BRC TAMS 2019 Audit

6 March 2019



Scope of the Audit

- 1. Defined along the same lines as the 2017 TAMS Audit:
 - Recruitment, Installation, Training of new households
 - Validation rules / Database Check Edits
 - Panel Quality Control
 - Panel turnover (actual churn)
 - Panel Tenure
 - Motivation (incentives)
 - Polling dashboard
 - RIM Weights
 - SEMS
 - Panel Updates
 - Inventory (meter stock report)
 - Coincidental Study
 - Household visits



Panel Audit

The dashboard introduced in 2017 covers all the necessary elements



Recruitment, Installation, Training of new households

- Material delivered to new households has been reviewed and is inline with international standards
- Nielsen monitor the "pre-production" panellists and isolate the non compliant households for trouble shooting/technician visit and eventually removal
- There are good relationships between the Nielsen technicians and the panellists



Validation rules / Database Check Edits

- All checks are in place to international Nielsen standards
- System is monitored internationally by internal auditors
- We can confirm the correct flagging of load-shedding households
- We recommend that unidentified viewing should be expanded in Nielsen reporting



Panel Quality Control



AREA 1600 1400 1200 1000 800 600 400 200 0 Metro Urban Rural Ideal Installed

 Panel balance is good



RACE

Ideal Installed





2000

1500

1000

500

0



Ideal Installed



Panel churn

Churn levels on average are within the ranges outlined in the GGTAM (Global guidelines for television audience measurement)

| | | 2017 actual churn | 2018 Actual churn | | | 2017 actual churn | 2018 Actual churn | | | 2017 actual churn | 2018 Actual churn |
|---------------|------------------------|-------------------------|-------------------------|-----------------|------------------------|-------------------------|-------------------------|------------|------------------------|-------------------------|-------------------------|
| Western Cape | Black Non-Pay Urban | 15% | 18% | Eastern Cape | Black Non-Pay Urban | 16% | 15% | Limpopo | Black Non-Pay Urban | 41% | 13% |
| Western Cape | Black Non-Pay Rural | 0% | 17% | Eastern Cape | Black Non-Pay Rural | 10% | 8% | Limpopo | Black Non-Pay Rural | 16% | 10% |
| Western Cape | Black Pay Urban | 34% | 6% | Eastern Cape | Black Pay Urban | 14% | 2% | Limpopo | Black Pay Urban | 9% | 5% |
| Western Cape | Black Pay Rural | 100% | 0% | Eastern Cape | Black Pay Rural | 9% | 0% | Limpopo | Black Pay Rural | 6% | 5% |
| Western Cape | Coloured Non-Pay Urban | 20% | 10% | Eastern Cape | Coloured Non-Pay Urban | 26% | 10% | Limpopo | Coloured Non-Pay Urban | 0% | |
| Western Cape | Coloured Non-Pay Rural | 38% | 9% | Eastern Cape | Coloured Non-Pay Rural | 0% | 0% | Limpopo | Coloured Non-Pay Rural | | |
| Western Cape | Coloured Pay Urban | 30% | 14% | Eastern Cape | Coloured Pay Urban | 13% | 0% | Limpopo | Coloured Pay Urban | 0% | |
| Western Cape | Coloured Pay Rural | 0% | 0% | Eastern Cape | Coloured Pay Rural | | 0% | Limpopo | Coloured Pay Rural | | |
| Western Cape | Indian Non-Pay Urban | 50% | 0% | Eastern Cape | Indian Non-Pay Urban | | | Limpopo | Indian Non-Pay Urban | | |
| Western Cape | Indian Non-Pay Rural | | | Eastern Cape | Indian Non-Pay Rural | | | Limpopo | Indian Non-Pay Rural | | |
| Western Cape | Indian Pay Urban | 0% | 0% | Eastern Cape | Indian Pay Urban | 0% | | Limpopo | Indian Pay Urban | 0% | |
| Western Cape | Indian Pay Rural | | | Eastern Cape | Indian Pay Rural | | | Limpopo | Indian Pay Rural | | |
| Western Cape | White Non-Pay Urban | 0% | 22% | Eastern Cape | White Non-Pay Urban | 100% | 25% | Limpopo | White Non-Pay Urban | 100% | |
| Western Cape | White Non-Pay Rural | 0% | | Eastern Cape | White Non-Pay Rural | | | Limpopo | White Non-Pay Rural | | |
| Western Cape | White Pay Urban | 8% | 6% | Eastern Cape | White Pay Urban | 39% | 6% | Limpopo | White Pay Urban | 0% | 100% |
| Western Cape | White Pay Rural | 0% | | Eastern Cape | White Pay Rural | | | Limpopo | White Pay Rural | | |
| | | 19% | 12% | | | 16% | 8% | | | 16% | 9% |
| Northern Cape | Black Non-Pay Urban | 25% | 33% | KwaZulu-Natal | Black Non-Pay Urban | 20% | 18% | Gauteng | Black Non-Pay Urban | 15% | 10% |
| Northern Cape | Black Non-Pay Rural | 29% | 29% | KwaZulu-Natal | Black Non-Pay Rural | 9% | 11% | Gauteng | Black Non-Pay Rural | 67% | 0% |
| Northern Cape | Black Pay Urban | 0% | 17% | KwaZulu-Natal | Black Pay Urban | 12% | 6% | Gauteng | Black Pay Urban | 6% | 5% |
| Northern Cape | Black Pay Rural | 100% | 0% | KwaZulu-Natal | Black Pay Rural | 4% | 9% | Gauteng | Black Pay Rural | 0% | 0% |
| Northern Cape | Coloured Non-Pay Urban | 15% | 15% | KwaZulu-Natal | Coloured Non-Pay Urban | 50% | 13% | Gauteng | Coloured Non-Pay Urban | 56% | 20% |
| Northern Cape | Coloured Non-Pay Rural | 0% | 0% | KwaZulu-Natal | Coloured Non-Pay Rural | | | Gauteng | Coloured Non-Pay Rural | | |
| Northern Cape | Coloured Pay Urban | 0% | 14% | KwaZulu-Natal | Coloured Pay Urban | 25% | 9% | Gauteng | Coloured Pay Urban | 18% | 19% |
| Northern Cape | Coloured Pay Rural | | | KwaZulu-Natal | Coloured Pay Rural | | | Gauteng | Coloured Pay Rural | | |
| Northern Cape | Indian Non-Pay Urban | | | KwaZulu-Natal | Indian Non-Pay Urban | 28% | 33% | Gauteng | Indian Non-Pay Urban | 67% | 0% |
| Northern Cape | Indian Non-Pay Rural | | | KwaZulu-Natal | Indian Non-Pay Rural | | | Gauteng | Indian Non-Pay Rural | | |
| Northern Cape | Indian Pay Urban | | | KwaZulu-Natal | Indian Pay Urban | 13% | 26% | Gauteng | Indian Pay Urban | 17% | 0% |
| Northern Cape | Indian Pay Rural | | | KwaZulu-Natal | Indian Pay Rural | | | Gauteng | Indian Pay Rural | | |
| Northern Cape | White Non-Pay Urban | 50% | 0% | KwaZulu-Natal | White Non-Pay Urban | 25% | 14% | Gauteng | White Non-Pay Urban | | |
| Northern Cape | White Non-Pay Rural | | 0% | KwaZulu-Natal | White Non-Pay Rural | | | Gauteng | White Non-Pay Rural | | |
| Northern Cape | White Pay Urban | 25% | 0% | KwaZulu-Natal | White Pay Urban | 11% | 6% | Gauteng | White Pay Urban | 8% | 9% |
| Northern Cape | White Pay Rural | | 0% | KwaZulu-Natal | White Pay Rural | | | Gauteng | White Pay Rural | | |
| | | 18% | 17% | | | 14% | 13% | | | 12% | 8% |
| Free State | Black Non-Pay Urban | 14% | 14% | Mpumalanga | Black Non-Pay Urban | 12% | 5% | North-West | Black Non-Pay Urban | 19% | 18% |
| Free State | Black Non-Pay Rural | 45% | 0% | Mpumalanga | Black Non-Pay Rural | 14% | /% | North-West | Black Non-Pay Rural | 6% | 8% |
| Free State | Black Pay Urban | 11% | 2% | Mpumalanga | Black Pay Urban | 8% | 6% | North-West | Black Pay Urban | 13% | 12% |
| Free State | Black Pay Rural | 0% | 0% | Mpumalanga | Black Pay Rural | 6% | 4% | North-West | Black Pay Rural | 0% | 11% |
| Free State | Coloured Non-Pay Urban | 0% | 0% | Mpumalanga | Coloured Non-Pay Urban | | | North-West | Coloured Non-Pay Urban | 0% | 0% |
| Free State | Coloured Non-Pay Rural | 00/ | 00/ | Mpumalanga | Coloured Non-Pay Rural | 001 | | North-West | Coloured Non-Pay Rural | | 00/ |
| Free State | Coloured Pay Urban | 0% | 0% | Mpumalanga | Coloured Pay Urban | 0% | | North-West | Coloured Pay Urban | | 0% |
| Free State | Coloured Pay Rural | | | Npumalanga | Coloured Pay Rural | | | North-West | Coloured Pay Rural | 00/ | |
| Free State | Indian Non-Pay Urban | | | Npumalanga | Indian Non-Pay Urban | | | North-West | Indian Non-Pay Urban | 0% | |
| Free State | Indian Non-Pay Kural | | | Moumalanga | Indian Non-Pay Kural | 00/ | 00/ | North West | Indian Non-Pay Kural | 00/ | |
| Free State | Indian Pay Urban | | | Moumalanga | Indian Pay Urban | 0% | 0% | North West | Indian Pay Urban | 0% | |
| Free State | Mulan Pay Kurai | 120/ | 00/ | Moumalanga | Mulan Pay Kurai | 750/ | 00/ | North-West | Mulan Pay Kuran | 220/ | 08/ |
| Free State | White Non-Pay Urban | 13% | 0% | Moumalanga | White Non-Pay Urban | /5% | 0% | North-West | White Non-Pay Urban | 33% | 0% |
| Free State | White Day Urban | 09/ | 250/ | Moumalanga | White Day Urban | 109/ | 200/ | North West | White Day Urban | 110/ | 269/ |
| Free State | White Day Dural | 9% | 25% | Moumalanga | White Pay Urban | 10% | 20% | North-West | White Pay Urban | 11% | 30% |
| i iee state | winte ray Kuldi | 1/1% | 8% | ivipuirialaliga | winte ray Kuldi | 12% | 6% | NOITH-WEST | winte ray Kuldi | 11% | 13% |
| | | 1-7/0 | 0/0 | | | 14/0 | 0/0 | | | 11/0 | 1.3/0 |





 Almost 60% of the panel has been on the panel for longer than 4 years.



Source: Nielsen 2019 week 3 dashboard

Motivation (incentives)

- All checks are in place to international Nielsen standards
- The grocery gift card works well and does not interfere with TV viewing



Polling



Installed Households

 Reporting vs Installed averages 89% over the past 6 months



METERED TV SETS

Reporting Households

 Metered vs Working TV sets averages 93% over the past 6 months



Weighting efficiency

 Weights and efficiencies are within the ranges (averaged over the past 6 months) as recommended in the GGTAM (Global guidelines for television audience measurement)

| | Weights lowest to highest | Efficiency |
|-------------|---------------------------|------------|
| Individuals | 1,329 - 13,099 | 91% |
| Households | 1,165 – 12,766 | 72% |



What do we do when testing RIMs?

- Raw data for a selection of days
- Extract the individual weights
- Normalize weights (divide all weights by the daily mean weight)
- Compute the Standard Deviation (SD) of the normalized weights
- Compute the Variable Inflation Factor (VIF)
 - 1 + (standard deviation of normalized weights)²
- Compute the Efficiency (EFF)
 - 1/VIF



Household weights



Household weights (2018 selected dates)





Individual weights



Individual weights

• Top score





Development of SEMS for TAMS



FROM THE ES TO THE DAILY PANEL...

- The daily panel is compared to the ES on a household and individual level. THE ES IS THE IDEAL.
- Theorethically, in a perfectly representative panel, everyone has the same weight.
- This is of course never the case...









THE NATURE OF LIVE PANELS...

- Panels churn, CHANGE and EVOLVE all the time
- Polling on any given day will not collect data from the whole panel.
- To PROJECT the correct picture, panels require DAILY ADJUSTMENT by WEIGHTING









FINDING THE RIGHT WEIGHTING MODEL...

- STATISTICAL FACTORS
 - Found through analysis:
 «influence on viewing»
- USEABILITY FACTORS
 - Data has to be relevant / useful for end users commercially and otherwise
- LEGITIMACY FACTORS
 - Necessary «countryspecific factors»









STATISTICAL FACTORS...

- Some variables show clear correlations with the households viewing time.
- THESE ARE TYPICALLY FACTORS LIKE:
 - Access to many or few channels
 - Household size









USEABILITY FACTORS...

- STABLE target sizes = predictable CPP's.
- AGE and GENDER are primary targets
- RACE a more usable variable than LANGUAGE (which is currently a proxy for race).
- LSM's are available targets as they are still used for trading.
 - LSMs will not be a RIM WEIGHTING, nor a panel control variable.







LEGITIMACY FACTORS...

- Most TAMS systems have elements that give legitimacy and GOOD REPRESENTATION.
 - These can be variables, or
 SAMPLE COMPOSITION like in
 SA.









Stability of the SEMs



LSM issues on TAM Panel



- In 6 months, 522 (22%) out of 2354 households changed LSM after having completed their update questionnaire.
- In LSM 3 to 7, the majority of changes were upwards. Conversely, the majority of changes were downwards in the higher LSMs, where upward movement is limited.

| | Jun-14 | | | | | | | | | | | | | |
|------------|---|---|----|----|-----|-----|----|----|----|-----|--|--|--|--|
| Jan- | Jan-14 LSM 3 LSM 4 LSM 5 LSM 6 LSM 7 LSM 8 LSM 9 LSM 10 MOVED OU | | | | | | | | | | | | | |
| LSM 3 | | | 1 | | 1 | | | | | 2 | | | | |
| LSM 4 | | 1 | | 22 | 9 | 1 | | | | 33 | | | | |
| LSM 5 | | 1 | 14 | | 80 | 5 | 3 | | | 103 | | | | |
| LSM 6 | | | 1 | 47 | | 78 | 15 | 5 | | 146 | | | | |
| LSM 7 | | | 1 | 2 | 48 | | 48 | 12 | 1 | 112 | | | | |
| LSM 8 | | | | | 6 | 32 | | 28 | 3 | 69 | | | | |
| LSM 9 | | | | | | 7 | 19 | | 14 | 40 | | | | |
| LSM 10 | | | | | | | | 17 | | 17 | | | | |
| MOVED INTO | | 2 | 17 | 71 | 144 | 123 | 85 | 62 | 18 | 522 | | | | |



LSM issues on TAM Panel



- In the first 6 months of 2015, 551 (22.8%) out of 2413 households changed LSM.
- Again, in LSM 3 to 7, the majority of changes were upwards, even more so than in 2014.

| | Jun-15 | | | | | | | | | | | | | |
|-----------------|--------|----------|-----------|-----------|------------|------------|-----------|-----------|-----------|--------------|--|--|--|--|
| Ja | an-15 | LSM 3 | LSM 4 | LSM 5 | LSM 6 | LSM 7 | LSM 8 | LSM 9 | LSM 10 | MOVED OUT OF | | | | |
| LSM2 | | | | | | | | | | 0 | | | | |
| LSM 3 | | | 8 | 1 | | | | | | 9 | | | | |
| LSM 4 | | 8 | | 42 | 6 | | | | | 56 | | | | |
| LSM 5 | | | 25 | | 89 | 8 | 1 | | | 124 | | | | |
| LSM 6 | | | 1 | 41 | | 86 | 12 | 2 | | 142 | | | | |
| LSM 7 | | | | 2 | 30 | | 46 | 21 | | 99 | | | | |
| LSM 8 | | | | | 2 | 34 | | 26 | 3 | 65 | | | | |
| LSM 9 | | | | | | 4 | 19 | | 18 | 41 | | | | |
| LSM 10 | | | | | | | | 16 | | 16 | | | | |
| MOVED IN | NTO | <u>8</u> | <u>34</u> | <u>86</u> | <u>127</u> | <u>132</u> | <u>78</u> | <u>65</u> | <u>21</u> | <u>551</u> | | | | |



SEM Movement On TAMS Panel

Change matrix for SEM's – Dec 2017 – Dec 2018

- In **12 months** 889 (**33%**) out of 2662 households changed SEM.
- Households changed SEM after having completed their update questionnaire.
- 456 households moved to a higher SEM.
- 433 households moved to a lower SEM.

| | | | | | | DEC | 2018 | | | | |
|-------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------------|--------------|
| DEC 2017 | SEM 1 | SEM 2 | SEM 3 | SEM 4 | SEM 5 | SEM 6 | SEM 7 | SEM 8 | SEM 9 | SEM 10 | Moved Out Of |
| SEM 1 | | 13 | 5 | 2 | | | | | | | 20 |
| SEM 2 | 25 | | 46 | 12 | 2 | 1 | | | | | 86 |
| SEM 3 | 10 | 62 | | 53 | 15 | 2 | 2 | | | | 144 |
| SEM 4 | 2 | 18 | 65 | | 52 | 16 | 7 | | | | 160 |
| SEM 5 | | 4 | 14 | 36 | | 53 | 10 | 3 | | | 120 |
| SEM 6 | | | 2 | 12 | 37 | | 52 | 5 | 2 | | 110 |
| SEM 7 | | | 1 | 4 | 8 | 42 | | 41 | 8 | 2 | 106 |
| SEM 8 | | | | 3 | 2 | 7 | 40 | | 24 | 8 | 84 |
| SEM 9 | | | | | | | 2 | 17 | | 20 | 39 |
| SEM 10 | | | | | | | | 2 | 18 | | 20 |
| Moved Into | 37 | 97 | 133 | 122 | 116 | 121 | 113 | 68 | 52 | 30 | 889 |



SEM Movement On TAMS Panel: 10 SEM Groups

Change matrix for SEM's – Jul 2018 – Jan 2019

- During these **7 months**, 594 (**21%**) out of 2,824 households moved between SEM groups 1 to 10.
- Households changed SEM after having completed their update questionnaire.

| | | | | | 10 SEM | Groups Ja | an 2019 | | | | |
|---------------------------|-------|-------|-------|-------|--------|-----------|---------|-------|-------|--------|-----------------|
| 10 SEM Groups Jul 2018 | SEM 1 | SEM 2 | SEM 3 | SEM 4 | SEM 5 | SEM 6 | SEM 7 | SEM 8 | SEM 9 | SEM 10 | Moved out of |
| SEM 1 | | 12 | 4 | 2 | | | | | | | 18 |
| SEM 2 | 13 | | 37 | 10 | 1 | 1 | | | | | 62 |
| SEM 3 | 9 | 33 | | 36 | 8 | 1 | 2 | | | | 89 |
| SEM 4 | 1 | 9 | 37 | | 29 | 15 | 4 | | | | 95 |
| SEM 5 | | 5 | 7 | 27 | | 31 | 12 | 2 | | | 84 |
| SEM 6 | 1 | | 1 | 8 | 34 | | 42 | 4 | 1 | | 91 |
| SEM 7 | | | | 2 | 5 | 31 | | 35 | 6 | 1 | 80 |
| SEM 8 | | | | 2 | 2 | 5 | 22 | | 8 | 4 | 43 |
| SEM 9 | | | | | | | 2 | 8 | | 13 | 23 |
| SEM 10 | | | | | | | | 1 | 8 | | 9 |
| Moved into | 24 | 59 | 86 | 87 | 79 | 84 | 84 | 50 | 23 | 18 | 594 |



SEM Movement On TAMS Panel: 20 SEM Groups

Change matrix for SEM's – Jul 2018 – Jan 2019

- During these **7 months**, 762 (**27%**) out of 2,824 households, moved between SEM groups 1 to 20.
- Households changed SEM after having completed their update questionnaire.

| | | 20 SEM Groups Jan 2019 | | | | | | | | | | | | | | | | | | | |
|------------------------------|----------|------------------------|----------|----------|----------|----------|----------|----------|----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------|
| 20 SEM Groups Jul 2018 | SEM 1 | SEM 2 | SEM 3 | SEM 4 | SEM 5 | SEM 6 | SEM 7 | SEM 8 | SEM 9 | SEM 10 | SEM 11 | SEM 12 | SEM 13 | SEM 14 | SEM 15 | SEM 16 | SEM 17 | SEM 18 | SEM 19 | SEM 20 | Moved out of |
| SEM 1 | | 3 | 2 | 2 | 2 | | 1 | 1 | | | | | | | | | | | | | 11 |
| SEM 2 | 1 | | 5 | 3 | | 2 | | | | | | | | | | | | | | | 11 |
| SEM 3 | 4 | 6 | | 12 | 9 | 4 | 2 | 1 | 1 | | | | | | | | | | | | 39 |
| SEM 4 | 1 | 2 | 9 | | 13 | 11 | 4 | 3 | | | 1 | | | | | | | | | | 44 |
| SEM 5 | | 3 | 9 | 16 | | 16 | 13 | 5 | 2 | | | | 1 | | | | | | | | 65 |
| SEM 6 | 1 | 5 | 1 | 7 | 16 | | 8 | 10 | 3 | 3 | 1 | | 1 | | | | | | | | 56 |
| SEM 7 | | | 1 | 3 | 10 | 17 | | 10 | 8 | 5 | 3 | | | | | | | | | | 57 |
| SEM 8 | 1 | | | 5 | 5 | 5 | 13 | | 9 | 7 | 8 | 4 | 2 | 2 | | | | | | | 61 |
| SEM 9 | | | 2 | 2 | 2 | 4 | 3 | 10 | | 15 | 7 | 2 | | 3 | 1 | | | | | | 51 |
| SEM 10 | | | 1 | | | 1 | 4 | 10 | 10 | | 13 | 9 | 5 | 4 | 1 | | | | | | 58 |
| SEM 11 | | 1 | | | | 1 | 1 | 3 | 13 | 12 | | 11 | 10 | 5 | | 1 | | | | | 58 |
| SEM 12 | | | | | | | | 4 | 1 | 8 | 12 | | 17 | 10 | 1 | 2 | 1 | | | | 56 |
| SEM 13 | | | | | | | | 1 | | 5 | 8 | 10 | | 10 | 13 | 2 | 3 | | 1 | | 53 |
| SEM 14 | | | | | | | | 1 | | | 1 | 12 | 13 | | 13 | 7 | 3 | | | | 50 |
| SEM 15 | | | | | | | | 1 | 1 | 1 | 1 | 4 | 8 | 6 | | 4 | 3 | 1 | 3 | | 33 |
| SEM 16 | | | | | | | | 1 | | | | | 2 | 6 | 3 | | 3 | 1 | 1 | | 17 |
| SEM 17 | | | | | | | | | | | | | 1 | | 6 | 1 | | 2 | 6 | 1 | 17 |
| SEM 18 | | | | | | | | | | | | | | 1 | | 1 | 4 | | 6 | | 12 |
| SEM 19 | | | | | | | | | | | | | | | 1 | | 5 | 2 | | | 8 |
| SEM 20 | | | | | | | | | | | | | | | | | | 1 | 4 | | 5 |
| Moved into | 8 | 20 | 30 | 50 | 57 | 61 | 49 | 61 | 48 | 56 | 55 | 52 | 60 | 47 | 39 | 18 | 22 | 7 | 21 | 1 | 762 |



SEM Movement On TAMS Panel: 5 Supergroups

Change matrix for SEM's – Jul 2018 – Jan 2019

- During these 7 months, 321 (11%) out of 2,824 households moved between the 5 SEM Supergroups.
- Households changed SEM after having completed their update questionnaire.

| | | 5 | Supergrou | ips Jan 20 | 19 | |
|----------------|--------|---------|-----------|------------|----------|--------|
| 5 Supergroups | SEM 1 | SEM 2 | SEM 3 | SEM 4 | SEM 5 | Moved |
| Jul 2018 | (0-15) | (16-30) | (31-65) | (66-85) | (86-100) | out of |
| SEM 1 (0-15) | | 34 | 6 | | | 40 |
| SEM 2 (16-30) | 31 | | 55 | | | 86 |
| SEM 3 (31-65) | 6 | 55 | | 59 | 1 | 121 |
| SEM 4 (66-85) | | | 47 | | 15 | 62 |
| SEM 5 (86-100) | | | | 12 | | 12 |
| Moved into | 37 | 89 | 108 | 71 | 16 | 321 |



SEM Movement On TAMS Panel: 3 Supergroups

Change matrix for SEM's – Jul 2018 – Jan 2019

- During these 7 months, 229 (8%) out of 2,824 households moved between the 3 SEM Supergroups.
- Households changed SEM after having completed their update questionnaire.

| | 3 | Supergrou | ips Jan 20 | 19 | | | | | | | | |
|----------------|--------|-----------------------|------------|--------|--|--|--|--|--|--|--|--|
| 3 Supergroups | SEM 1 | EM 1 SEM 2 SEM 3 Move | | | | | | | | | | |
| Jul 2018 | (0-30) | (31-65) | (66-100) | out of | | | | | | | | |
| SEM 1 (0-30) | | 61 | | 61 | | | | | | | | |
| SEM 2 (31-65) | 61 | | 60 | 121 | | | | | | | | |
| SEM 3 (66-100) | | 47 | | 47 | | | | | | | | |
| Moved into | 61 | 108 | 60 | 229 | | | | | | | | |

Further investigation by Nielsen will tell us which variables are creating instability/movement Conversations with Kantar/industry to further stabilise the SEM variables

Recommendation to explore introducing the 3 supergroups into the weighting matrix



Panel Updates



Panel Updates

• The regular updating of information about the panel homes is an ongoing process. It continues to operate as it should.



Inventory of tech equipment

The Meter Stock report



Nielsen keep tight control of meter stock

| BRC Meter | | | | | | | | | | | | | | | | |
|--|---------------------|-----------------------|-----------------|---------------|-----------|------------------|-----------------------------|-----------------------------------|-----------------------|-----------------|---------------|----------|------------------|-----------------------------|----------------------------------|--------|
| Information | | | | | | | | | | | | | | | | |
| January 2019 | | | | <u> </u> | | | | | | | | <u> </u> | | | | |
| | Total | | 1 | 1 | Purchased | | 1 | 1 | | _ | | Rental | | | | Total |
| Description | Installed Meters | Installed to Panel | Technicia ns | Storeroo m | Workshop | Repair center | Damaged beyond repair | Lost(accu mulated for 2018) | Installed to Panel | Technicia ns | Storeroo m | Workshop | Repair center | Damaged beyond repair | Lost(acu mulated for 2018) | Meters |
| Unitam 3 - | | | | | | | | | | | | | | | | |
| Autonomous meter | 2638 | 1939 | 45 | 12 | 60 | 20 | 0 | 6 | 699 | 26 | 10 | 32 | 10 | 0 | 1 | 2860 |
| Unitam 3 - Base meter (used for additional tv in home) | 537 | 498 | 69 | 17 | 23 | 137 | 0 | 0 | 39 | 37 | 14 | 34 | 29 | 0 | 0 | 897 |
| Unitam Classic - | | | | | | | | | | | | | | | | |
| Combox | 354 | 194 | 24 | 9 | 25 | 40 | 0 | 0 | 160 | 23 | 0 | 21 | 25 | 0 | 2 | 523 |
| Unitam Classic - Meter | 438 | 411 | 92 | 89 | 101 | 43 | 0 | 1 | 27 | 24 | 88 | 26 | 4 | 0 | 1 | 907 |
| | | | | | | | | | | | | | | | | |
| GTAM Meter | 129 | N/A | N/A | N/A | N/A | N/A | N/A | N/A | 129 | 65 | 53 | 11 | 2 | 0 | 0 | 260 |
| GTAM Light | 48 | N/A | N/A | N/A | N/A | N/A | N/A | N/A | 48 | 22 | 4 | 3 | 1 | 0 | 0 | 78 |
| | | | | | | | | | | | | | | | | |
| Total Meters | 4144 | 3042 | 230 | 127 | 209 | 240 | 0 | 7 | 1102 | 197 | 169 | 127 | 71 | 0 | 4 | 5525 |



Coincidental studies

A standard method for checking meter and panel reliability



Coincidental study - July 2018

| | | | | | | Panel member was present on the meter statement | | Panel me NOT prese meter st | mber was ent on the catement | RESULTS | | | | |
|--|------------------|--|----------------------|--|---|---|--|---|--|--|--|--|---|--|
| | Campaign Date | Total households to contact this wave | Response Rate (%) | Total households successfully coded | Total persons successfully coded | (A) | (B) | (C) | (D) | Correct Button usage by claimed viewers A/(A+C)* 100 | Correct Button usage by claimed non- viewers D/(B+D)* 100 | Overall Button pressing accuracy (A+D)/(A +B+C+D) *100 | Reported Viewing Index (A+B)/(A +C)*100 | |
| | (Date) | N | % | N | N | Total persons claimed watching TV during the IC N | Total persons claimed NOT watching TV during the IC N | Total persons claimed watching TV during the IC N | Total persons claimed NOT watching TV during the IC N | % | % | % | % | |
| | <u>July 18</u> | 2756 | 74.35% | 2016 | 11094 | 1610 | 938 | 1282 | 7264 | 55.67% | 88.56% | 79.99% | 88.11% | |

Reported Viewing Index of 88.11 % - a typical level for Nielsen and Kantar in many markets.



Household visits



Household visits

Nothing to report

- Only one of three successfully completed
- Second one load-shedded
- Third one amnesia and load shedded



Check of viewing data

- The viewing is stable and clearly tracked over time in the dashboard pages
- We recommend that a "load shedding" monitoring be included in the dashboard. Identifying the days, stages and viewing impact.



Overall comment

Overall the auditor is pleased with the organisation of resources at Nielsen and see clear ownership of the TAMS service from every team member.



Questions



About 3M3A

3M3A is a partnership formed to support and manage TV, radio and online measurement

Measurement Media Management

We know... setting up, managing and validating an audience measurement system is complicated and critical



About 3M3A

3M3A works with stakeholders to adapt to market needs while applying best global practices

Audience Audit Analysis

We know... negotiating with vendors, managing projects and evaluating results is better with people who've been there done that



3M3A's Team: Robert Ruud



- Long experience with media measurement, central in introducing TAM and PPM meters in Norway. Cand.polit. from Oslo University. (Master of Social Science)
- Specializing in quant work and writing specifications for media measurement tender invitations.
- Extensive expertise in TAM audits and consulting in East and West Europe, Asia, South America, middle East and Africa.
- Experience: Tenders and briefs, advice and assessment including trials for online, TV and radio.
- Robert is technical adviser to the AA in Lebanon, and works extensively for broadcasters in Scandinavia



3M3A's Team: Chris O'Hearn



- Established and led 'tview' in the UAE, the first large-scale TAM system in the Middle East as head of the JIC.
- Conducted vendor contract, joint-venture negotiation, marketing, branding, recruitment.
- Project management expert and consultant specialising in media with experience in UK, South America, Sweden, and Middle East.
- Masters degree in Project Management
- Past projects: Complete Pay TV platform setup; major studio and facility construction and fit-out; media business planning and consultancy; production and journalism.
- Metadata Project Dovetail



3M3A's Team: Brenda Wortley



- Media research specialist with 30 years' experience covering agency, sales and audience measurement with specialties in Return Path Data and Pay TV.
- Headed the media department of JWT for 5 years and joint MD of MindShare South Africa.
- Led Research and Strategy division of DStv Media Sales, the advertising sales house of MultiChoice, Africa's sub Saharan leading Pay TV platform.
- Set up Return Path Panels and large online panels across multiple countries.
- As head of Research and Audience Measurement for Multichoice since 2016 she has extended her experience across sub-Saharan Africa developing many bespoke trackers and research initiatives.
- Has been an consultant since February 2018.

