

FROM AMPS_LSM TO ES_SEM

TOWARDS A COMMON PLANNING & BUYING SEM CURRENCY

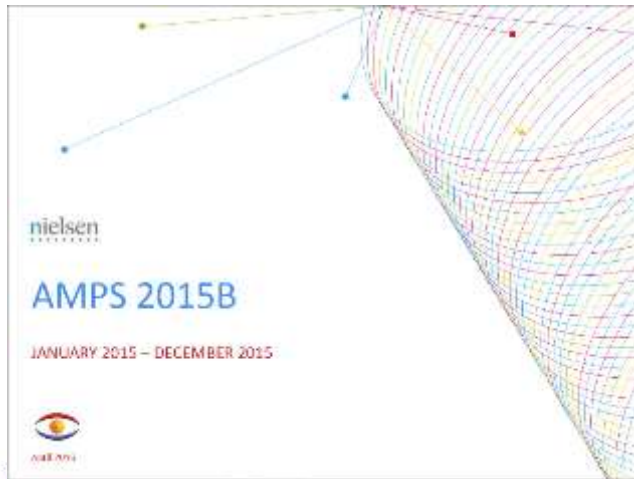
Saslan.

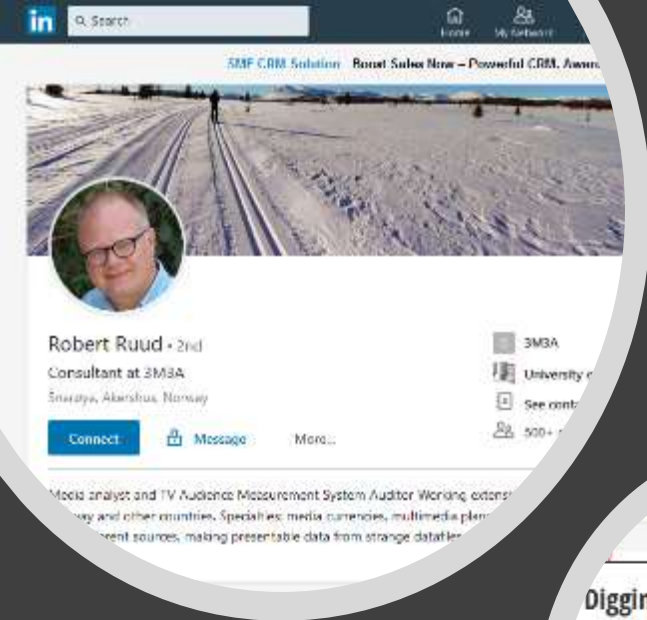


INTRODUCING THE ESTABLISHMENT SURVEY



END OF THE WORLD OR BRAVE NEW WORLD?





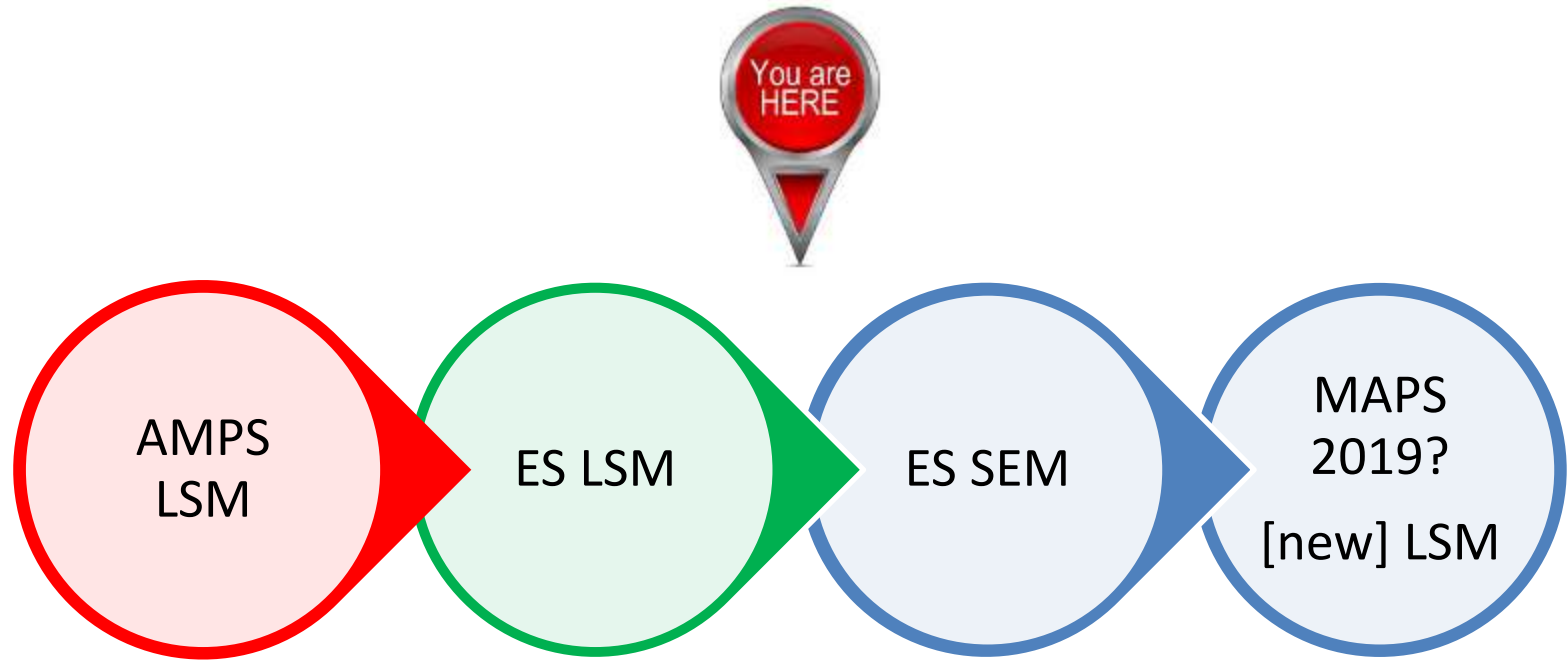
RESEARCH & MEDIA PLANNING



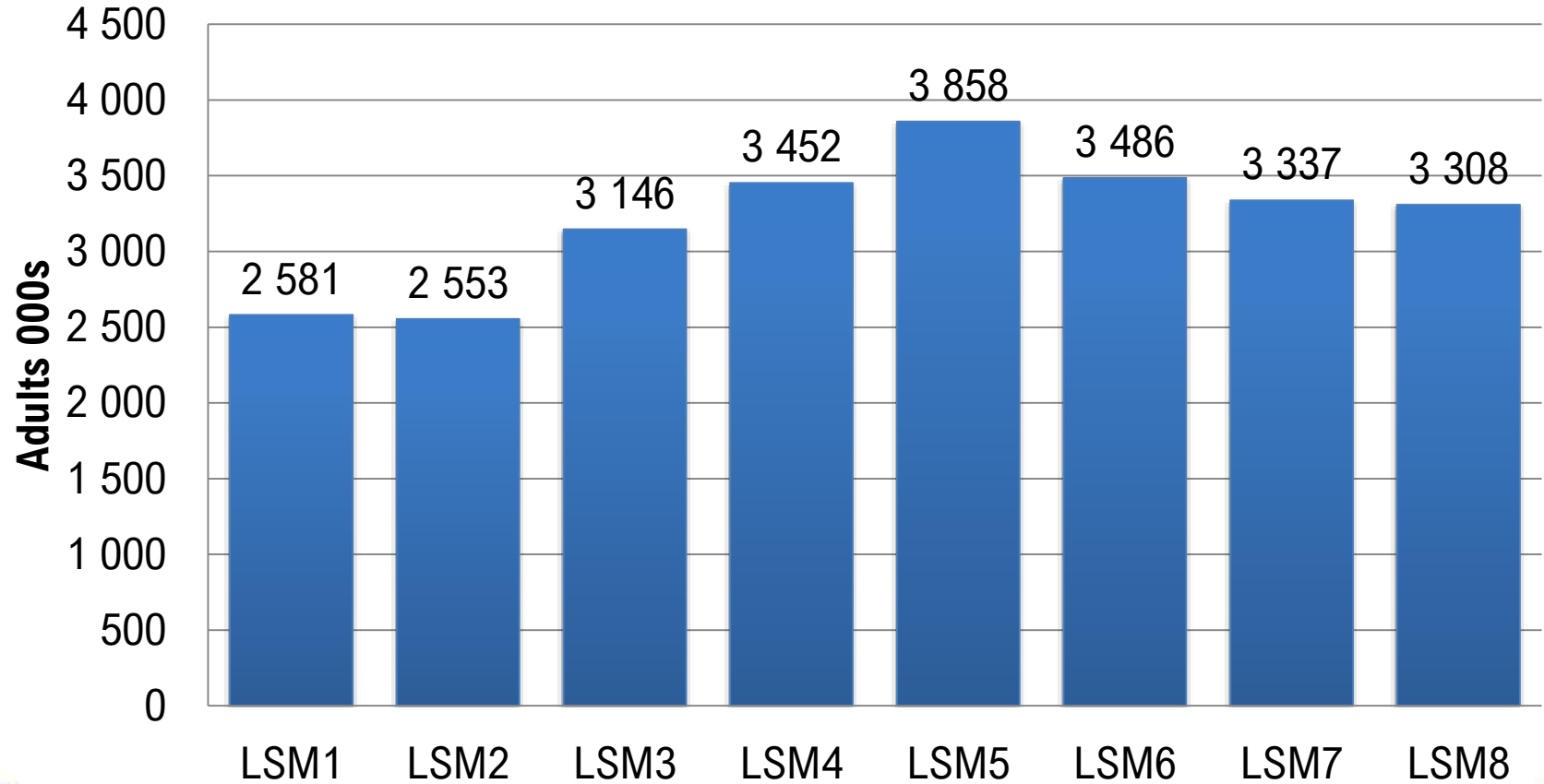
KNOW THE DIFFERENCE

ES & JICS: THE HUB & DONOR MODEL





1989-1997: THE GALPIN CONUNDRUM



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AMPS_LSM 1989: A NEW REALITY

- What we ...
 - Have in common
 - Buy in common
 - Consume in common
 - Believe in common
 - Feel in common
- Cluster segmentation

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GULF NEWS &

SOUTH AFRICA

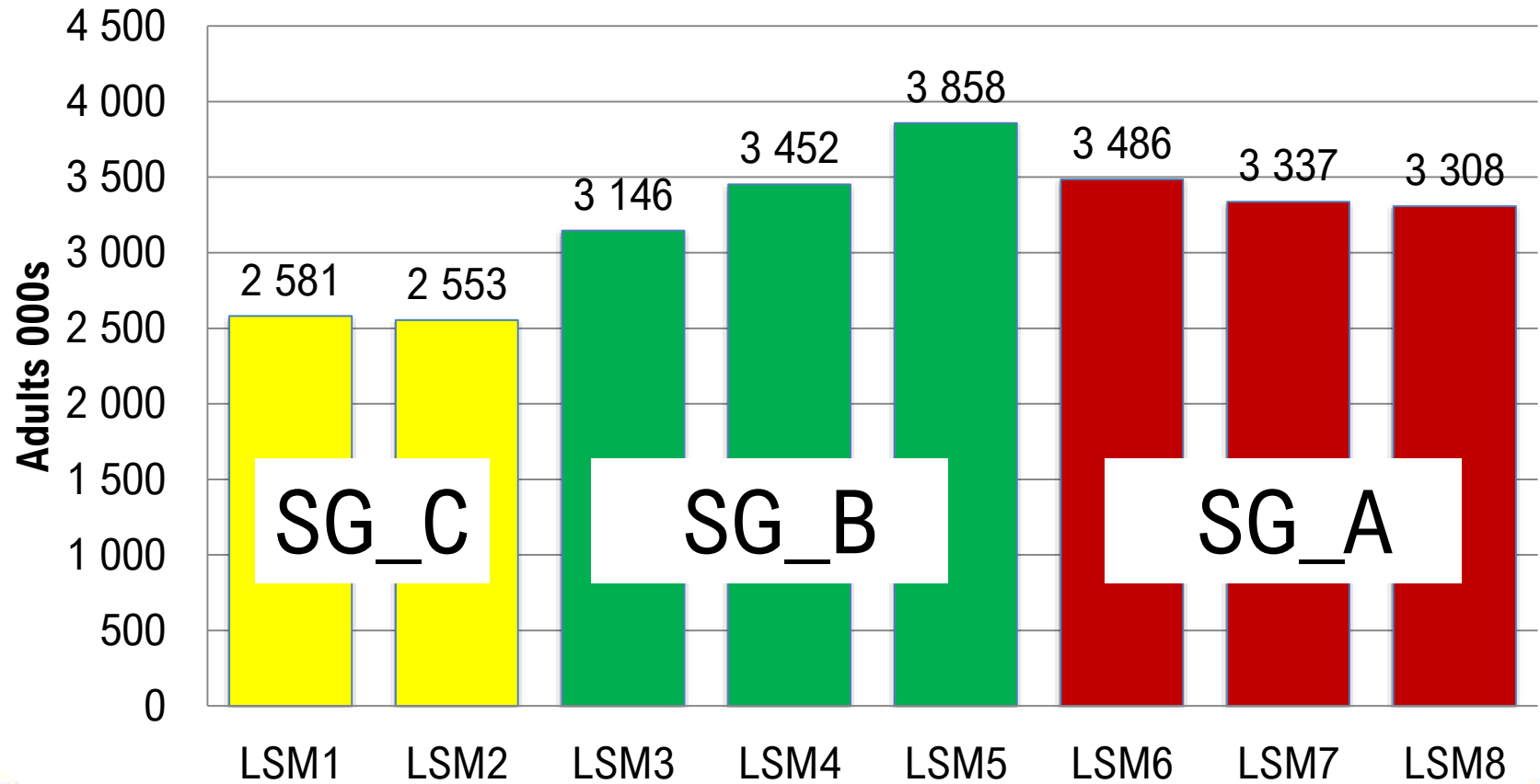
June 12, 2018 | Last updated 5 minutes ago

South Africa: The remarkable referendum of 1992

South Africans were asked: Do you support continuation of the reform process which the State President [FW de Klerk] began on 2 February 1990?"

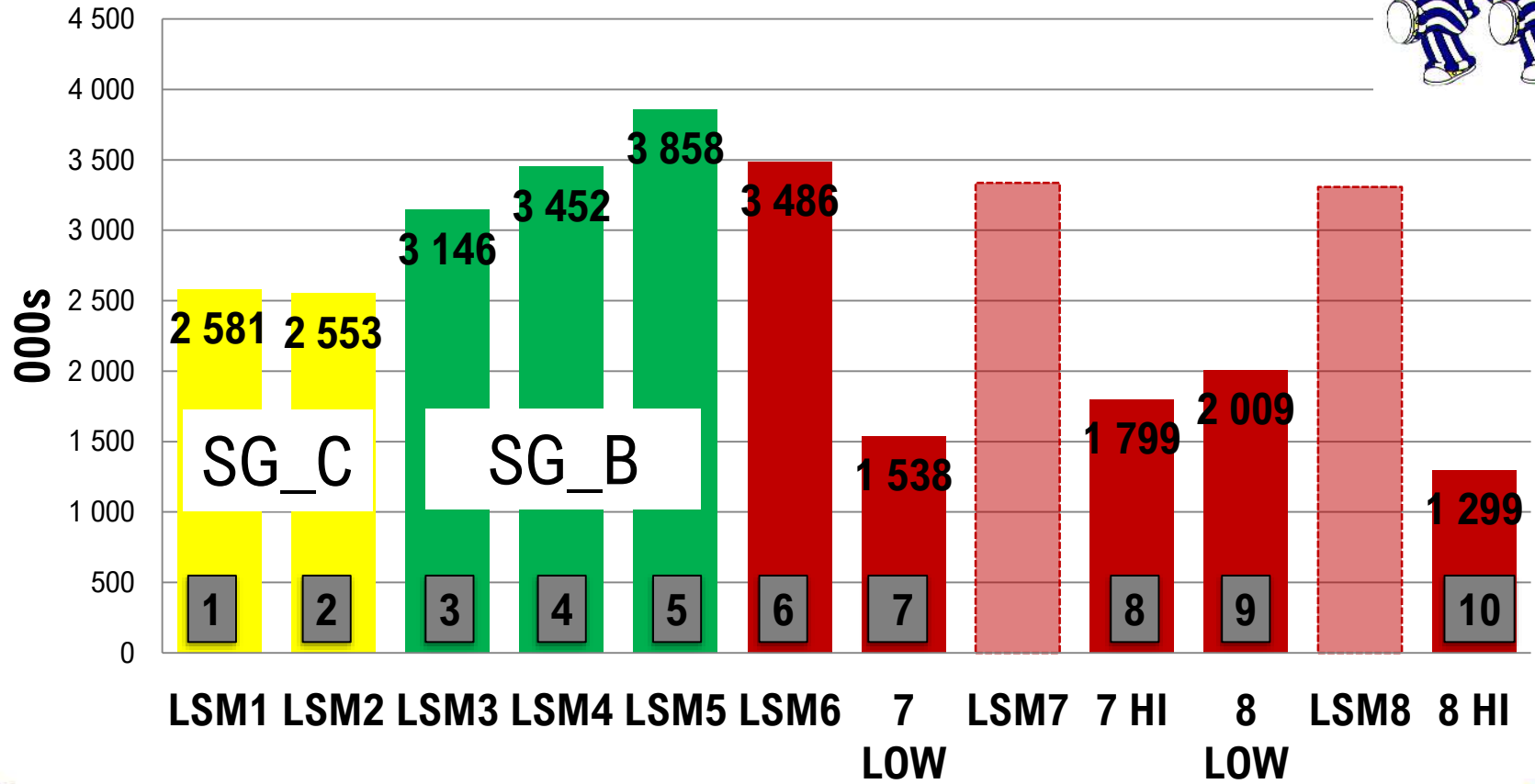


1989-1997: THE 1ST SUPERGROUPS



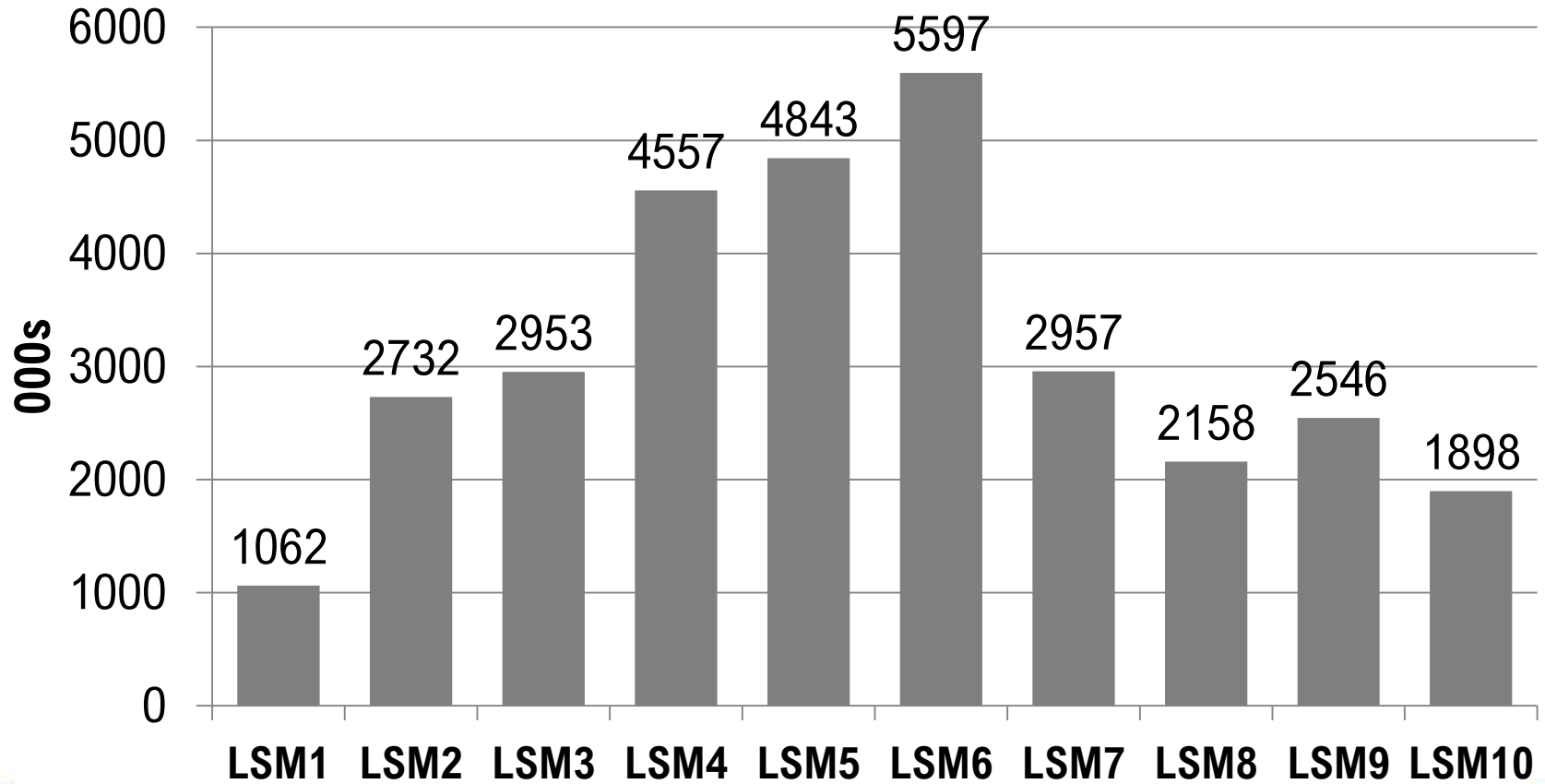
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1997 - 2001: AMPS_LSM SPLITS



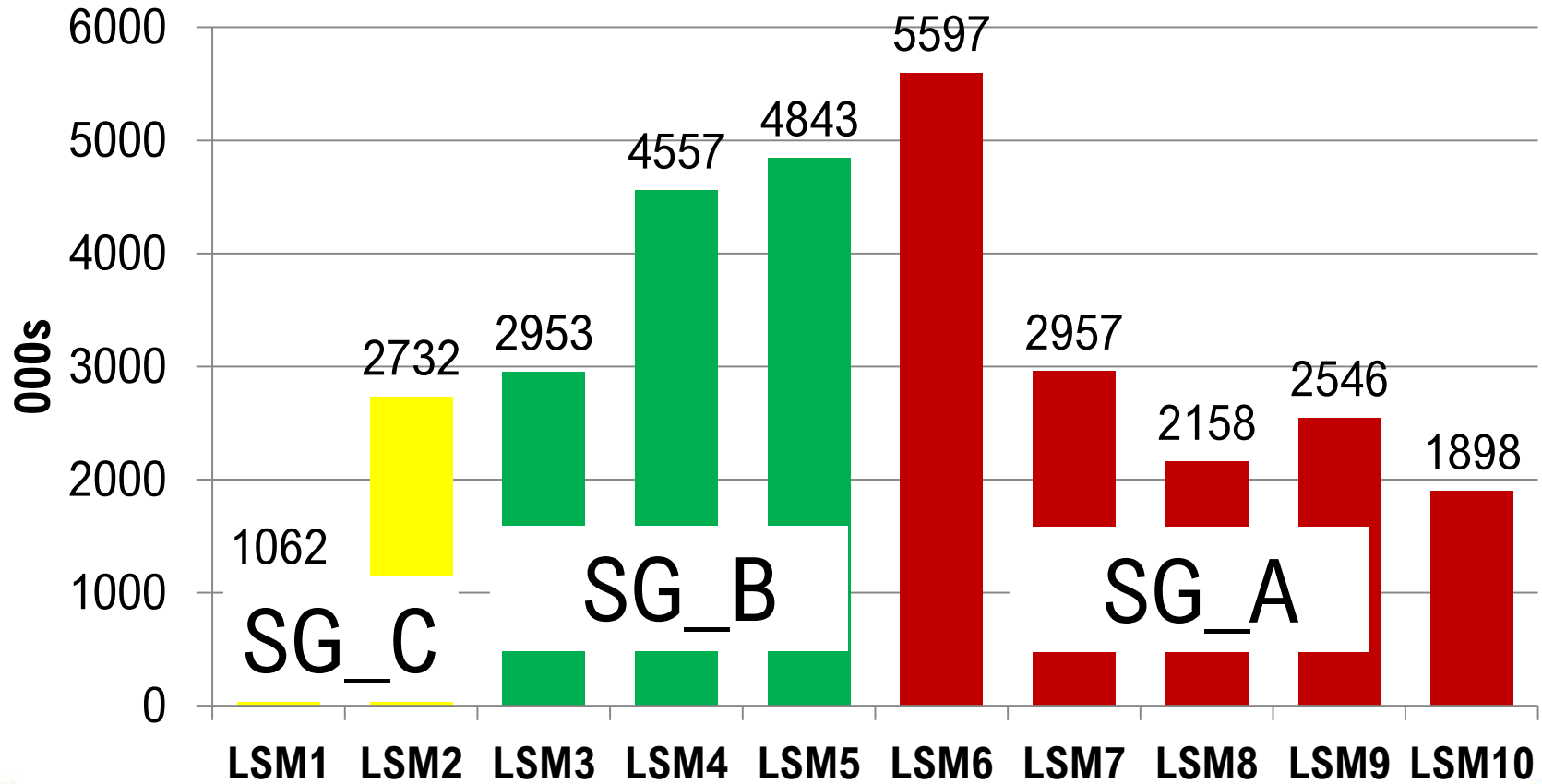
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2001: THE 10_LSM MODEL



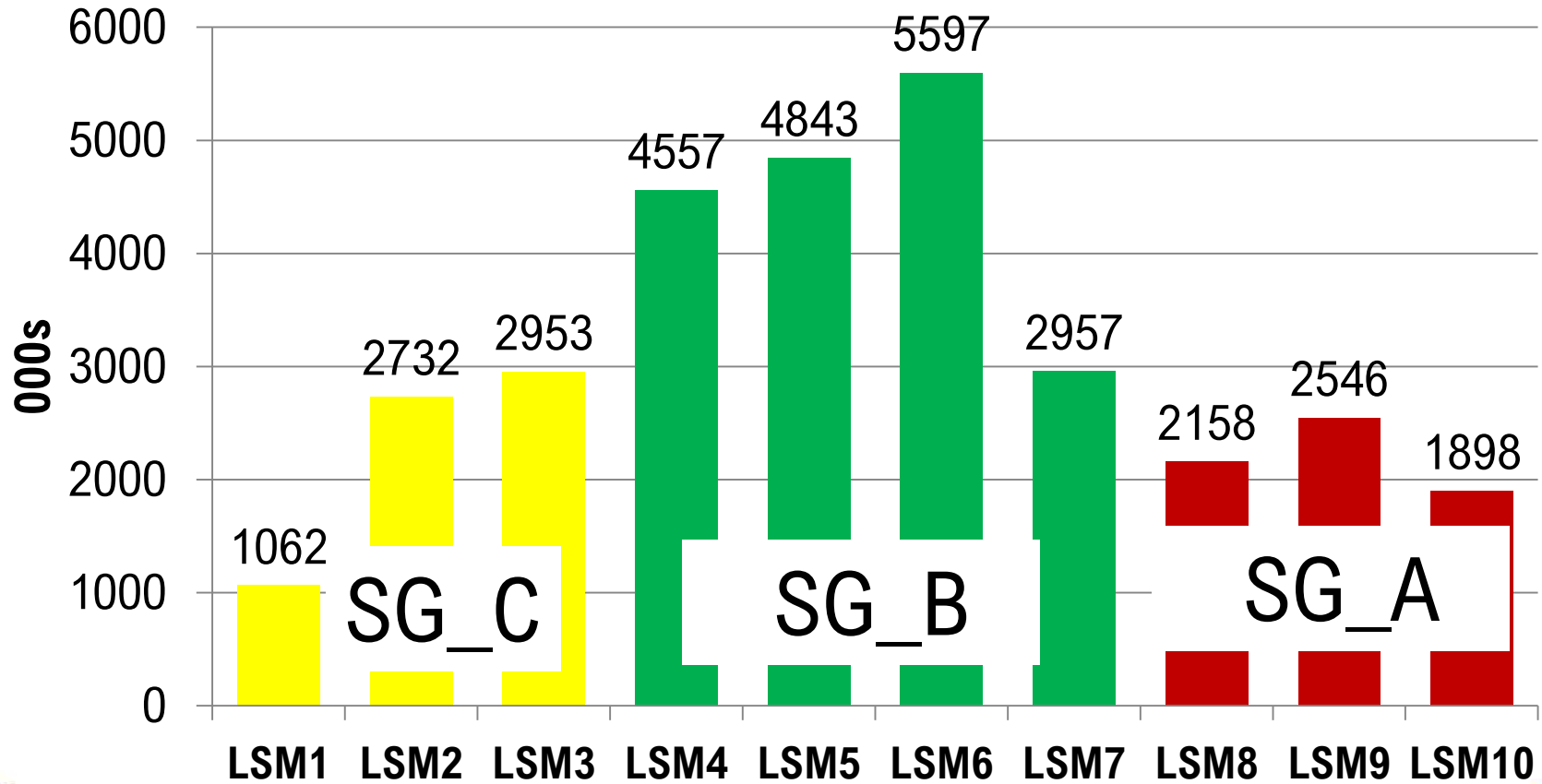
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2001-2008: THE 10_LSM MODEL



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2001-2008: THE 10_LSM MODEL



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SAARF UNIVERSAL LSM 1995-2015

- Hot Running Water
- Fridge/freezer
- Microwave oven
- Dishwashing Liquid
- Flush toilet in/outside house
- No domestic in household
- VCR
- Vacuum cleaner/floor polisher
- No Cellphone in household
- 1 Cellphone in HH
- 2 Cellphone in HH
- 3+ Cellphone in HH
- Traditional hut
- House/ Cluster/ Town House
- Washing machine
- PC in home
- Electric stove
- TV set
- Tumble dryer
- Home telephone
- Less than 2 radio sets in household
- Hi-fi/music Centre
- Home Theatre System
- Built-in Kitchen sink
- Home security service
- Deep freezer
- Water in home/on plot
- M-Net/DSTV subscription
- Dishwasher
- Air Conditioner
- Swimming Pool
- Electricity
- Sewing machine
- DVD Player
- Gauteng
- Western Cape
- Rural outside Gauteng /W.Cape
- Metropolitan Dweller
- Motor Vehicle in household

SAARF UNIVERSAL LSM 1995-2015

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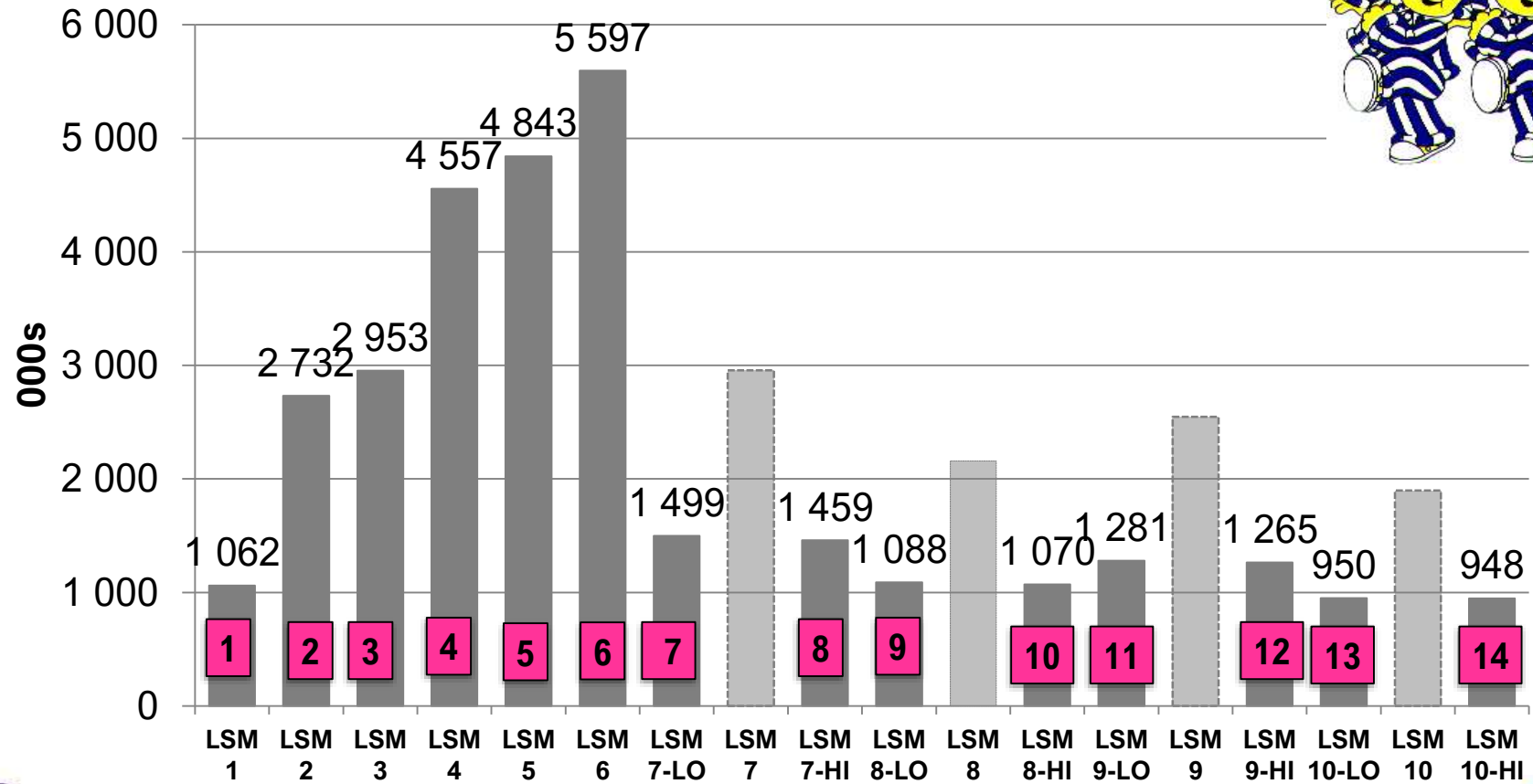
Less than 2 radio sets in household

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M-Net/DSTV subscription

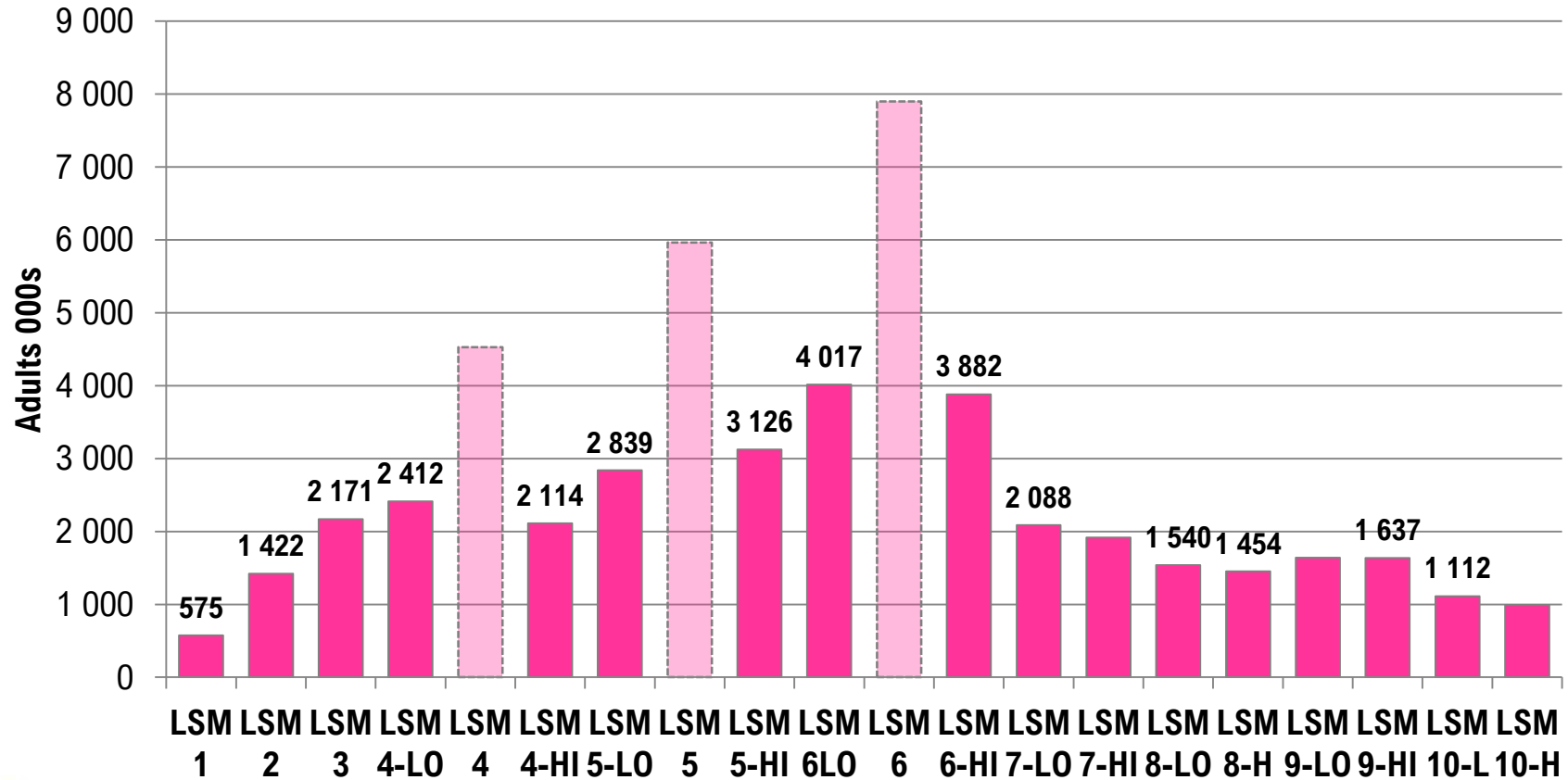
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- Motor Vehicle in household

2008: THE 14_LSM MODEL



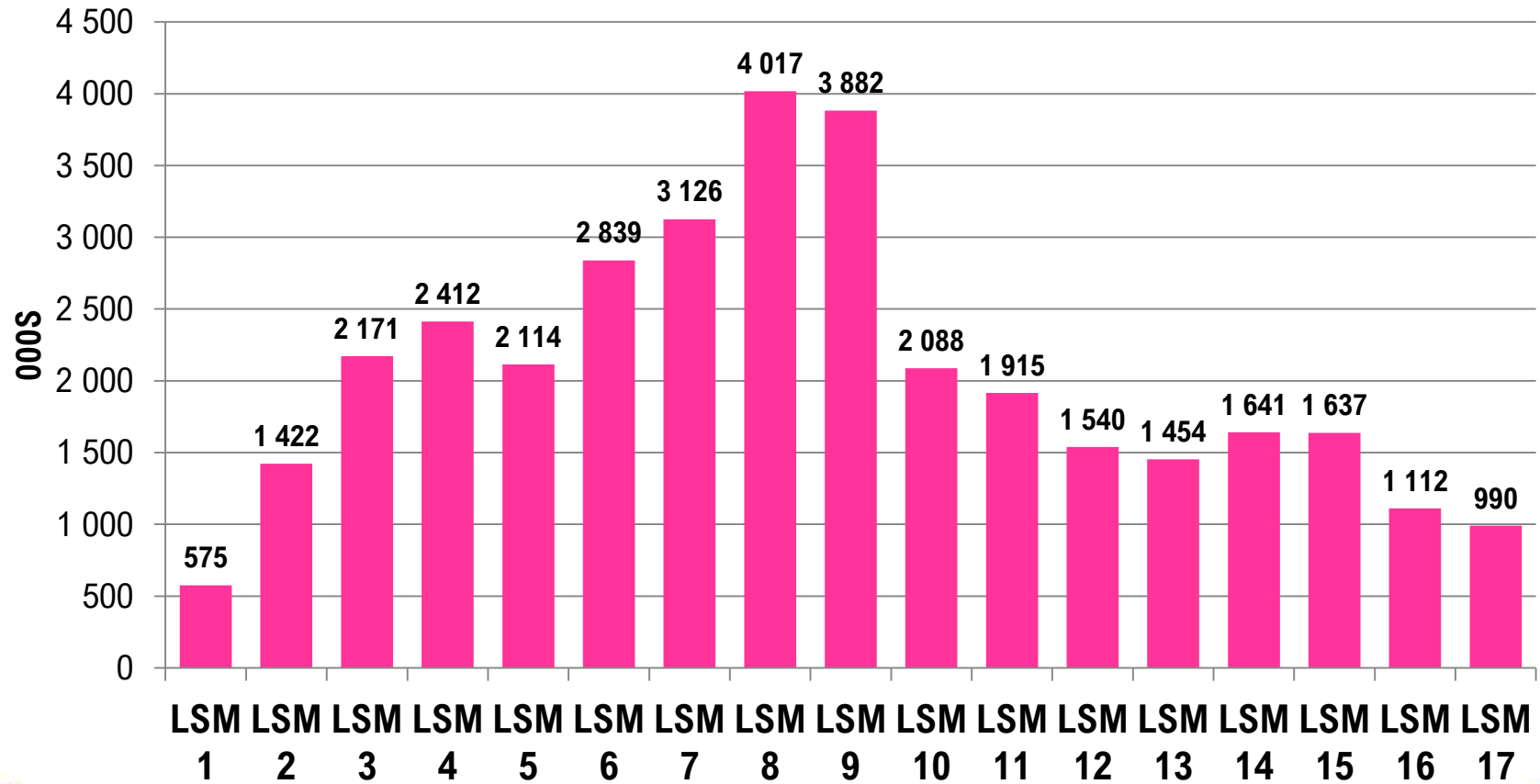
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LSM EXTENSIONS 2013



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2013-2015: THE 17 LSM MODEL



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**2013-2015:
AMPS
THE 17 LSM
MODEL?**

Survey : AMPS 2015 Main Branded AB (Jan 2015-Dec 2015) (A15AB)

Category Filters None Apply Clear

Selection Tree

- Domestic Worker
- Education
- Gender
- Household status
- Decision maker
- Income
- Language
- Lifestages
- Living standard measurements
 - SAARF universal LSM
 - LSM scores
 - LSM Extensions
 - SAARF LSM (93 Weights)
 - SAARF Pyramid
 - LSM scores (93)
 - Meter universe
 - No. of people in HH

Selection Decision

SAARF universal LSM

- Universal LSM 1
- Universal LSM 2
- Universal LSM 3
- Universal LSM 4
- Universal LSM 5
- Universal LSM 6
- Universal LSM 7
- Universal LSM 8
- Universal LSM 9
- Universal LSM 10

LSM Extensions

- LSM Group 4 - Low
- LSM Group 4 - High
- LSM Group 5 - Low
- LSM Group 5 - High
- LSM Group 6 - Low
- LSM Group 6 - High

Reset Clear

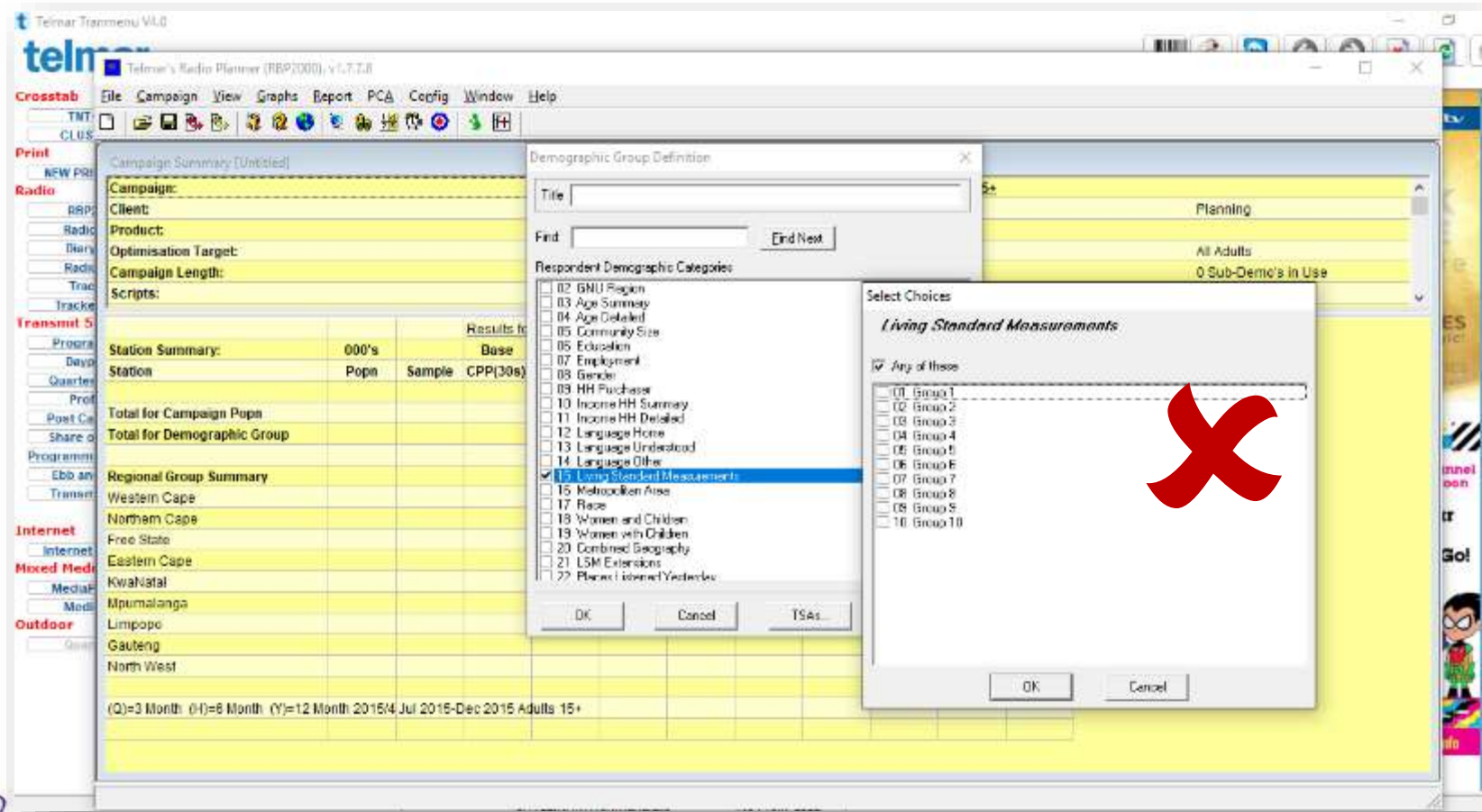
☒ Use short titles

Add to: Tables Columns Rows

0 Tables 17 Columns 0 Rows

	Title
1	Universal LSM 1
2	Universal LSM 2
3	Universal LSM 3
4	LSM Group 4 - Low
5	LSM Group 4 - High
6	LSM Group 5 - Low
7	LSM Group 5 - High
8	LSM Group 6 - Low
9	LSM Group 6 - High
10	LSM Group 7 - Low
11	LSM Group 7 - High
12	LSM Group 8 - Low
13	LSM Group 8 - High
14	LSM Group 9 - Low
15	LSM Group 9 - High
16	LSM Group 10 - Low
17	LSM Group 10 - High
18	

SAARF RAMS 2015



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TAMS

Transmit 5.0.20.3 - [Programmes - Untitled]

File Edit Schedules Layout Window Rep...

Transmit Period Audience Station

Module Define Audiences

Programmes

File

New

Open

Save

Close

Analysis

Close

Refresh

Run

Build

Print

Actuals

Show Actuals

Show Plan

2018 FIFA Official Br

Non Standard Audiences

Title	Code	Title	Code	Title	Code	Title	Code
Age		Race		Education			
All Individuals 4+ years	ALL	Inc A	IA	Lower Education	EDLO		
Adults 15+ years	ADS15	Inc B	IB	Higher Education	EDHI		
Children 4-14 years	CHL15	Inc C	IC				
		Inc D	ID	Access			
		Inc nnnn-nnnn	INC	Digital DSTV	DS		
Gender				No Digital DSTV	NDS		
Males 4+ years	MAL	Women's Status		Analogue Mnet	MNO		
Females 4+ years	FEM	Mothers	MOTH	Top TV	TOP		
Men 15+ years	MEN15	Housewives	HW	Pay TV	PAY		
Women 15+ years	WOM15	Non-Housewives	NHW	Free to Air	FTA		
Boys 4-14 years	BOY15			Mnet (inc DSTV)	MN		
Girls 4-14 years	GIRL15	Household Status		No Mnet (inc DSTV)	NMN		
		Household Purchg	HPUR				
Age effective 9/5/2010		Wholly Resp Purchg	WPUR	VCR			
Aged 4-6	AGE4	Partly Resp Purchg	PPUR	With VCR	VCR		
Aged 7-10	AGE7	Not Resp Purchg	NPUR	Without VCR	NVCR		
Aged 11-14	AGE11						
Aged 15-24	AGE15	Living Standards Measure		PVR			
Aged 25-34	AGE25	LSM 1	LSM1	With PVR	PVR		
Aged 35-49	AGE35	LSM 2	LSM2	Without PVR	NPVR		
Aged 50+	AGE50	LSM 3	LSM3				
Aged 50-64	AGE5064	LSM 4	LSM4	Province			
Aged 65+	AGE65	LSM 5	LSM5	Western Cape	WC		
Age n-n	AGE	LSM 6	LSM6	Northern Cape	NC		
		LSM 7	LSM7	Free State	OFS		
Old Income		LSM 8	LSM8	Eastern Cape	EC		
Higher Income	HINC	LSM 9	LSM9	Kwazulu/Natal	KN		
Middle Income	MINC	LSM 10	LSM10	Mpumalanga	ET		
Lower Income	LINC	LSM n-n	LSM	Limpopo	NT		

Selected Non Standard Audience Mnemonic

Non Standard Audience Description

Using mnemonic Using Title

Accept and Continue

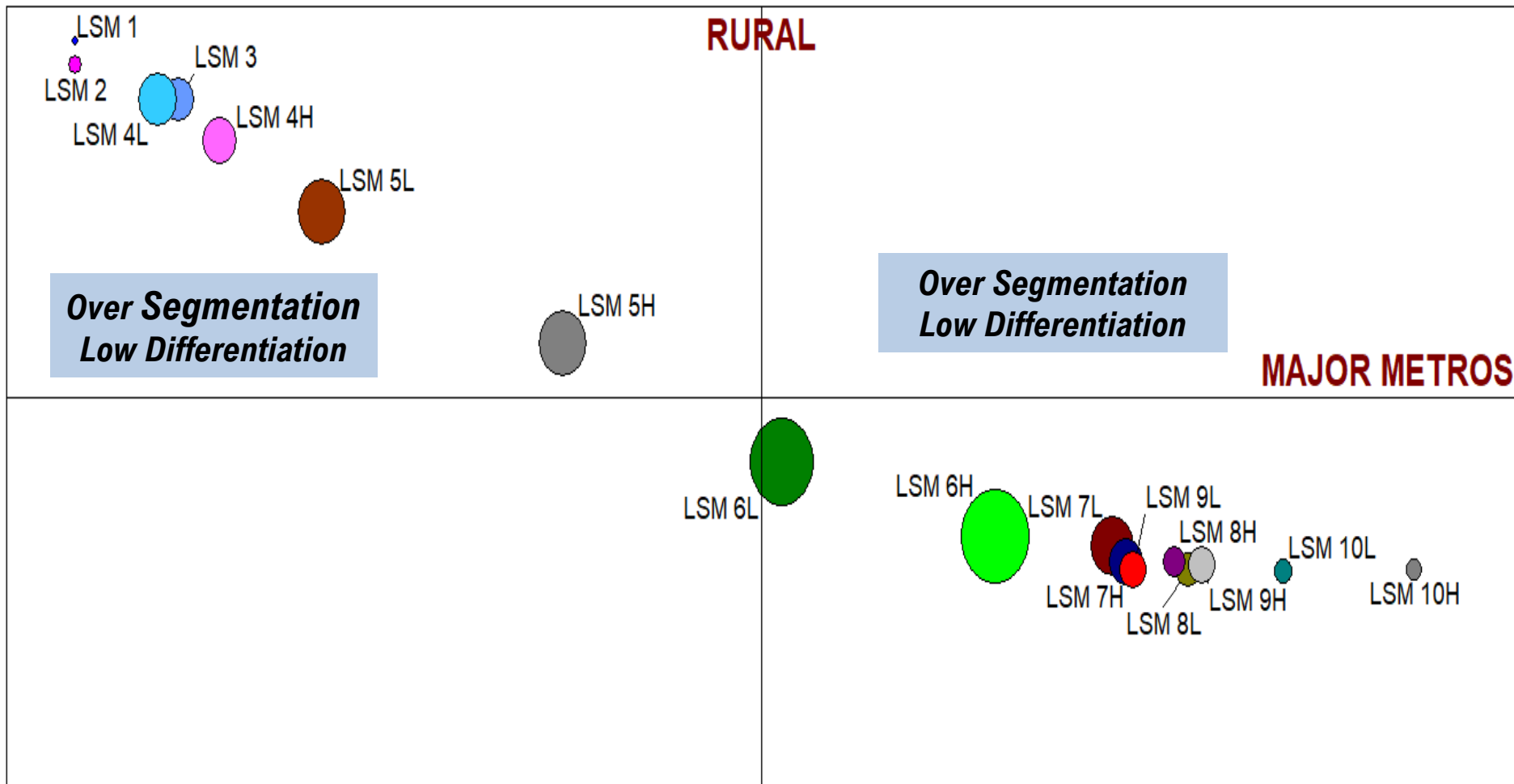
Show Income Breakdown

Clear Coding

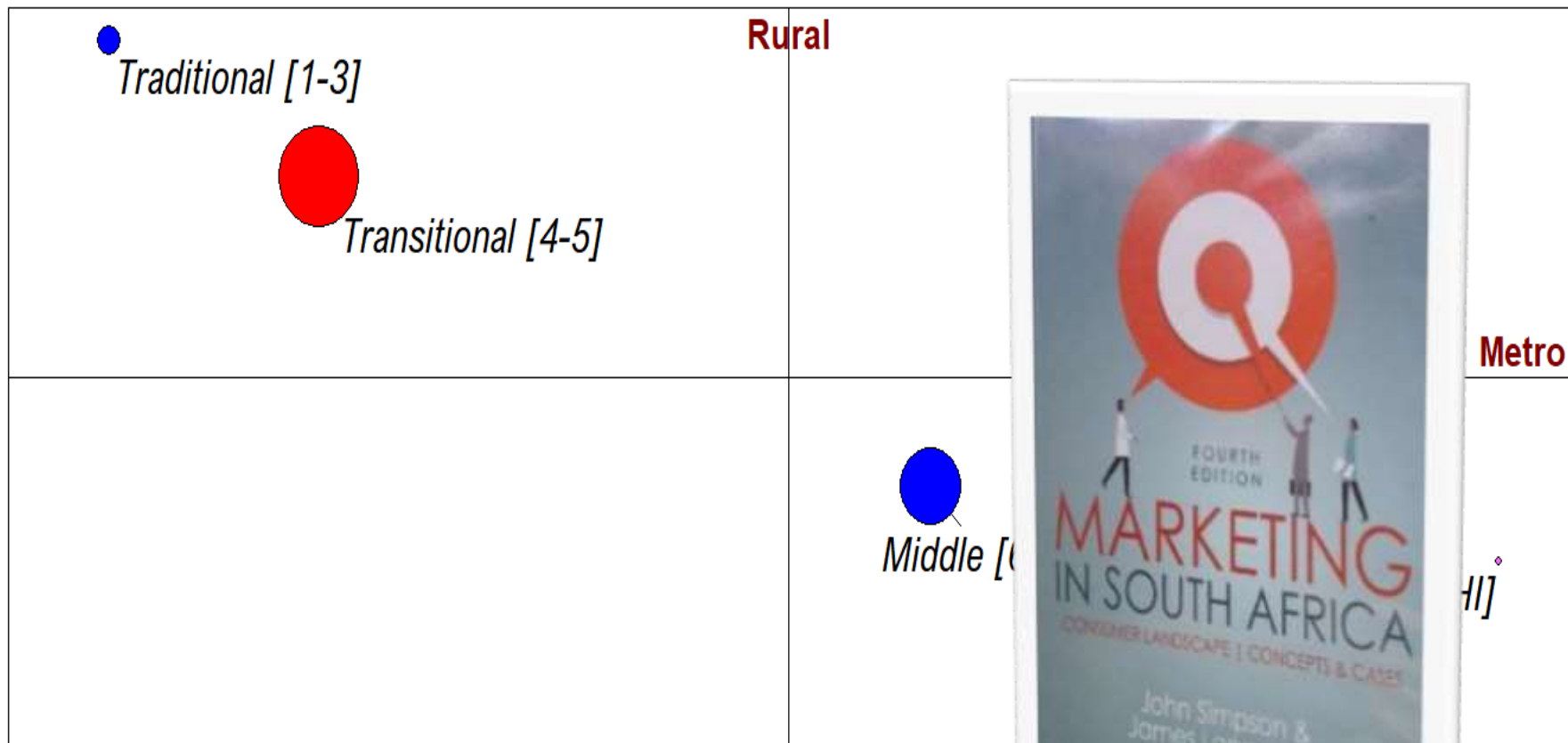
Cancel OK

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LSM DISTRIBUTION



2008 - 2015: Muller Cluster Model



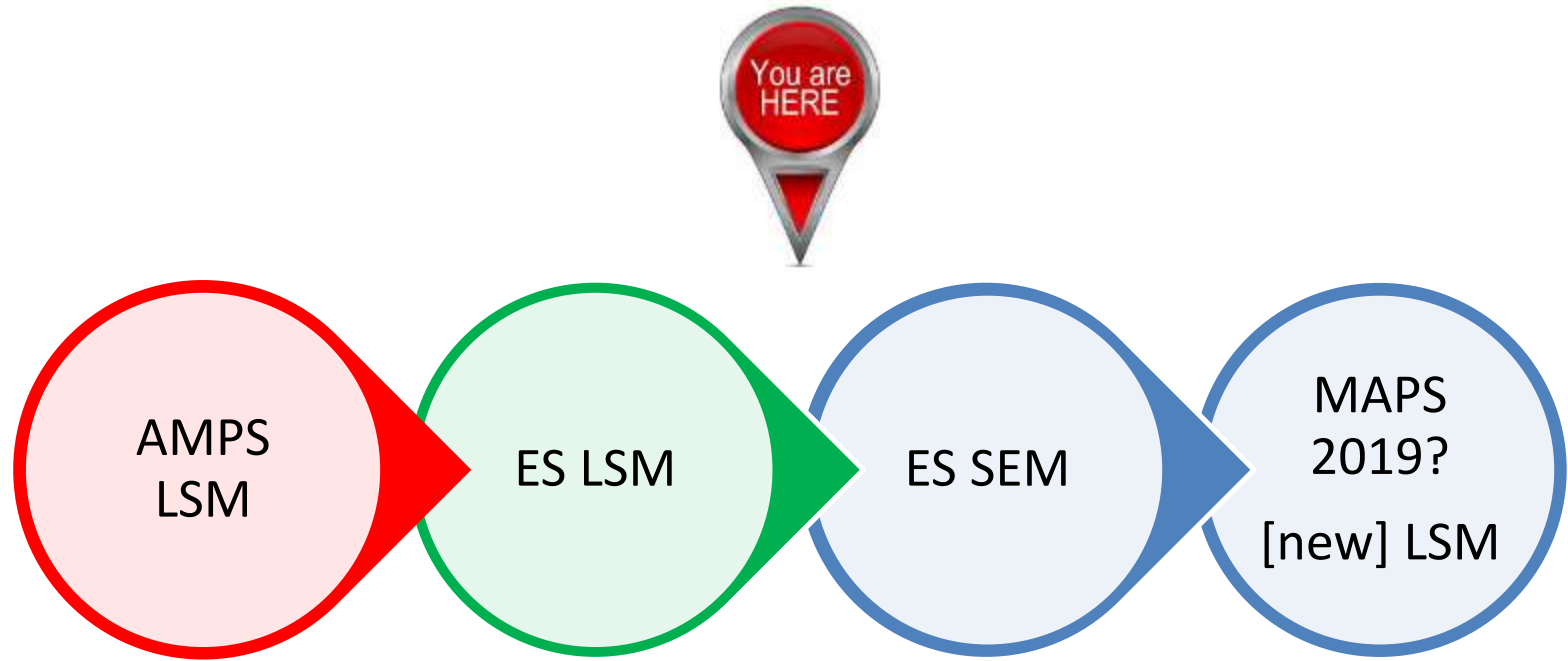
AMPS 2015_Reweighted

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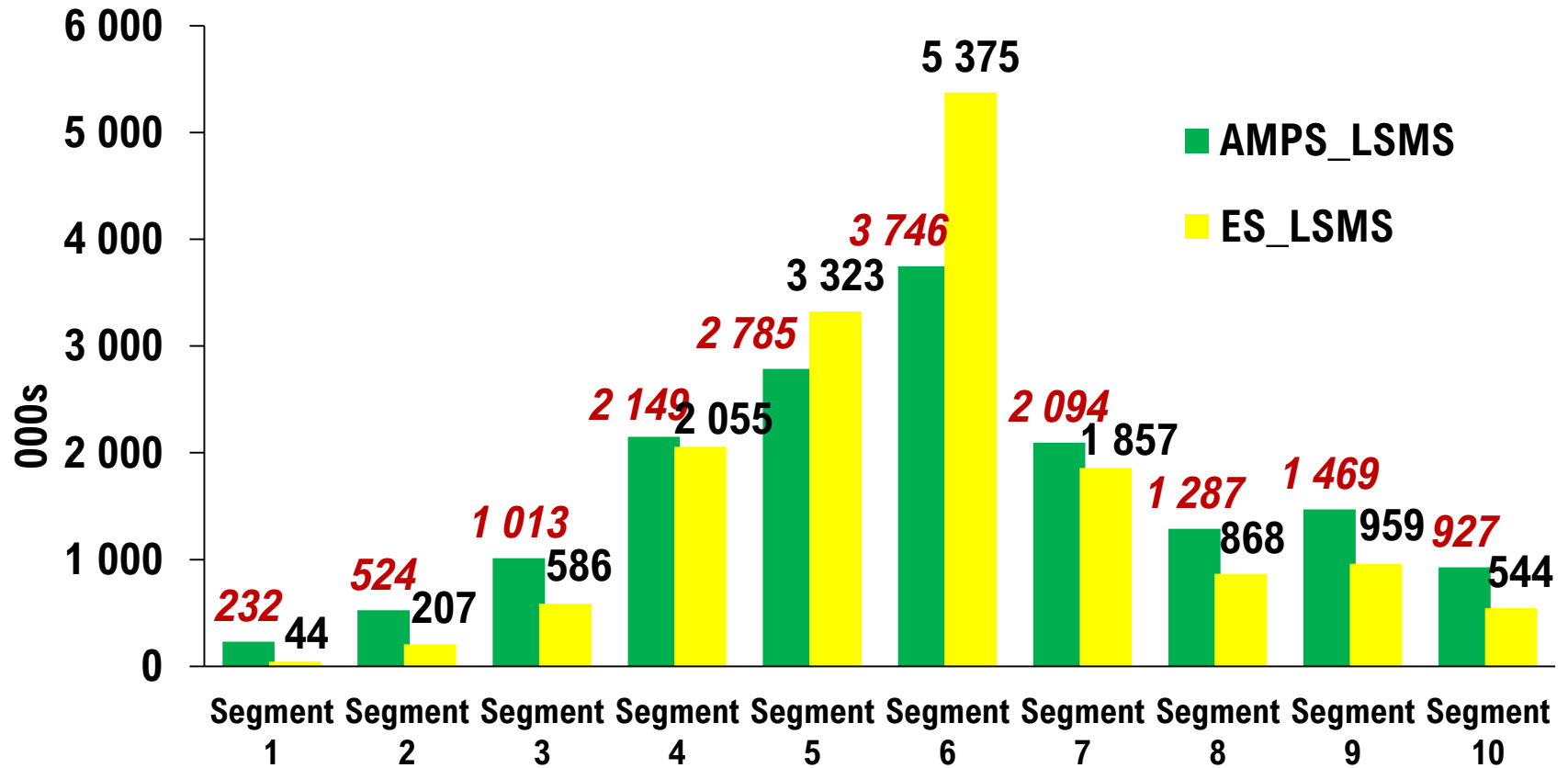
**THE TYPICAL
SOCIO
ECONOMIC
SEGMENTATION
MODEL**

Grade	Social class	Income earner's occupation
A	Upper middle class	Higher managerial, administrative or professional
B	Middle class	Intermediate managerial, administrative or professional
C1	Lower middle class	Supervisory or clerical and junior managerial, administrative or professional
C2	Skilled working class	Skilled manual workers
D	Working class	Semi and unskilled manual workers
E	Non-working class	Casual or lowest grade workers, pensioners, and others who depend on the welfare state for their income

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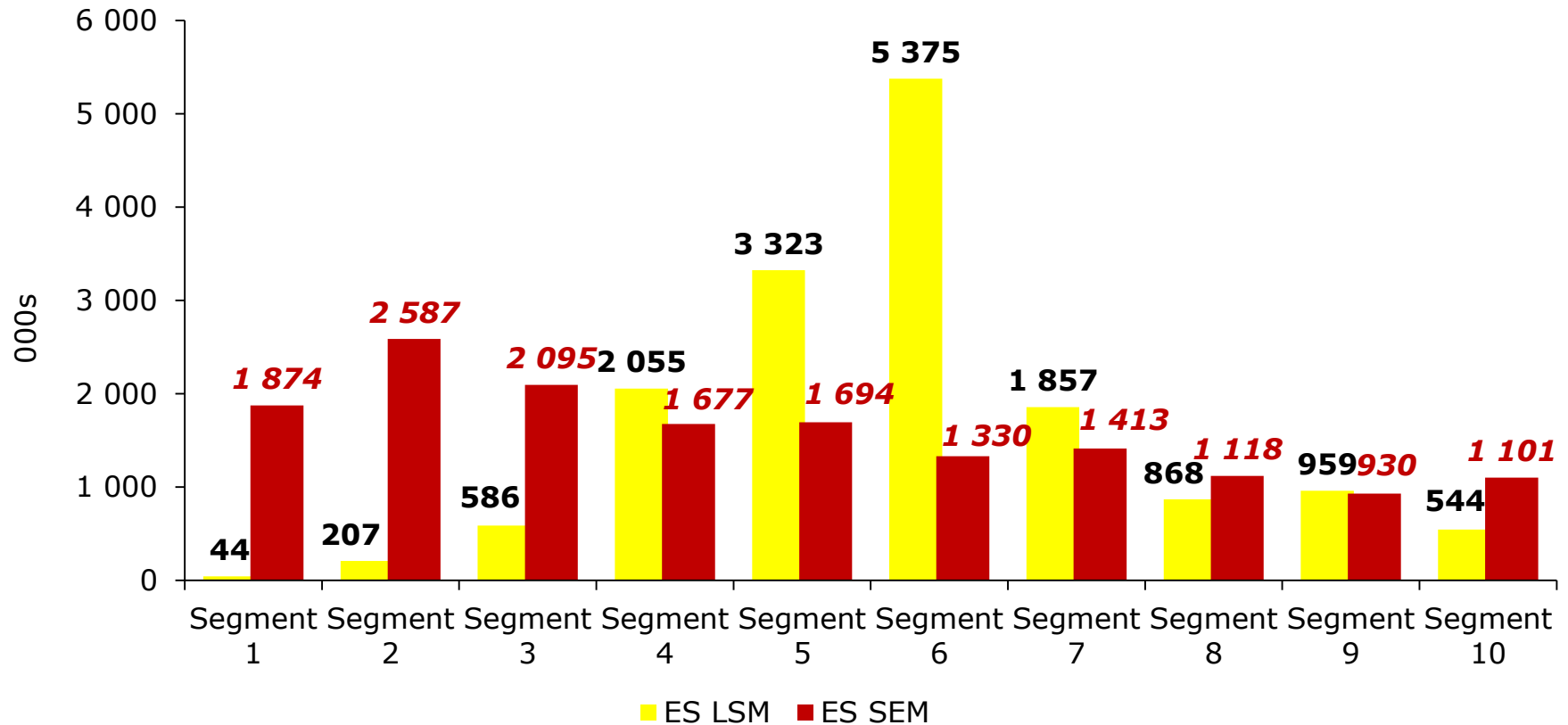


AMPS_LSM & ES_LSM: HH DISTRIBUTION



Saudan

HH DISTRIBUTION: ES_LSM v ES_SEM



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AMPS v ES SAMPLING FRAMEWORK

AMPS (unweighted)



Black	53%
Coloured	15%
Indian / Asian	7%
White	25%

Source: AMPS 2015B (Household level)

ES (unweighted)



Black	82%
Coloured	9%
Indian / Asian	2%
White	6%

Source: ES Jul-Aug 2016 (n=4,535)

IHS Population

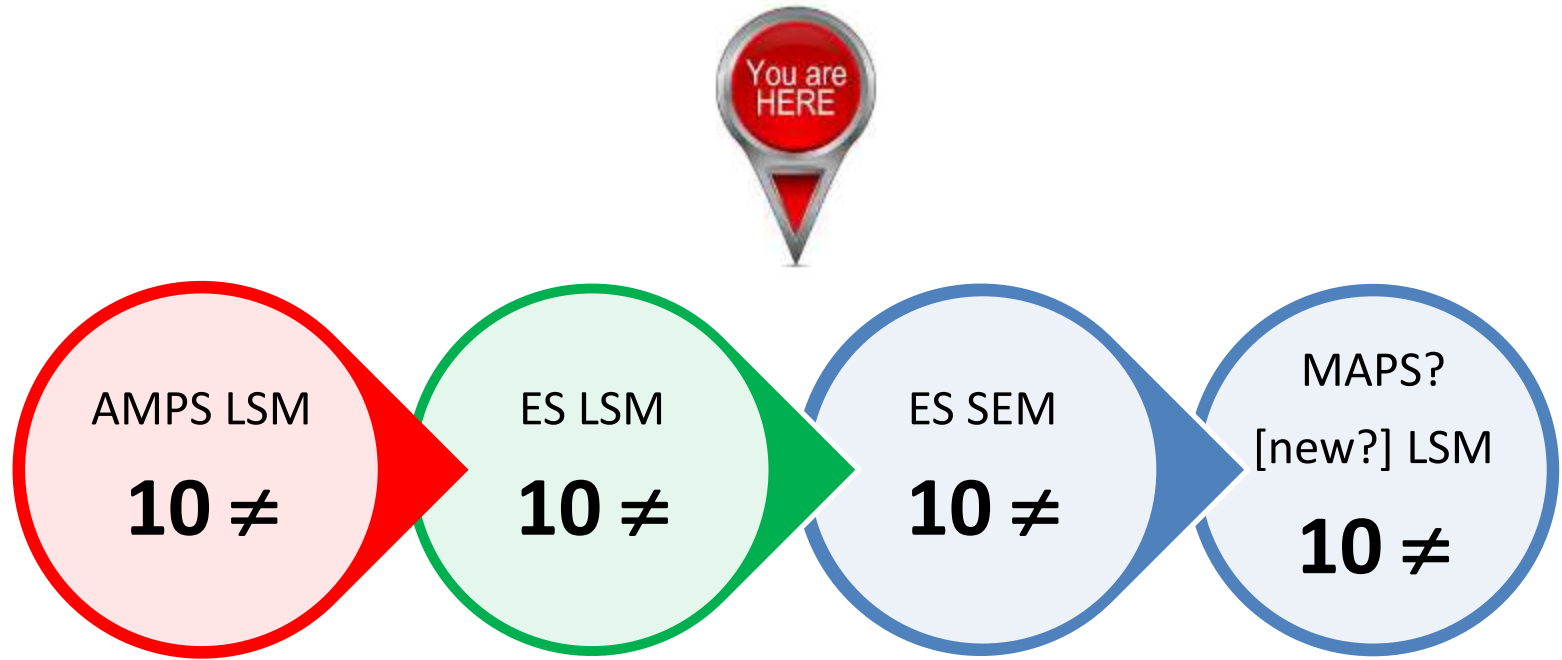


Black	79%
Coloured	7%
Indian / Asian	3%
White	11%

Source: IHS Household Population estimates Dec 2015

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LSM TO SEM: OPTIMAL SEGMENTS FOR IMPROVED USABILITY?

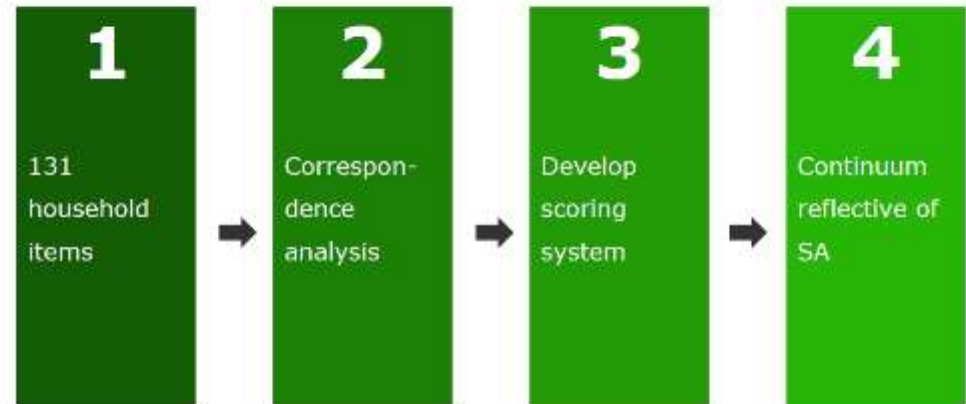


“

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

With flexibility to be applied to any media and marketing study in SA

THE SEM DEVELOPMENT PROCESS



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 VARIABLE & LSM VARIABLES...

1. Post office nearby
2. Police station nearby
3. ***Built in kitchen sink***
4. ***Home security service***
5. ***Motor car***
6. ***Deep freezer FS***
7. ***Microwave***
8. ***Floor polisher/ Vacuum***
9. ***Washing machine***
10. Flooring materials
11. ***Water source***
12. ***Type of toilet***
13. Roof material
14. Number of 'sleeping rooms'

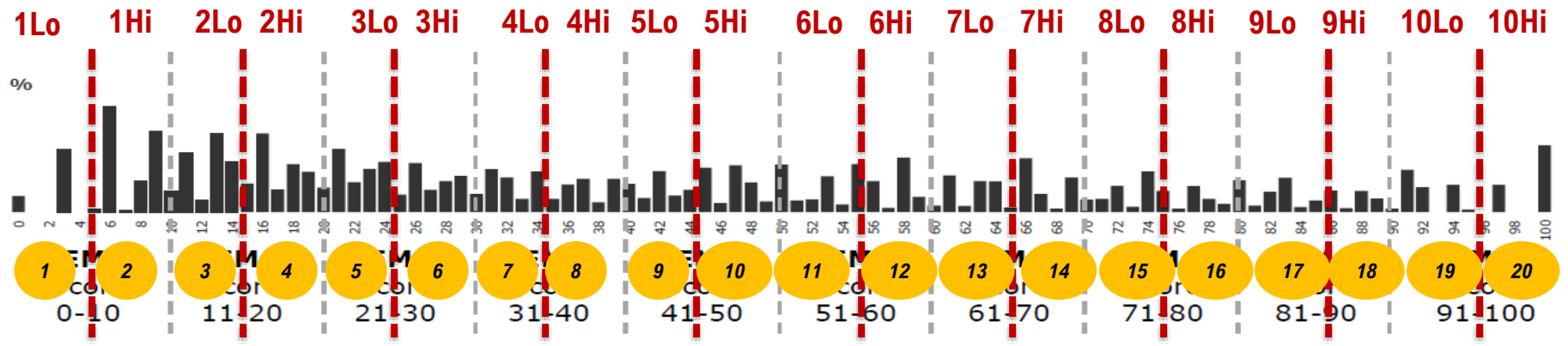
9/14

THE MORE
THINGS CHANGE...



THE SEM CONTINUUM

ES ✓ RAMS ✓ PAMS ✓
TAMS ✗



Low socio-economic living → High socio-economic living

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

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

PROPOSED SUPERGROUPS & CLUSTERS BASED ON WHERE CHANGES IN LIFESTYLE CAN BE NOTED FROM SEGMENT PROFILING

SEM 1 Low	SEM 1 High	SEM 2 Low	SEM 2 High	SEM 3 Low	SEM 3 High	SEM 4 Low	SEM 4 High	SEM 5 Low	SEM 5 High	SEM 6 Low	SEM 6 High	SEM 7 Low	SEM 7 High	SEM 8 Low	SEM 8 High	SEM 9 Low	SEM 9 High	SEM 10 Low	SEM 10 High
0-5	6-10	11-15	16-20	21-25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61-65	66-70	71-75	76-80	81-85	86-90	91-95	96-100



SUPERGROUPS

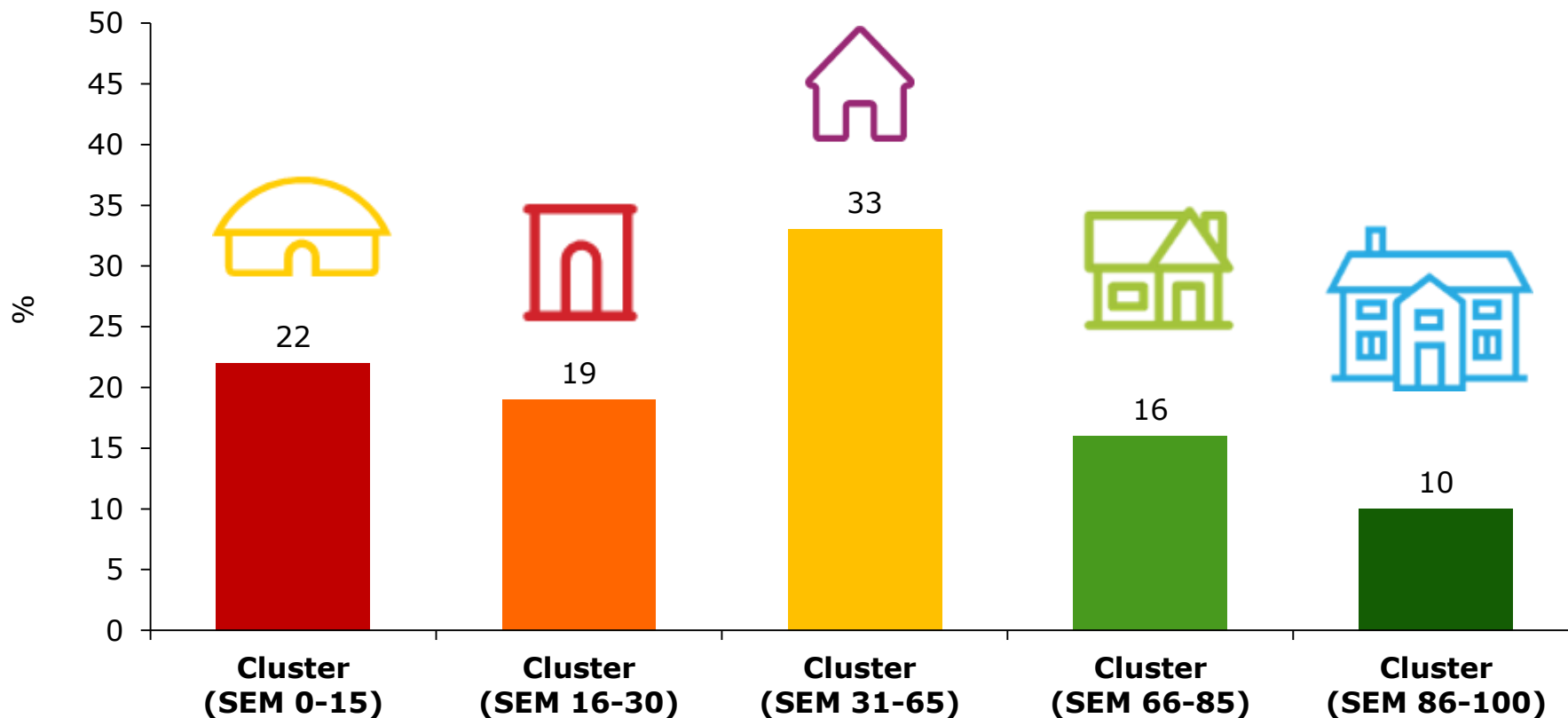
0-30	31-65	66-100
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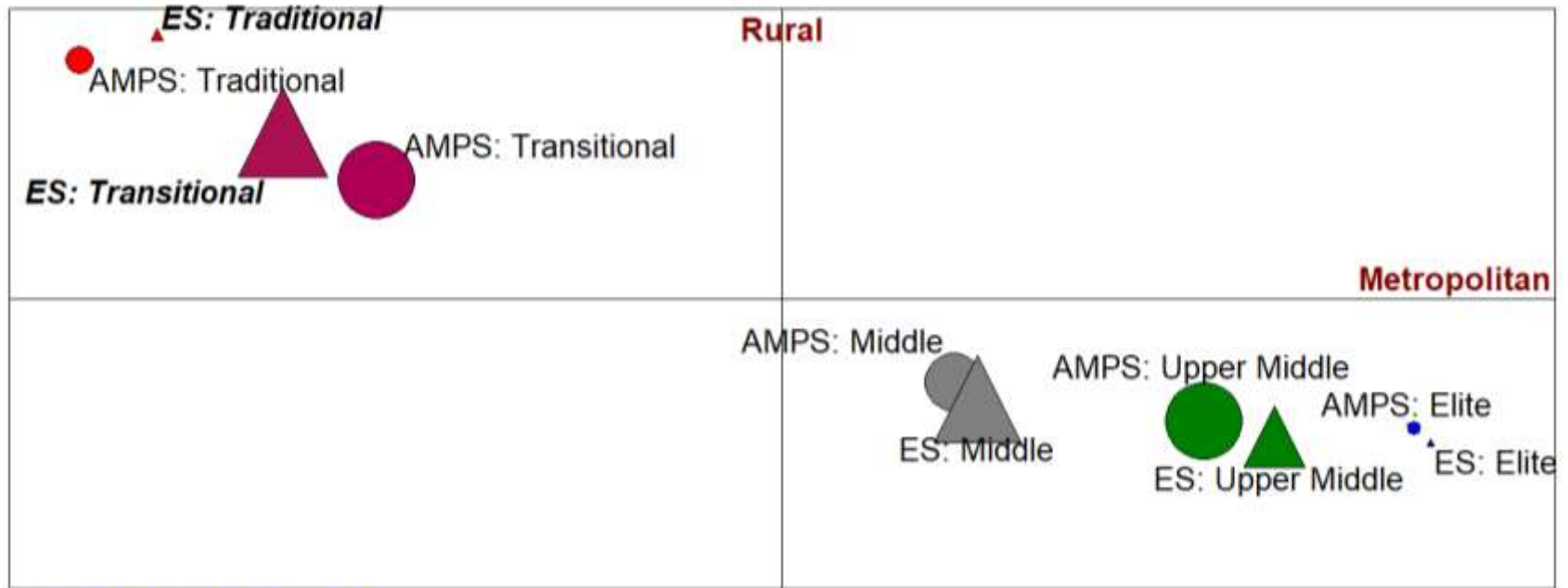
CLUSTERS

0-15	16-30	31-65	66-85	86-100
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From Supergroups to Clusters



SEM CLUSTERS IN MULLERSPEAK



AMPS 2015 ABRW v ES 2017 BA

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SEGMENT ON CATEGORY & PLAN ON BRAND



SEM 1 Low	SEM 1 High	SEM 2 Low	SEM 2 High	SEM 3 Low	SEM 3 High	SEM 4 Low	SEM 4 High	SEM 5 Low	SEM 5 High	SEM 6 Low	SEM 6 High	SEM 7 Low	SEM 7 High	SEM 8 Low	SEM 8 High	SEM 9 Low	SEM 9 High	SEM 10 Low	SEM 10 High
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SEGMENT ON CATEGORY & PLAN ON BRAND



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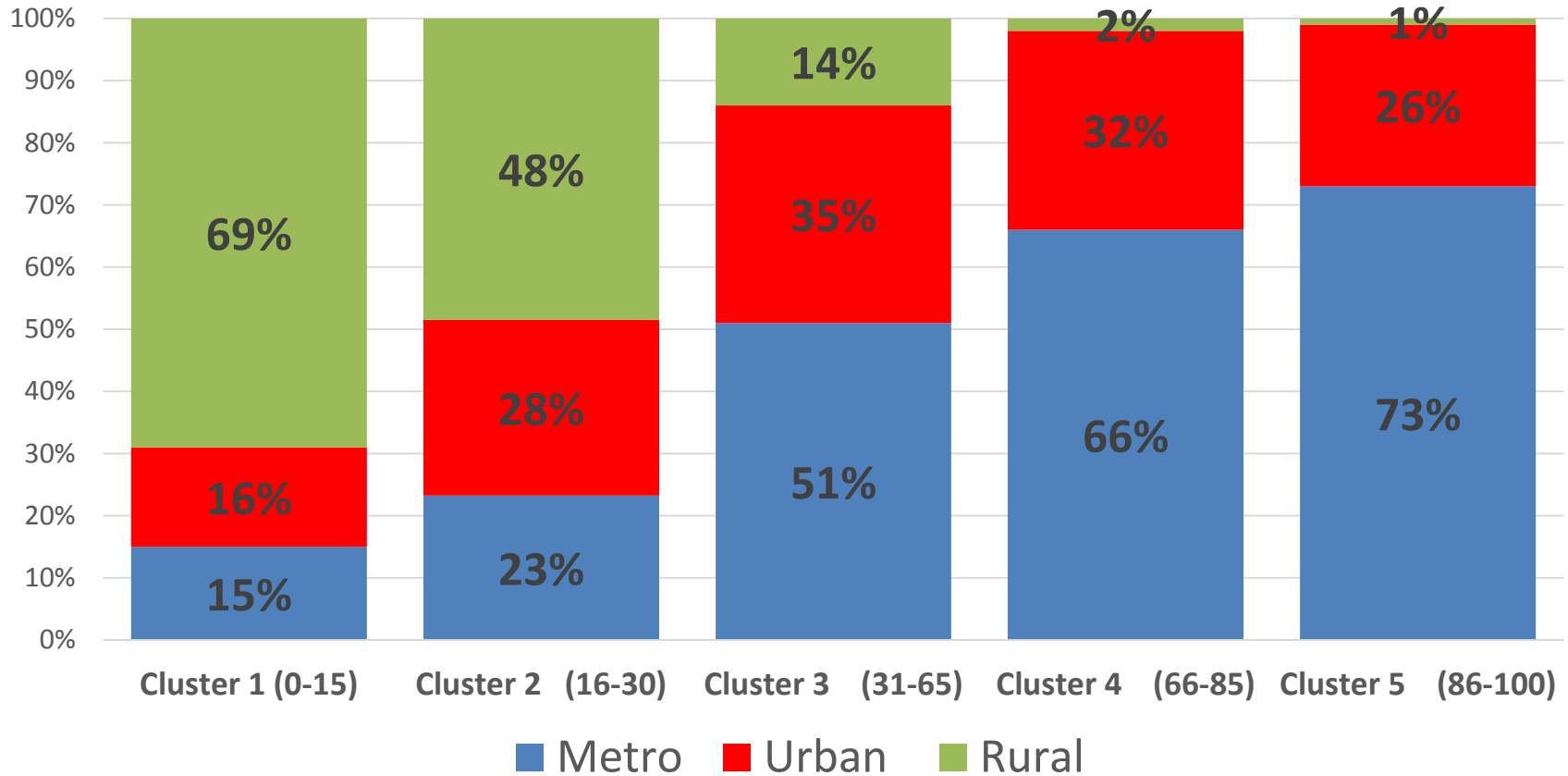
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AMPS_LSM TO ES_SEM

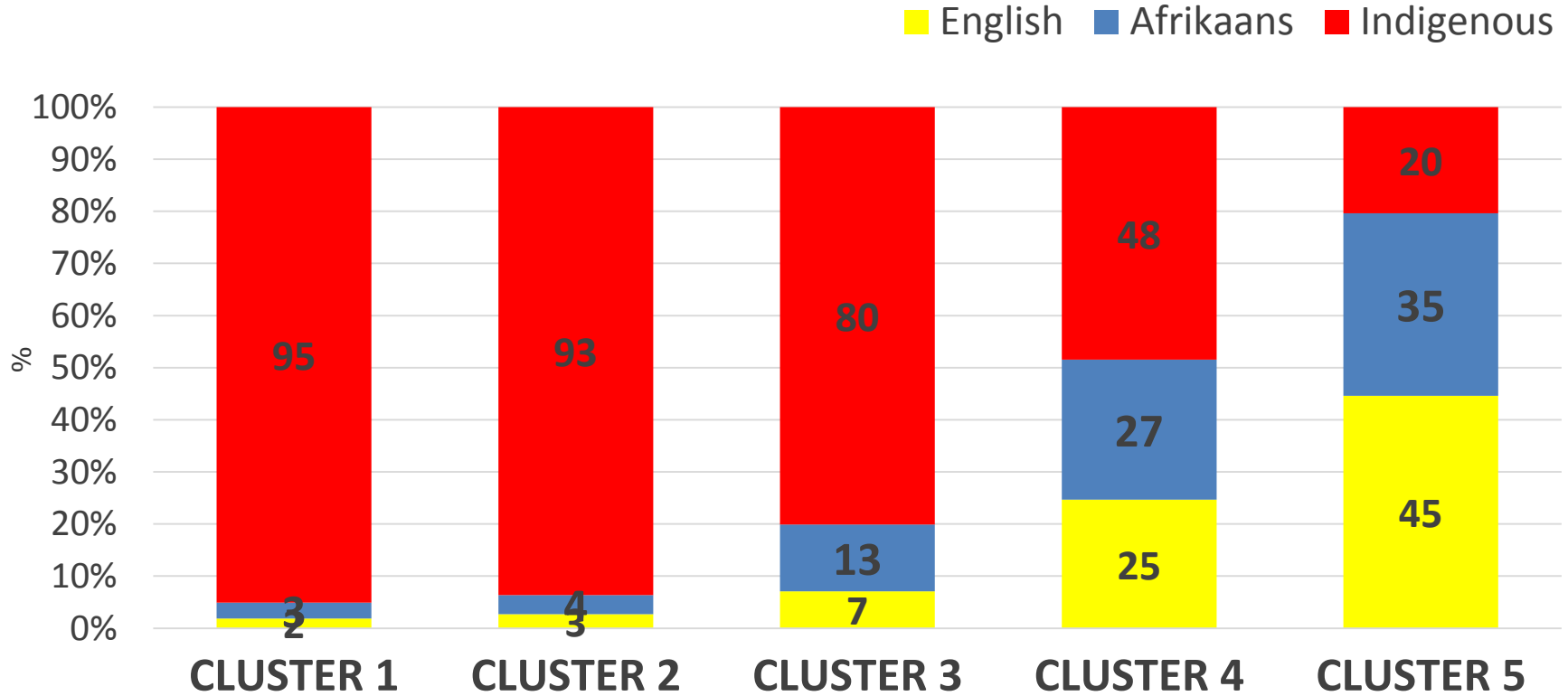
From House to Homes

SEM_CLUSTERS: GEO-COMMUNITY



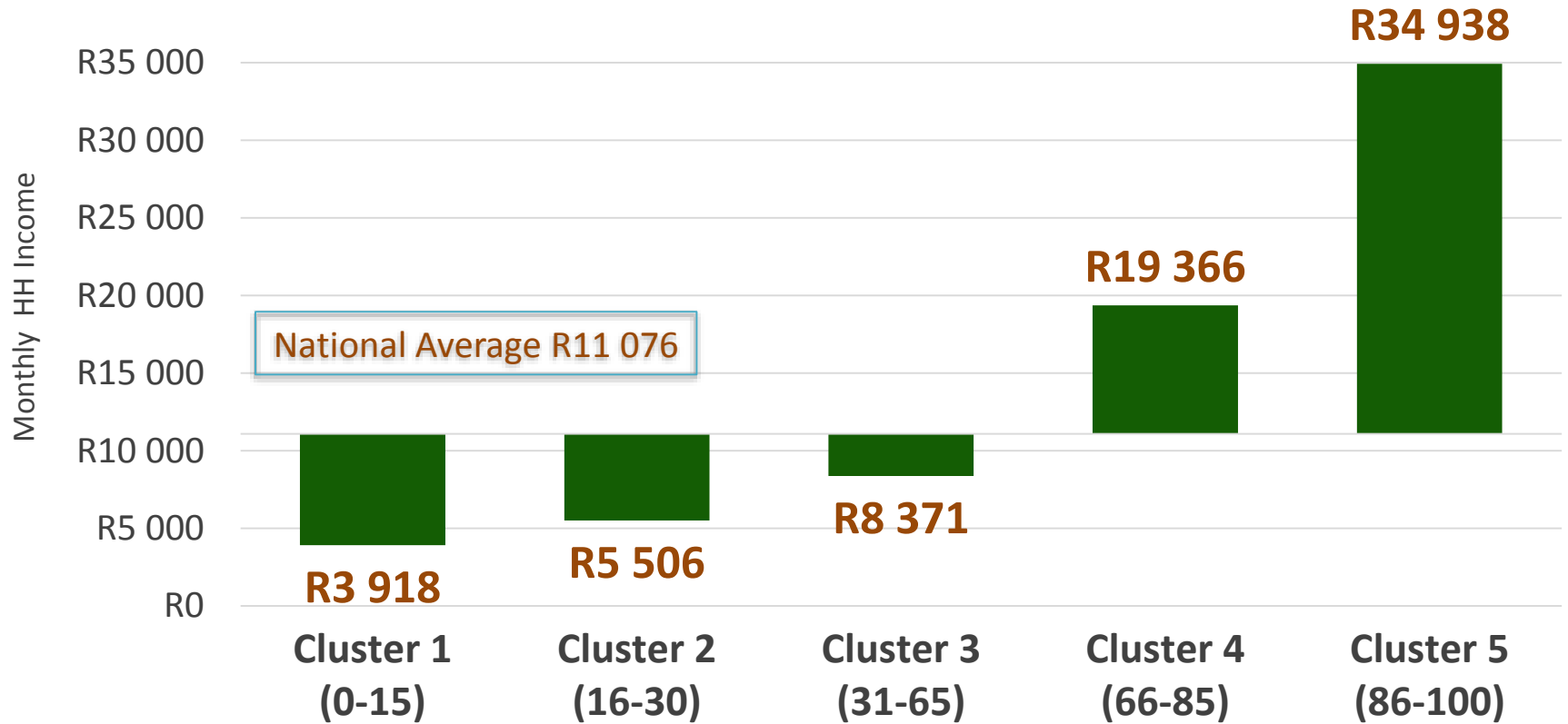
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SEM_CLUSTERS: HOME LANGUAGE



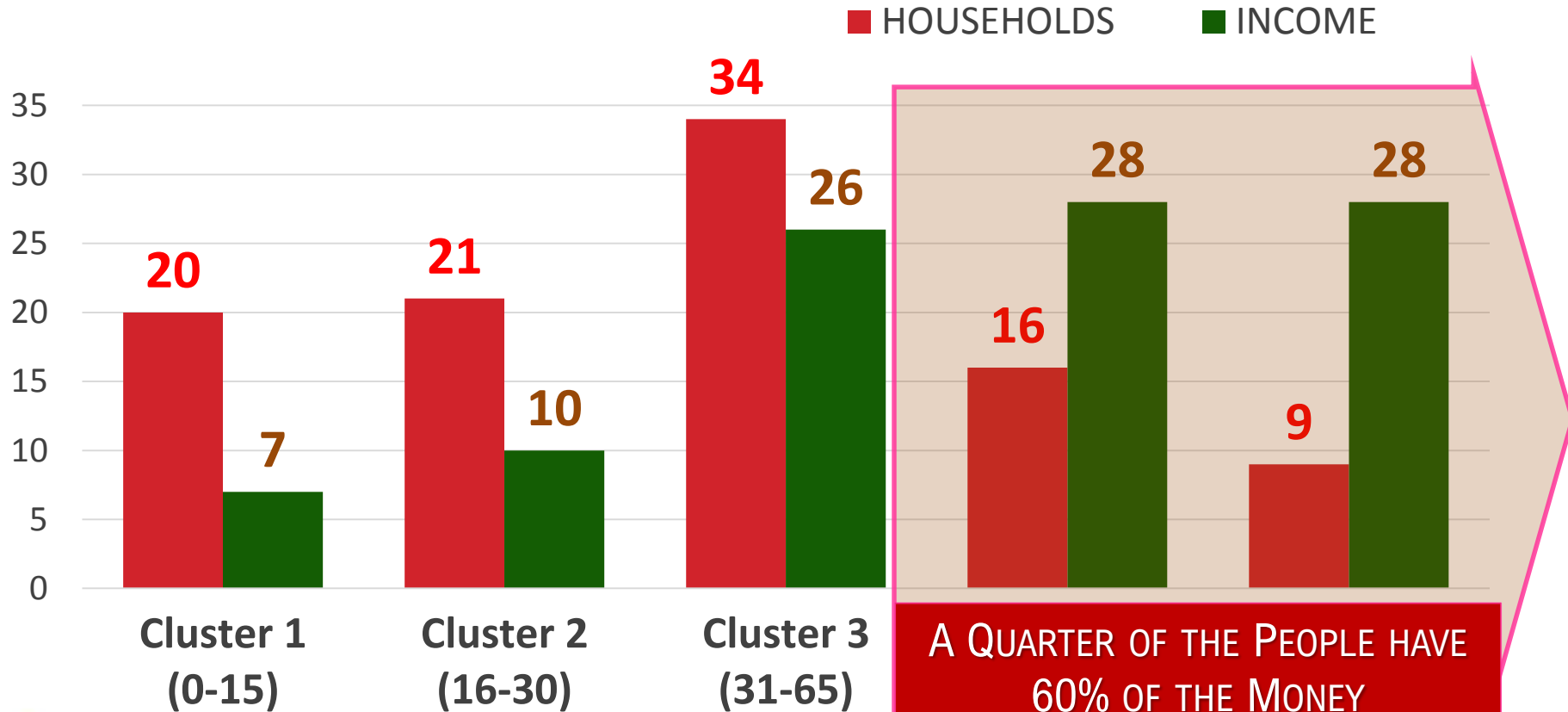
Sordan

SEM_CLUSTERS AVG. HOUSEHOLD INCOME



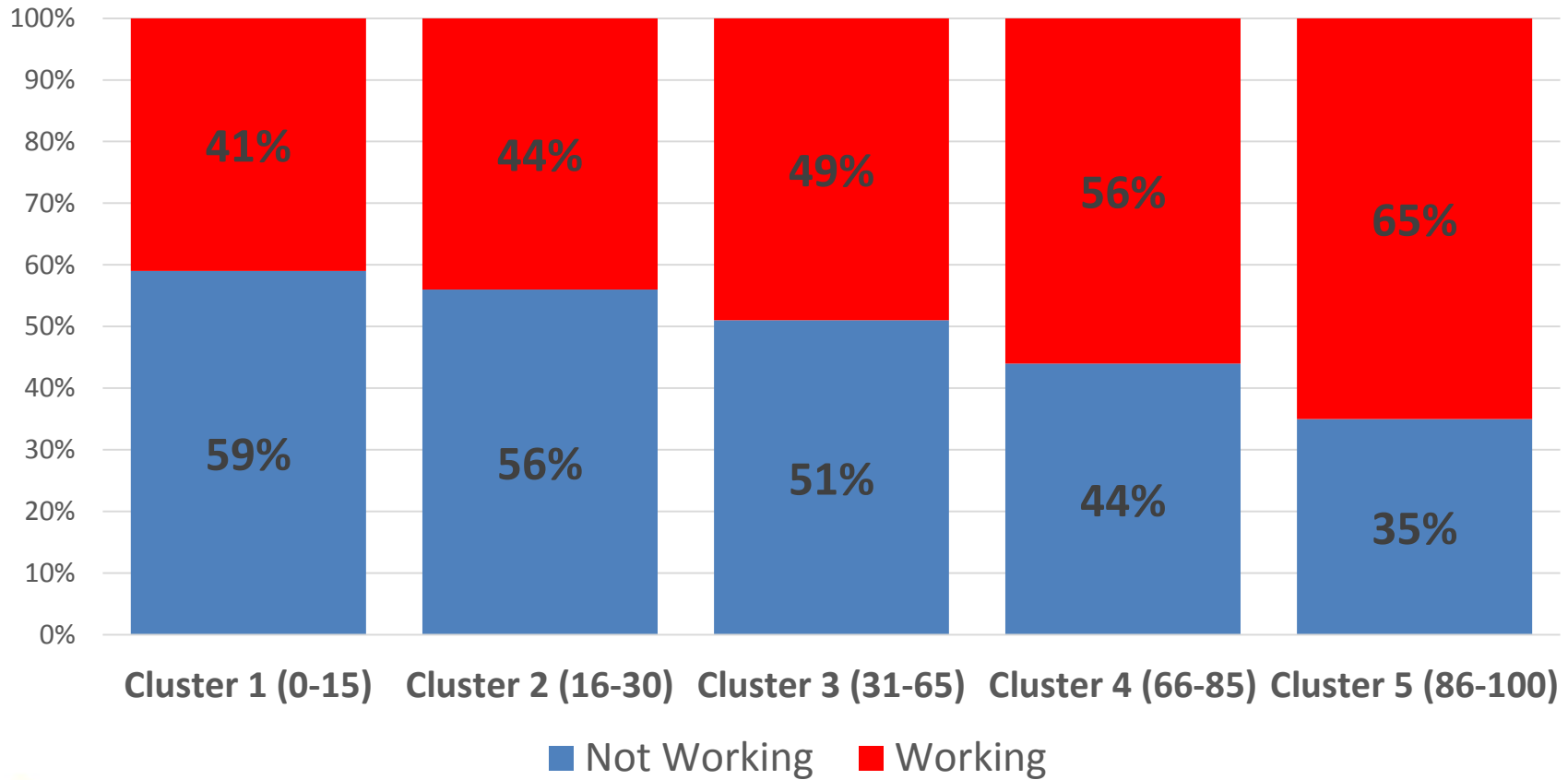
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SEM_CLUSTERS: HOUSEHOLDS % Vs. INCOME %



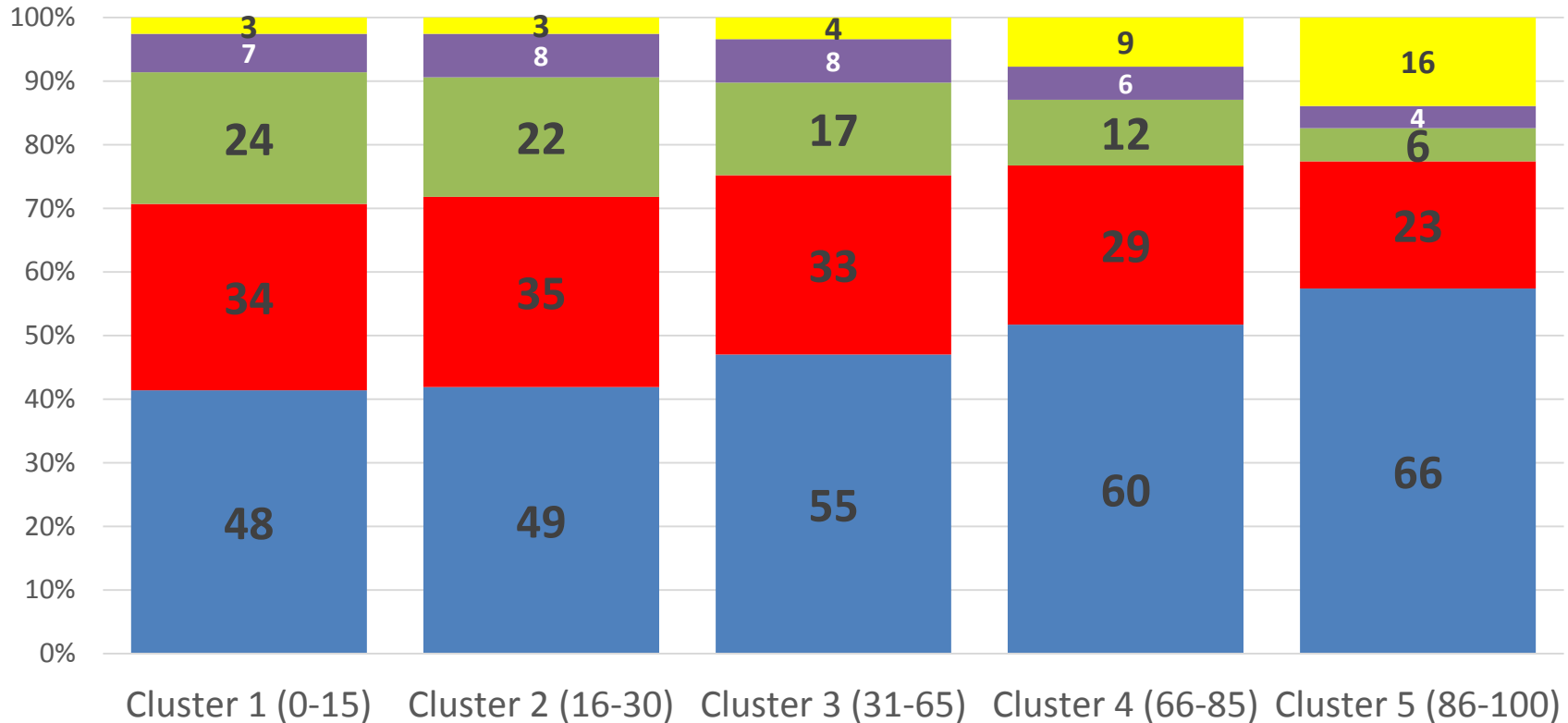
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SEM_CLUSTERS: EMPLOYMENT



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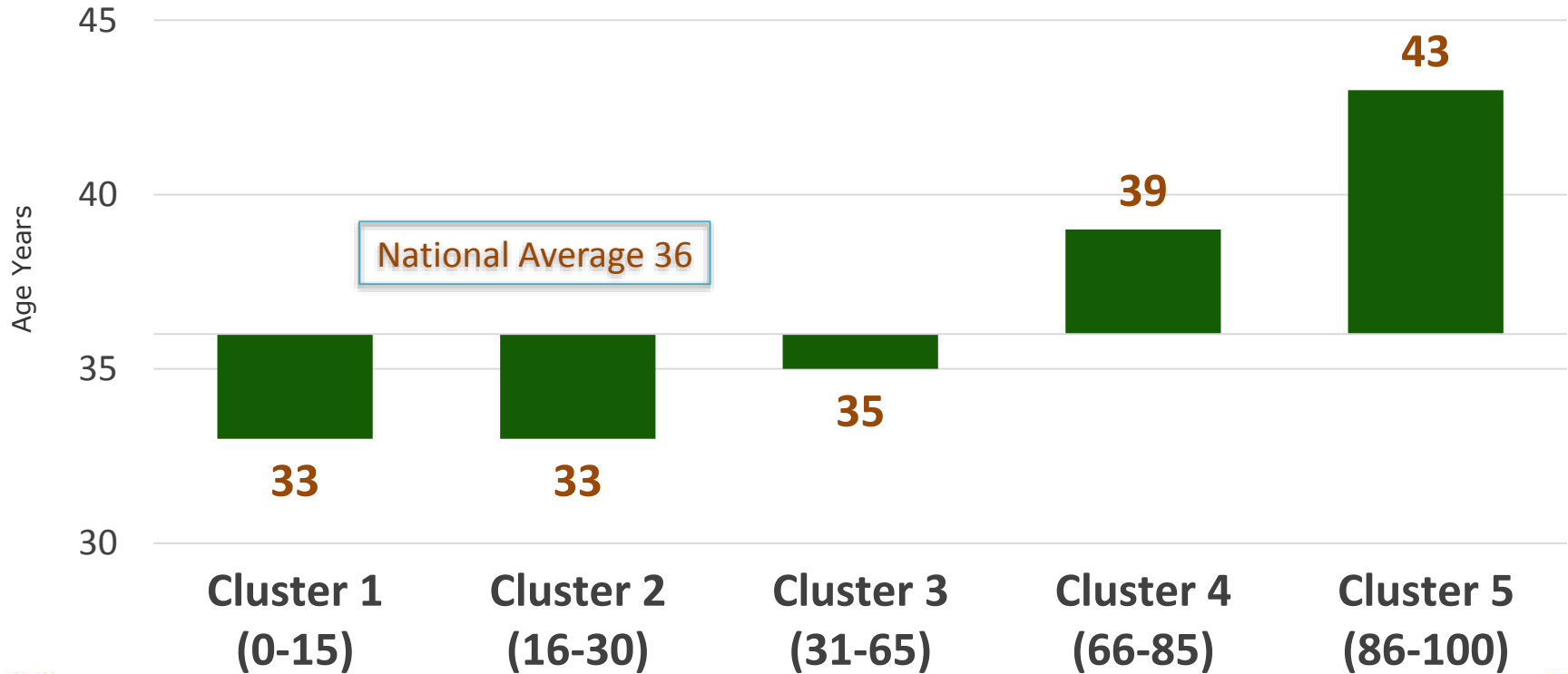
SEM_CLUSTERS: SOURCES OF INCOME



■ Salary & Wages ■ Money Partner/ Family ■ Grants & UIF ■ Informal Trading/ Rentals ■ Pensions RA Investments

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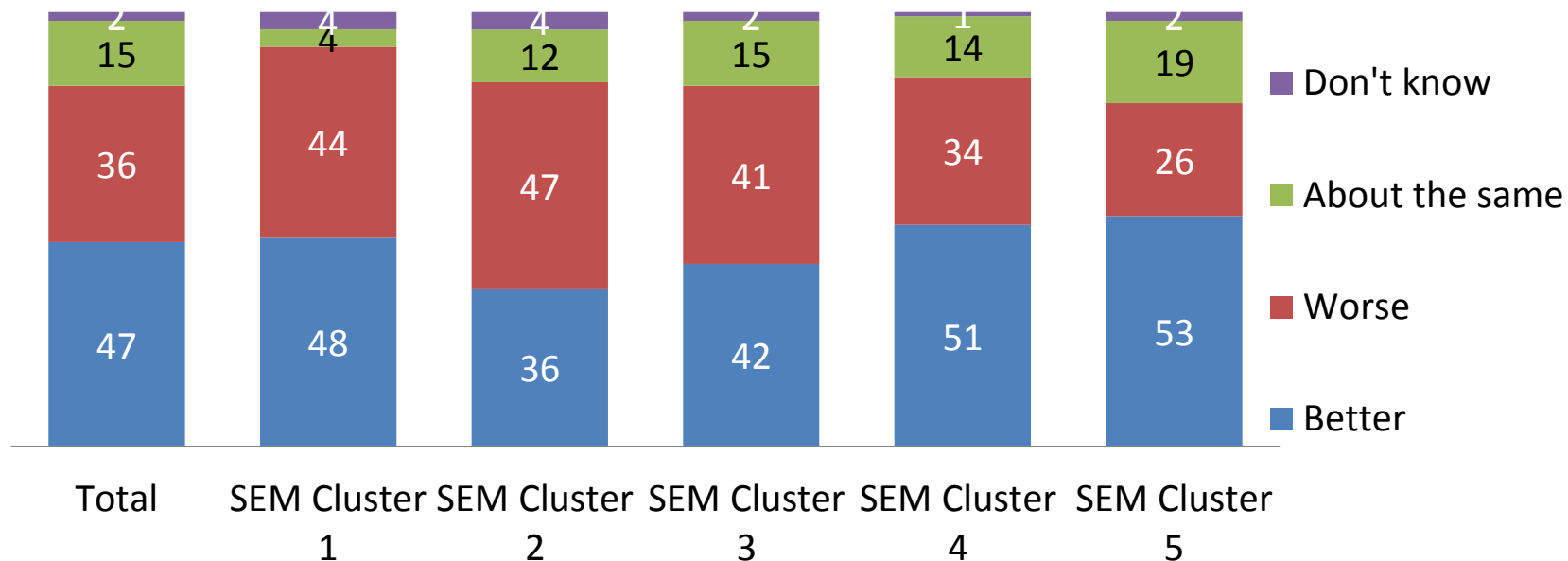
SEM_CLUSTERS: AVERAGE AGE



Sardar

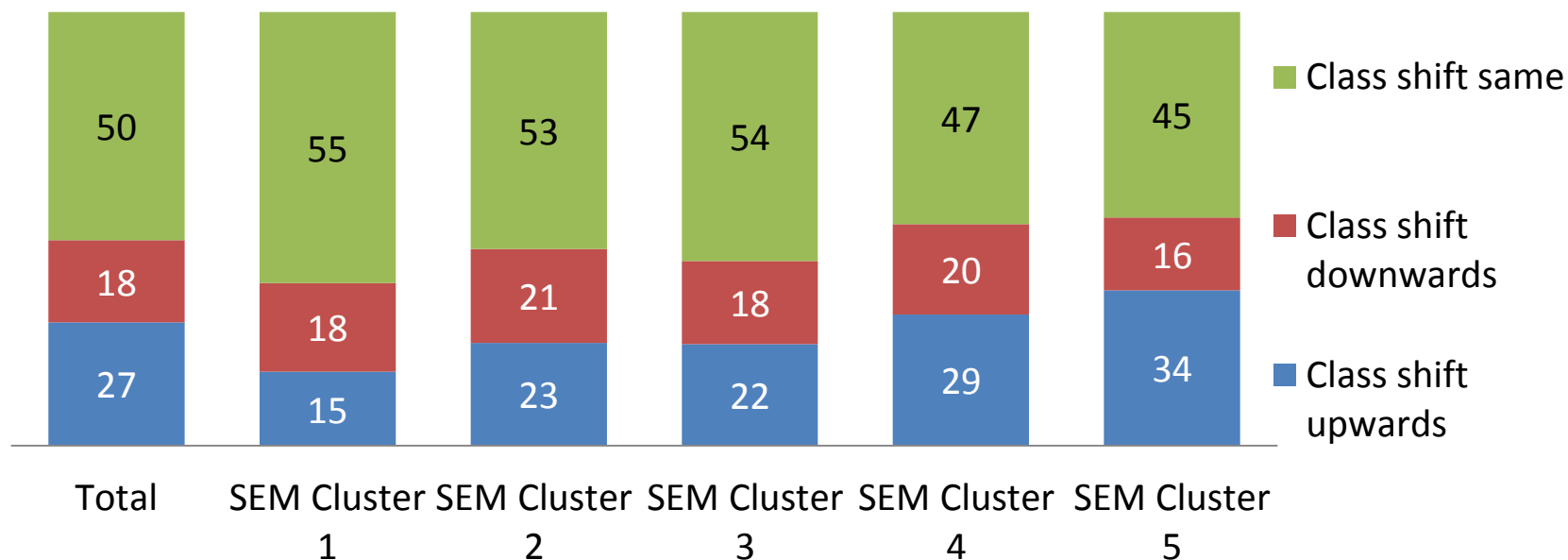
FUTUREFACT: PERCEPTION SOL

Standard of living compared to parents at the same age



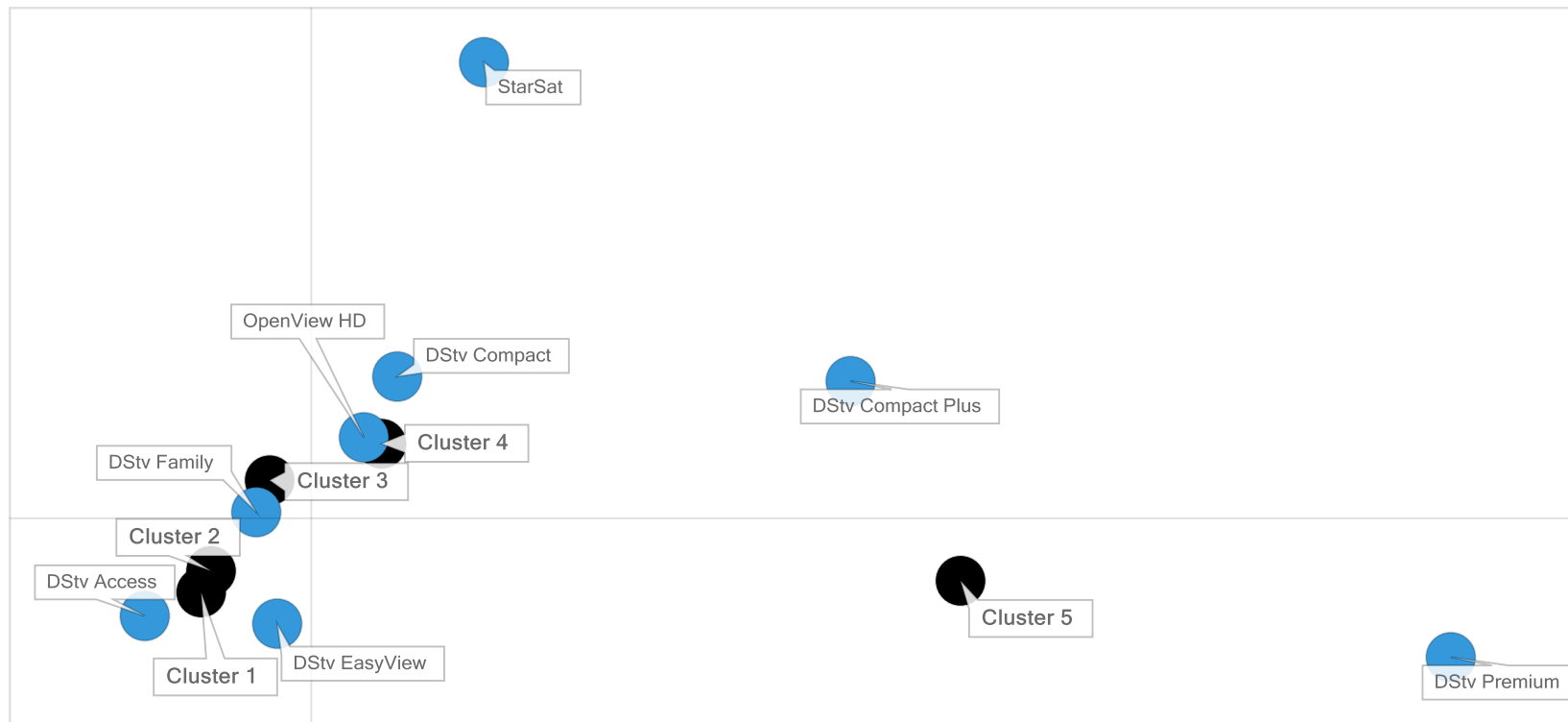
FUTUREFACT: PERCEPTION MOBILITY

Class mobility (shifts compared to parents at the same age)



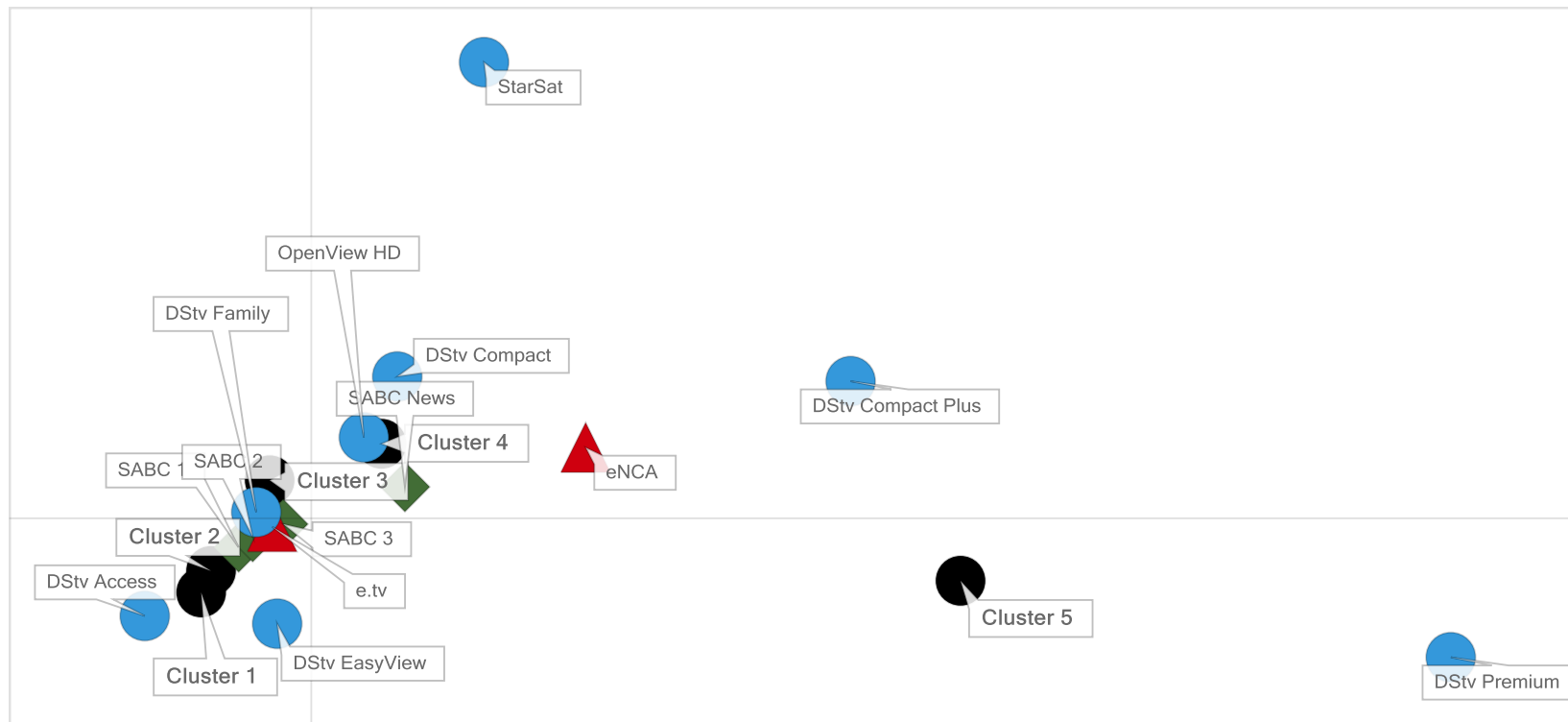
Pay TV

High Explanatory Value: 98%



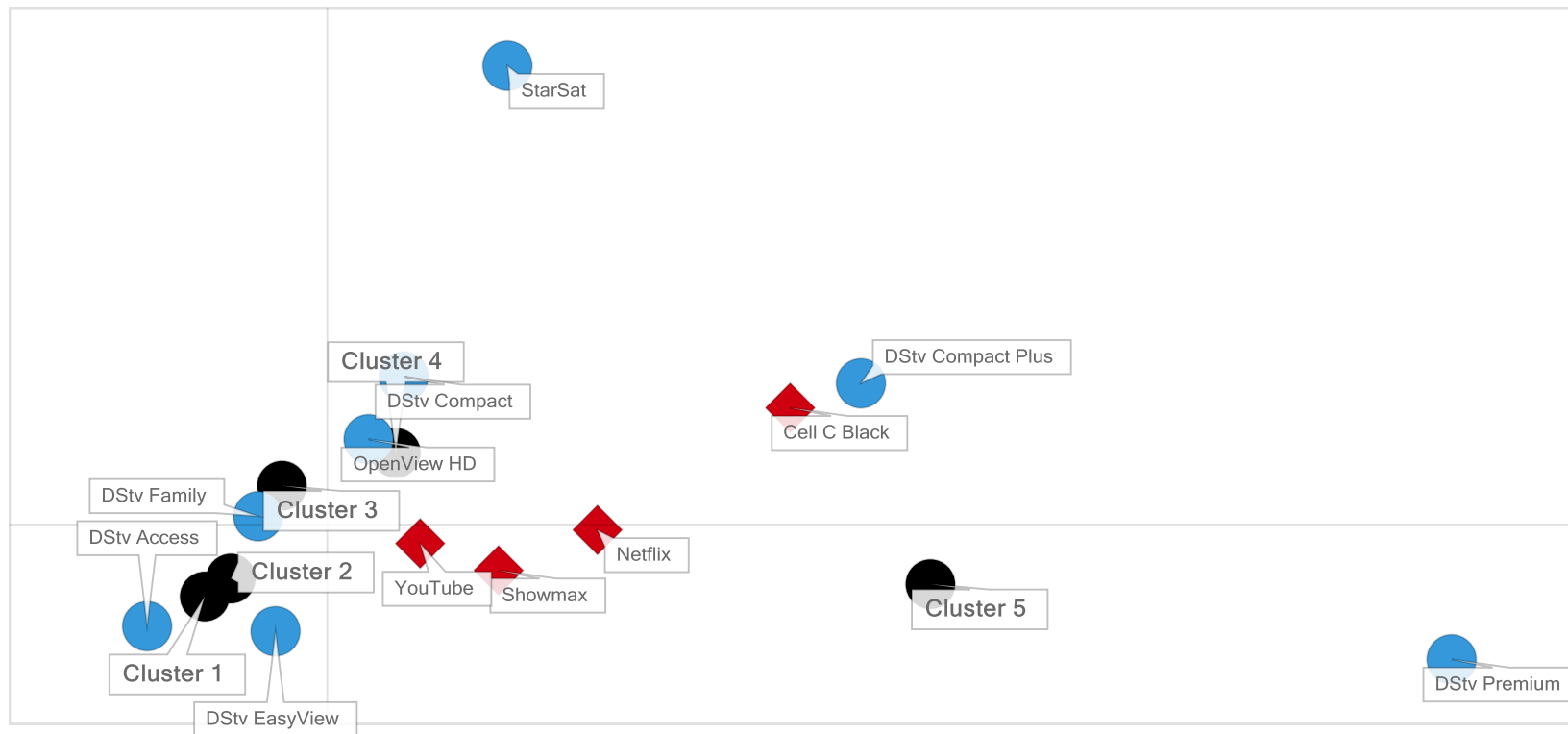
Pay TV & FTH

High Explanatory Value: 98%



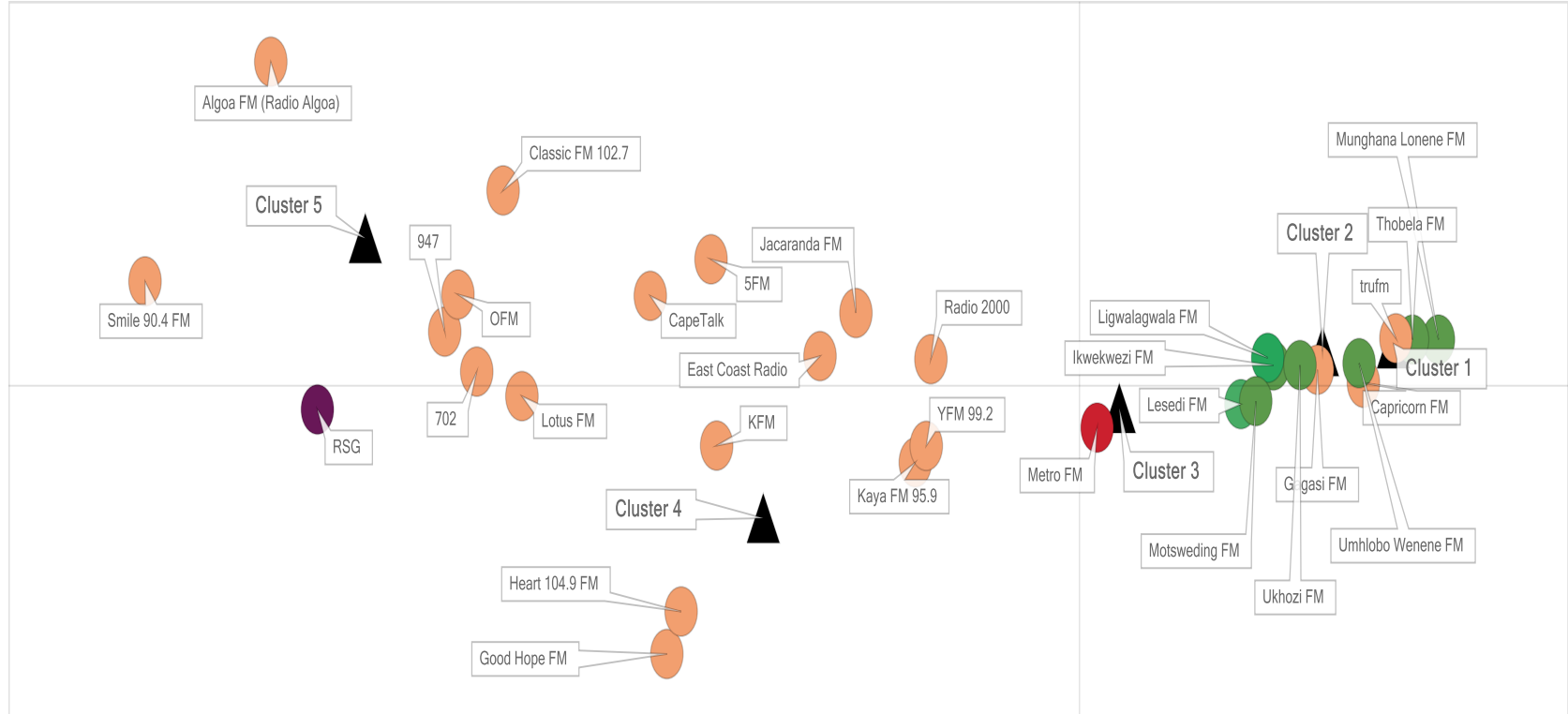
Pay TV & Streaming

High Explanatory Value: 96%



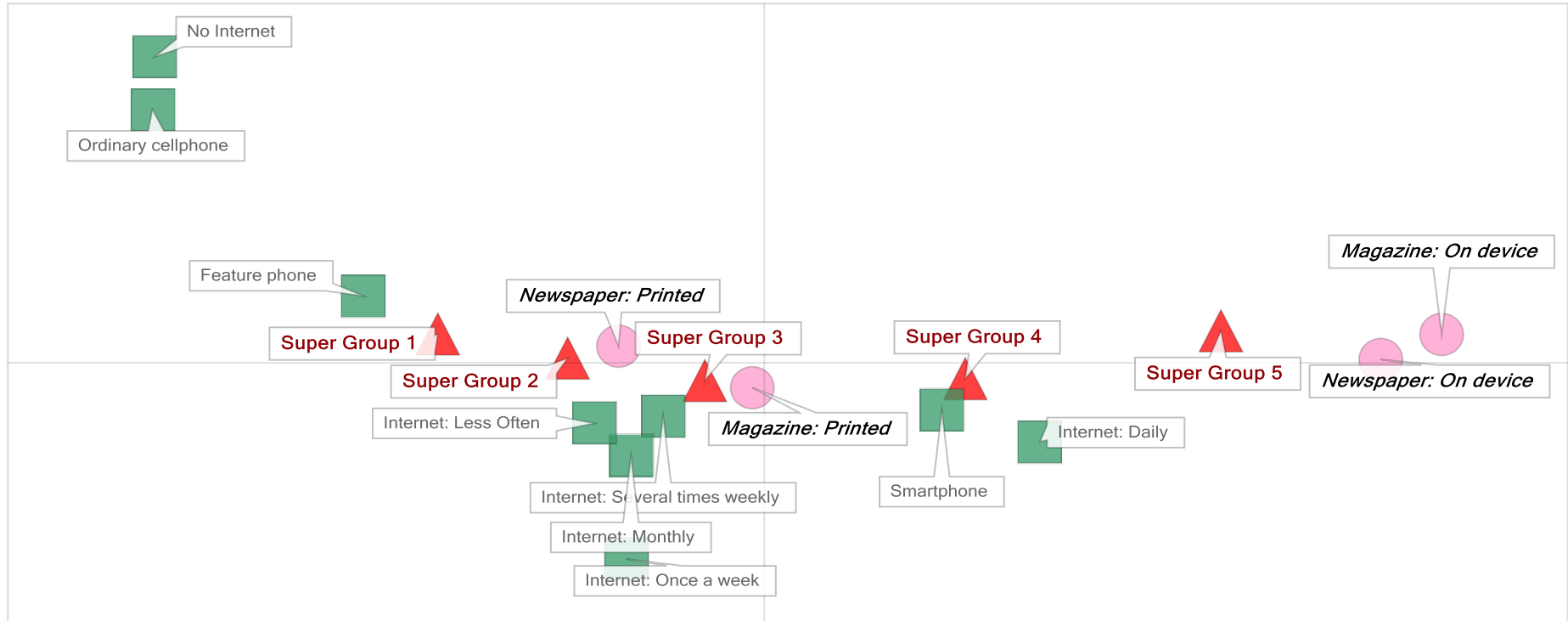
Branded Radio

High Explanatory Value: 92%



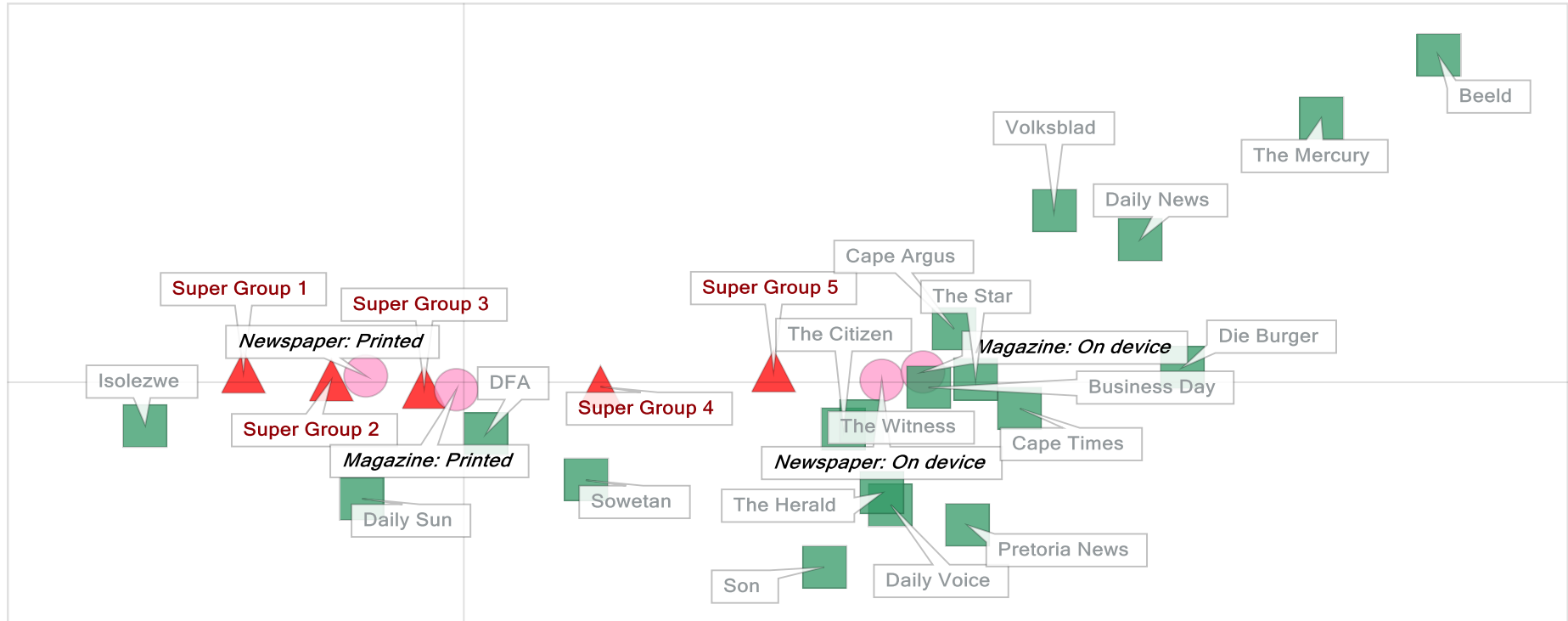
Magazines & Newspapers v Digital

High Explanatory Value: 100%



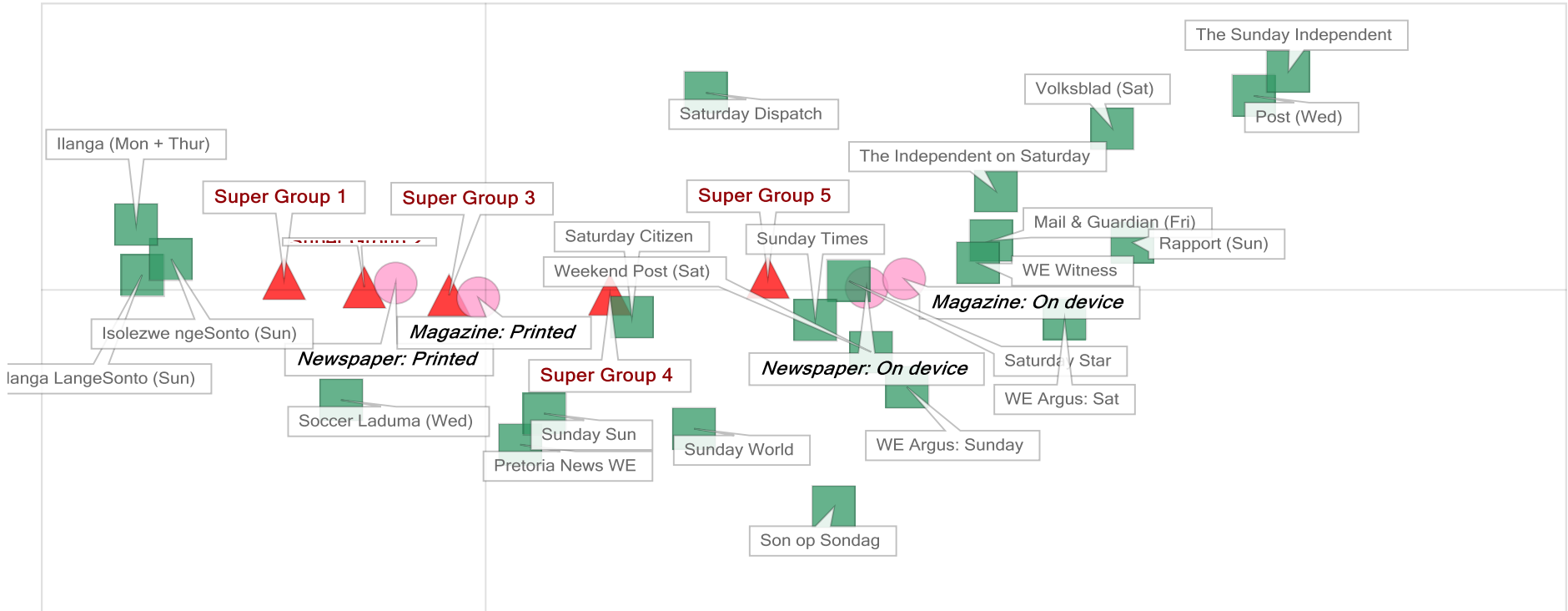
Daily Newspaper Titles: Printed Format

High Explanatory Value: 100%



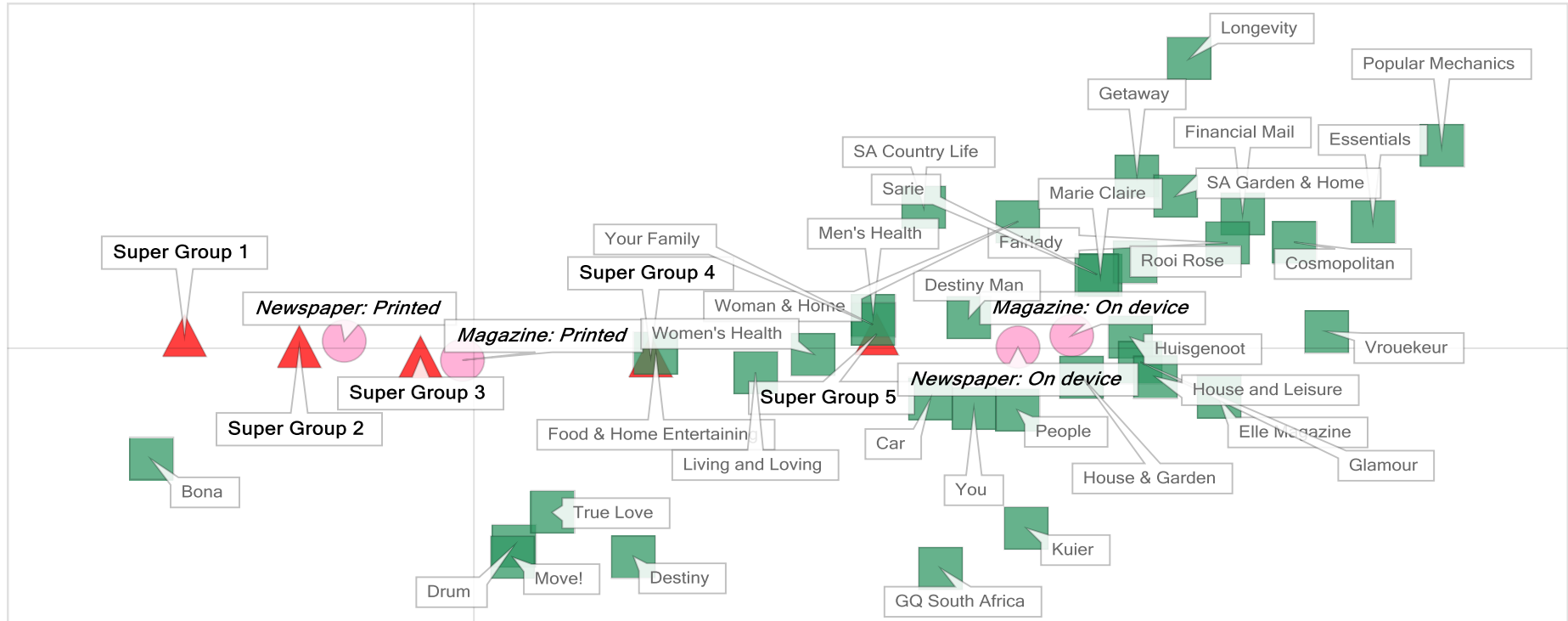
Weekly Newspaper Titles: Printed Format

High Explanatory Value: 100%



Magazine Titles: Printed Format

High Explanatory Value: 100%



ES & JICS: THE HUB & DONOR MODEL

