

Industry Workshop

Media Imperatives

June 3 2021



Publisher
Research
Council

Media Imperatives

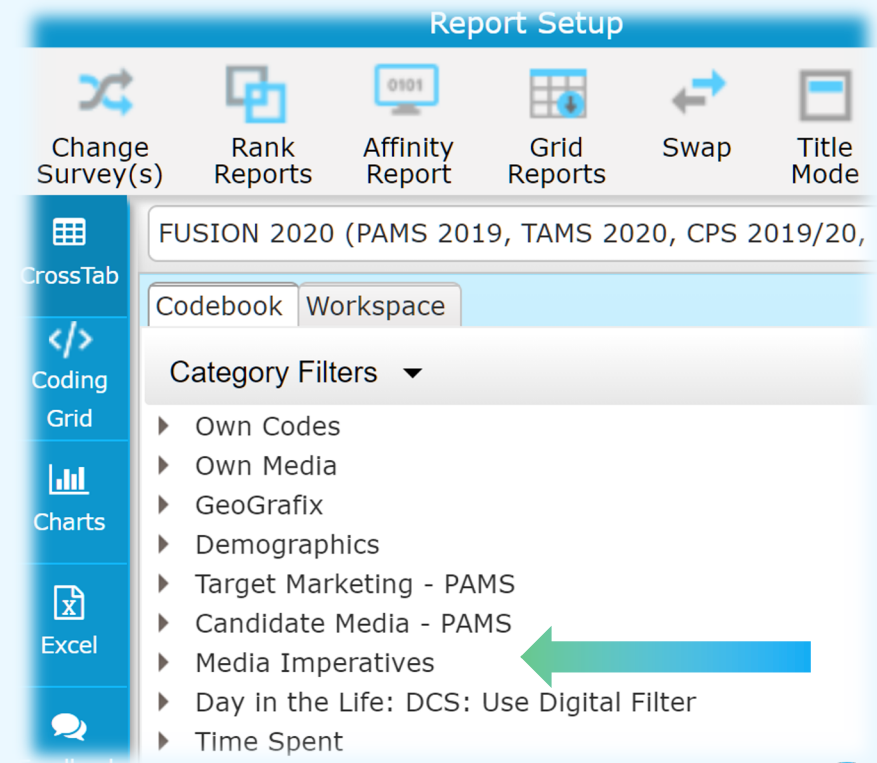
A core principle of media planning is to balance and assign ratings across the entire Target Market.

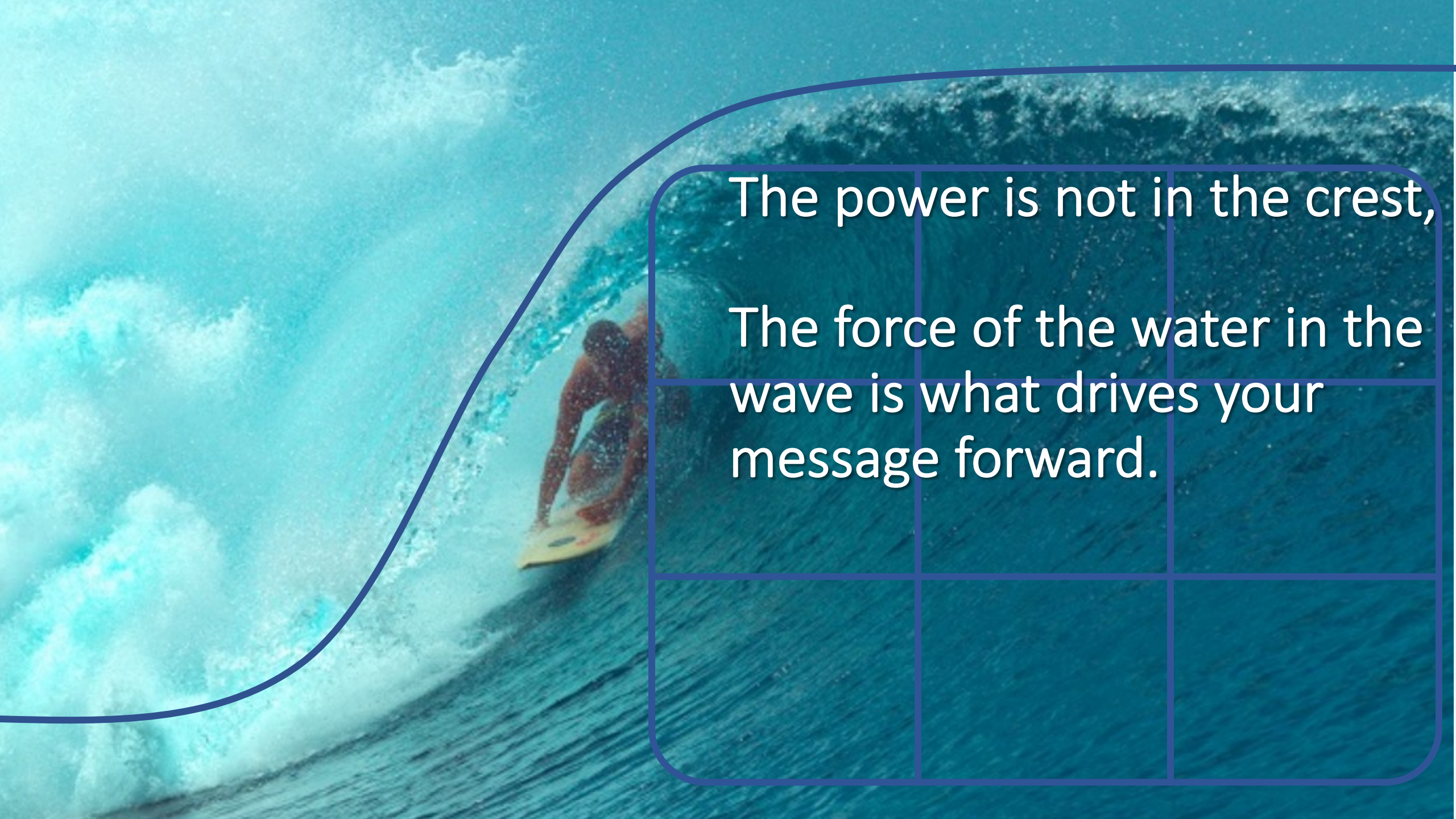
Media Imperatives were developed to do just this, they segment a medium's audience into Light, Medium and Heavy users. These are then cross-tabbed with LMH users of a second medium. Target Market consumers are then assigned to a particular imperative segment in the matrix, based on their cross-consumption of the two media types being examined.

This allows planners to see at a glance, whether a TV & Radio plan, or a TV and Reading (Digital and Print) plan is actually reaching all segments of the TM with a similar media weight.

The PRC has pre-coded Media Imperatives (MI) onto the Fusion 2020 survey, so you can quickly and easily check that your campaigns reach all segments of the TM, and subsequently apportion ratings across the entire MI matrix.

More importantly, you can see which combinations of media offer the most balanced media weight to all market segments.



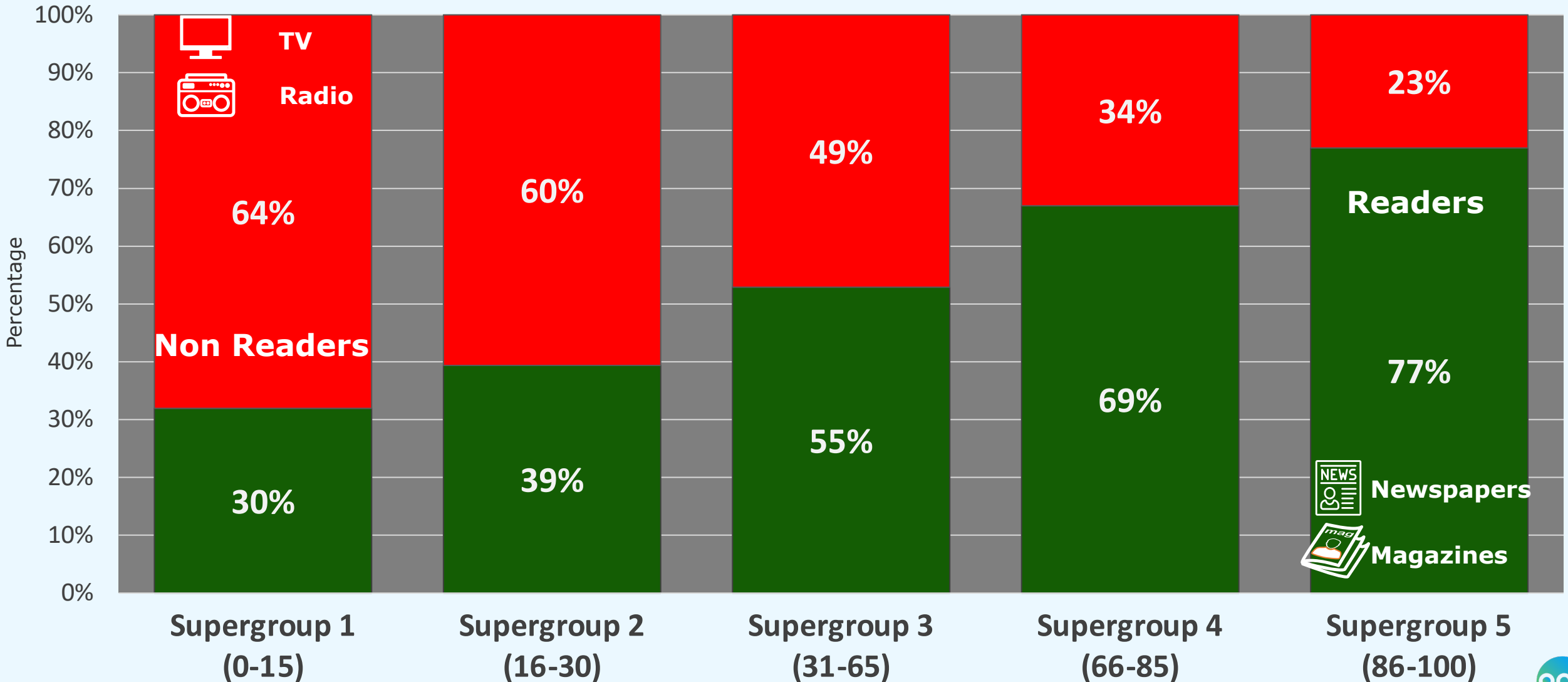


The power is not in the crest,

The force of the water in the
wave is what drives your
message forward.

SEM – Readers* vs. Non-Readers 2019

SEM SUPERGROUPS



* Fusion2020 Average Issue Reader any PAMS Newspaper or Magazine Past Month

Media Imperatives

Media imperatives split the Target Market into Light, Medium and Heavy users of each medium. This allows planners to identify the size of each segment and balance the media plan to ensure GRP's/ RATINGS (Reach & Frequency) are equalised across all consumers.

LIGHT TV

MEDIUM TV

HEAVY TV

LIGHT READING

MEDIUM READING

HEAVY READING

READING IMPERATIVES

TV IMPERATIVES

Definitions

In terms of Reading and Digital, the PAMS definitions are very specific as seen below:

SECTION B: READING

➤ READ OUT:

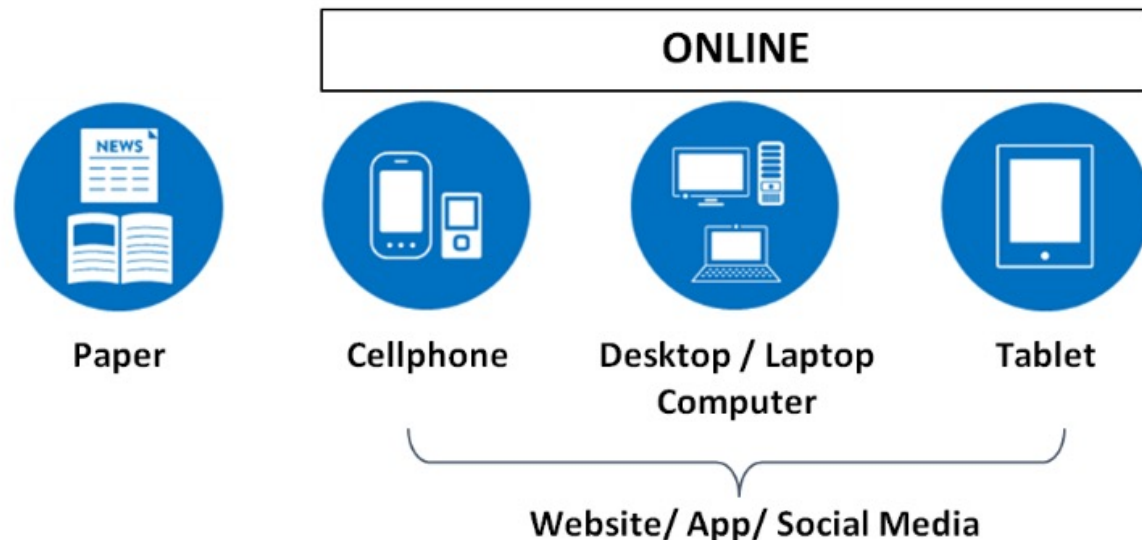
I am now going to ask you a few questions about your reading of Newspapers, Online News Sites, Magazines or Online Magazine content.

➤ HAND RESPONDENT THE DEFINITION CARD OF WHAT IS MEANT BY READING AND READ OUT DEFINITION:

By Reading we mean, that you have personally read, paged through or viewed all or any part of any of these, for one minute or longer.

You could have read a paper version, including any of the separate parts or sections that come with it, OR you could have read these online on your cellphone, computer or tablet.

It does not matter if you paid for them or if they were free. It also does not matter where you read them.



Definitions

In terms of Viewing, the definitions are broad and we do not spell out Platforms/channels per se.

So, television, might include Netflix and streaming services that do not accept advertising.

SECTION L: VIEWING

L1. During an average week, on how many days do you personally watch TV?

7 days (every day)

6 days

5 days

4 days

3 days

2 days

1 day

Don't watch TV in an average week

➤ RECORD ONE ANSWER

➤ IF "DON'T WATCH TV IN AN AVERAGE WEEK", SKIP TO INFLUENCER QUESTION

➤ IF WATCH TV IN L1, ASK:

L2. On average, how many hours per day do you personally watch television?

Less than one hour

1-2 hours

3-4 hours

More than 4 hours

➤ RECORD ONE ANSWER

Definitions

Again with regards to Listening the definitions are broader and we do not spell out devices per se.

One would assume that this broad question is device agnostic and would include listening to the "radio" on a cell phone.

SECTION K: LISTENING

K1. During an average week, on how many days do you listen to the **radio**?

7 days (every day)

6 days

5 days

4 days

3 days

2 days

1 days

Don't listen to radio in an average week

➤ RECORD ONE ANSWER

➤ IF "DON'T LISTEN TO RADIO IN AN AVERAGE WEEK", SKIP TO VIEWING SECTION

➤ IF LISTEN IN K1, ASK:

K2. On average, how many hours per day do you personally listen to the radio?

Less than one hour

1-2 hours

3-4 hours

More than 4 hours

➤ RECORD ONE ANSWER

Definitions

TV, Radio and Internet segments are based on average daily time spent with the medium:

| | <u>Avg Daily Hours</u> | | <u>Avg Daily Hours</u> | | <u>Avg Daily Hours</u> |
|-----------|------------------------|--------------|------------------------|-----------------|------------------------|
| LIGHT TV | 0-2 Hours | LIGHT RADIO | 0-1 Hours | LIGHT INTERNET | 0 - 30 Minutes |
| MEDIUM TV | 2-4 Hours | MEDIUM RADIO | 2-3 Hours | MEDIUM INTERNET | 30 min - 2 Hours |
| HEAVY TV | 4+ Hours | HEAVY RADIO | 4+ Hours | HEAVY INTERNET | 2+ Hours |

PRINT and DIGITAL READING segmentation is based on number of titles / sites read:

| | <u>No. of Titles Read</u> | | <u>No. of Titles/Sites Read</u> |
|--------------|---------------------------|----------------|---------------------------------|
| LIGHT PRINT | 0-1 Titles | LIGHT READING | 0-1 Titles/Sites |
| MEDIUM PRINT | 2-4 Titles | MEDIUM READING | 2-4 Titles/ Sites |
| HEAVY PRINT | 5+ Titles | HEAVY READING | 5+ Titles/Sites |

Segment Sizes

The current time spent definitions in Fusion 2020 were not designed with Media Imperatives in mind, so the sizes of the segments differ from the ideal 33/33/33 LMH split.

| | <u>Avg Daily Hours</u> | <u>Universe Split</u> |
|---------------------|------------------------|-----------------------|
| LIGHT TV | 0-2 Hours | 36% |
| MEDIUM TV | 2-4 Hours | 27% |
| HEAVY TV | 4+ Hours | 37% |
| <hr/> | | |
| LIGHT RADIO | 0-1 Hours | 26% |
| MEDIUM RADIO | 2-3 Hours | 49% |
| HEAVY RADIO | 4+ Hours | 25% |

Segment Sizes Cont'd

| | <u>Avg Time/Titles</u> | <u>Universe Split</u> |
|-----------------|------------------------|-----------------------|
| LIGHT INTERNET | 0 - 30 Minutes | 43% |
| MEDIUM INTERNET | 30 min - 2 Hours | 29% |
| HEAVY INTERNET | 2+ Hours | 29% |
| <hr/> | | |
| LIGHT READING | 0-1 Titles/Sites | 35% |
| MEDIUM READING | 2-4 Titles/ Sites | 30% |
| HEAVY READING | 5+ Titles/Sites | 35% |
| <hr/> | | |
| LIGHT PRINT | 0-1 Titles | 42% |
| MEDIUM PRINT | 2-4 Titles | 30% |
| HEAVY PRINT | 5+ Titles | 28% |

Training (Telmar)

To assign the TM segments to add up to 100% you need to use % table.

1. Click on data items
2. Click on available data items
3. Move % table to the right
4. Uncheck everything except % table

Selected Data Items

Available Data Items

Number Format

Data Item Selection

×

Note: These settings are survey specific, hence will be changed on changing survey(s).

Available Data Items

Audience



Resps



%Col



%Row



Index



%Table



Audience Rank



%Col Rank



%Row Rank



Selected Data Items

Audience

Resps

%Col

%Row

Index

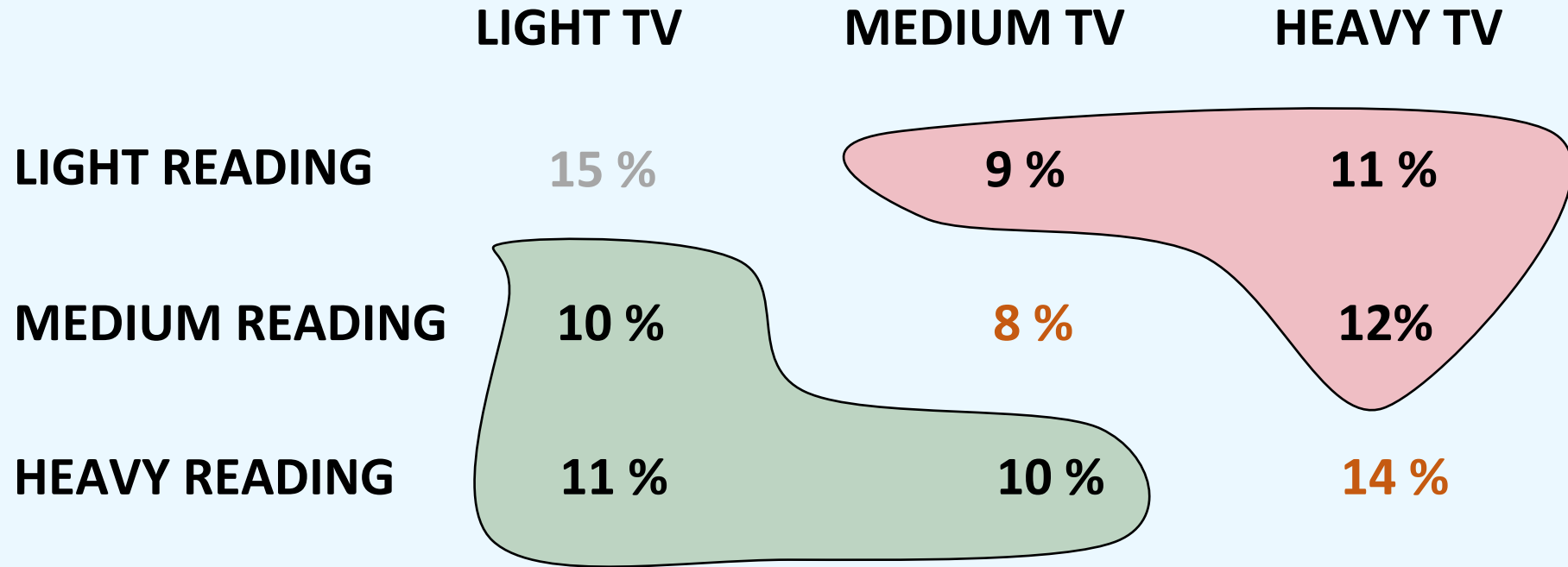


Clear default

as default.

Media Imperatives TV & READING

TARGET: SA ADULTS



Of the SA Adult Population:

32% are TV imperatives

31% are READING imperatives

22% are Dual [both TV & READING]

15% are light users of TV & READING

Media Imperatives TV & READING

TOTAL ADULTS

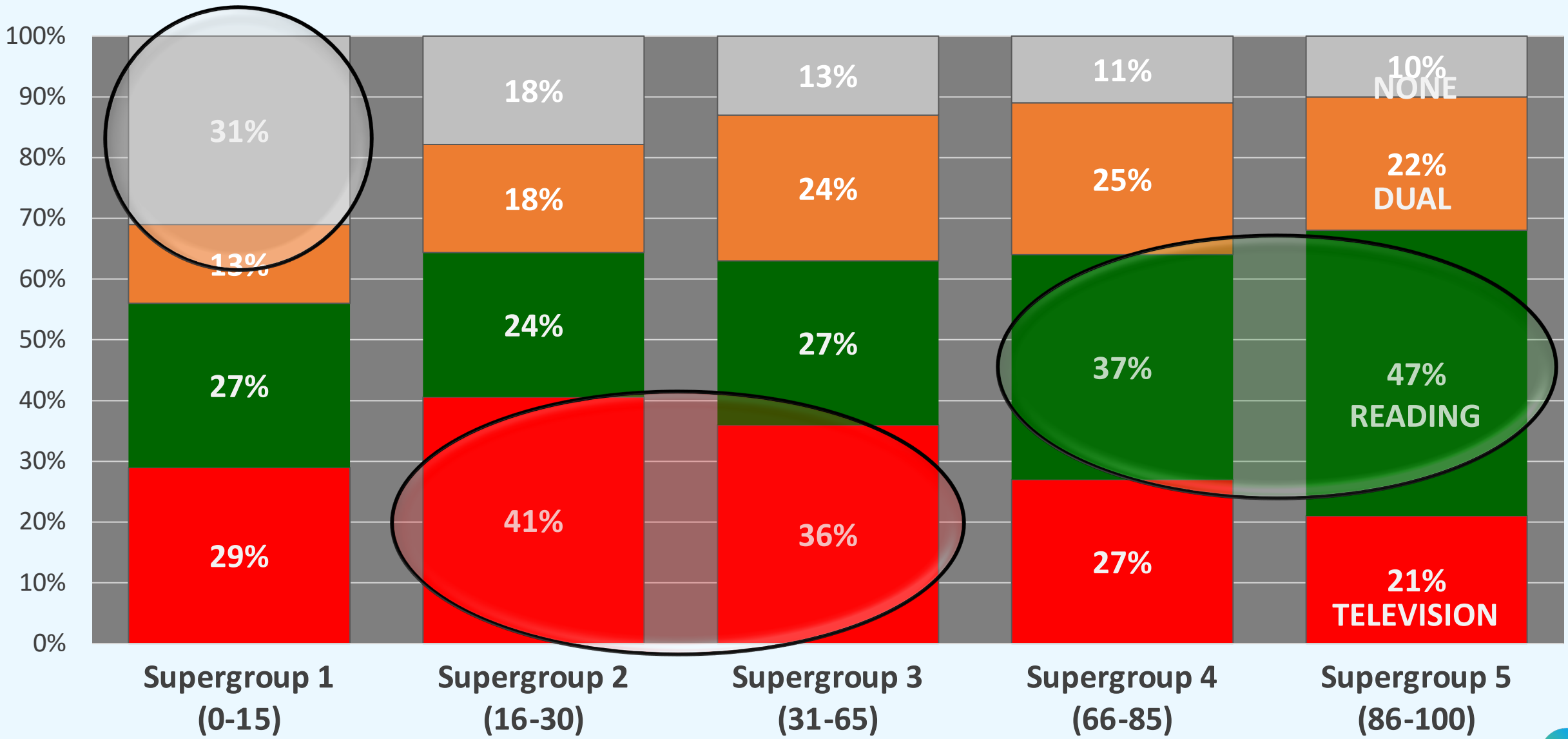
TOTAL MARKET
IMPERATIVES

32%

TV

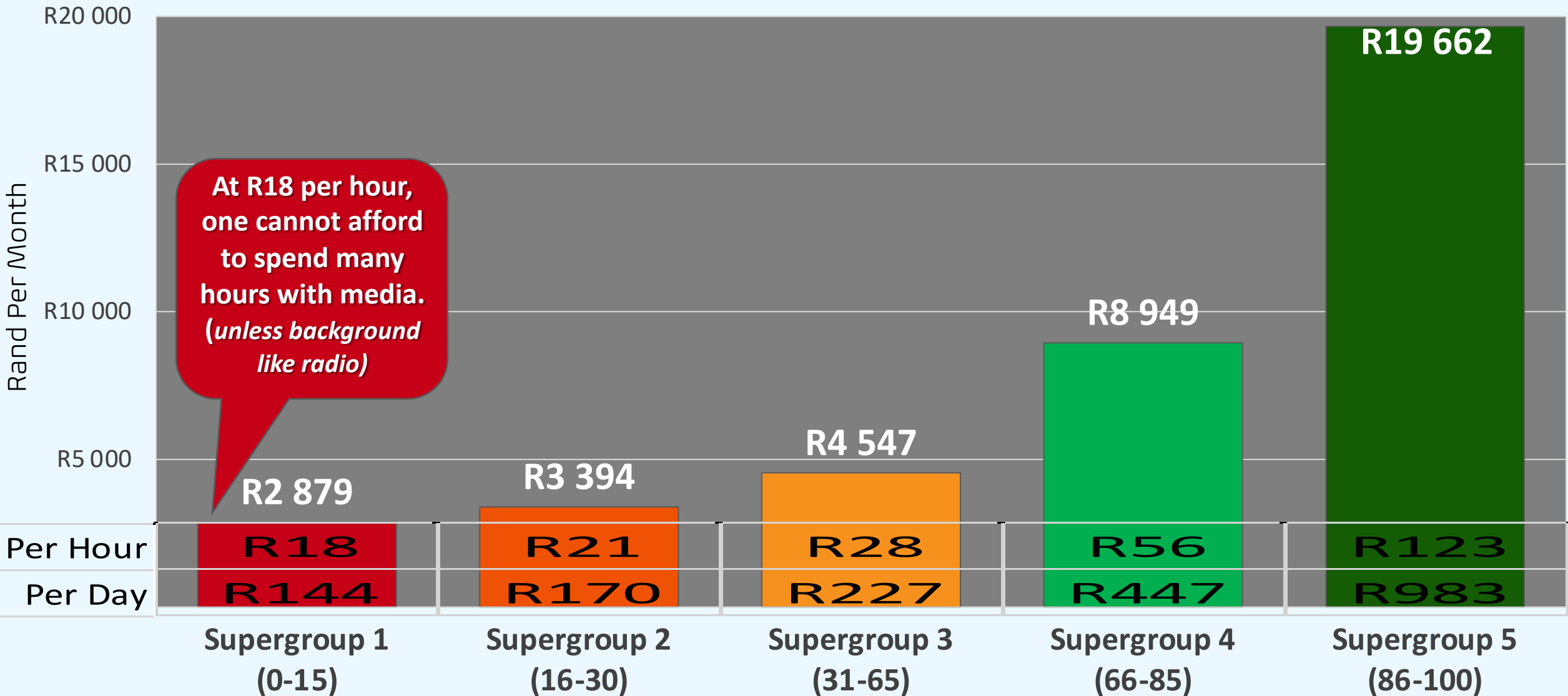
31%

READING



Average Monthly Personal Income

SEM SUPERGROUPS



Media Imperatives TV & PRINT

A WORD OF CAUTION

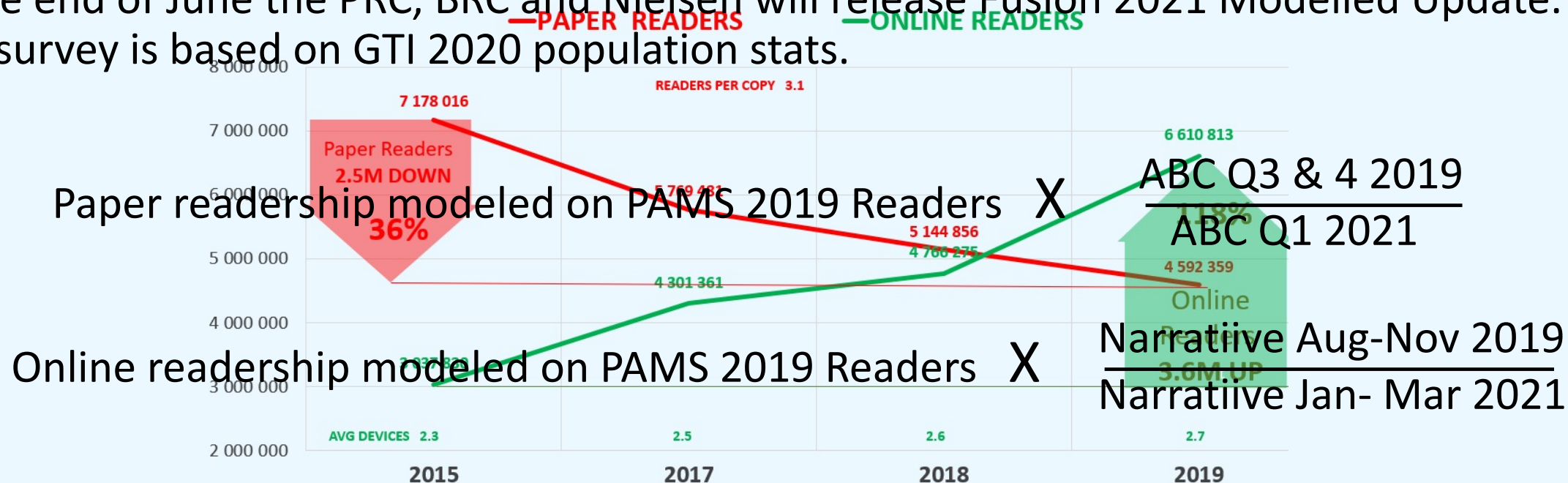
PRINT readership is from PAMS 2019. Fieldwork mid-point Oct 2019 Pre Covid when circulations were much higher. So PRINT IMPERATIVES as at today will be lower.

There are more than 1 Million More Readers in just 4 years!

They have just changed from Paper to Online

At the end of June the PRC, BRC and Nielsen will release Fusion 2021 Modelled Update.

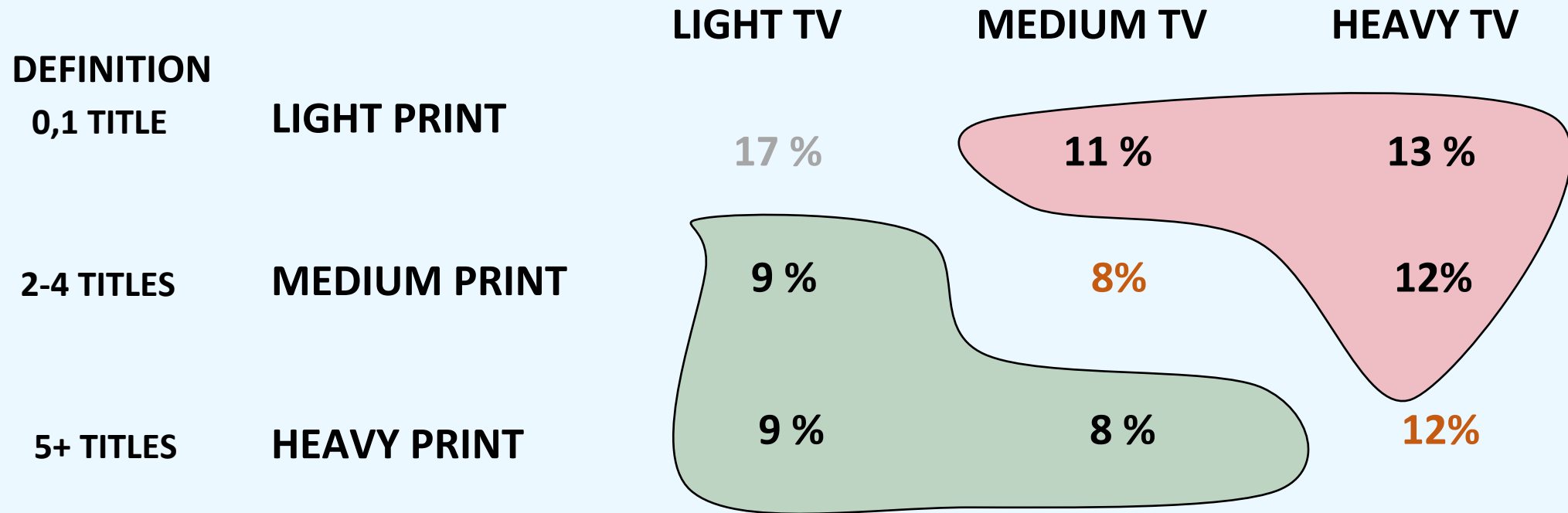
This survey is based on GTI 2020 population stats.



Media Imperatives TV & PRINT

TOTAL ADULTS

We then assign 100% of the defined target market to each of the TM segments:



Of the SA Adult Population:

36% are TV imperatives

26% are PRINT imperatives

20% are Dual [both TV & PRINT]

17% are light users of TV & PRINT

Media Imperatives TV & PRINT

TOTAL ADULTS

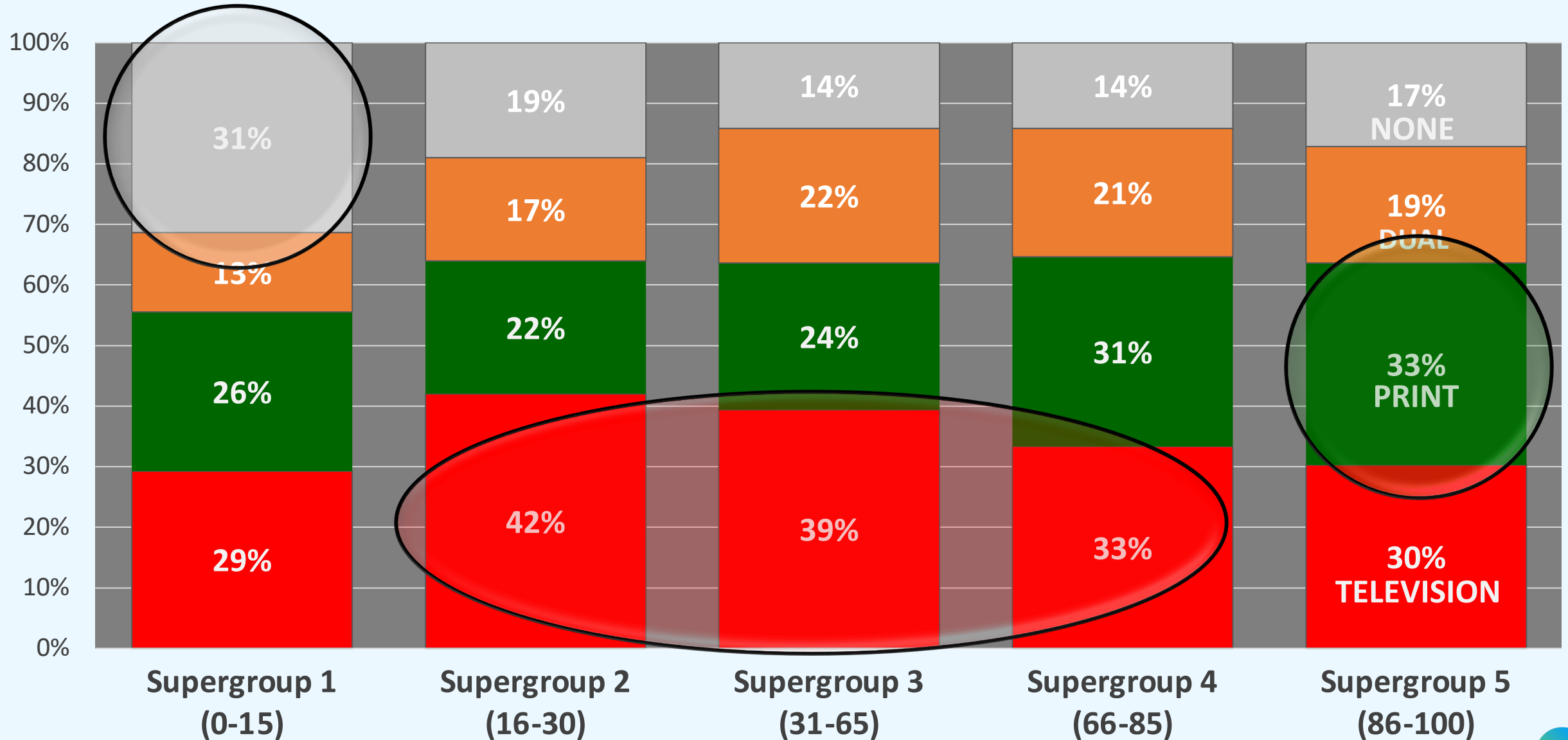
TOTAL MARKET
IMPERATIVES

36%

TV

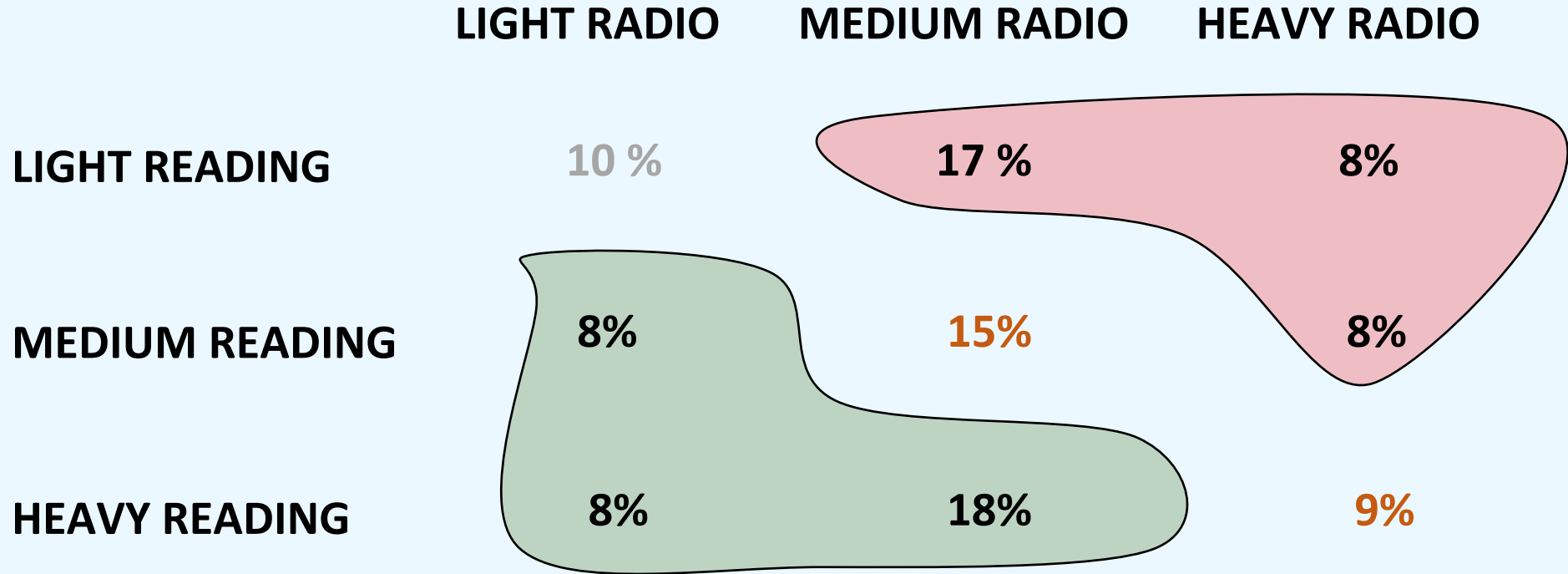
26%

PRINT



Media Imperatives RADIO & READING

TOTAL ADULTS



Of the SA Adult Population:

33% are RADIO imperatives

34% are READING imperatives

24% are Dual both RADIO & READING

10% are light users of RADIO & READING

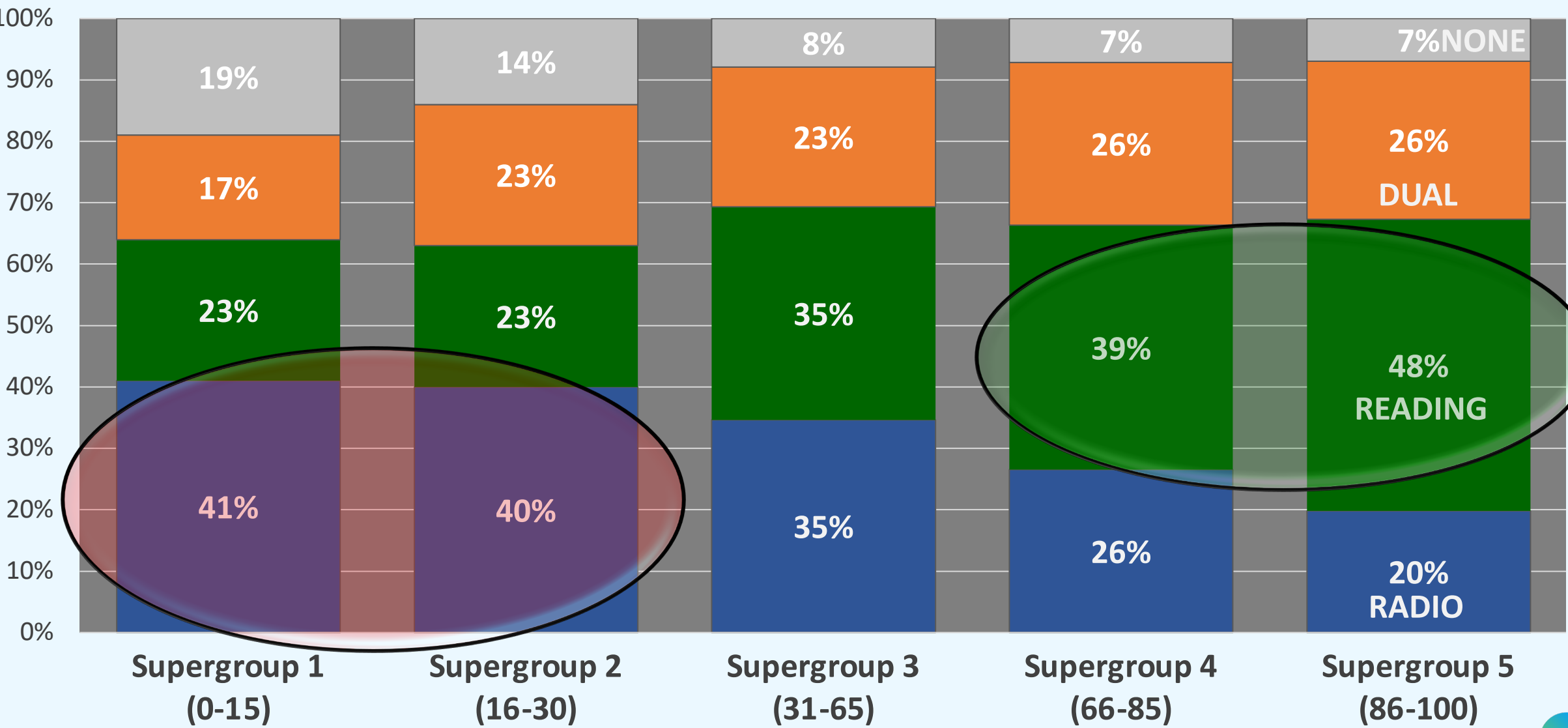
Media Imperatives RADIO & READING

TOTAL ADULTS

TOTAL MARKET IMPERATIVES

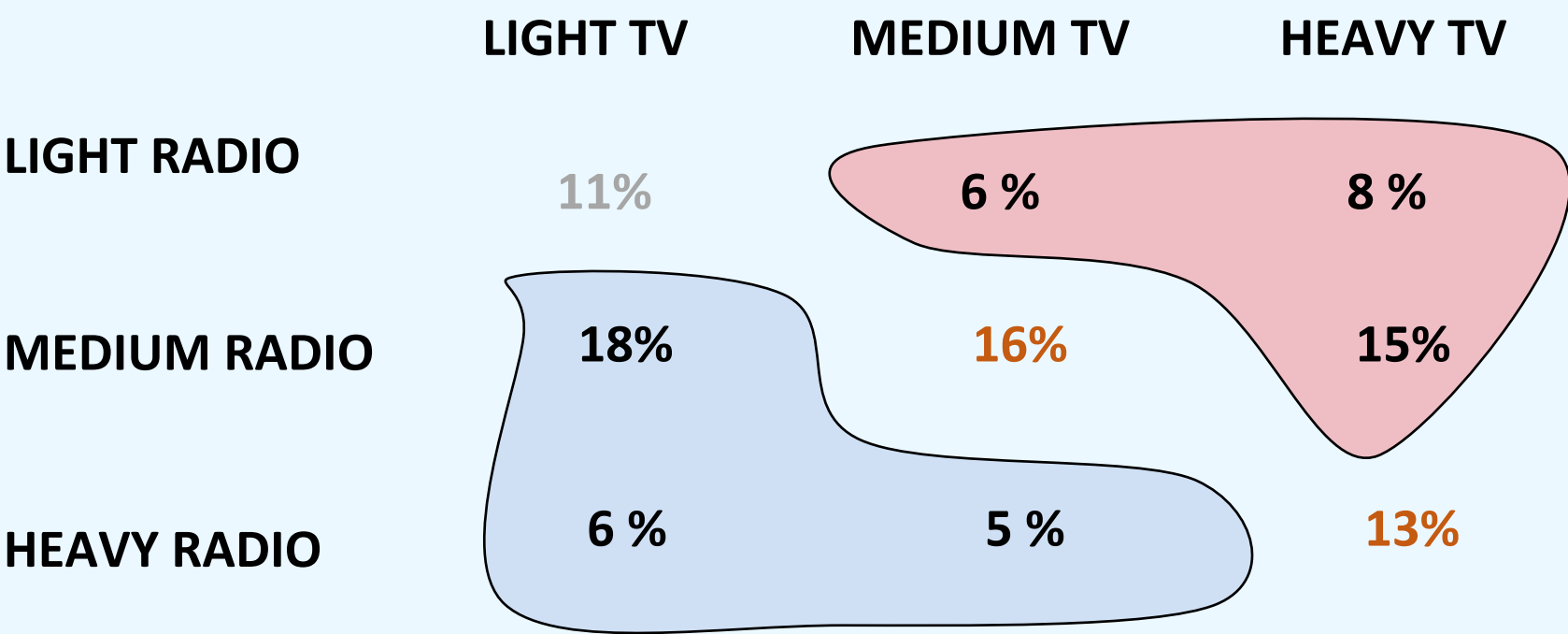
33% RADIO

34% READING



Media Imperatives TV & RADIO

TOTAL ADULTS



Of the SA Adult Population:

29% are TV imperatives

29% are RADIO imperatives

29% are Dual [both TV & RADIO]

11% are light users of TV & RADIO

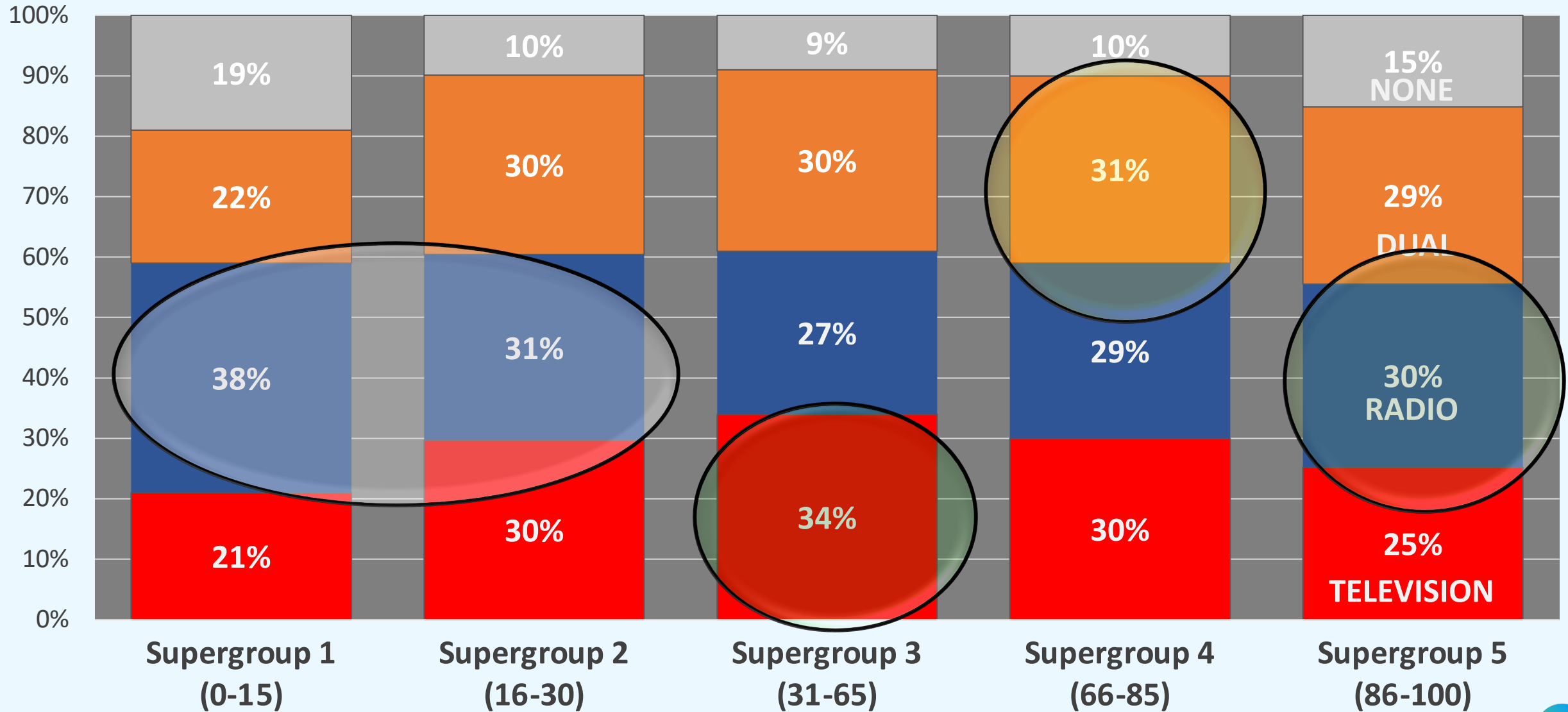
Media Imperatives TV & RADIO

TOTAL ADULTS

TOTAL MARKET
IMPERATIVES

29%
TV

29%
RADIO



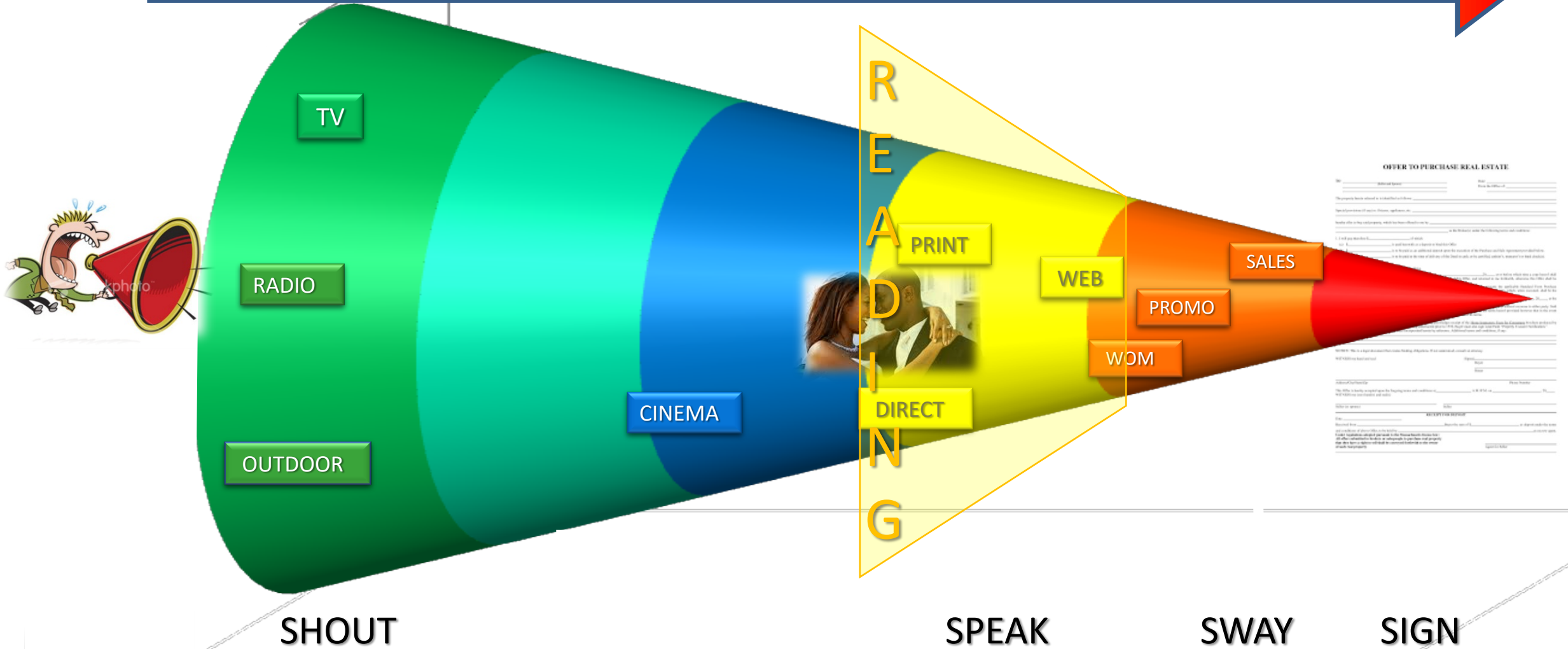
The Purchase Funnel

Influences at Each Step in the Funnel

AWARENESS

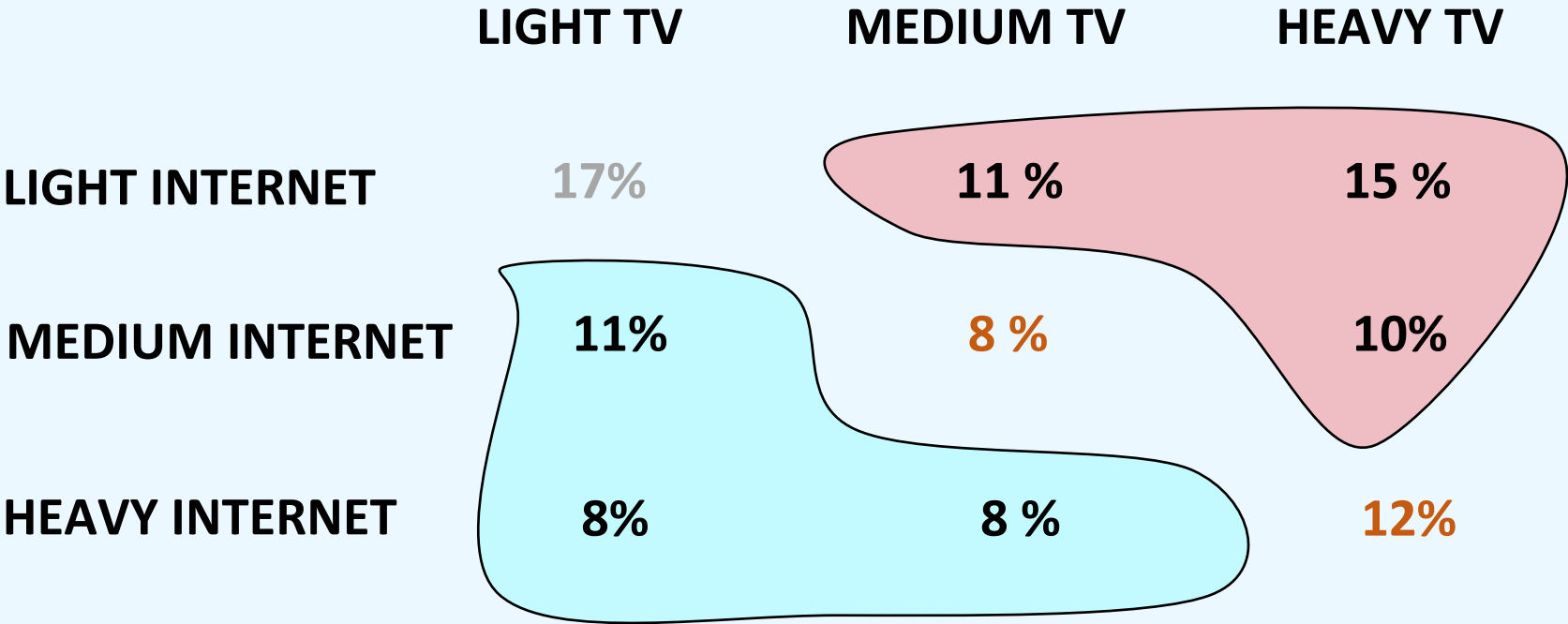
CONSIDERATION

PURCHASE



Media Imperatives TV & INTERNET

TOTAL ADULTS



Of the SA Adult Population:

36% are TV imperatives

27% are INTERNET imperatives

20% are Dual [both TV & INTERNET]

17% are light users of TV & INTERNET

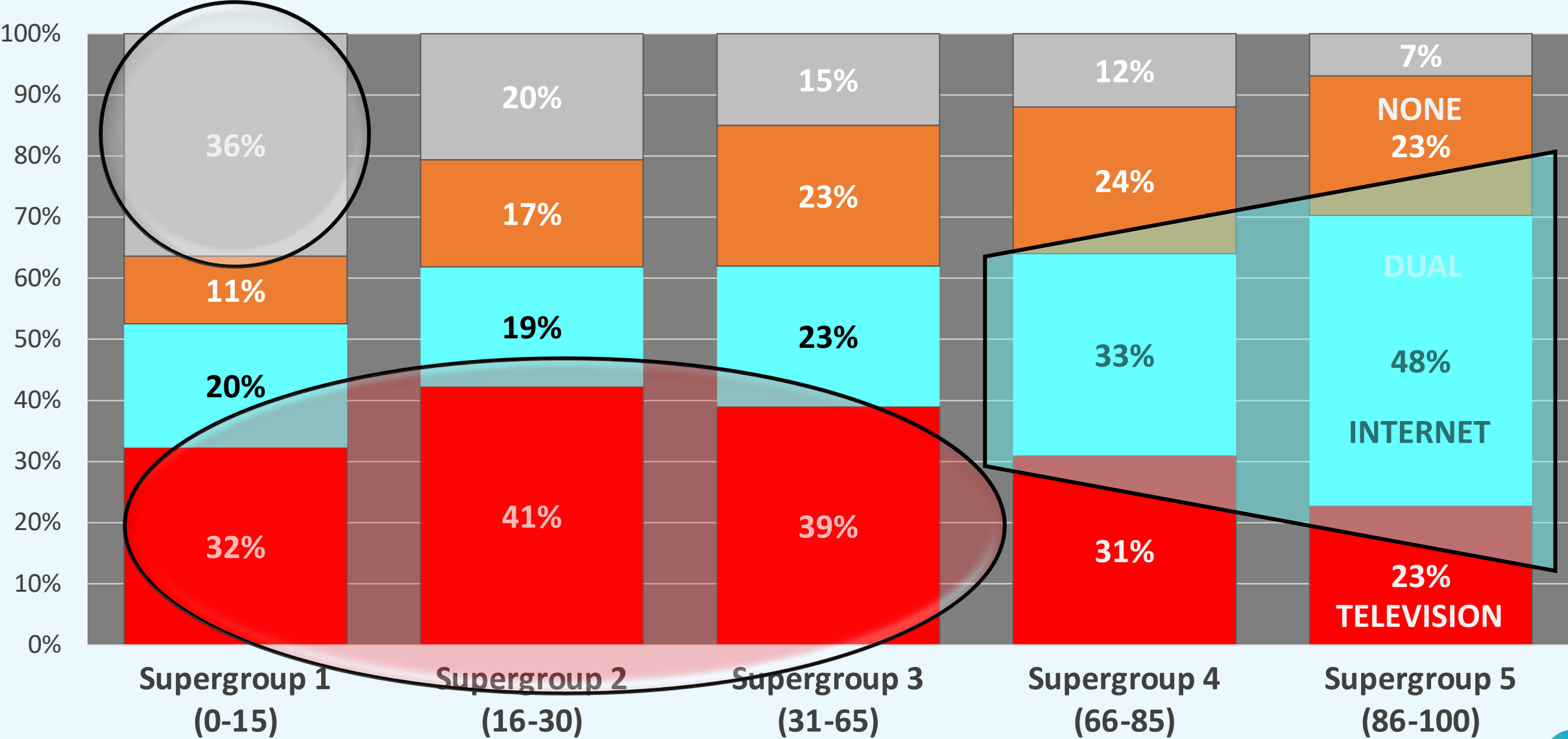
Media Imperatives TV & INTERNET

TOTAL ADULTS

TOTAL MARKET IMPERATIVES

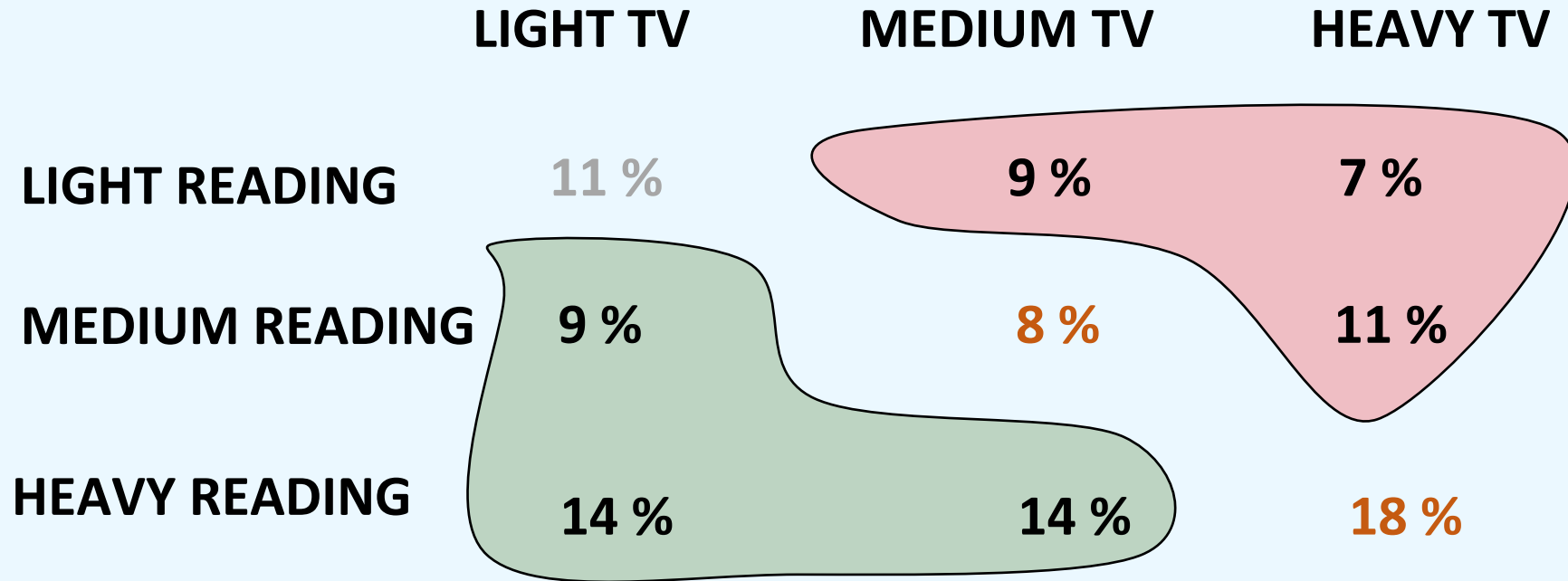
36%
TV

27%
INTERNET



Media Imperatives TV & READING

TARGET: INFLUENCERS 5+ POSITIVE STATEMENTS



OF INFLUENCERS :

27% are TV imperatives

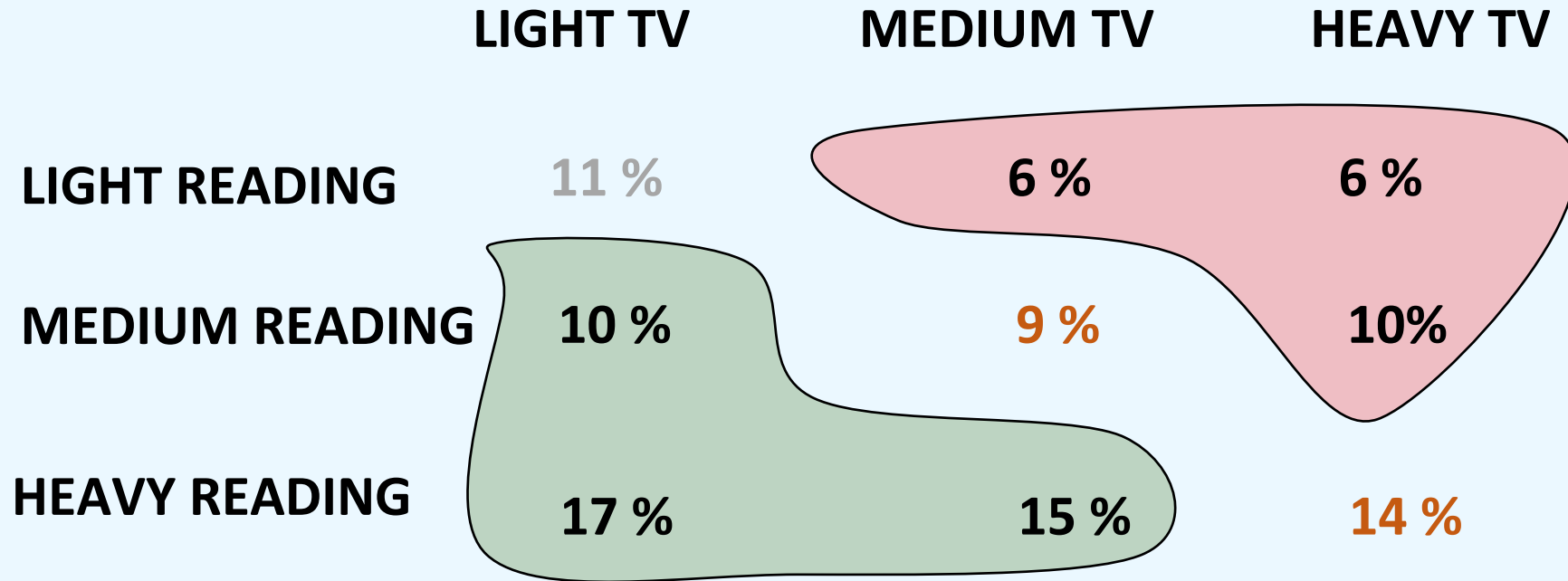
37% are READING imperatives

26% are Dual [both TV & READING]

11% are light users of TV & READING

Media Imperatives TV & READING

TARGET: WORKING FULL TIME



OF FULL TIME WORKERS:

22% are TV imperatives

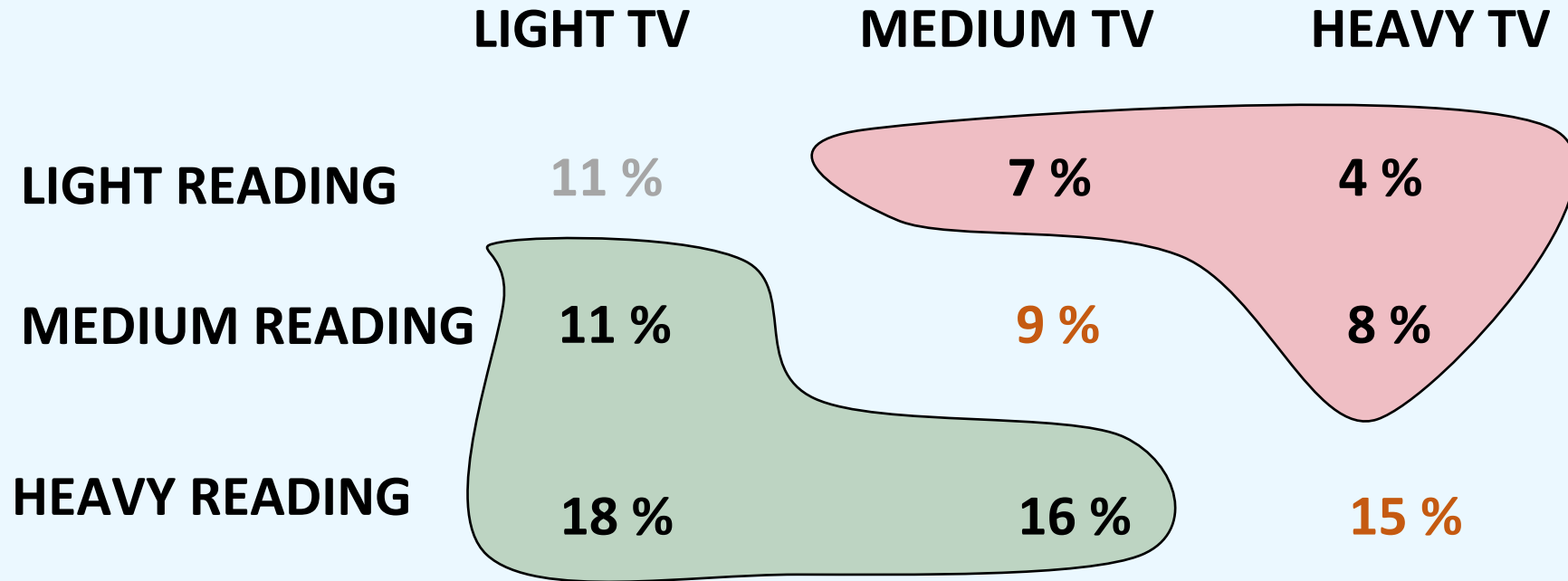
42% are READING imperatives

23% are Dual [both TV & READING]

11% are light users of TV & READING

Media Imperatives TV & READING

TARGET: NEW CAR BUYERS



OF NEW CAR BUYERS :

19% are TV imperatives

45% are READING imperatives

24% are Dual [both TV & READING]

11% are light users of TV & READING




The PRC have been at the forefront of media research in South Africa since being established in 2016. With innovations such as readership flooding, fusion, multi-method currencies, income weighting and oversampling, geosegmentation, automated planning tools and now Media Imperatives we are firmly committed to delivering the most accurate and representative data to the industry.

All designed to give deeper insights and help you to make more informed media decisions.

Visit prc.za.com for more media insights

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