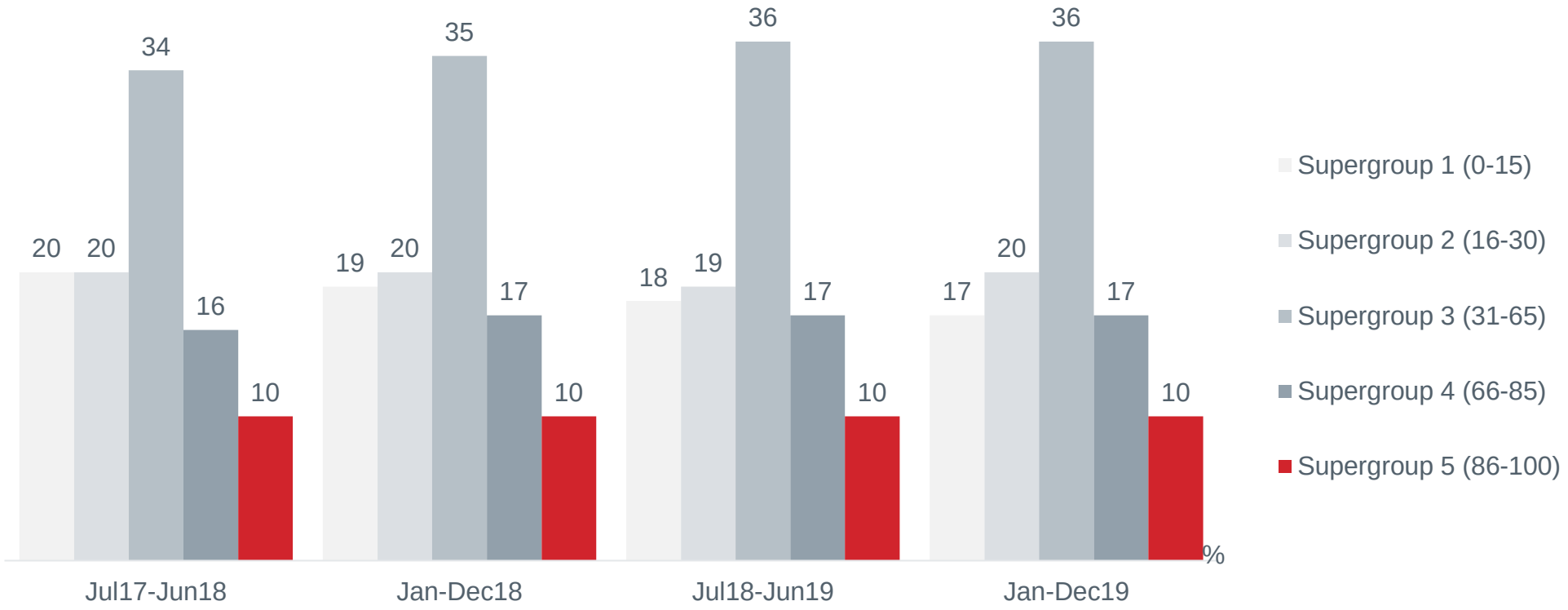
Monthly household income



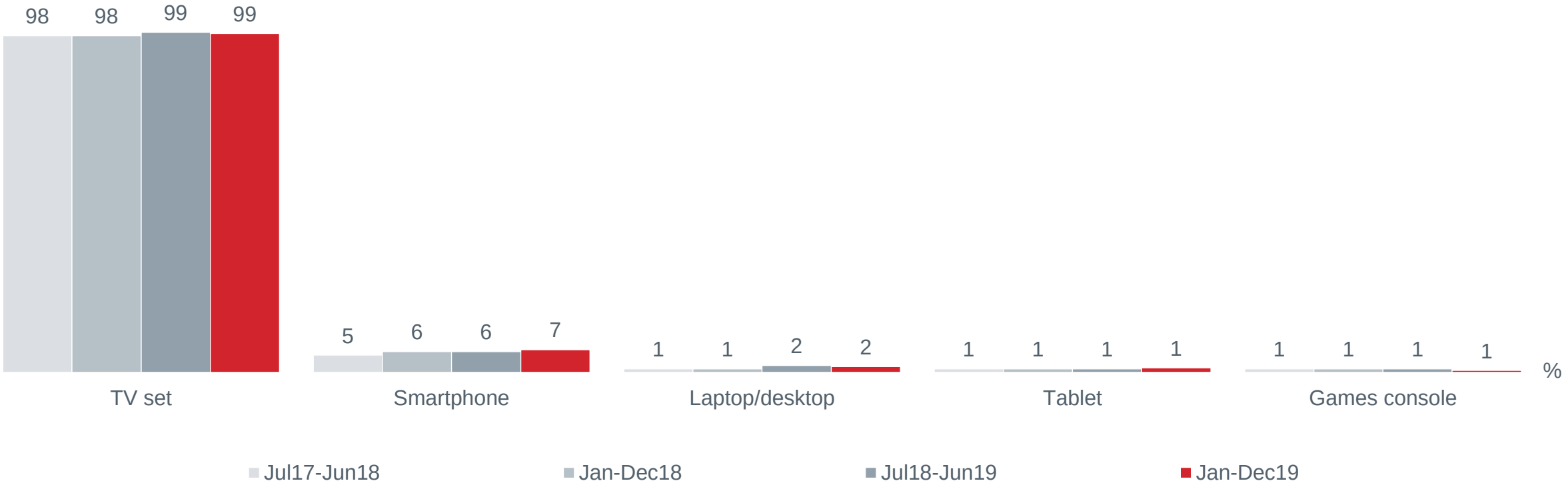
*Note: Was R0-R1,999 prior to Jan 2018

Past 7 day TV viewers

SEM

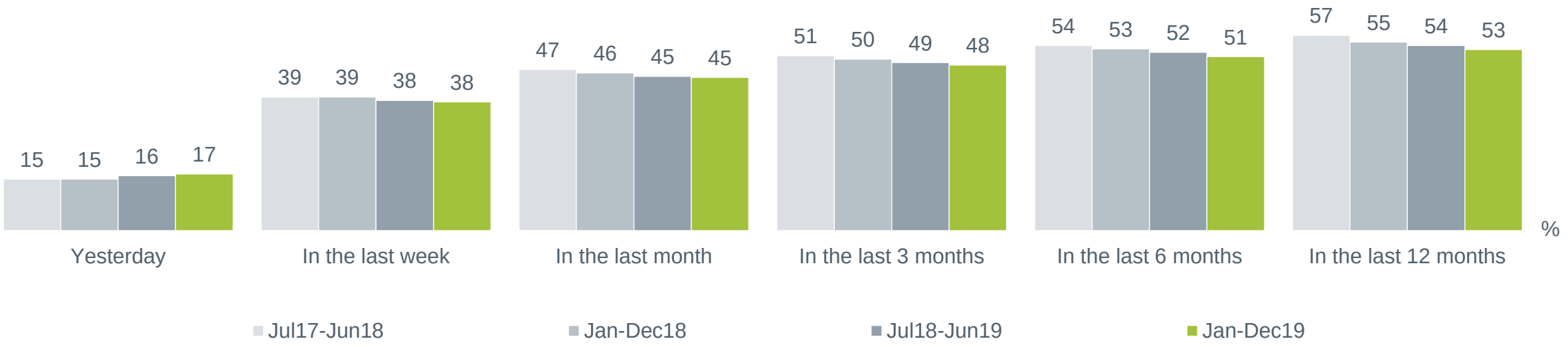


Viewing devices



3.
READING
Past 7 days

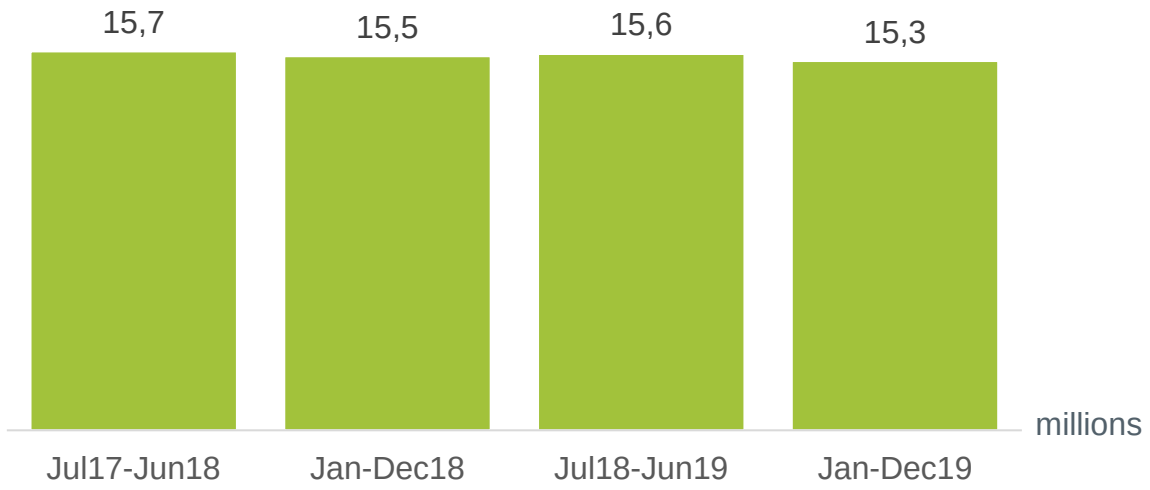
Newspaper reach



Past 7 day Newspaper readers

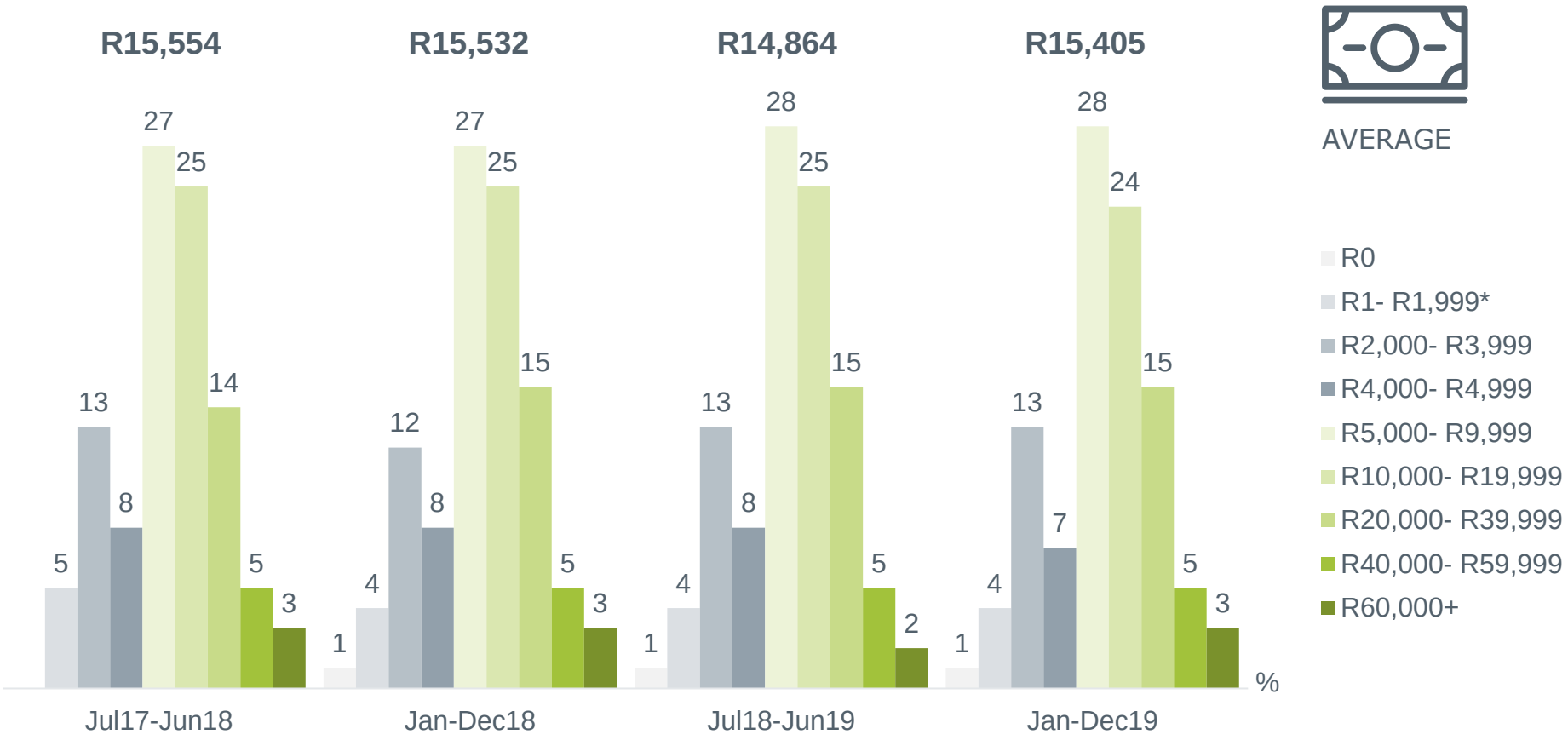
Population

ADULTS 15+



Past 7 day Newspaper readers

Monthly household income



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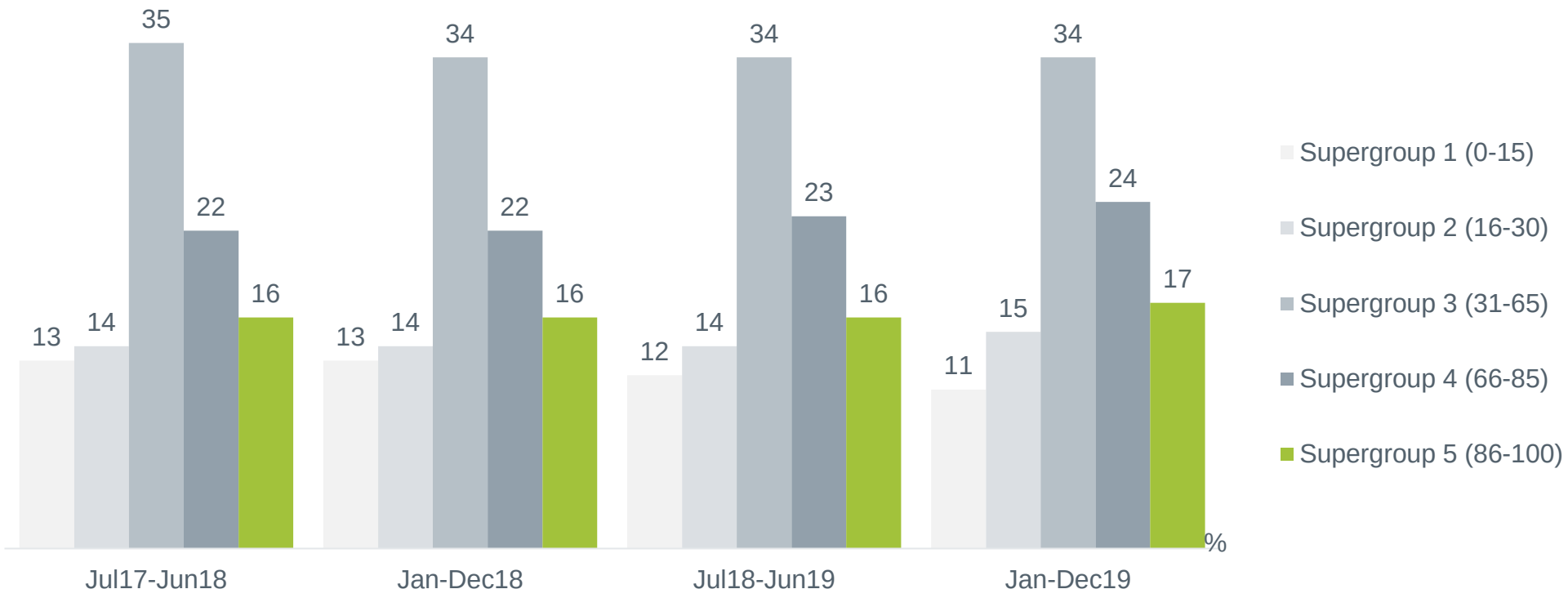
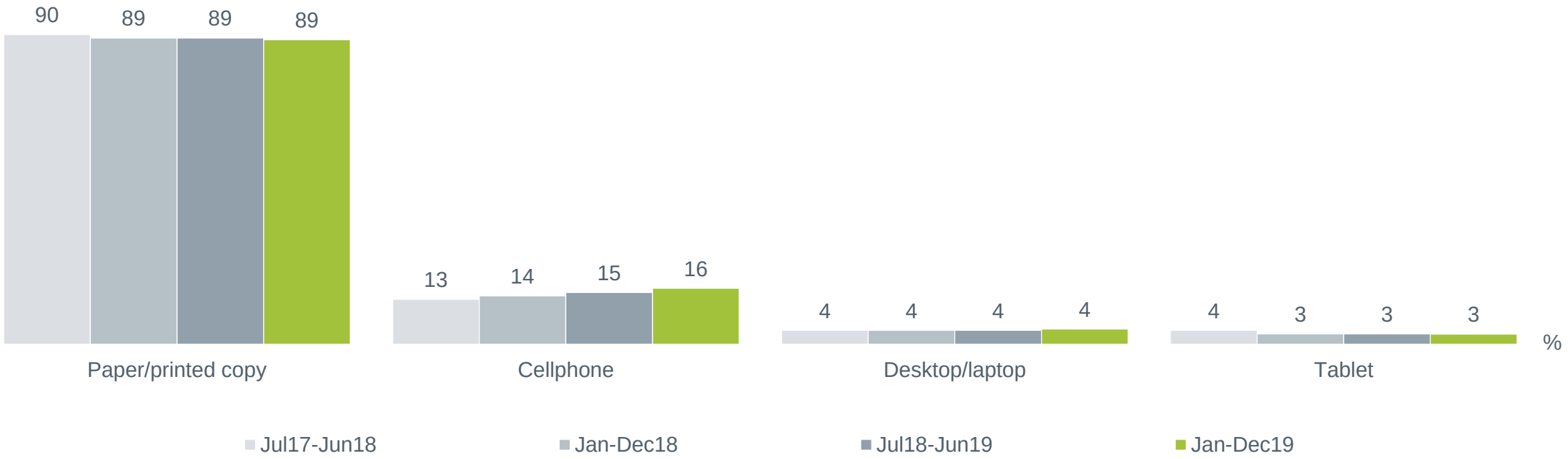
Past 7 day Newspaper readers

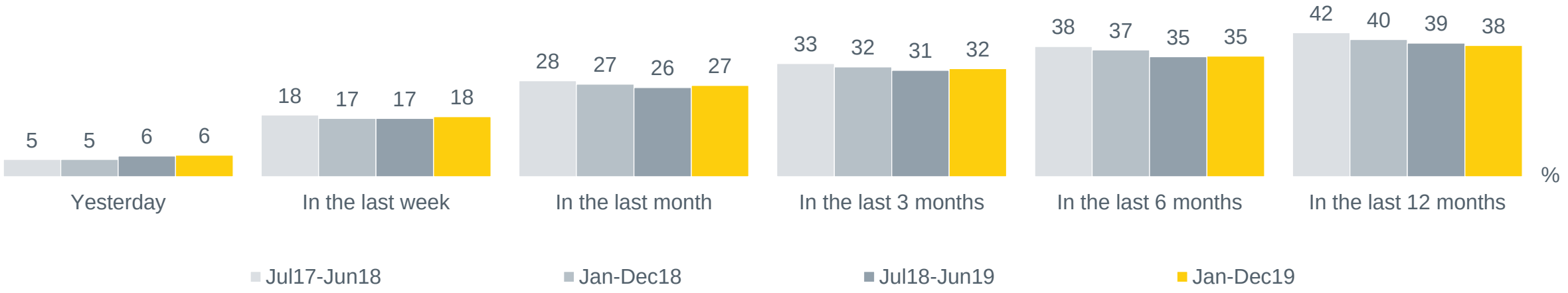
SEM



Newspaper platform usage



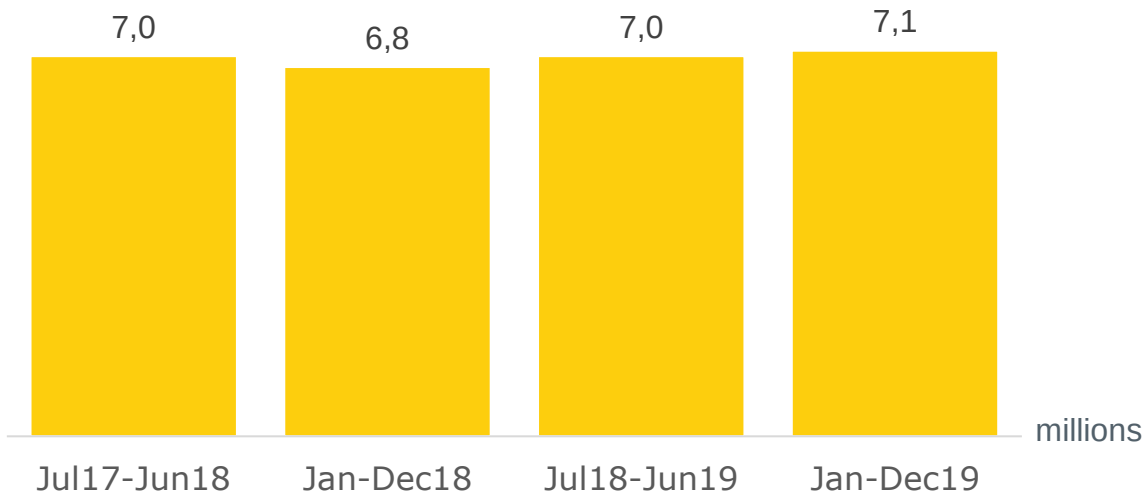
Magazine reach



Past 7 day Magazine readers

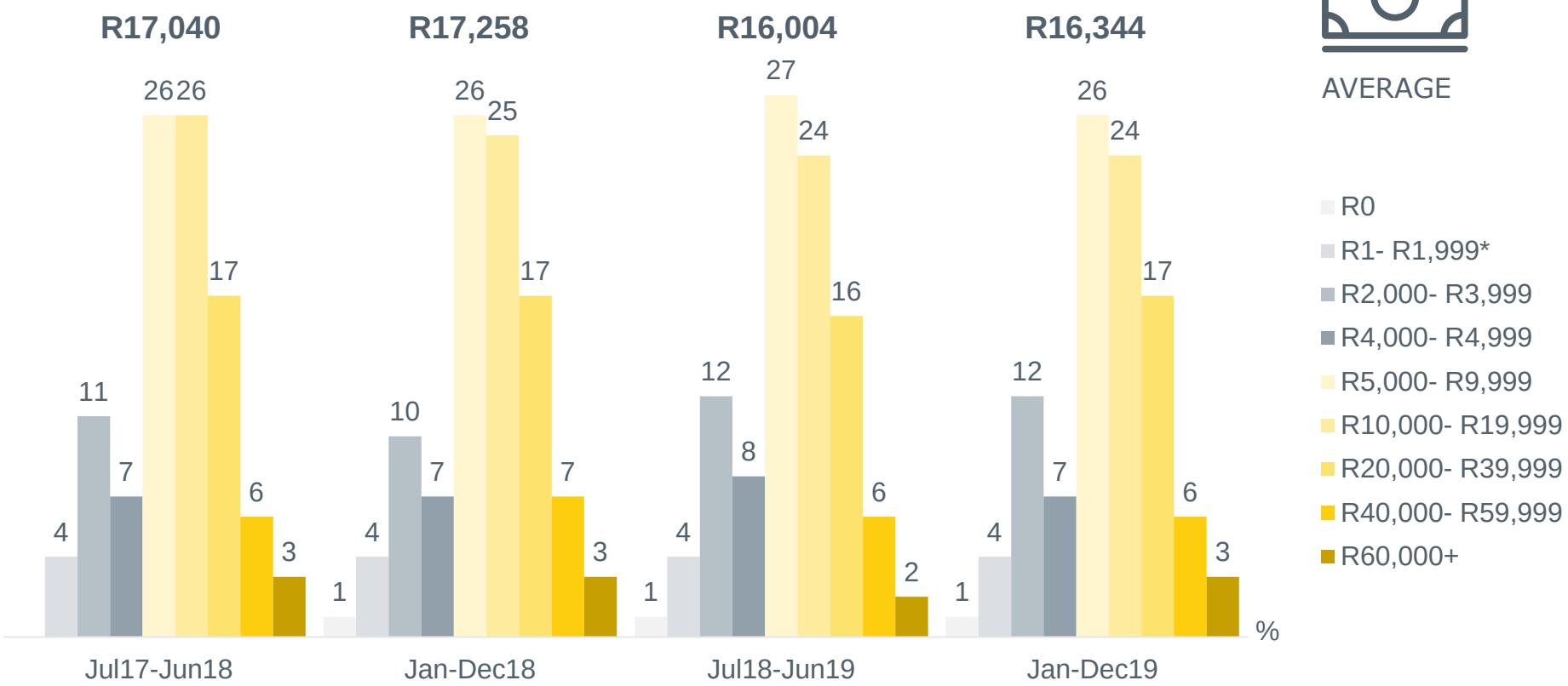
Population

ADULTS 15+



Past 7 day Magazine readers

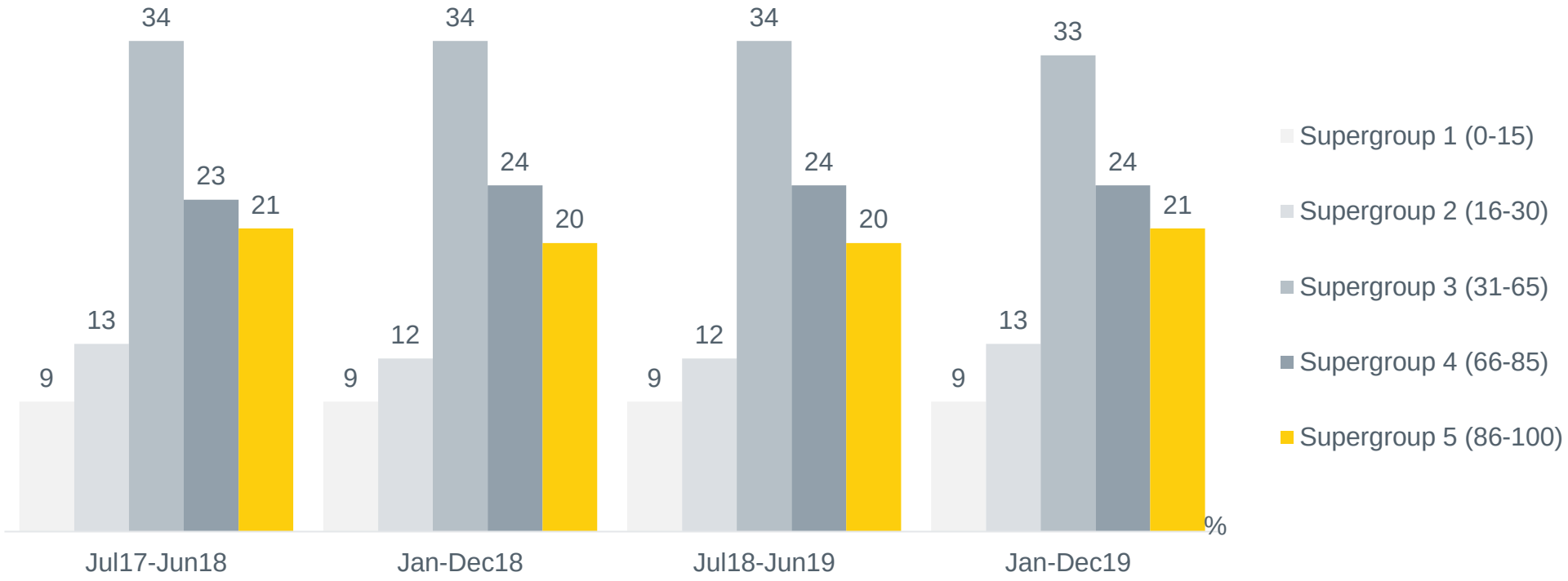
Monthly household income



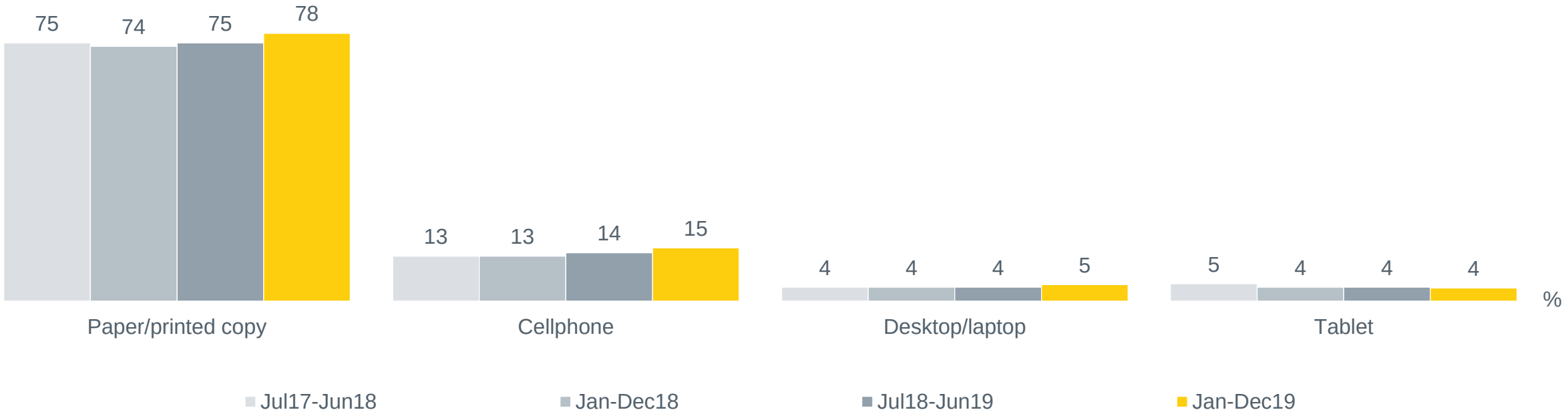
*Note: Was R0-R1,999 prior to Jan 2018

Past 7 day Magazine readers

SEM

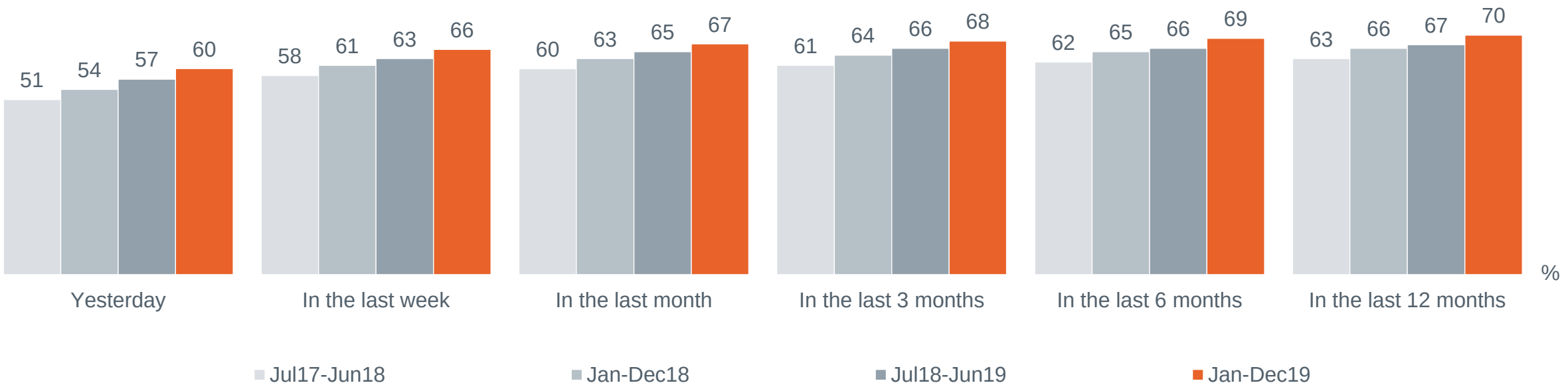


Magazine platform usage



4.
DIGITAL
Past 7 days

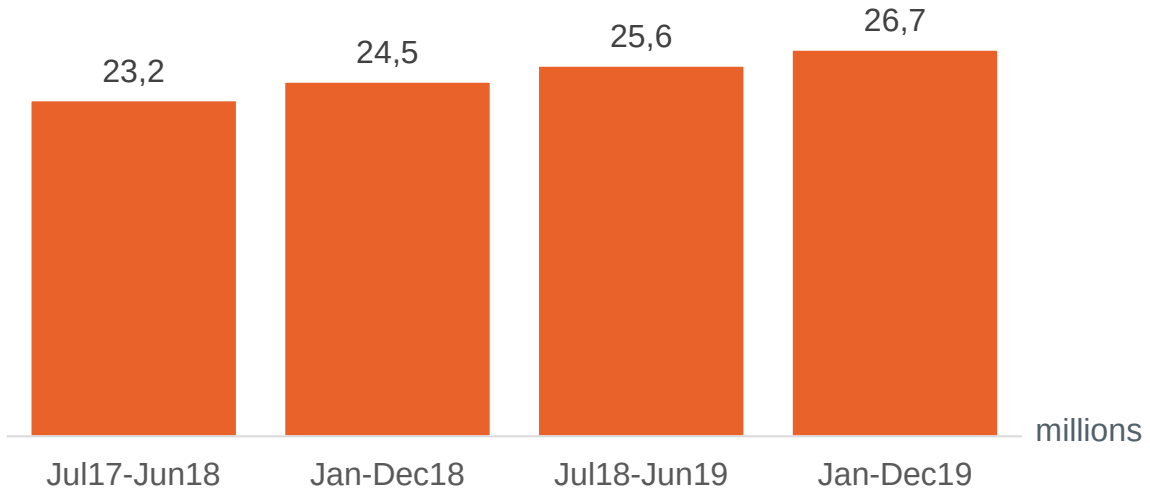
Steady increases in Internet reach



Past 7 day Internet users

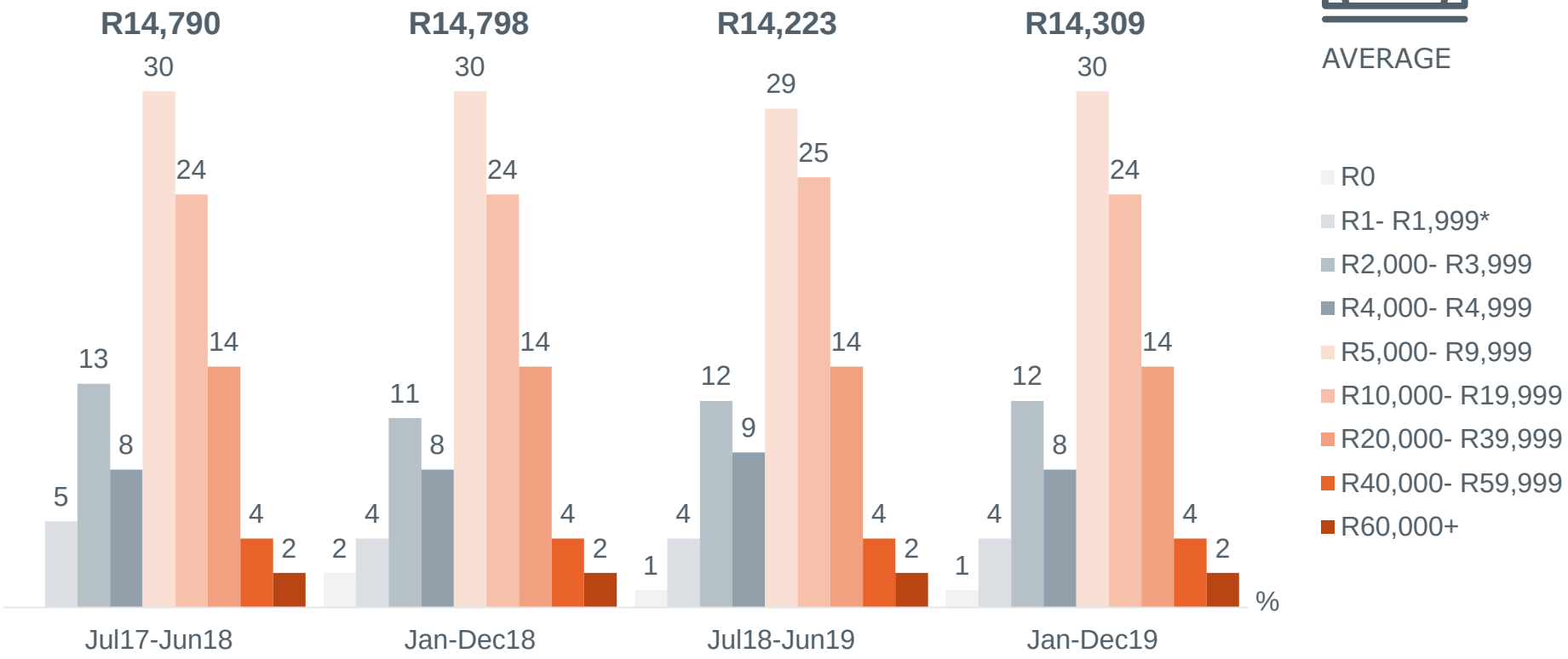
Population

ADULTS 15+



Past 7 day Internet users

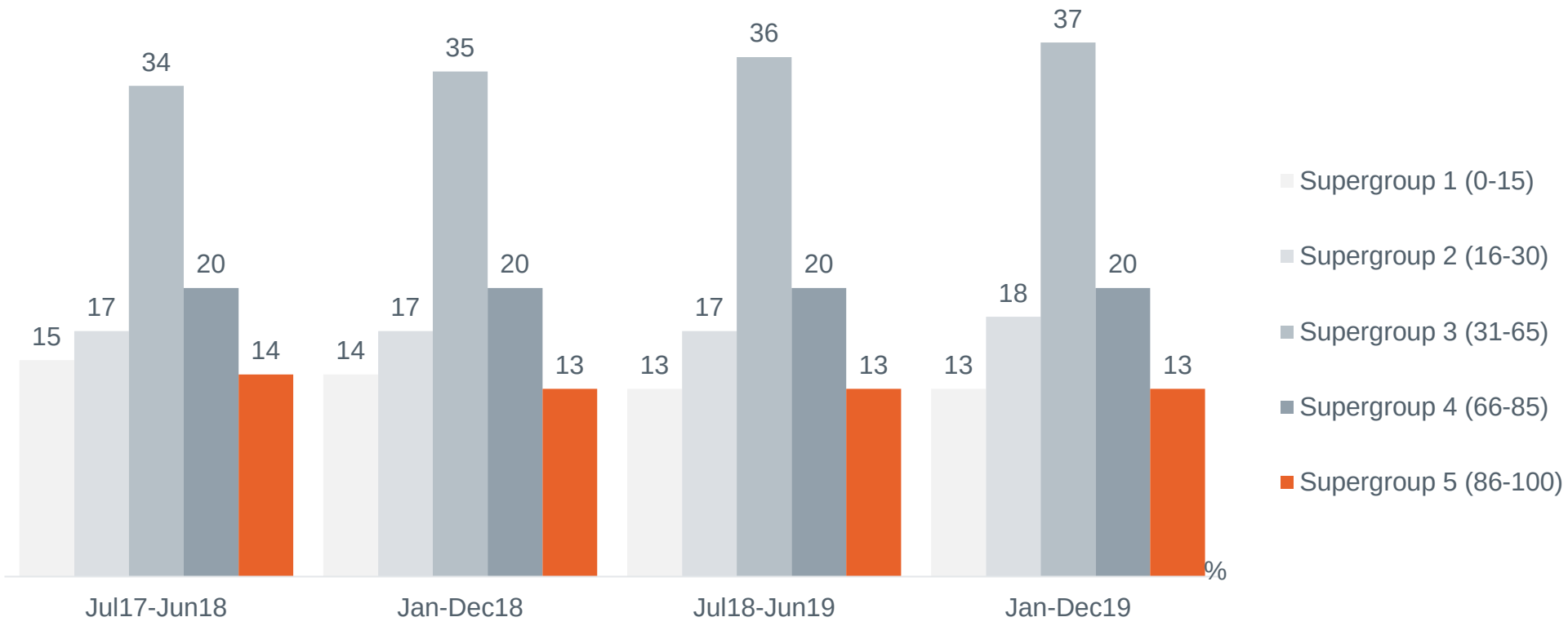
Monthly household income



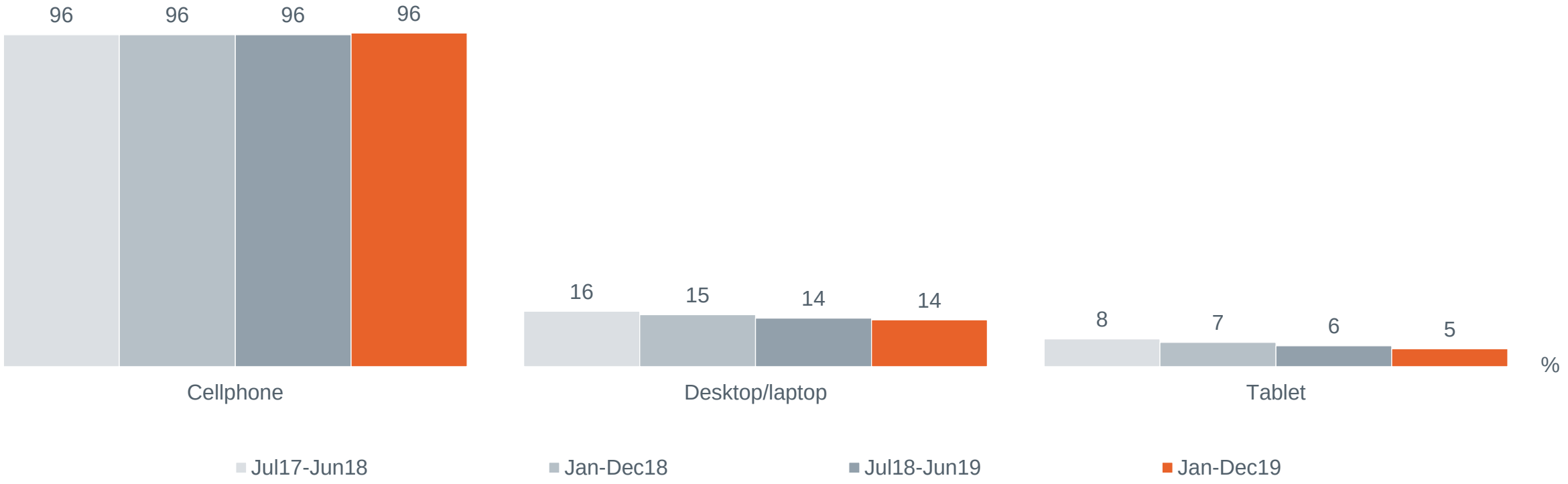
*Note: Was R0-R1,999 prior to Jan 2018

Past 7 day Internet users

SEM

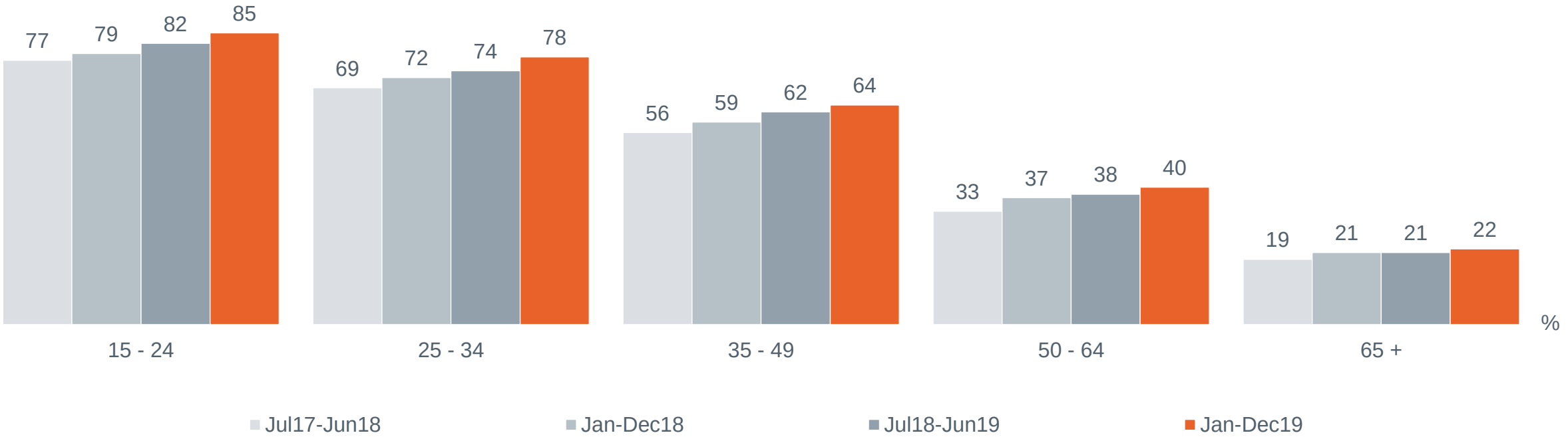


Digital devices

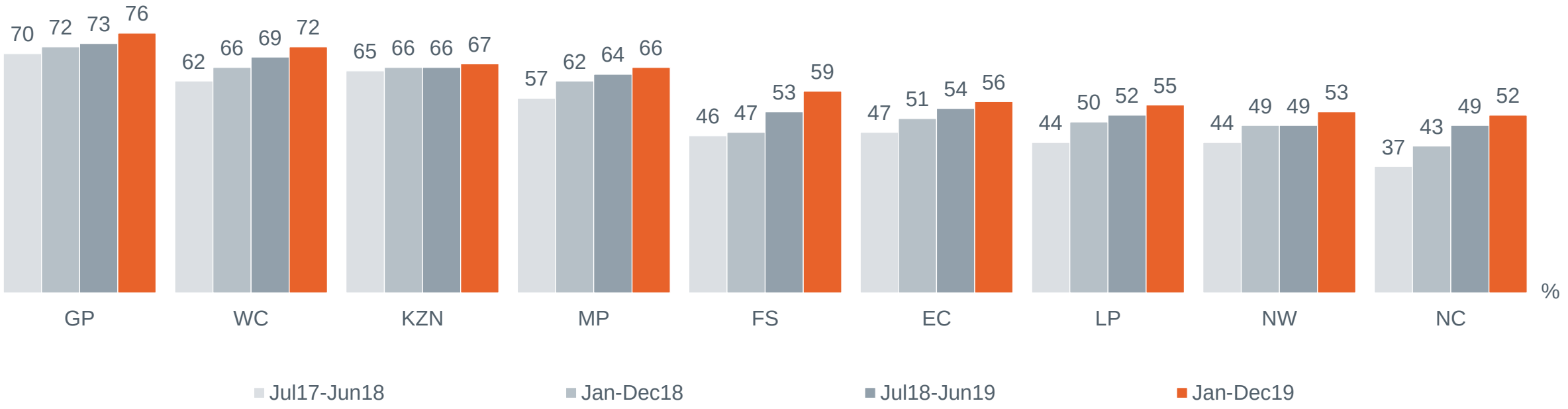


Past 7 day internet usage by age

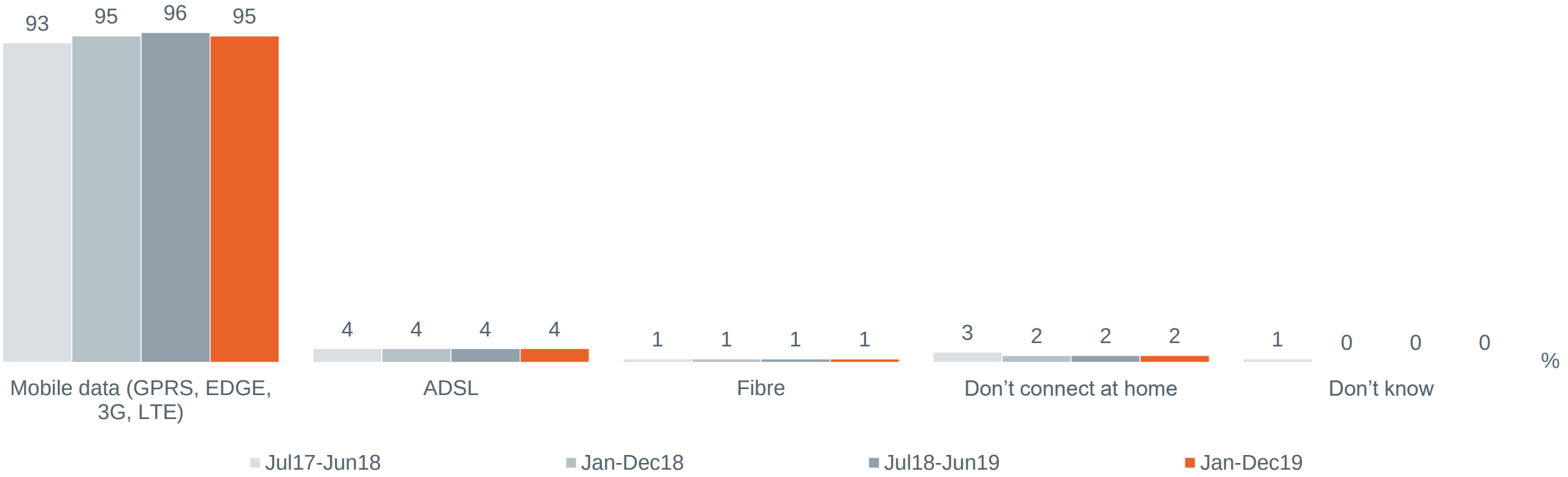
Steady increases across all age groups



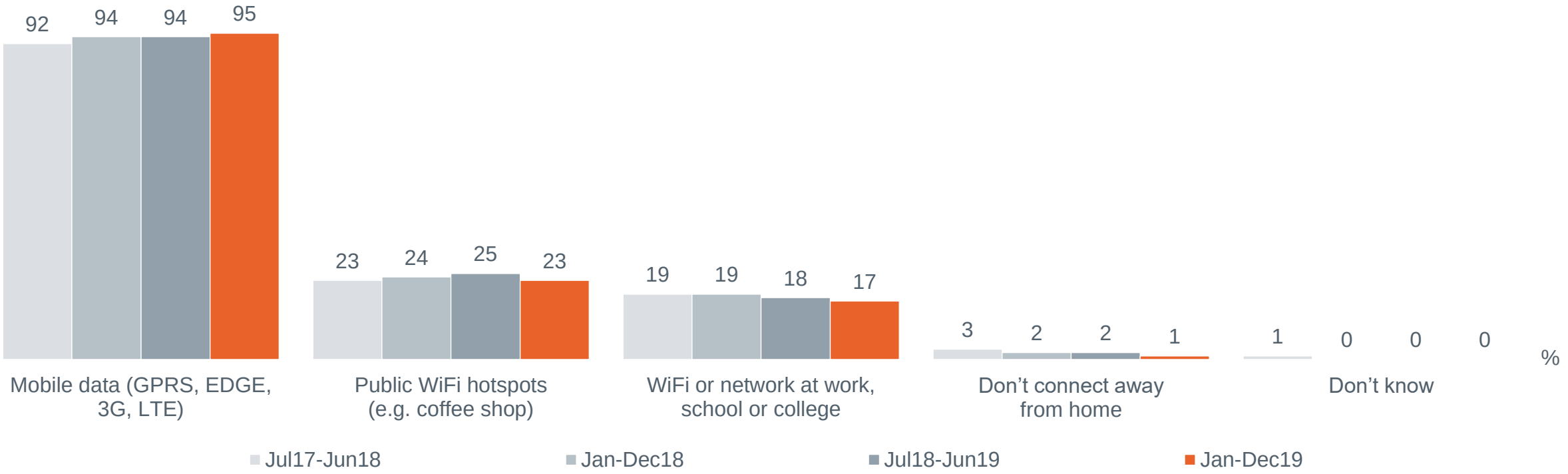
Past 7 day internet usage by province



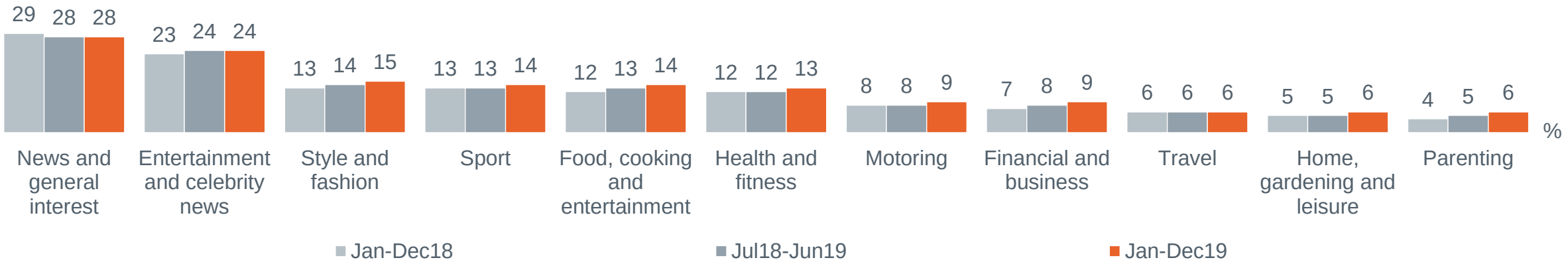
Connection to the internet: At home



Connection to the internet: Away from home



Websites usually visited



Note: Question only effective Jan 2018 onwards

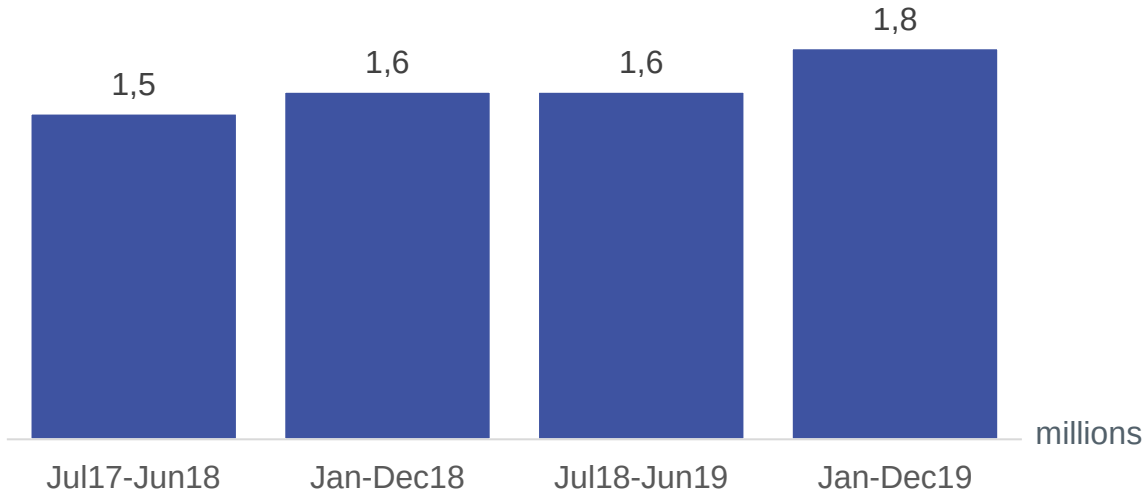
3
CINEMA
Past month

Cinema reach

Past month Cinema goers

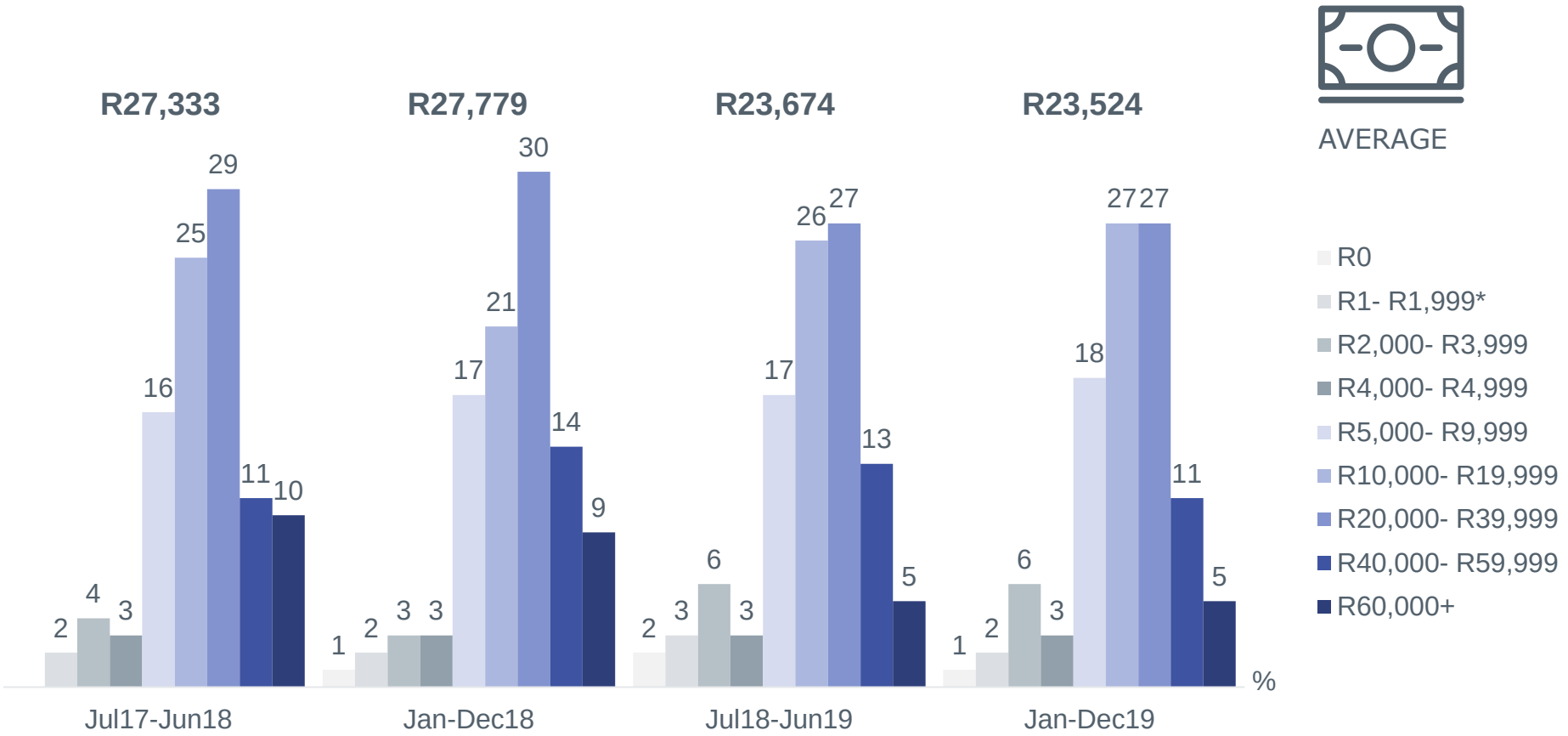
Population

ADULTS 15+



Past month Cinema goers

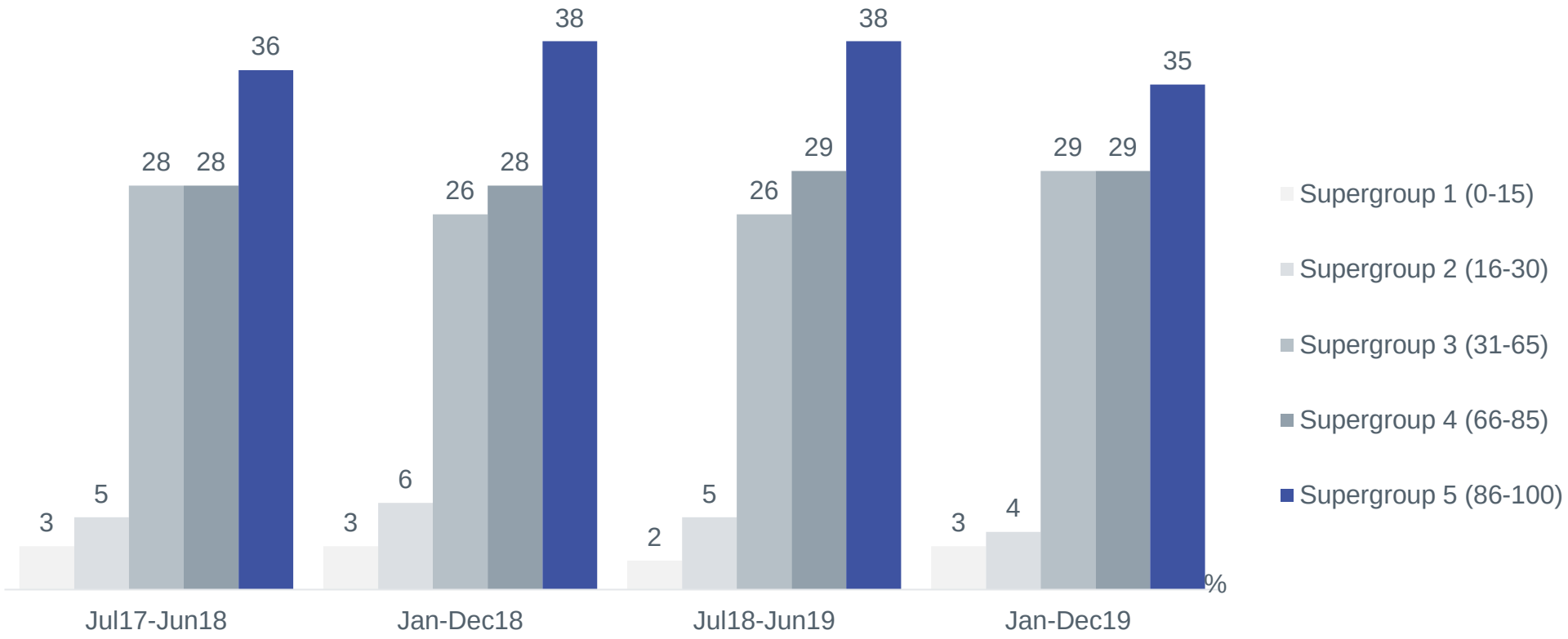
Monthly household income



*Note: Was R0-R1,999 prior to Jan 2018

Past month Cinema goers

SEM



ESTABLISHMENT SURVEY SEM 2018™

Establishment Survey

SEM™ 2018

A socio-economic measure that depicts how South Africans live –

based on what they have access to in and near their homes

brc THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA

prc Publisher Research Council

The power of SEM

Reflective of our unequal society and provides a more realistic picture of SA

Relevant and differentiating Meaningfully differentiates how people live, along a spectrum from low to high socio-economic living

Stable. A person's score doesn't change quickly over time (focus on structural items and infrastructure elements, low reliance on durables, no reliance on technology items)

Flexibility of analysis to meet target market requirements – output is a continuum from 0 to 100, therefore can be sliced and diced as required

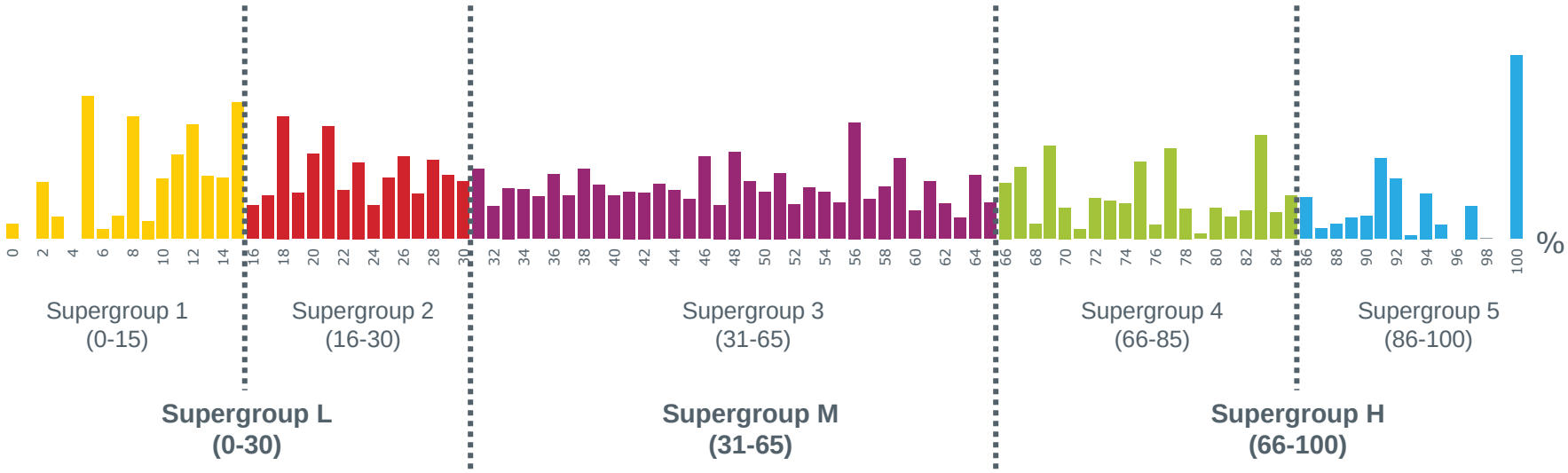
Good predictor of media and purchasing behaviour, and **highly correlated** to various demographics and attitudes

The 14 SEM inputs

- Built-in kitchen sink
- Water source/Hot running water
- Type of toilet
- Motor car
- Microwave oven
- Washing machine
- Deep freezer which is free standing/ Side-by-side fridge and freezer
- Floor polisher or vacuum cleaner
- Type of roof material
- Type of floor material
- Number of sleeping rooms
- Home security service
- Post Office near where you live
- Police station near where you live

- Focus on structural items
- Low reliance on durables
- No reliance on technology items
- Short and easy to use

The SEM 2018 continuum

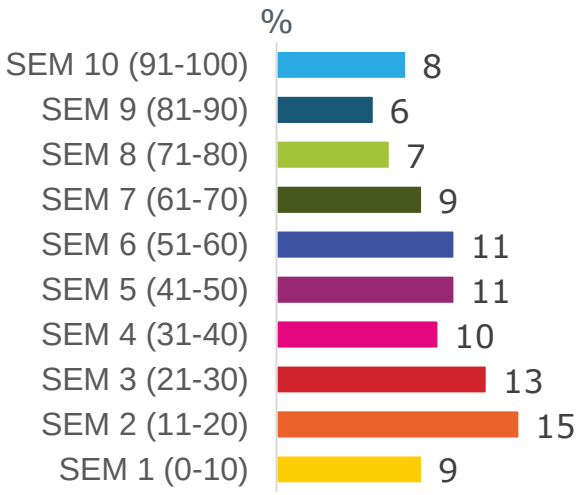


Fully customisable: The SEM continuum allows flexibility to group based on any combination of SEM scores to meet your target market requirements

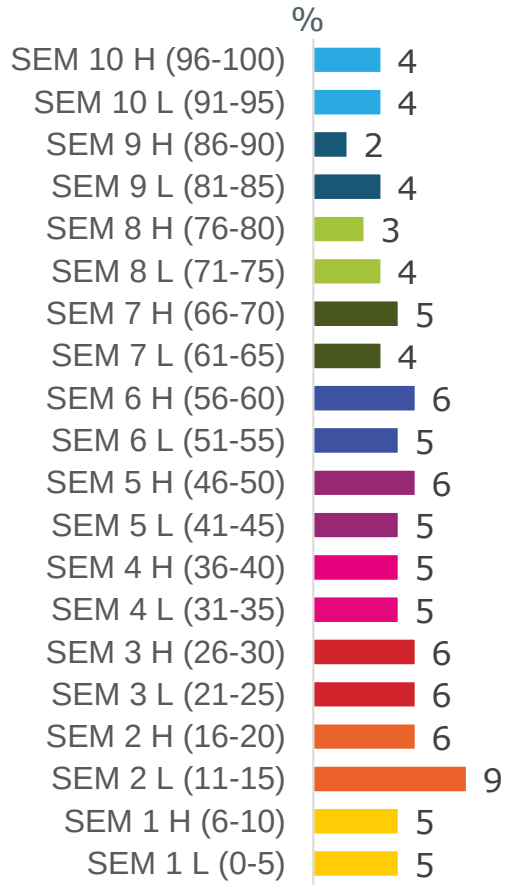
For example: 0-40; 41-95; 96-100

Different standard SEM outputs available

10 groups:
For ease of use



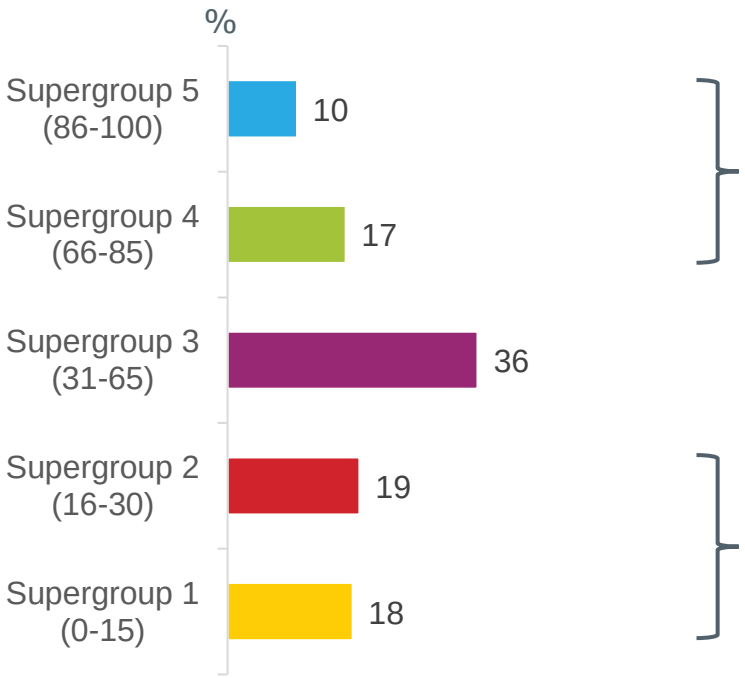
20 groups:
For finer targeting



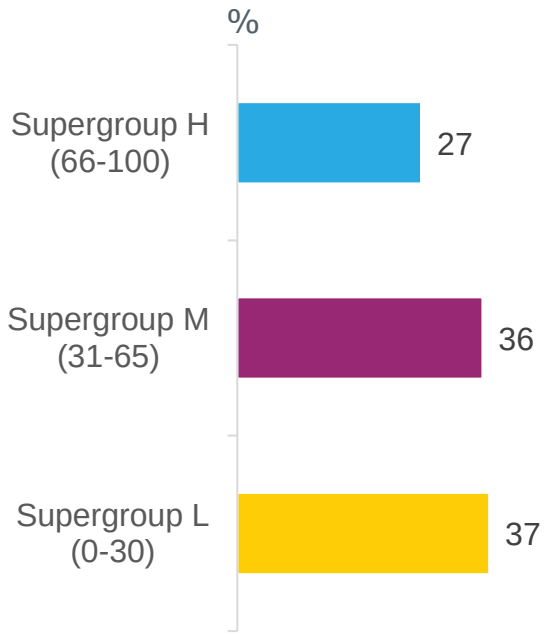
Both of these outputs are based on equal distribution of scores (SEM has been validated as a good continuum)

Different standard SEM outputs available

5 supergroups:
For simpler targeting

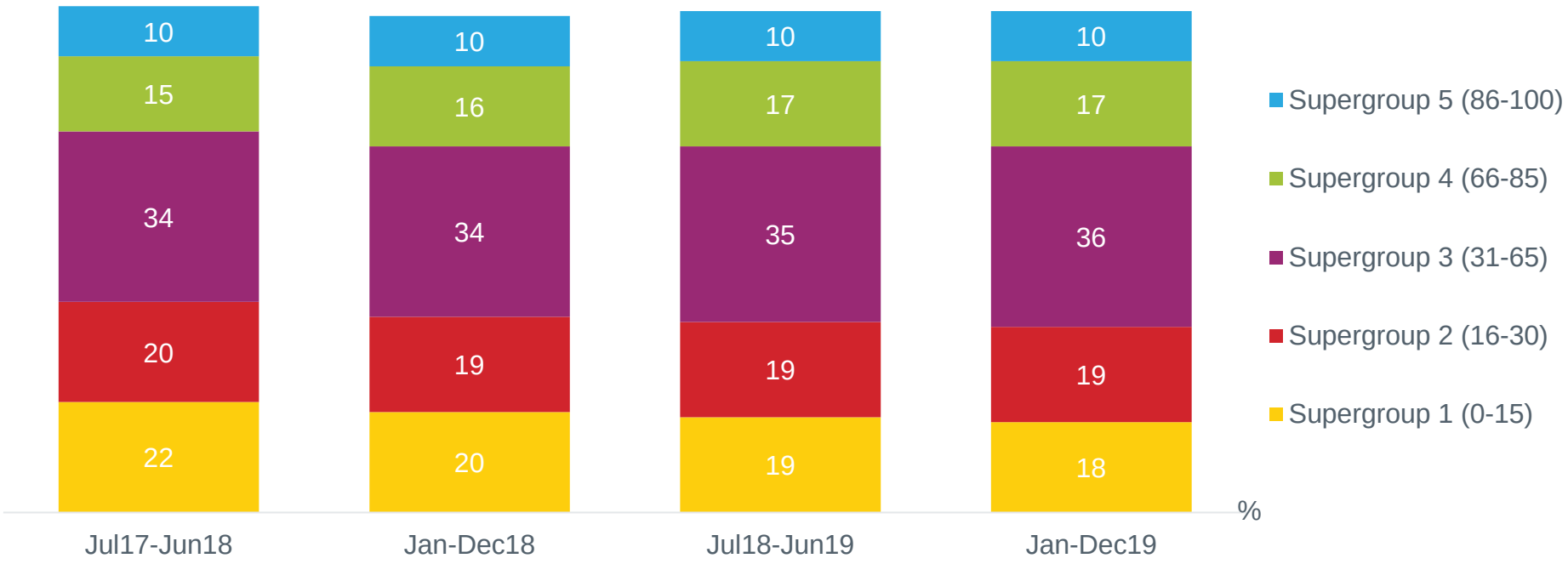


3 supergroups:
For macro targeting and mobile solutions



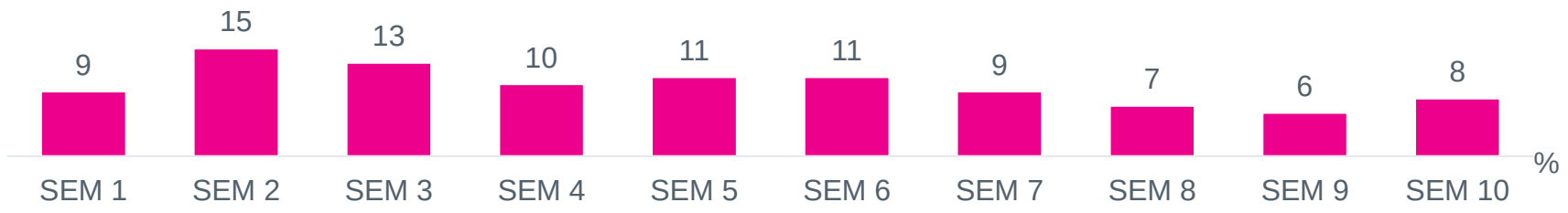
Supergroup cut-points are based on where changes in lifestyle can be noted from segment profiling

SEM supergroups tracked

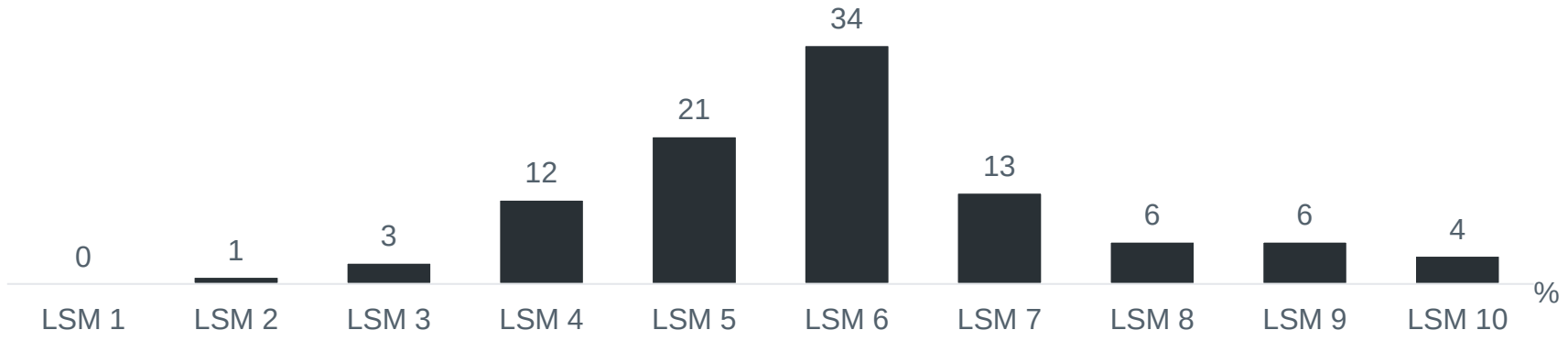


ES SEM vs. ES LSM

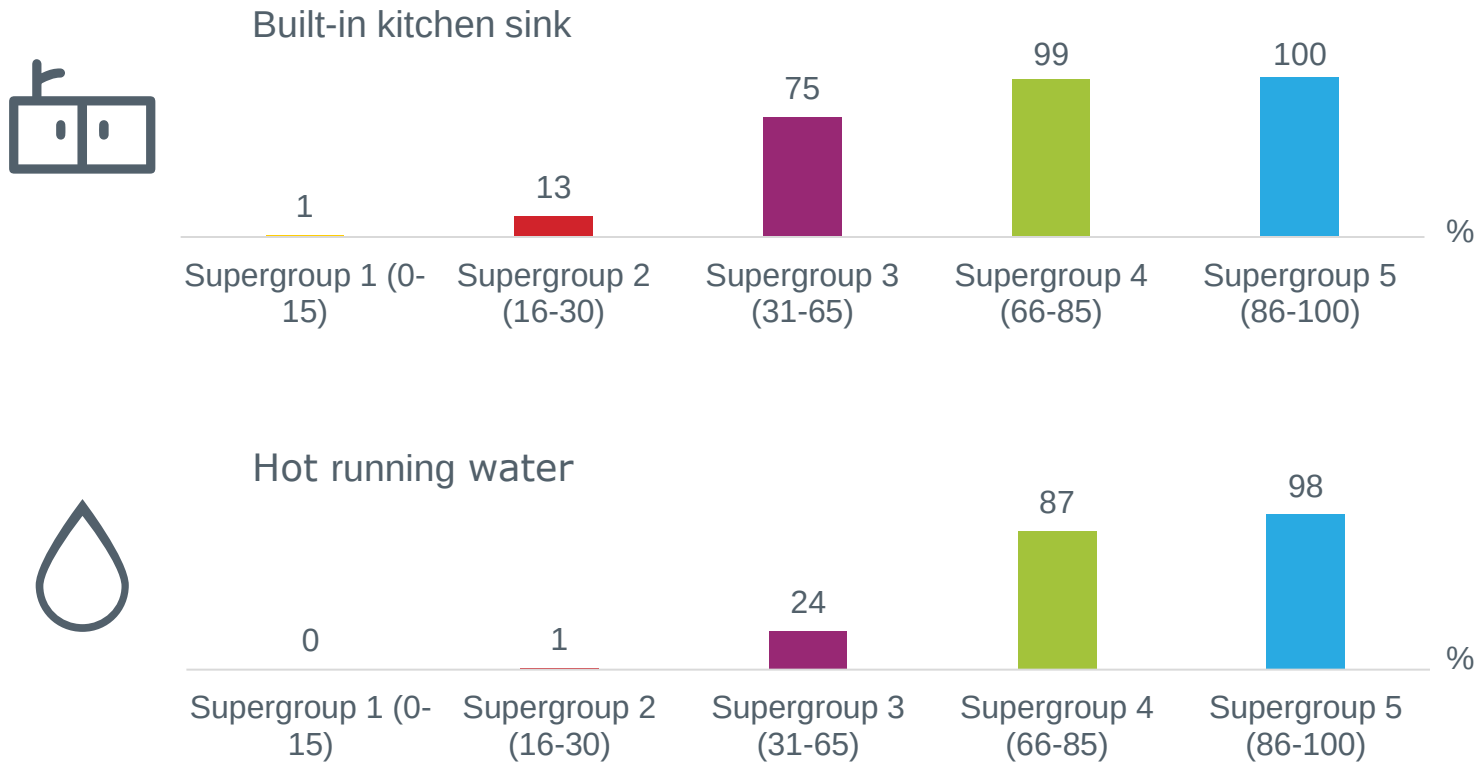
SEM:



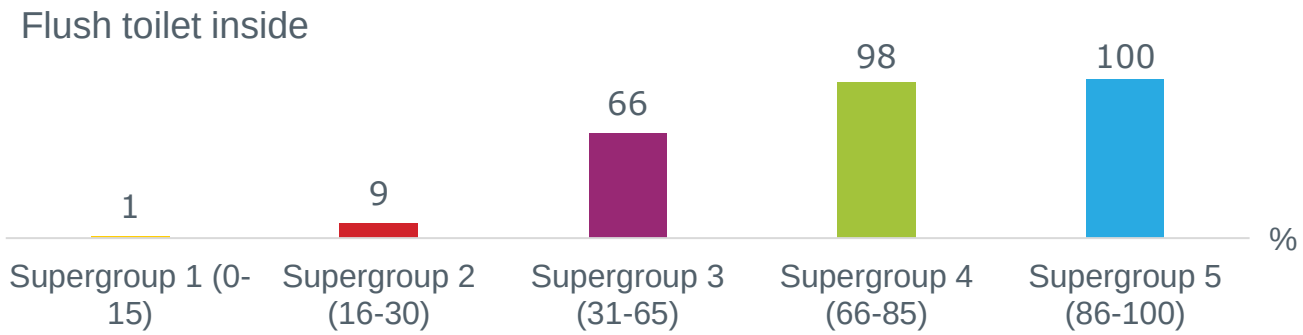
LSM:

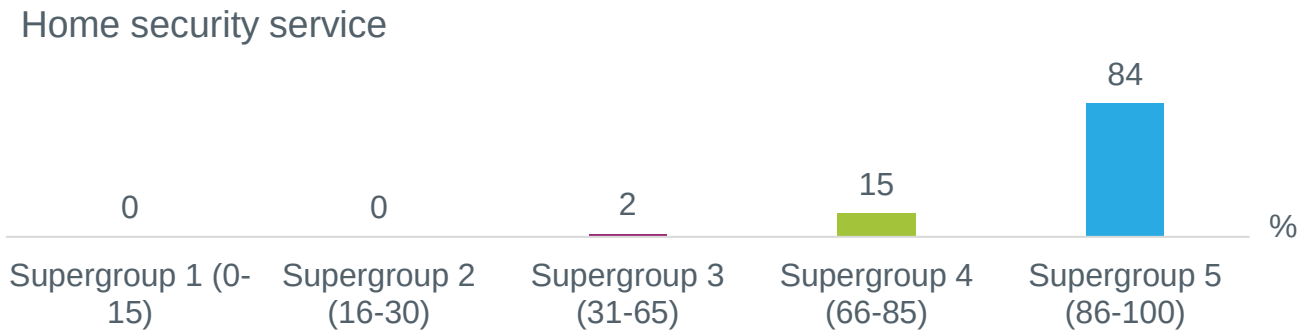


SEM 2018 key input variables

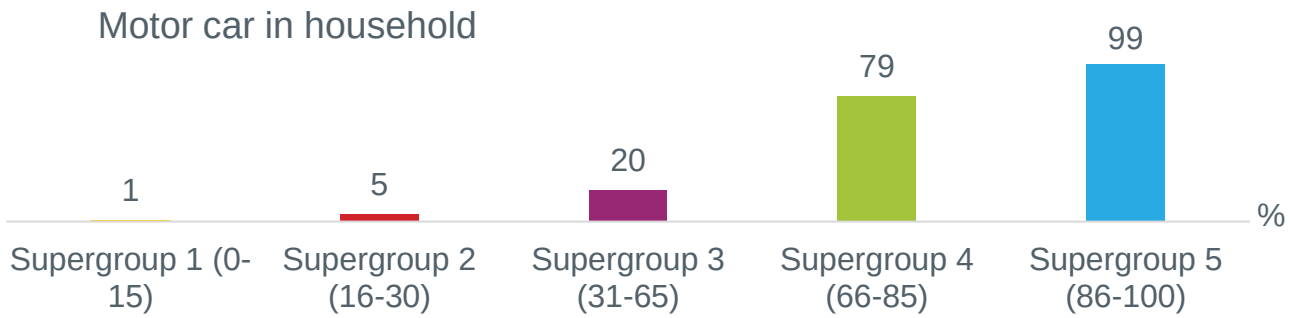


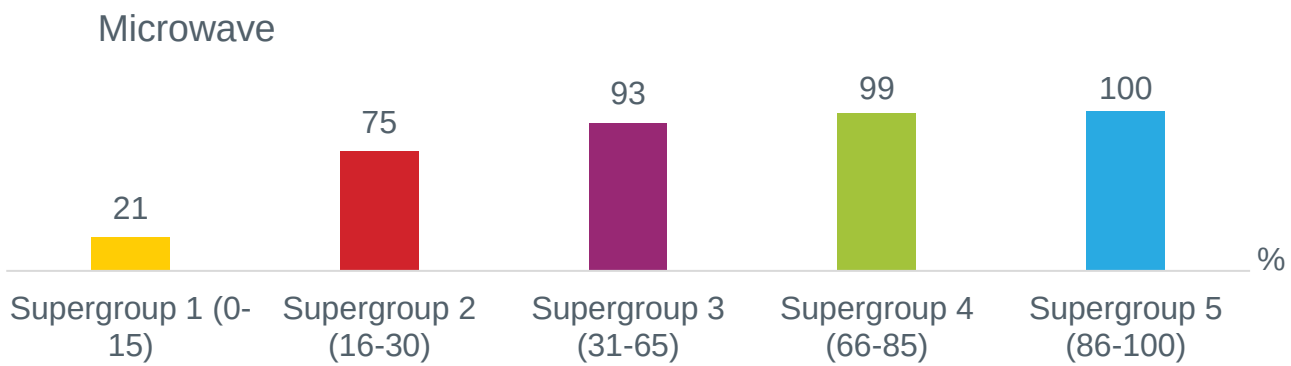
SEM 2018 key input variables



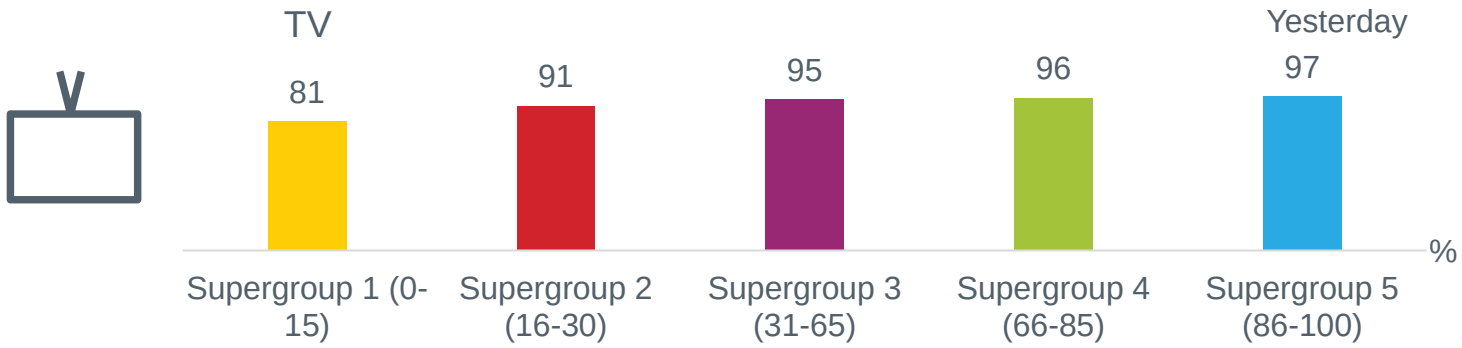


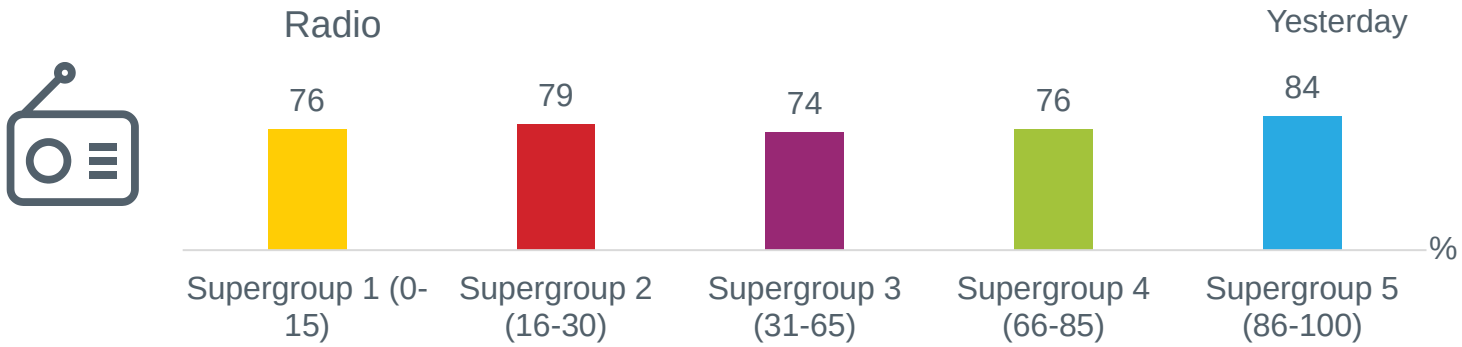
SEM 2018 key input variables



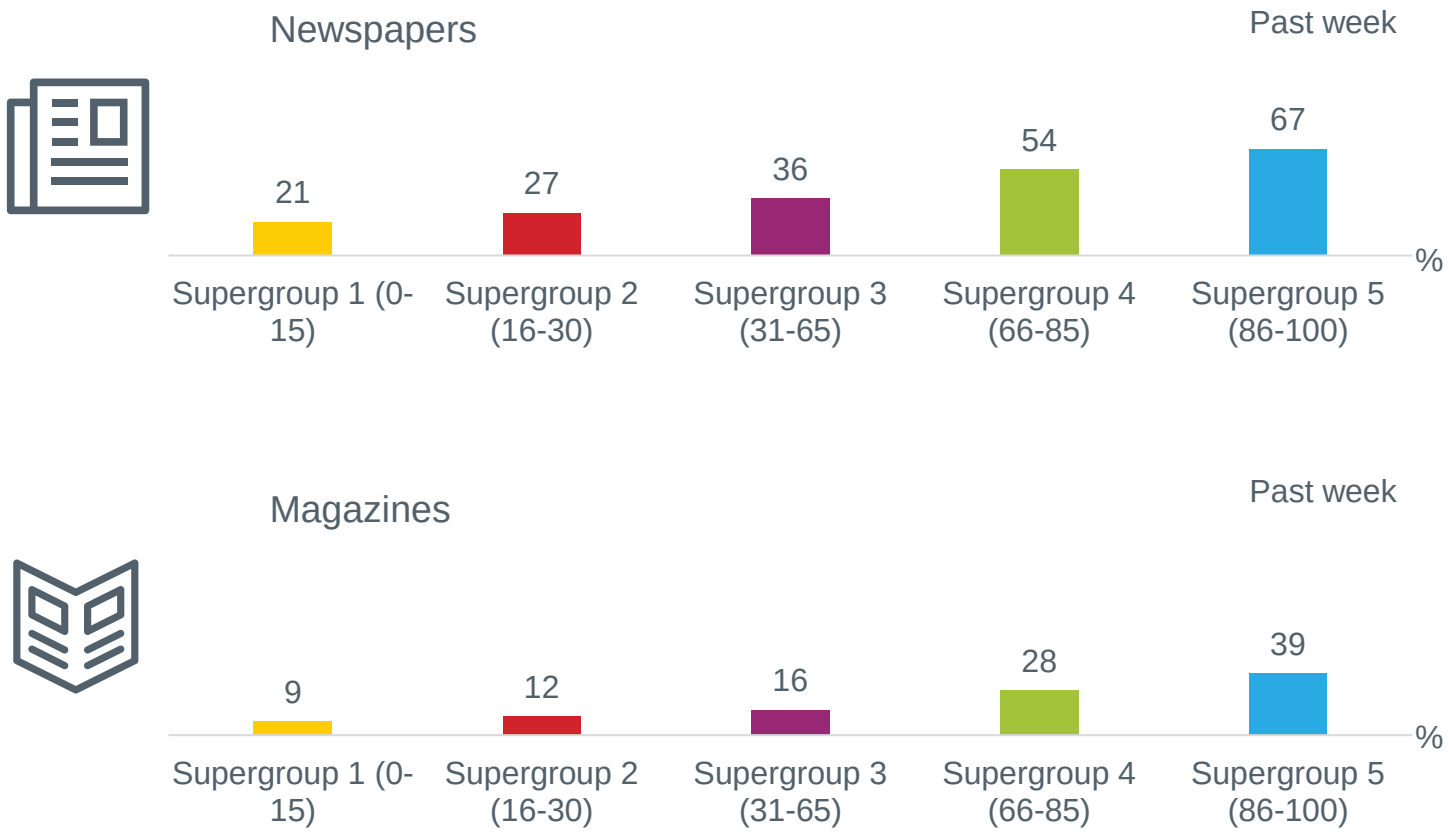


SEM 2018 media profiles

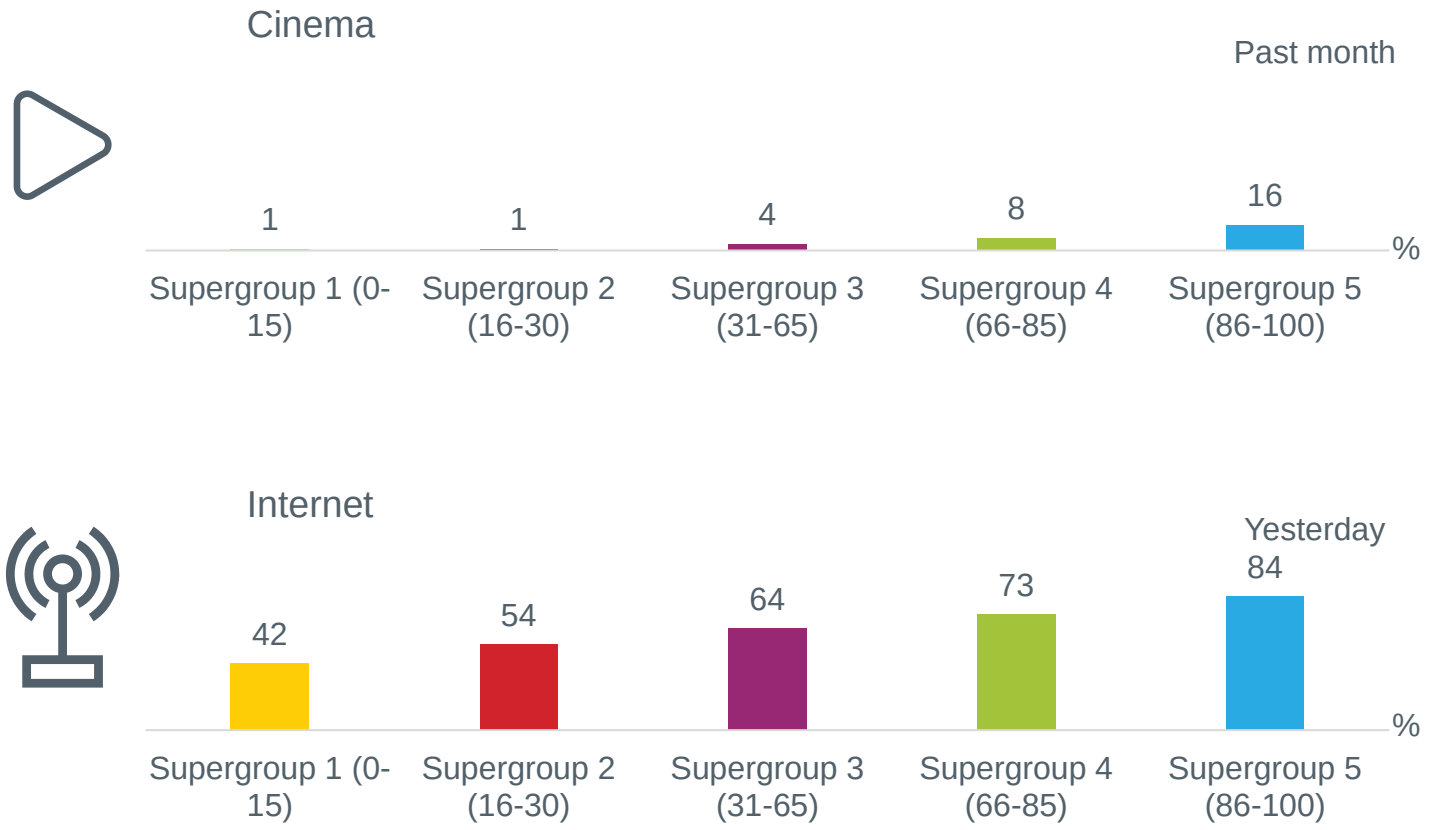




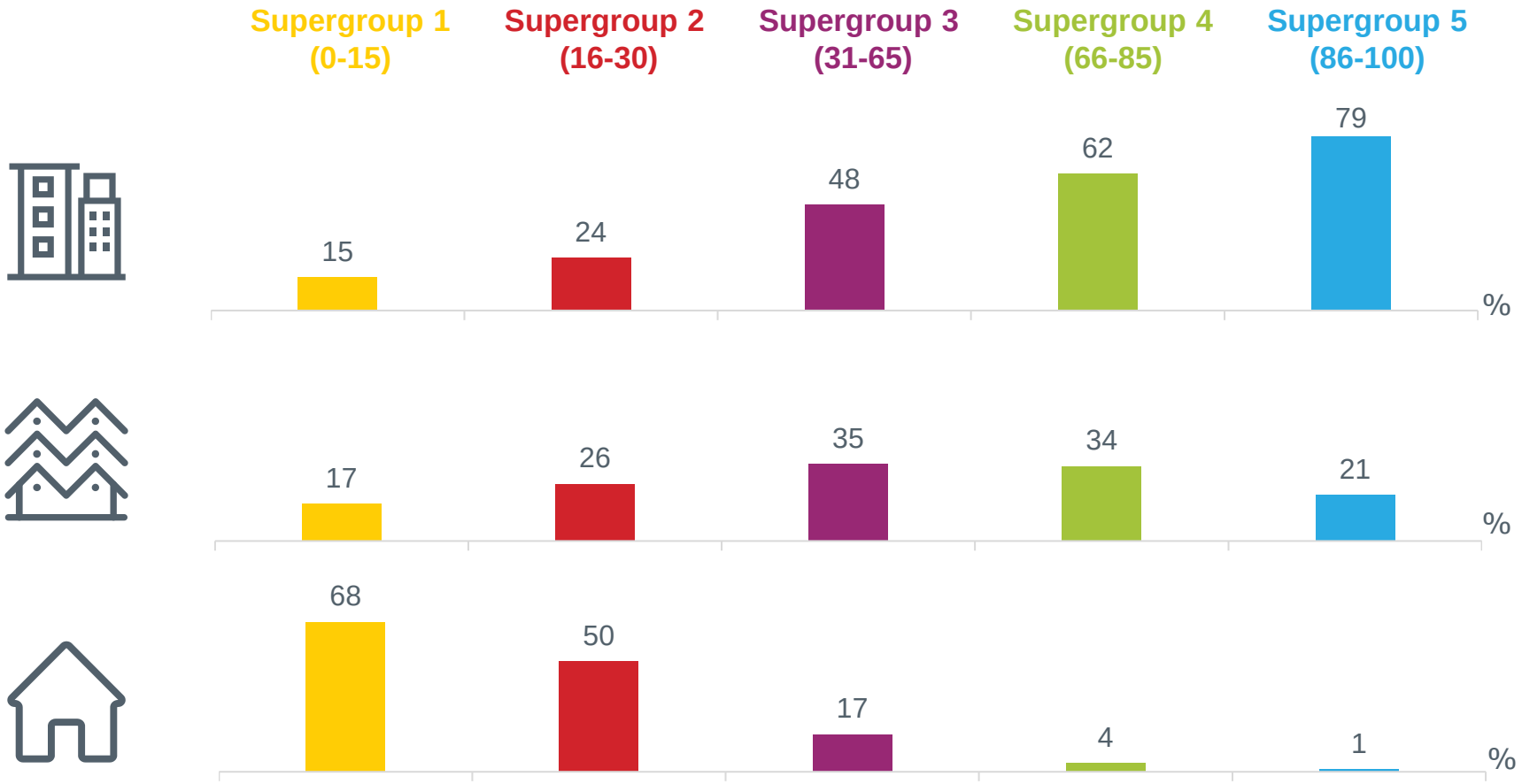
SEM 2018 media profiles



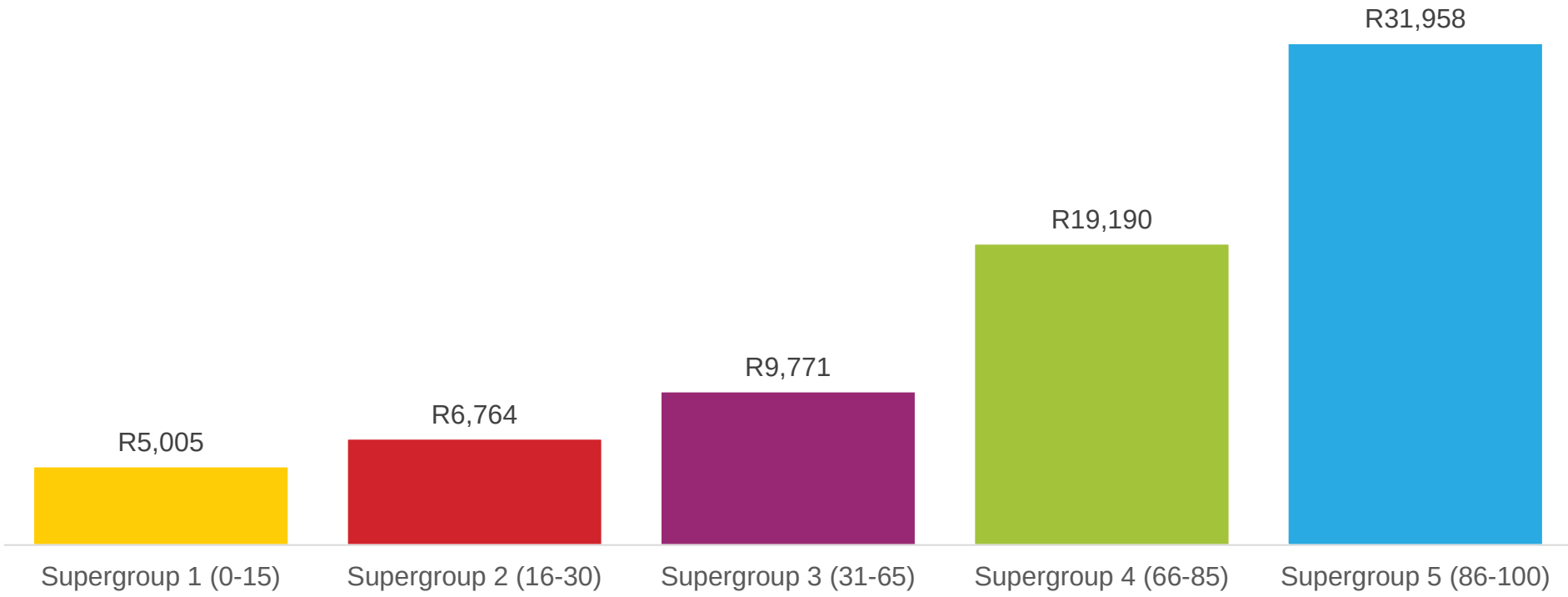
SEM 2018 media profiles



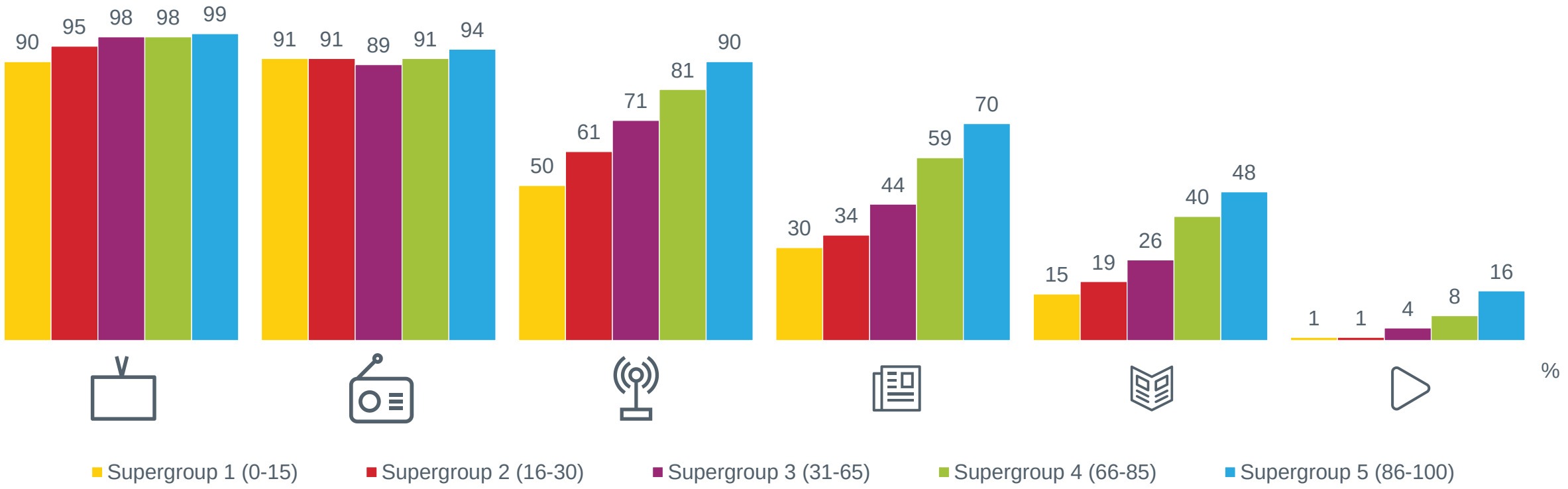
Demographic landscape by SEM



Monthly household income by SEM supergroup



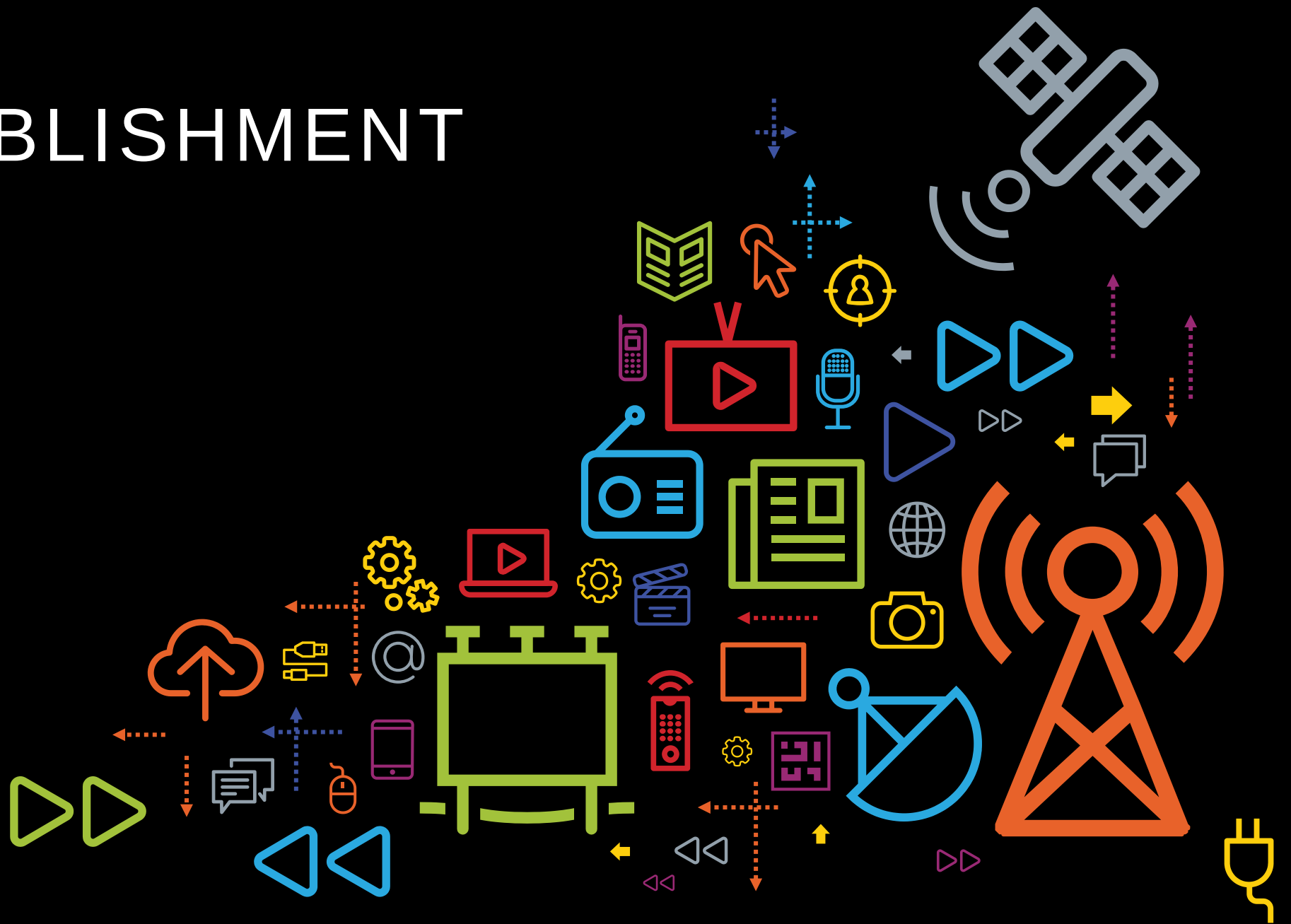
Monthly media reach by SEM supergroup



KANTAR TNS

THE ESTABLISHMENT SURVEY

March 2020 release



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