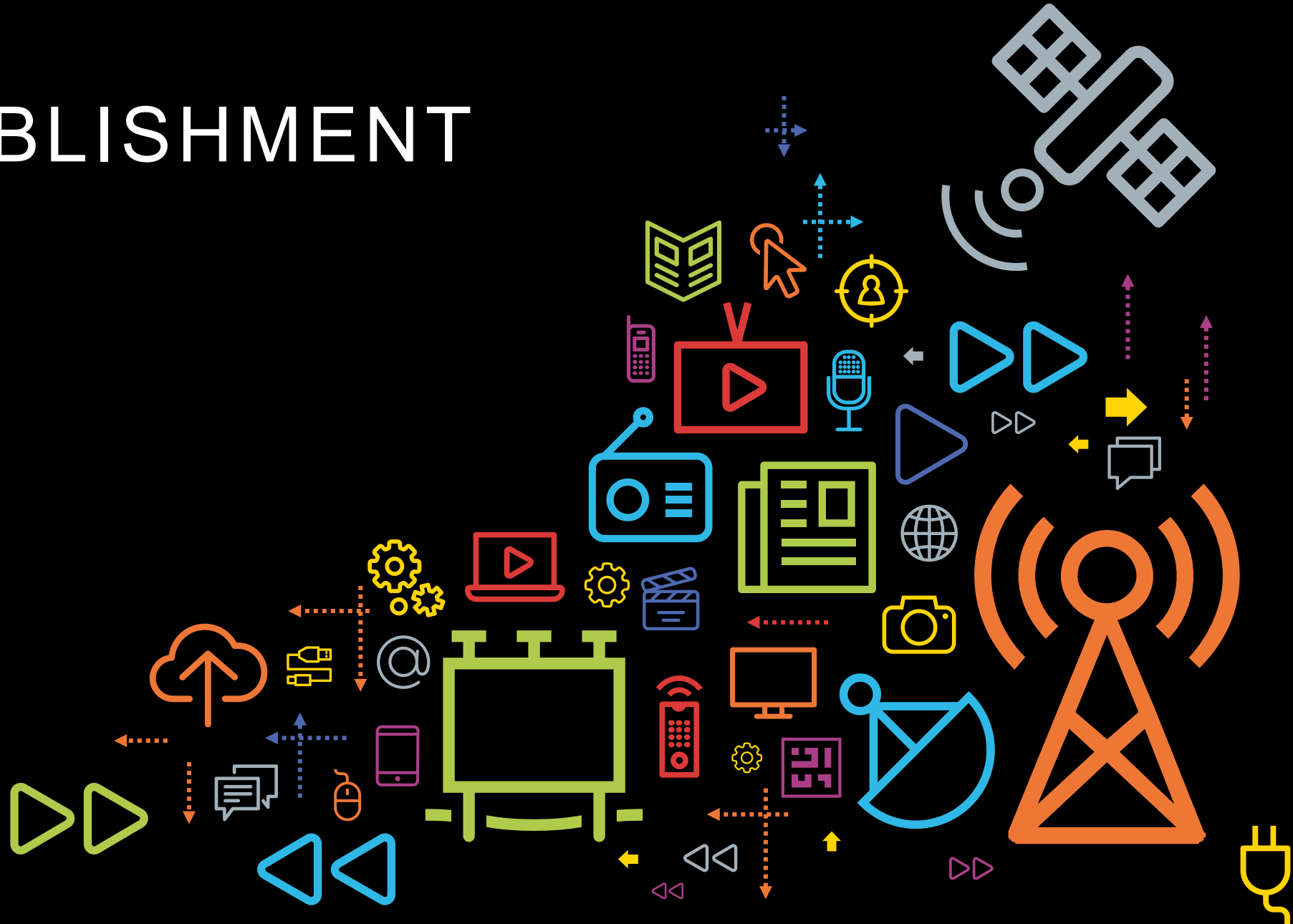
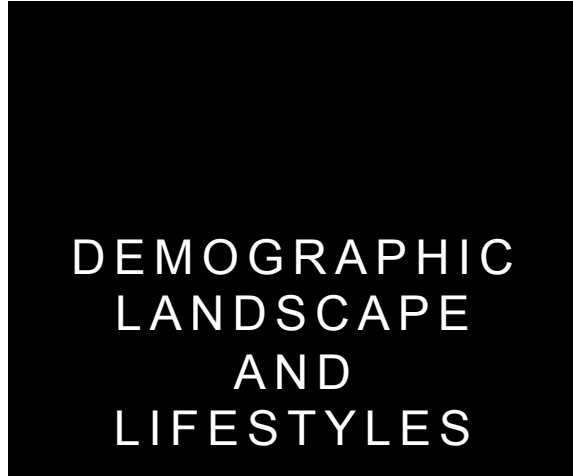


PUBLISHER
RESEARCH COUNCIL



Contents



ESTABLISHMENT SURVEY BASICS



25,000 annual sample

**Representative of the SA
population**

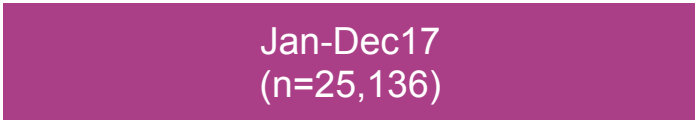
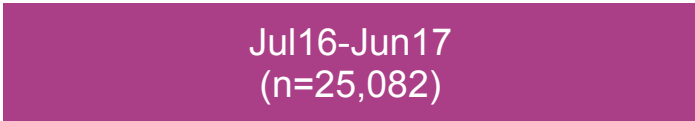
**Demographic / geographic /
lifestyle / products & multi-
media landscape**

**Cross platform / cross device
media consumption**

**Single source
(IHS population data)**

SEM (segmentation model)

Trended ES data (rolling 12 month data)



Weighted to
IHS Jun 2016:



15.8m
Households



39.5m
Adults 15+

Weighted to
IHS Jun 2017:



16.2m
Households



40.1m
Adults 15+

ES sample closely reflects the SA population

ES (unweighted)



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

Source: ES Jan-Dec 2018 (n=25,092)

IHS Population



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

Source: IHS Individual Population estimates Jun 2017

High weighting efficiency



Household

Individual

Jul16-Jun17

93.8%

84.7%

Jan-Dec17

95.7%

84.2%

Jul17-Jun18

96.1%

83.3%

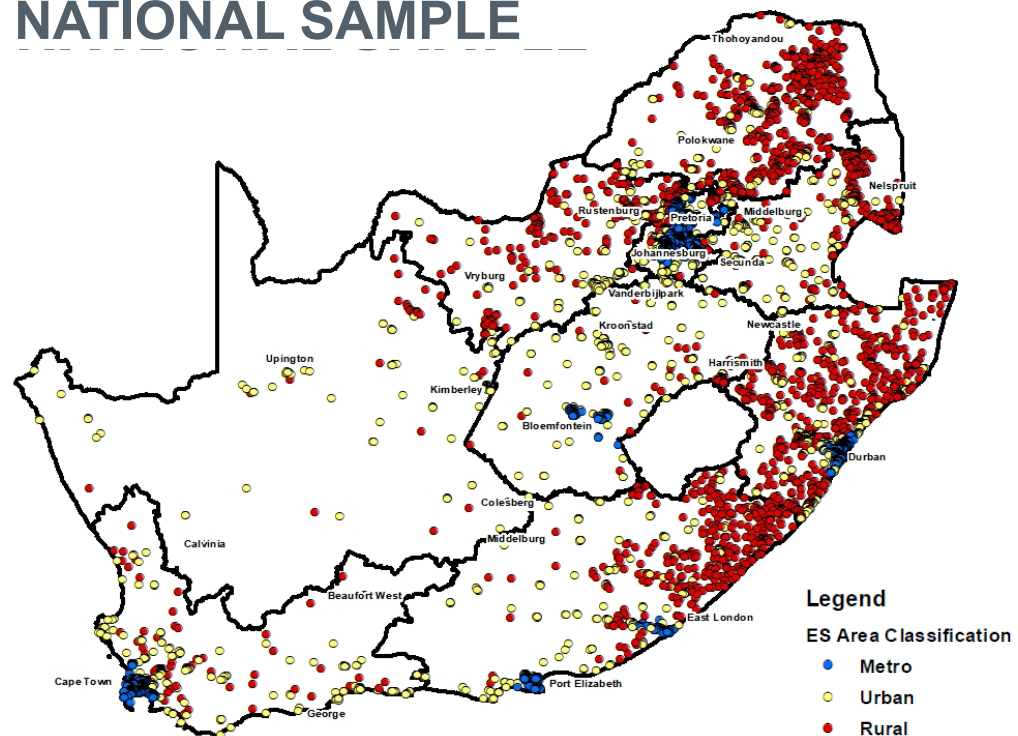
Jan-Dec18

95.3%

83.2%

Establishment Survey – vital signs

NATIONAL SAMPLE



Universe: Population aged 15+
40.1 million

25,092 sample

JAN-DEC 2018

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

19% Urban

29% Urban

30% Urban



31% Rural

21% Rural

27% Rural

20% Rural

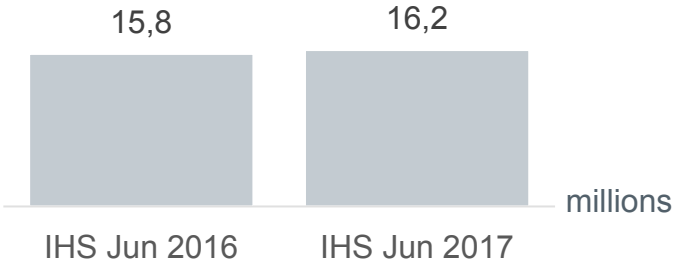
DEMOGRAPHIC LANDSCAPE



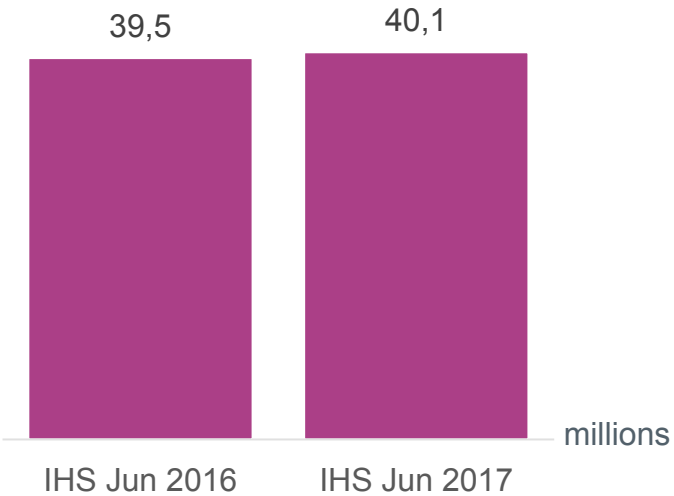
SA's growing population



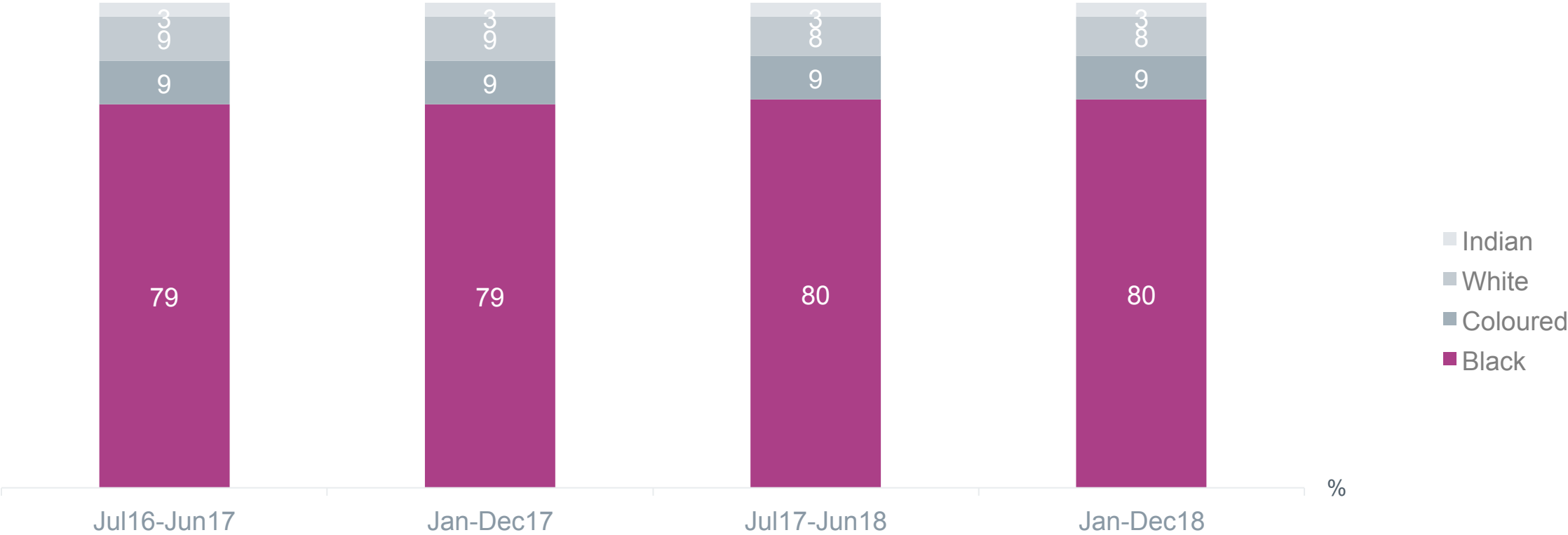
Households



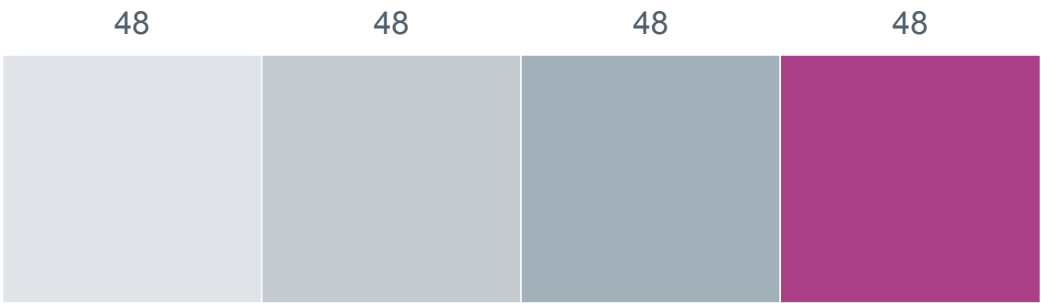
Adults 15+



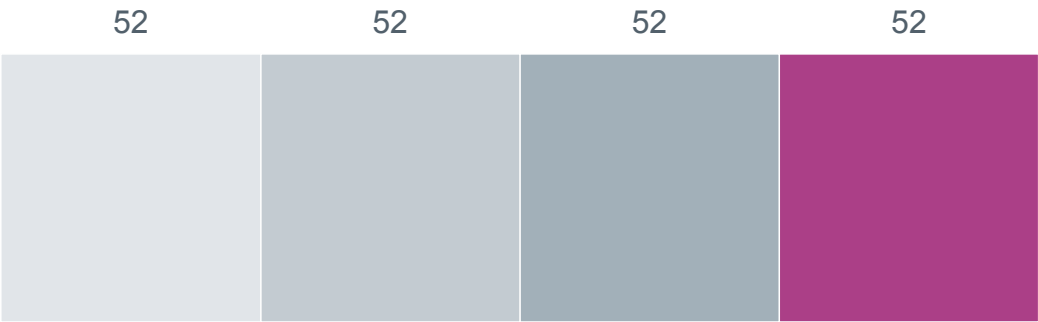
Race profile



Gender profile



Male



Female

%

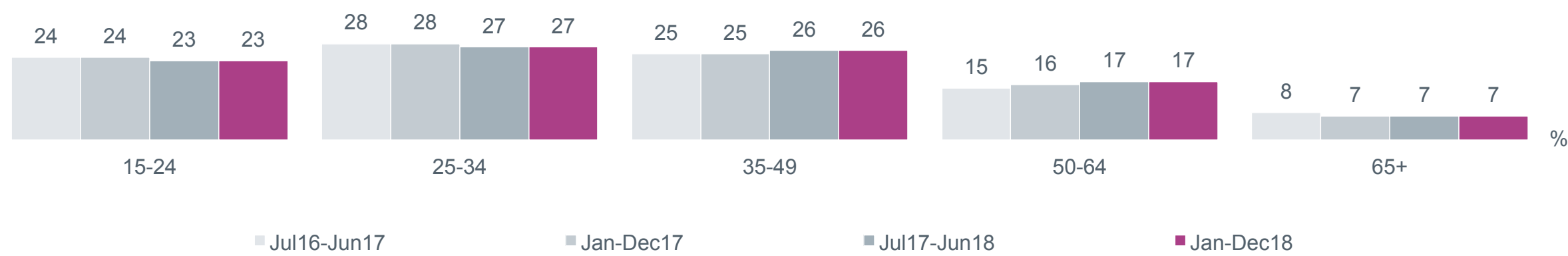
Jul16-Jun17

Jan-Dec17

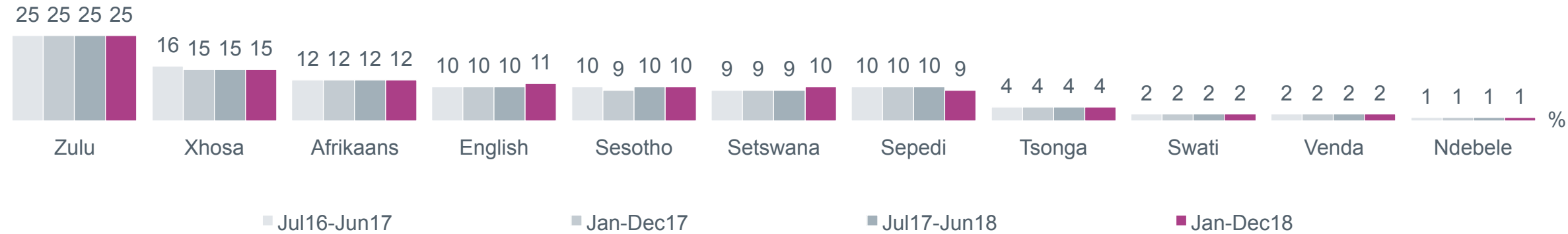
Jul17-Jun18

Jan-Dec18

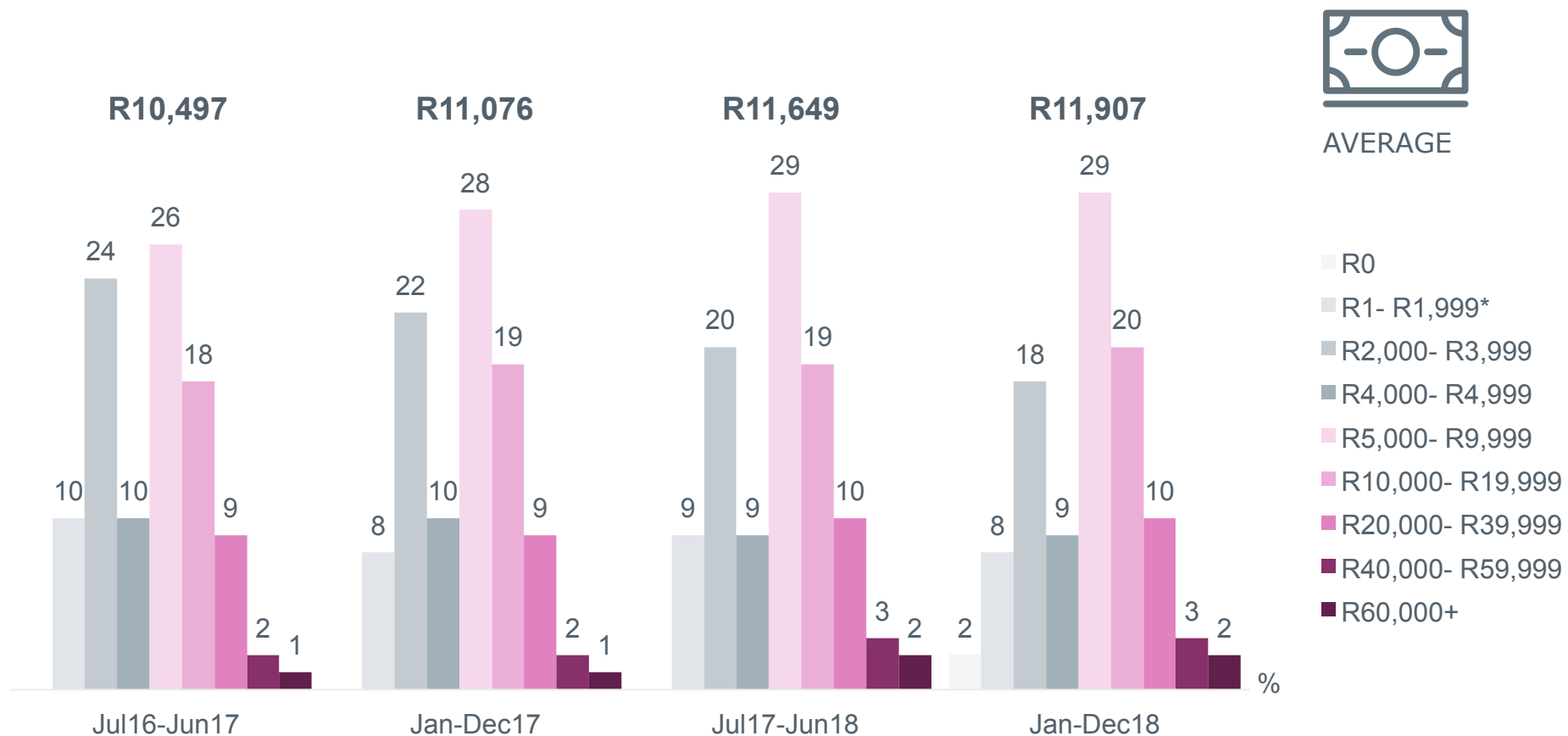
Age profile



Languages spoken most often in SA homes

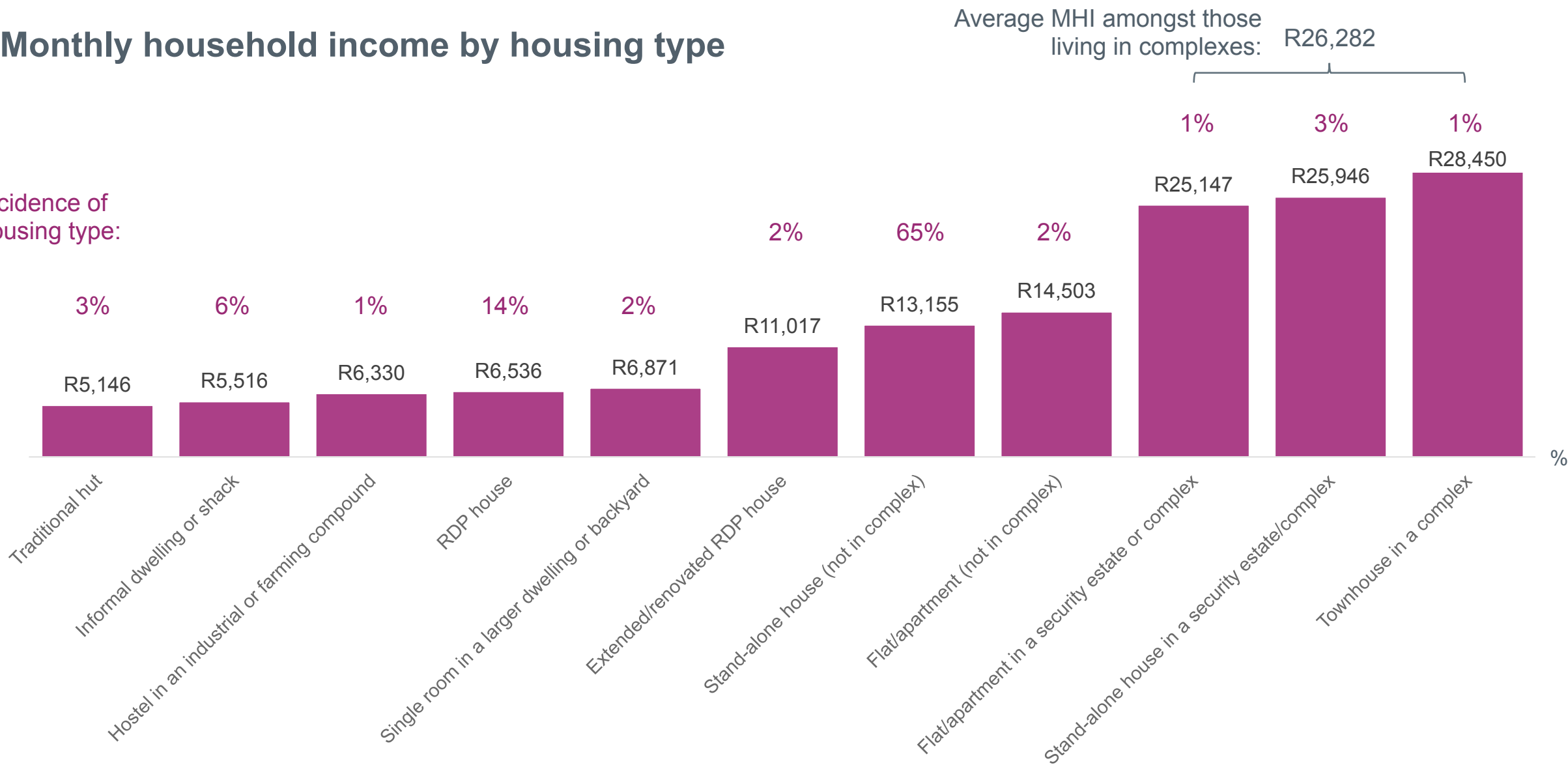


Monthly household income

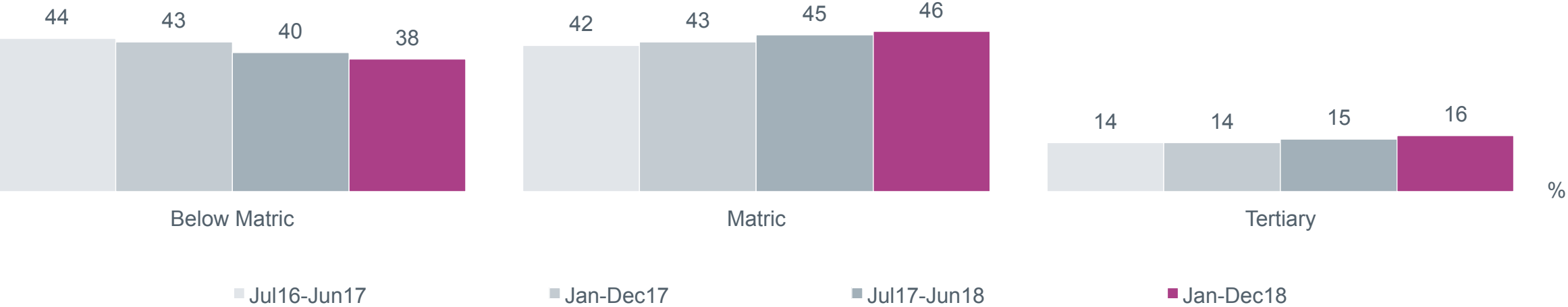


Monthly household income by housing type

Incidence of housing type:



Improvement in education levels

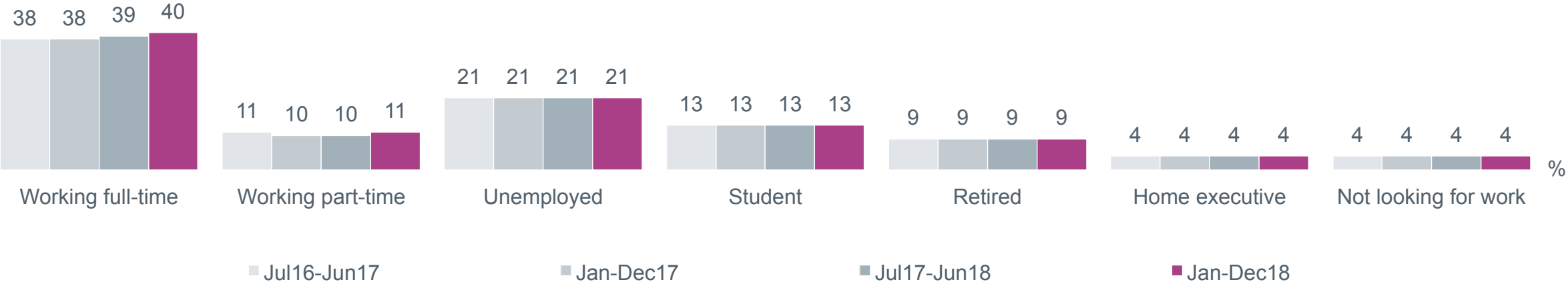


Increased working population

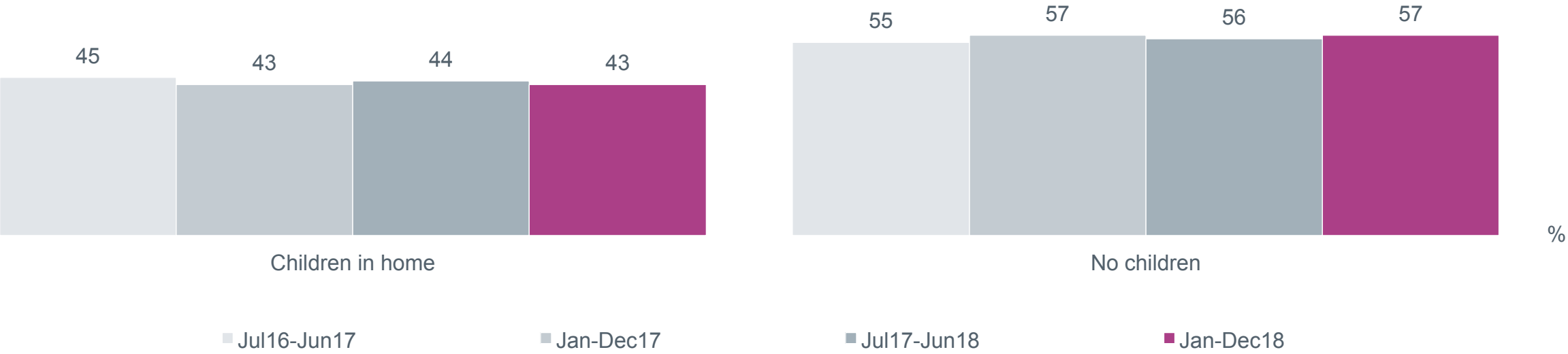


WORKING

Jul16-Jun17	49%
Jan-Dec17	49%
Jul17-Jun18	50%
Jan-Dec18	50%



Children under 15 years living at home



Area classification

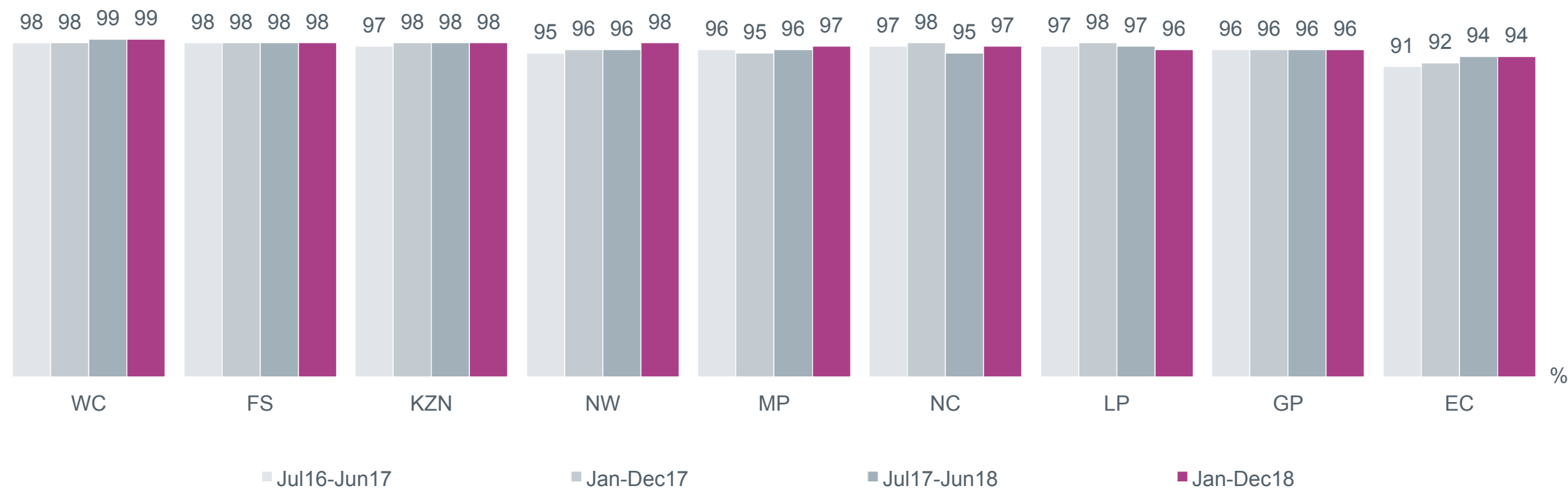


	Jul16 - Jun17		Jan - Dec17		Jul17 - Jun18		Jan - Dec18	
Metro	41%	16.1m	41%	16.1m	41%	16.4m	41%	16.4m
Urban	28%	11.2m	28%	11.2m	28%	11.4m	28%	11.4m
Rural	31%	12.1m	31%	12.1m	31%	12.3m	31%	12.3m

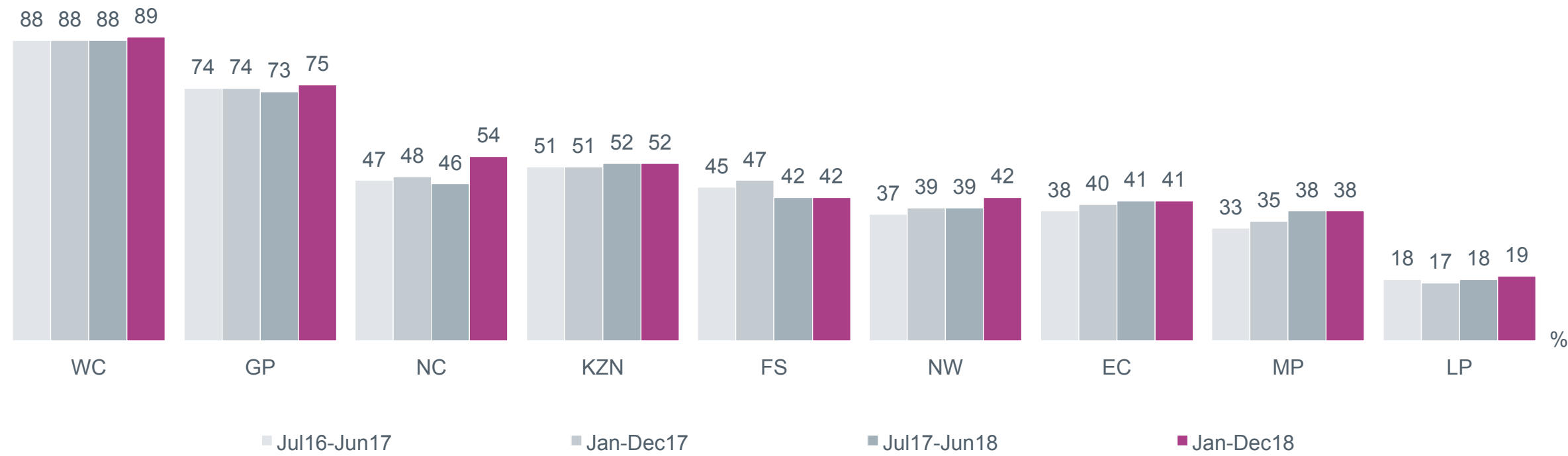
Shifts in population by province

	Jul16 - Jun17		Jan - Dec17		Jul17 - Jun18		Jan - Dec18	
Gauteng	25%	10.0m	25%	10.0m	25%	10.2m	25%	10.2m
KwaZulu-Natal	19%	7.6m	19%	7.6m	19%	7.7m	19%	7.7m
Western Cape	12%	4.8m	12%	4.8m	12%	4.9m	12%	4.9m
Eastern Cape	12%	4.8m	12%	4.8m	12%	4.8m	12%	4.8m
Limpopo	10%	3.8m	10%	3.8m	10%	3.9m	10%	3.9m
Mpumalanga	7%	2.9m	7%	2.9m	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%	2.0m	5%	2.0m
Northern Cape	2%	0.9m	2%	0.9m	2%	0.9m	2%	0.9m

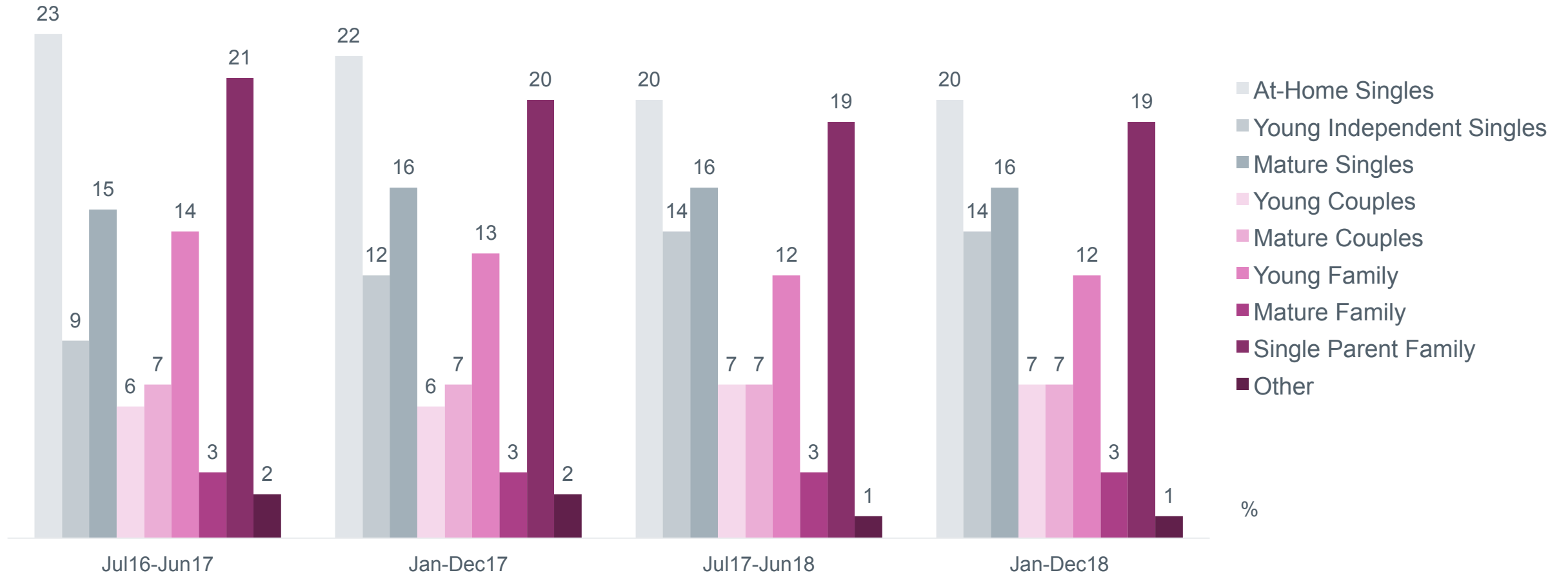
Electrification by province



Water access by province



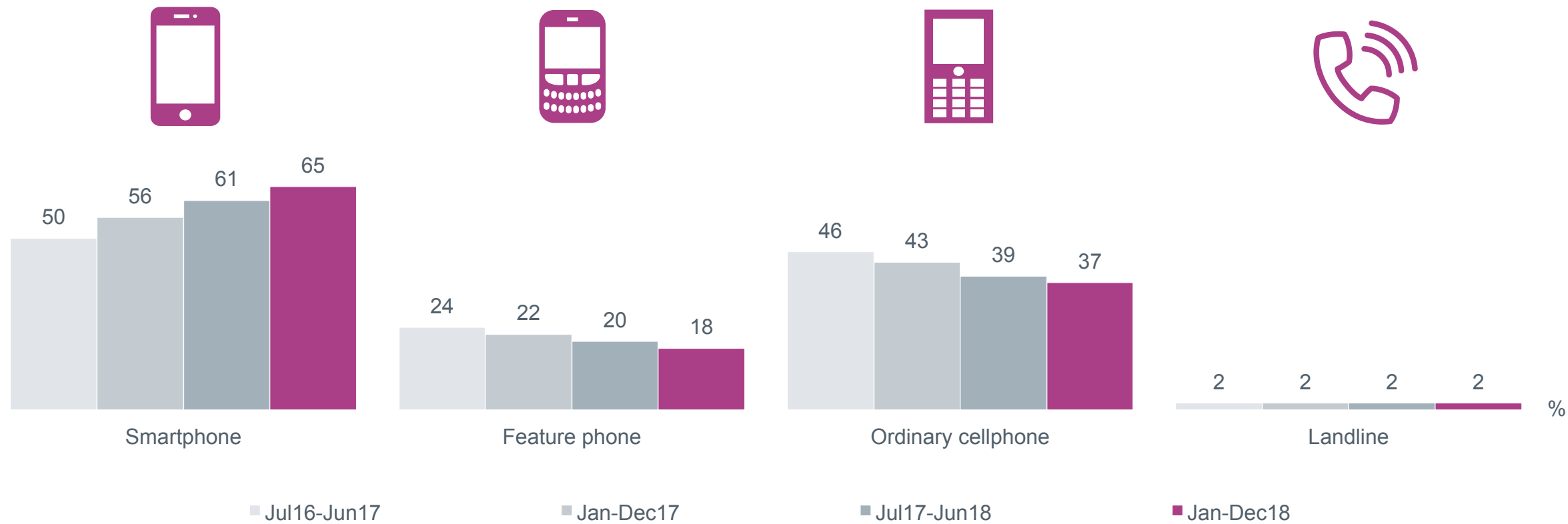
Shifts in life stages



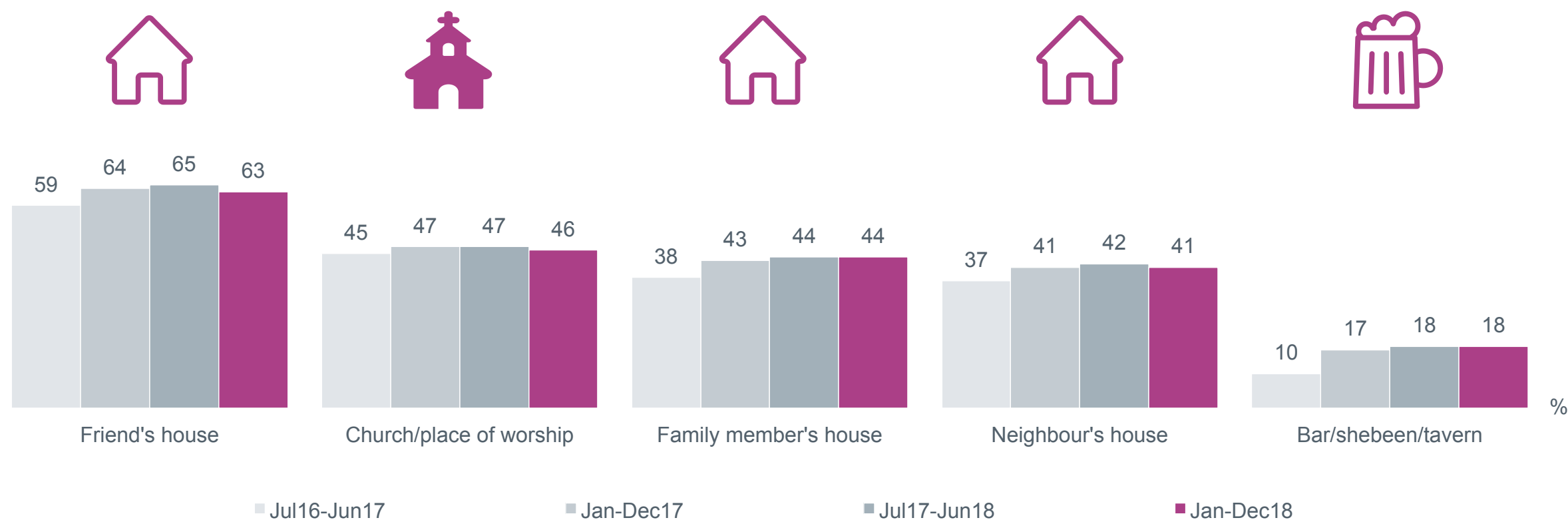
LIFESTYLES



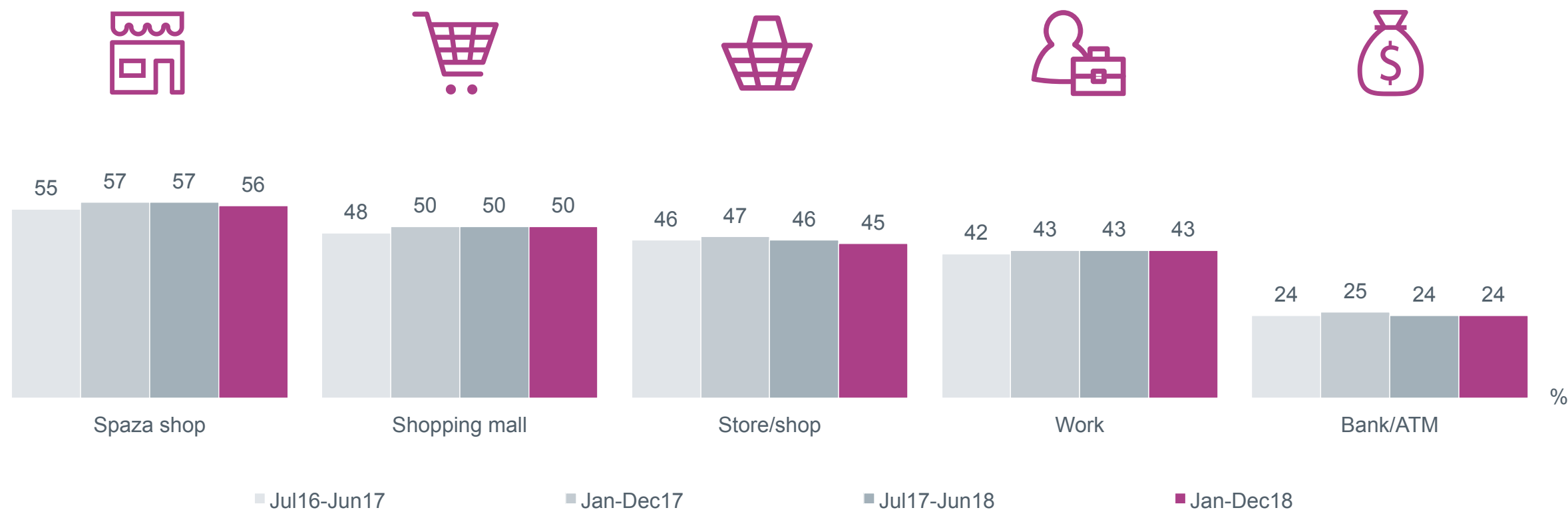
Almost every home has a cellphone, and minimal incidence of landlines



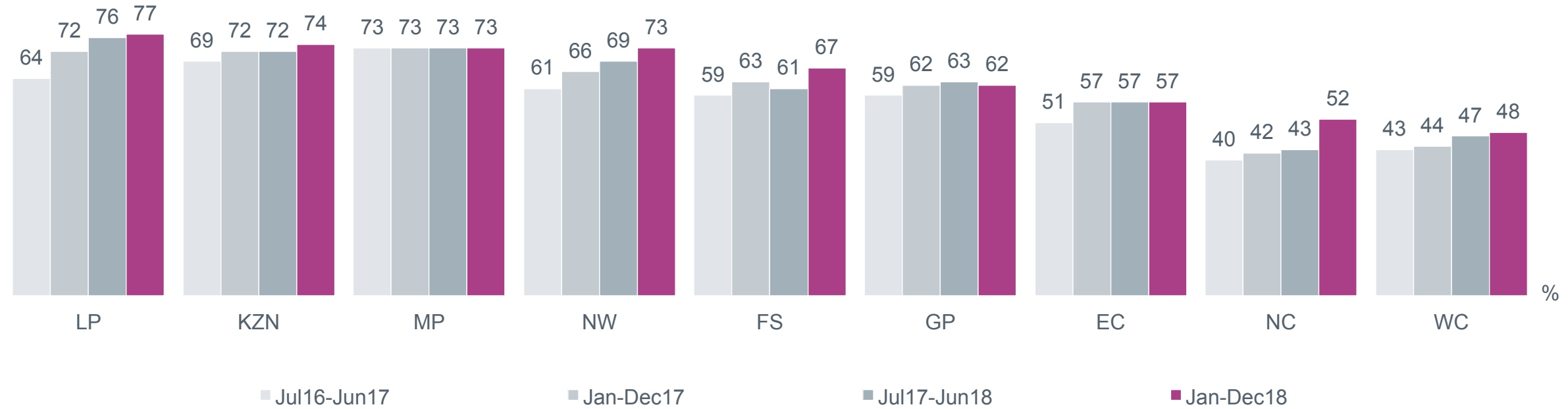
Past week destinations – social



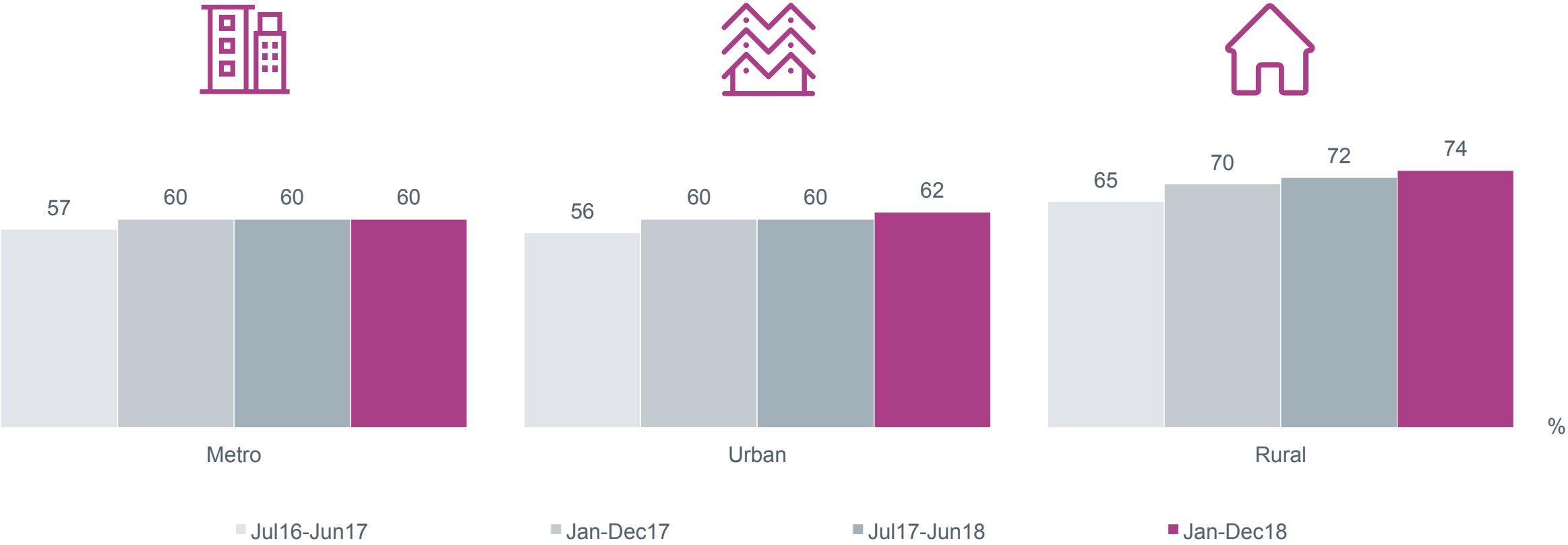
Past week destinations – business



Growth of the taxi/bus industry by province



Growth of the taxi/bus industry by area type

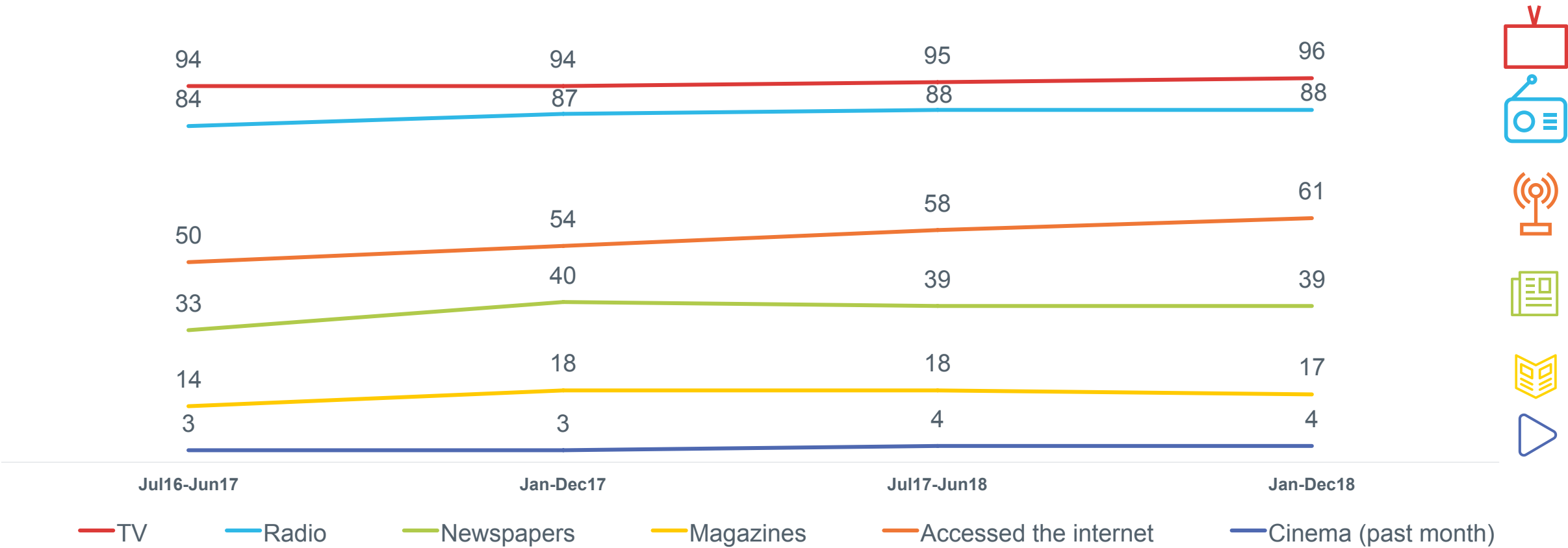


MEDIA LANDSCAPE



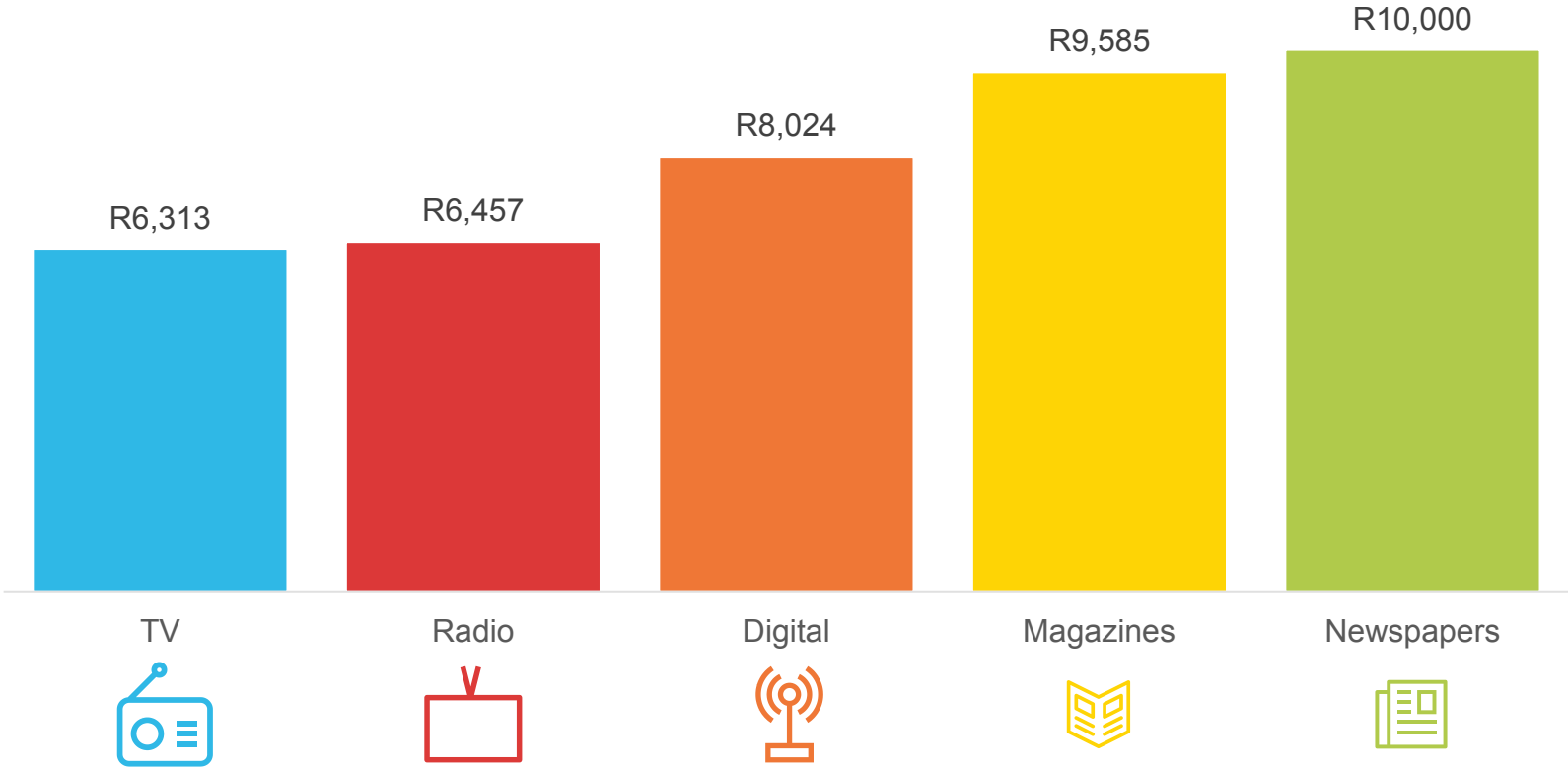
Media landscape

Past 7 day reach trend (%)



Media penetration by income

Personal monthly income – Rand per month



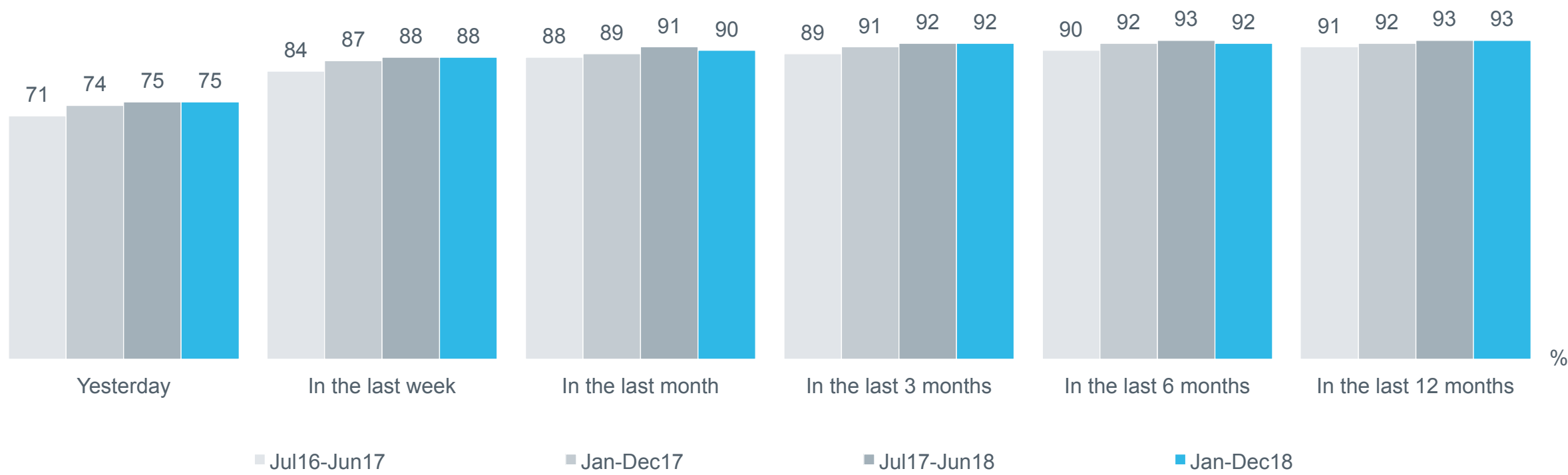
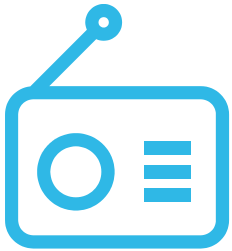


LISTENING

Past 7 days

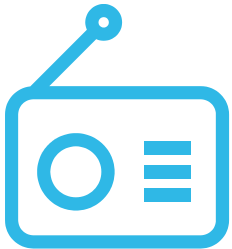


Listening reach

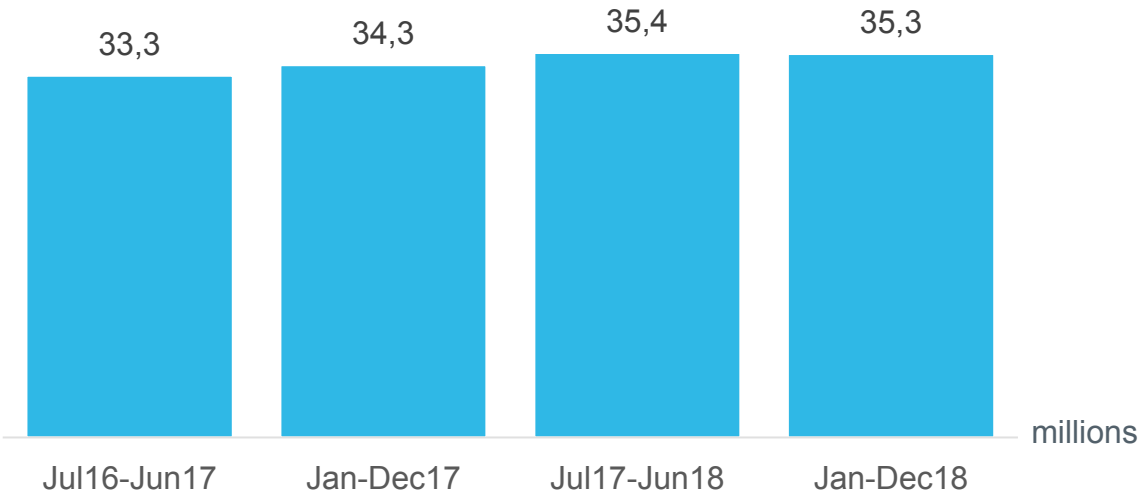


Past 7 day Radio listeners

Population

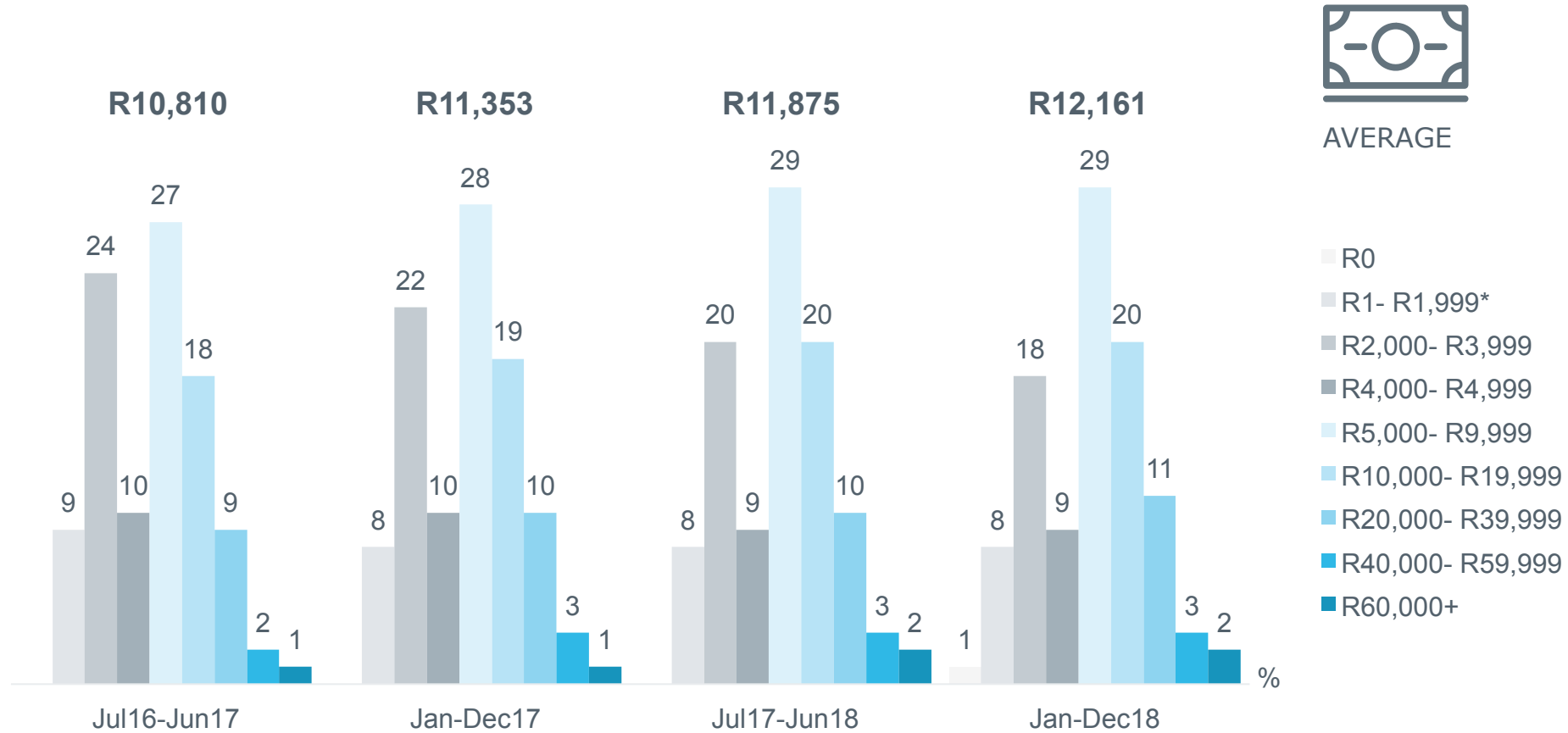


ADULTS 15+

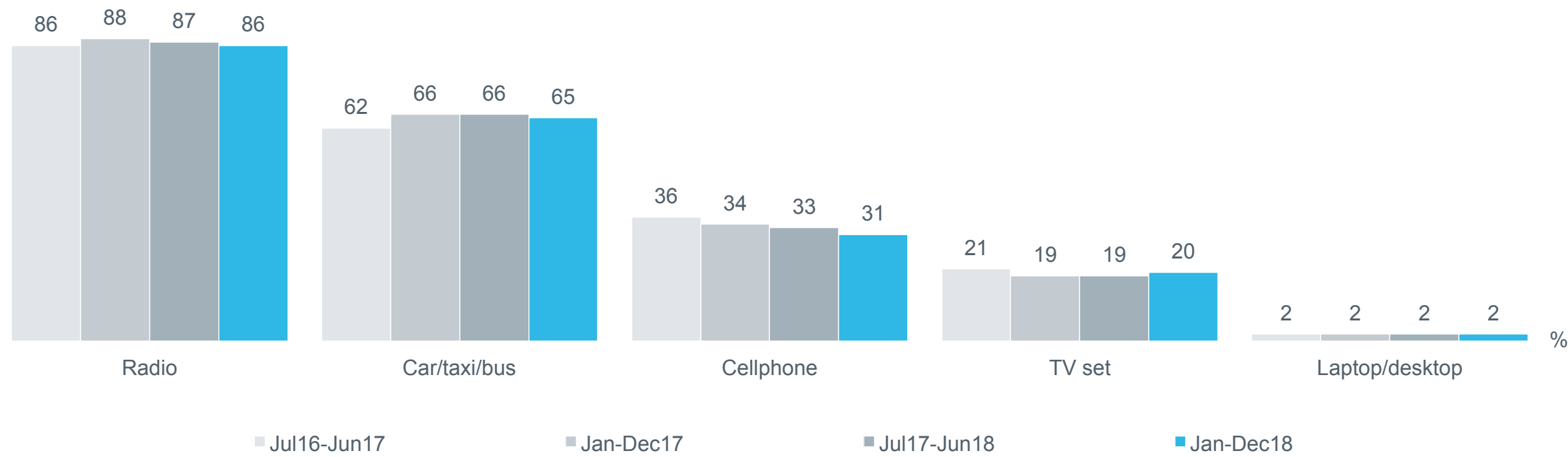
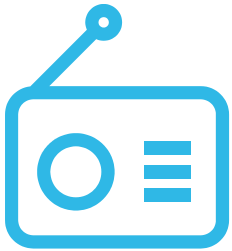


Past 7 day Radio listeners

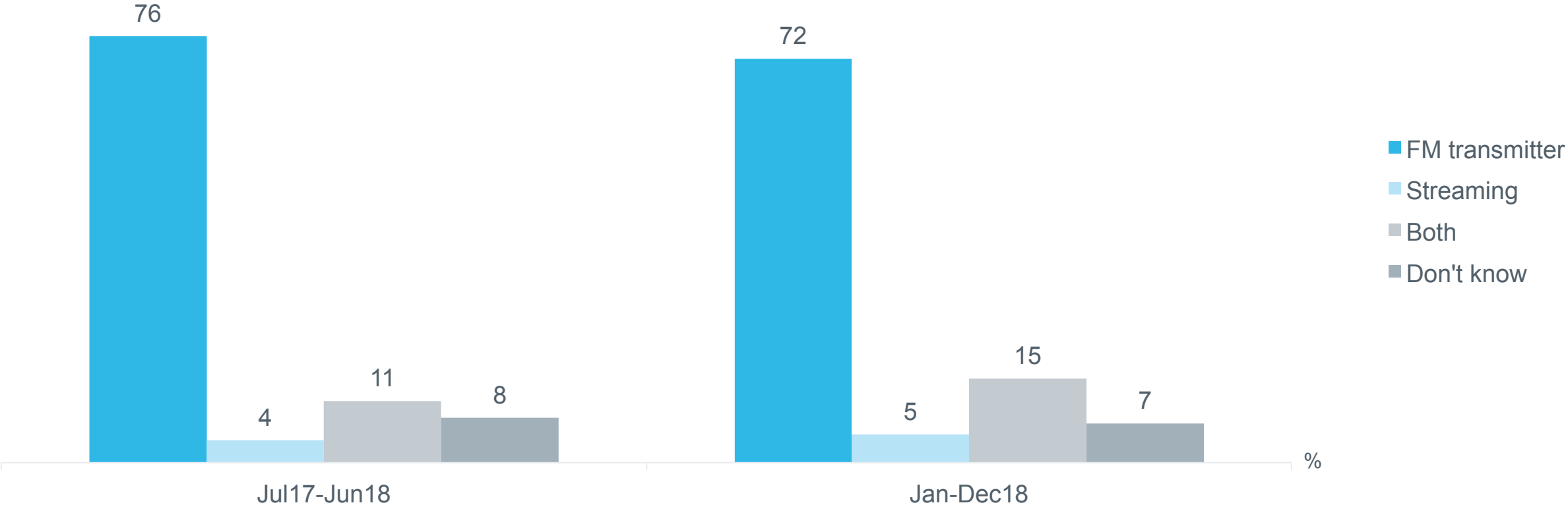
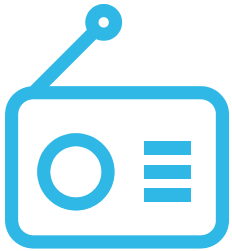
Monthly household income



Listening devices



Cellphone listening

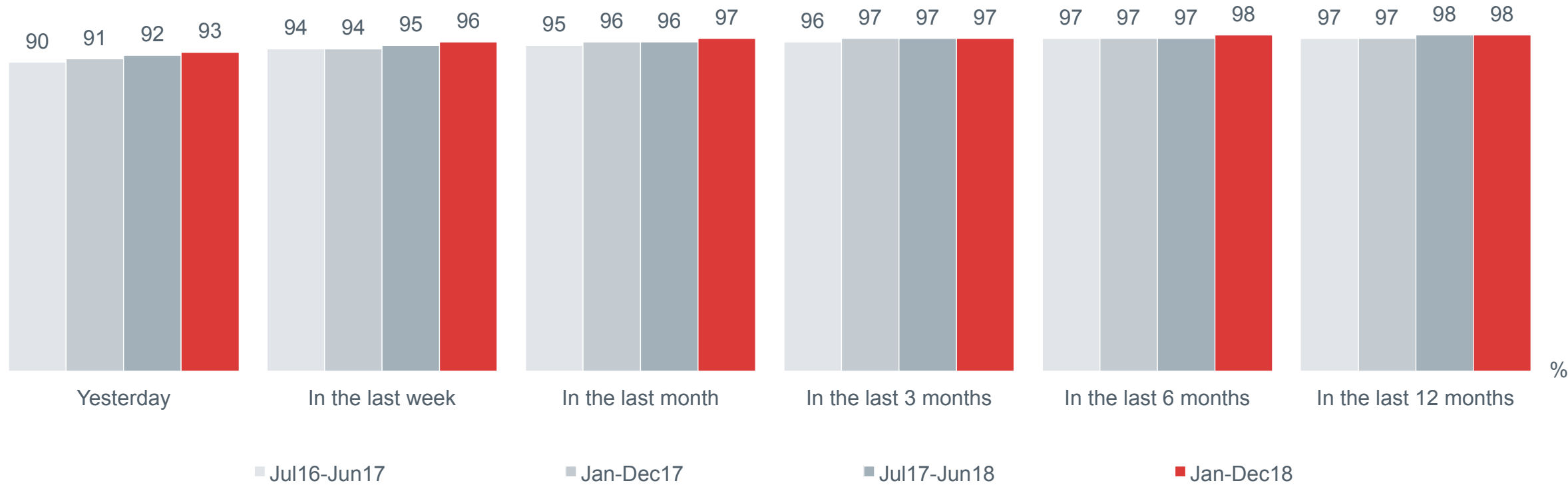
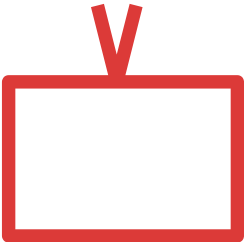


2. VIEWING

Past 7 days

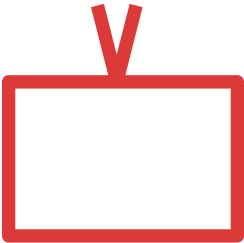


Viewing reach

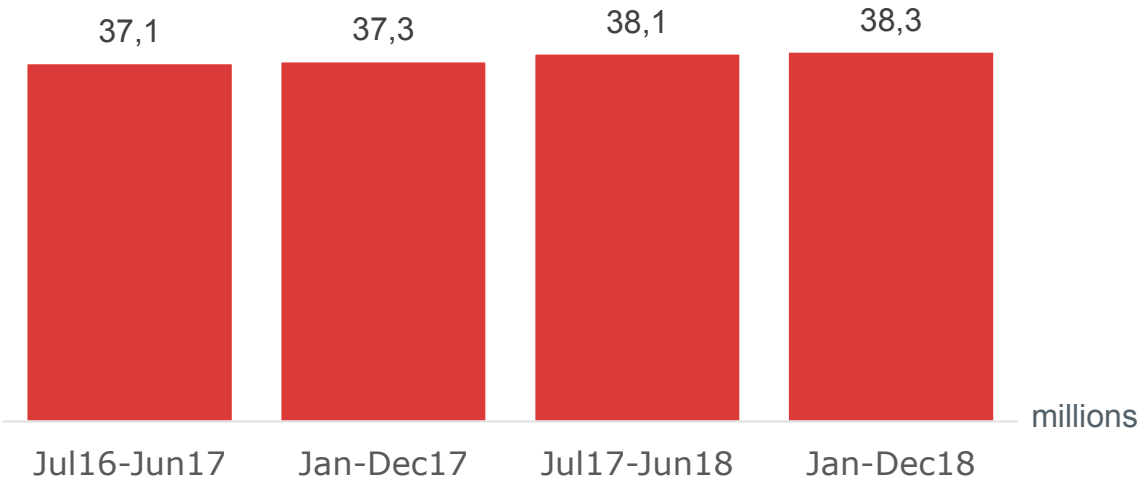


Past 7 day TV viewers

Population

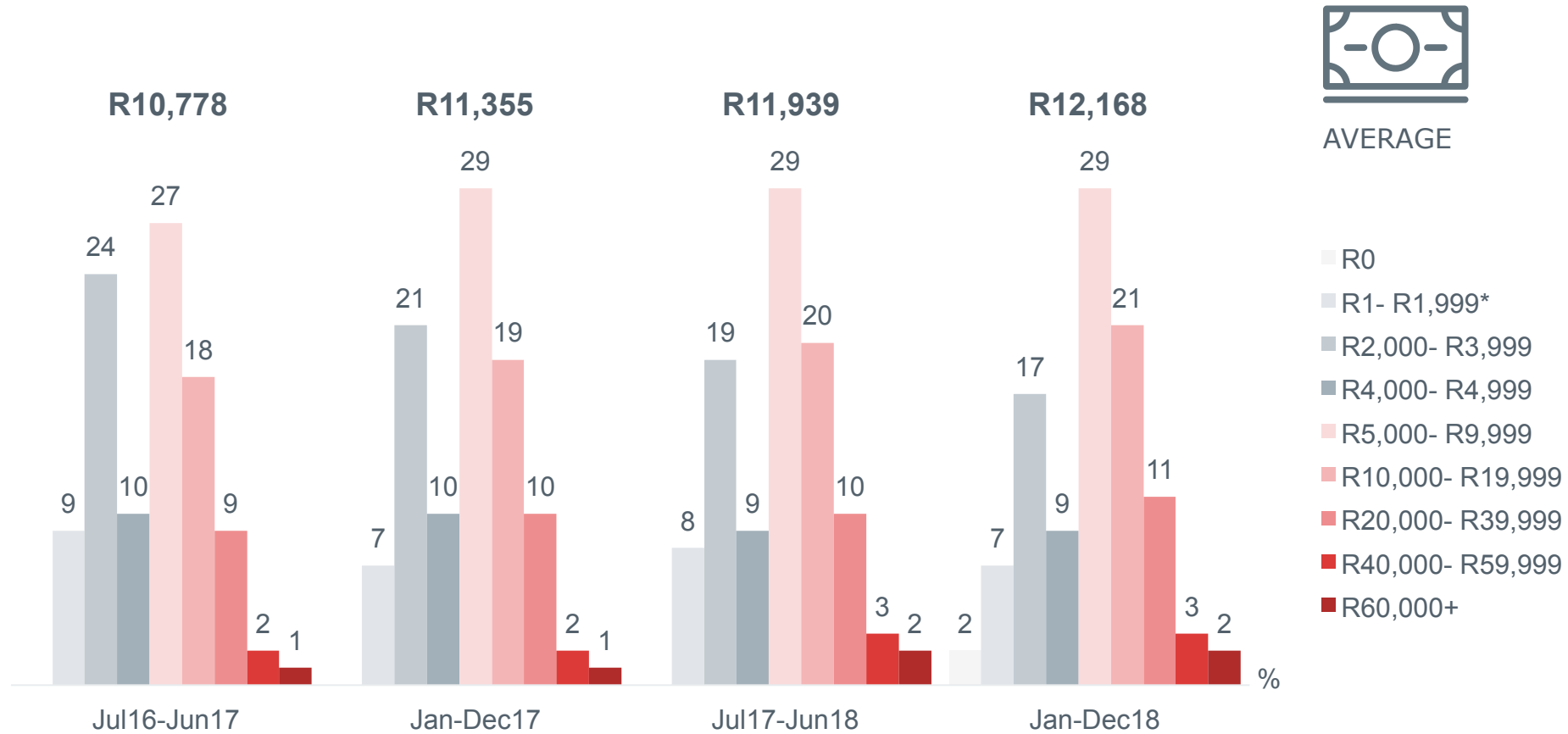
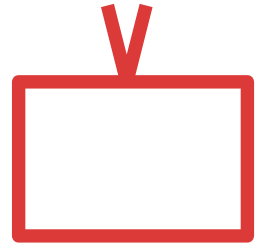


ADULTS 15+

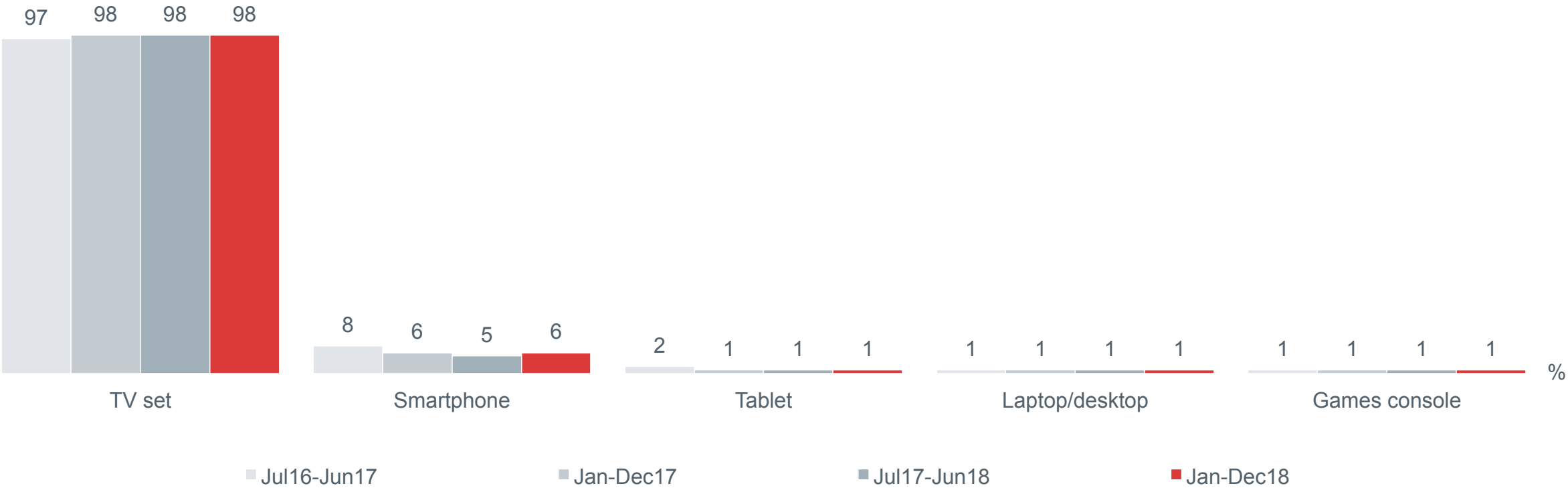
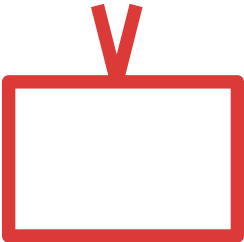


Past 7 day TV viewers

Monthly household income



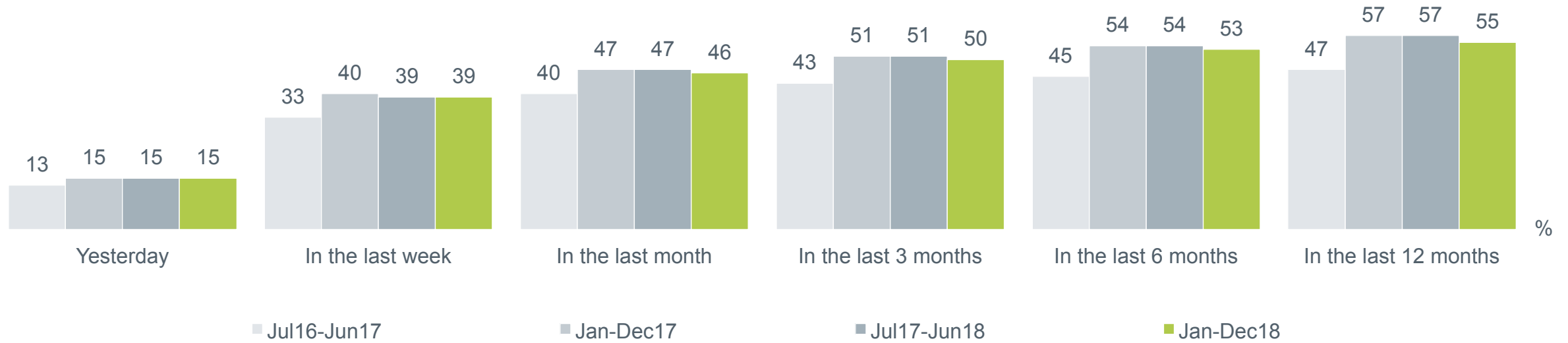
Viewing devices



3. READING Past 7 days



Newspaper reach

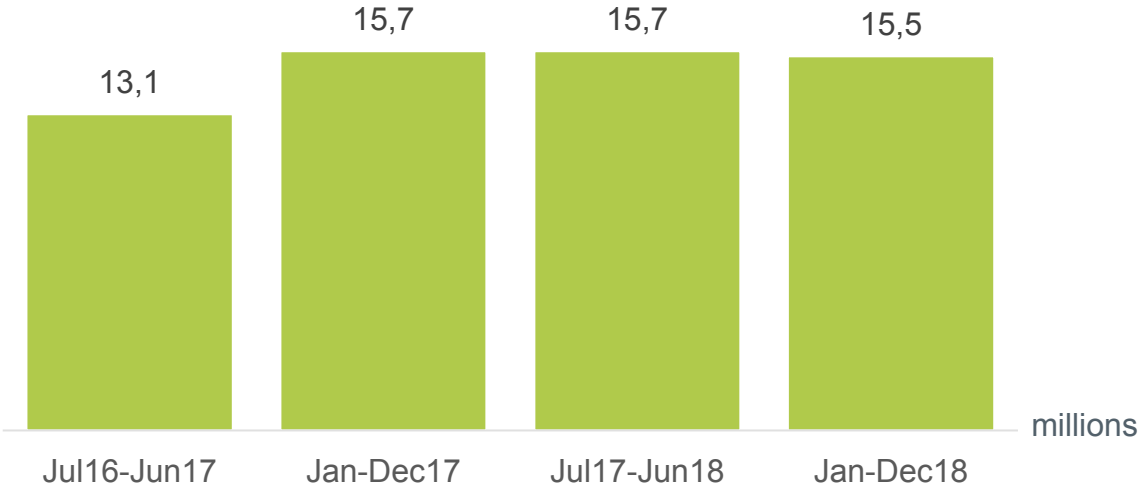


Past 7 day Newspaper readers

Population

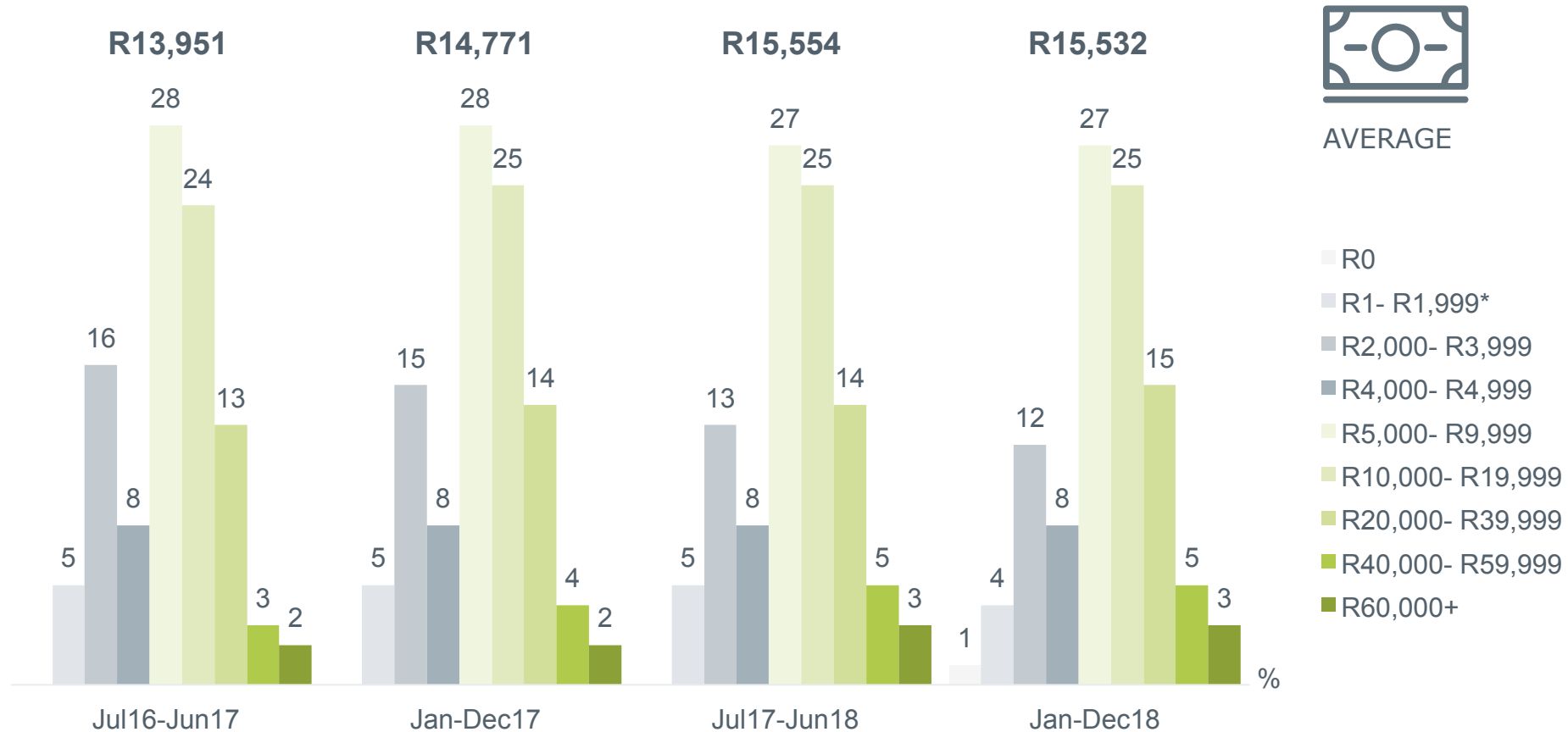
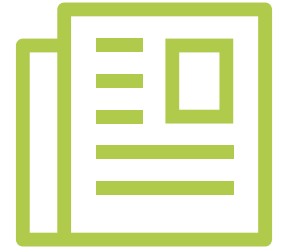


ADULTS 15+

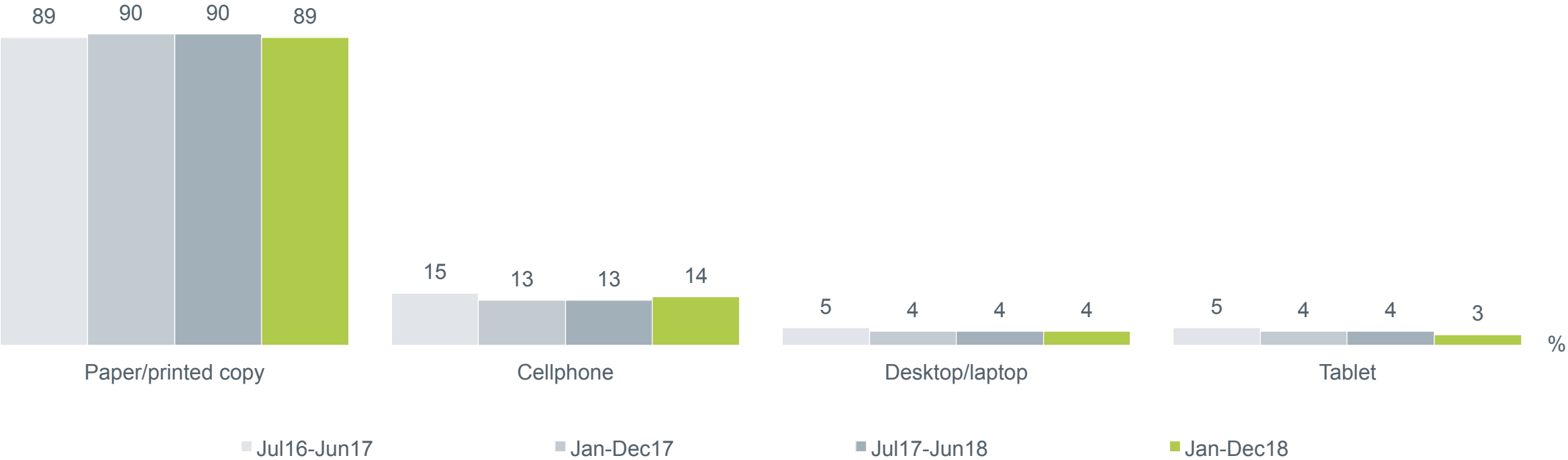


Past 7 day Newspaper readers

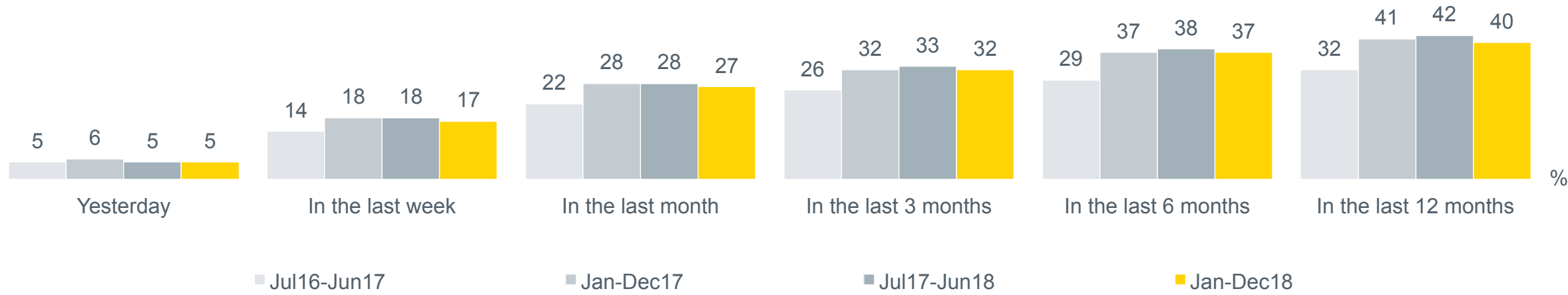
Monthly household income



Newspaper platform usage



Magazine reach

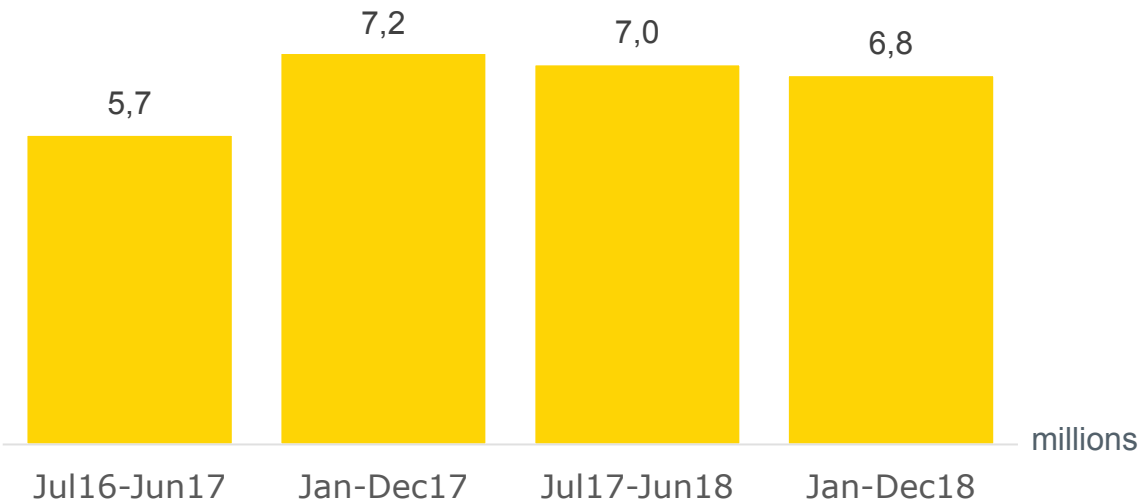


Past 7 day Magazine readers

Population

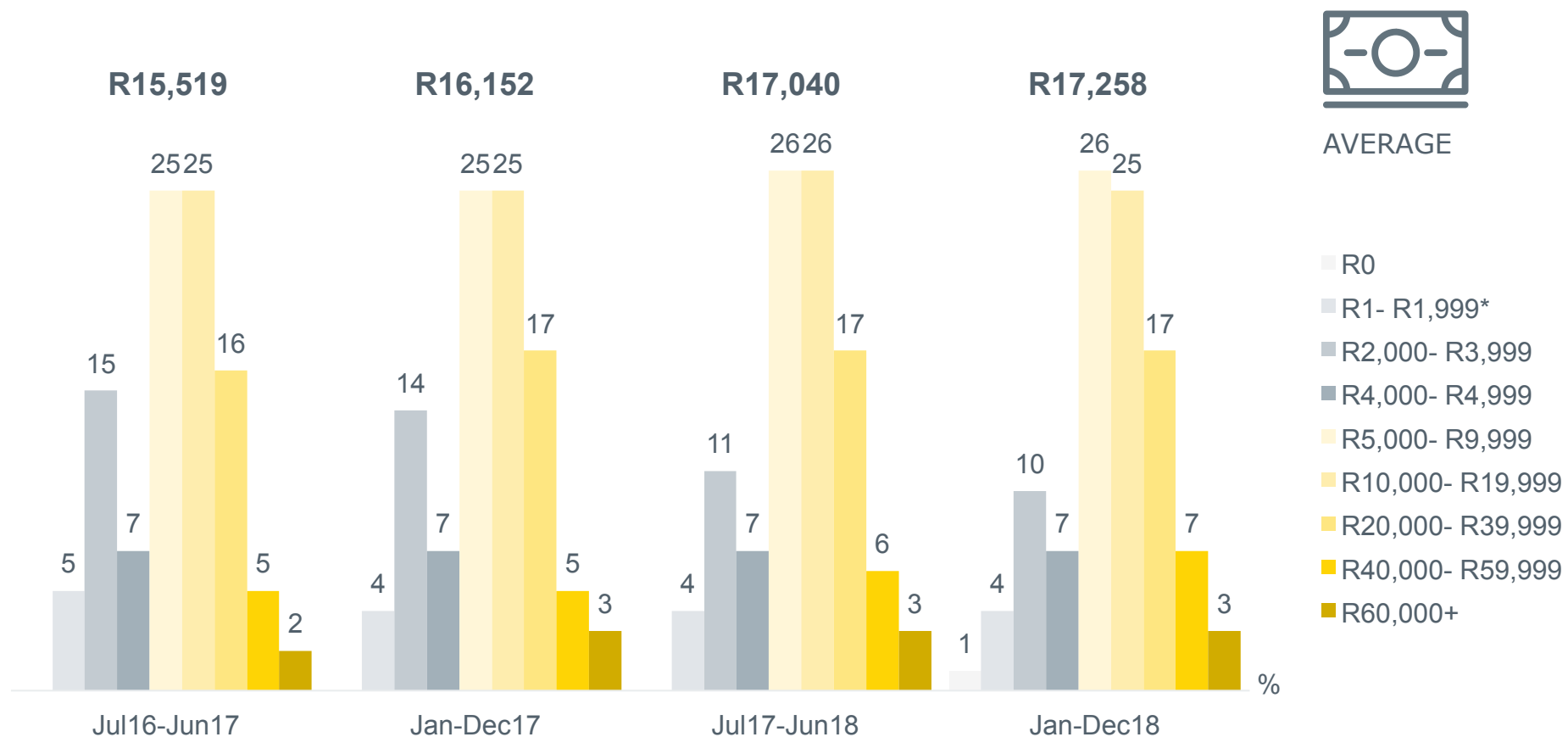


ADULTS 15+

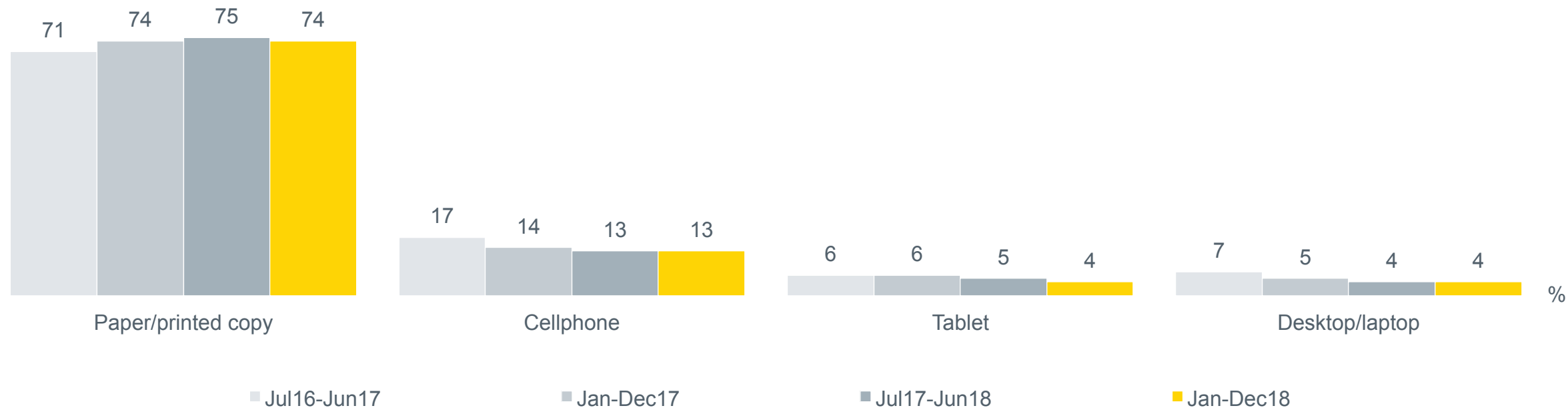


Past 7 day Magazine readers

Monthly household income



Magazine platform usage



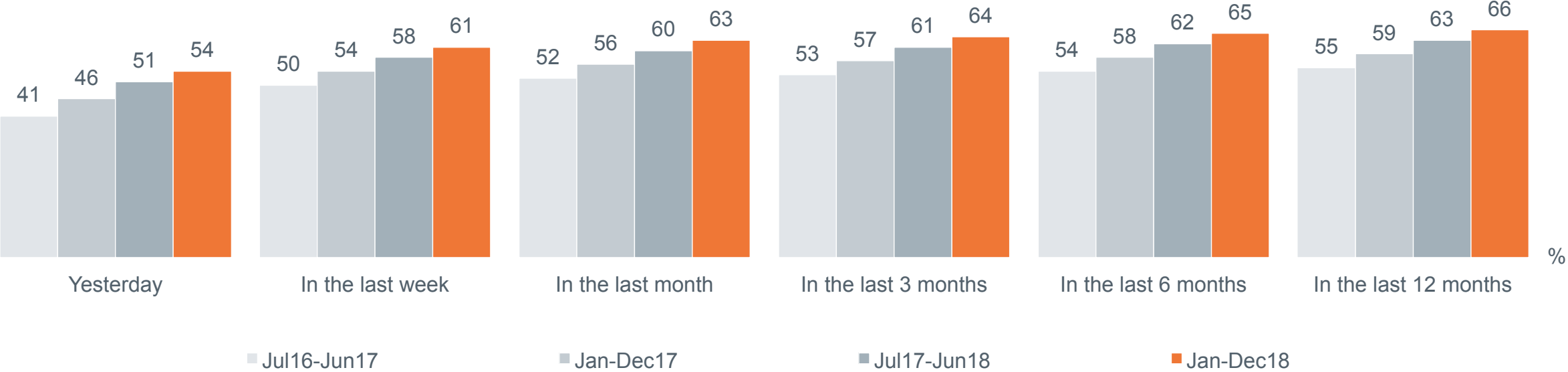
4.

DIGITAL

Past 7 days



Steady increases in Internet reach

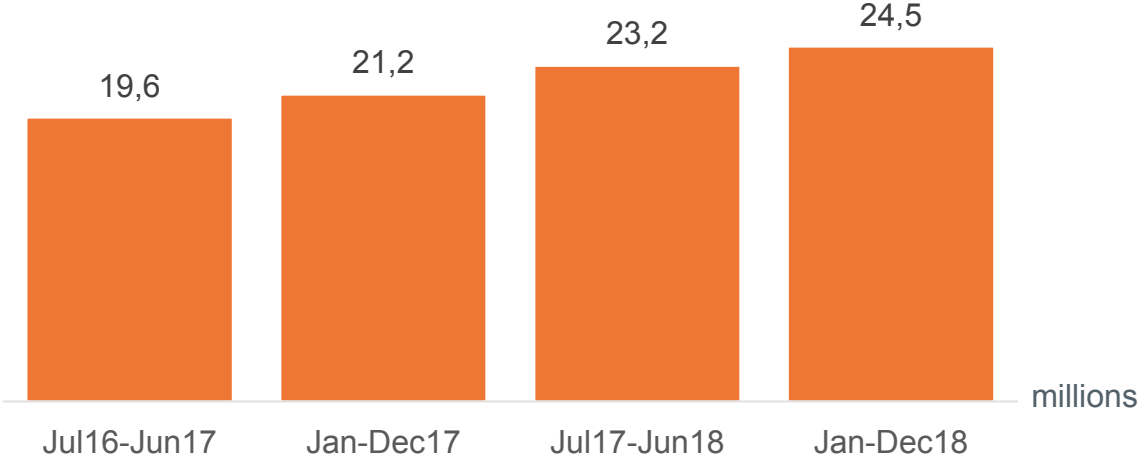


Past 7 day Internet users

Population

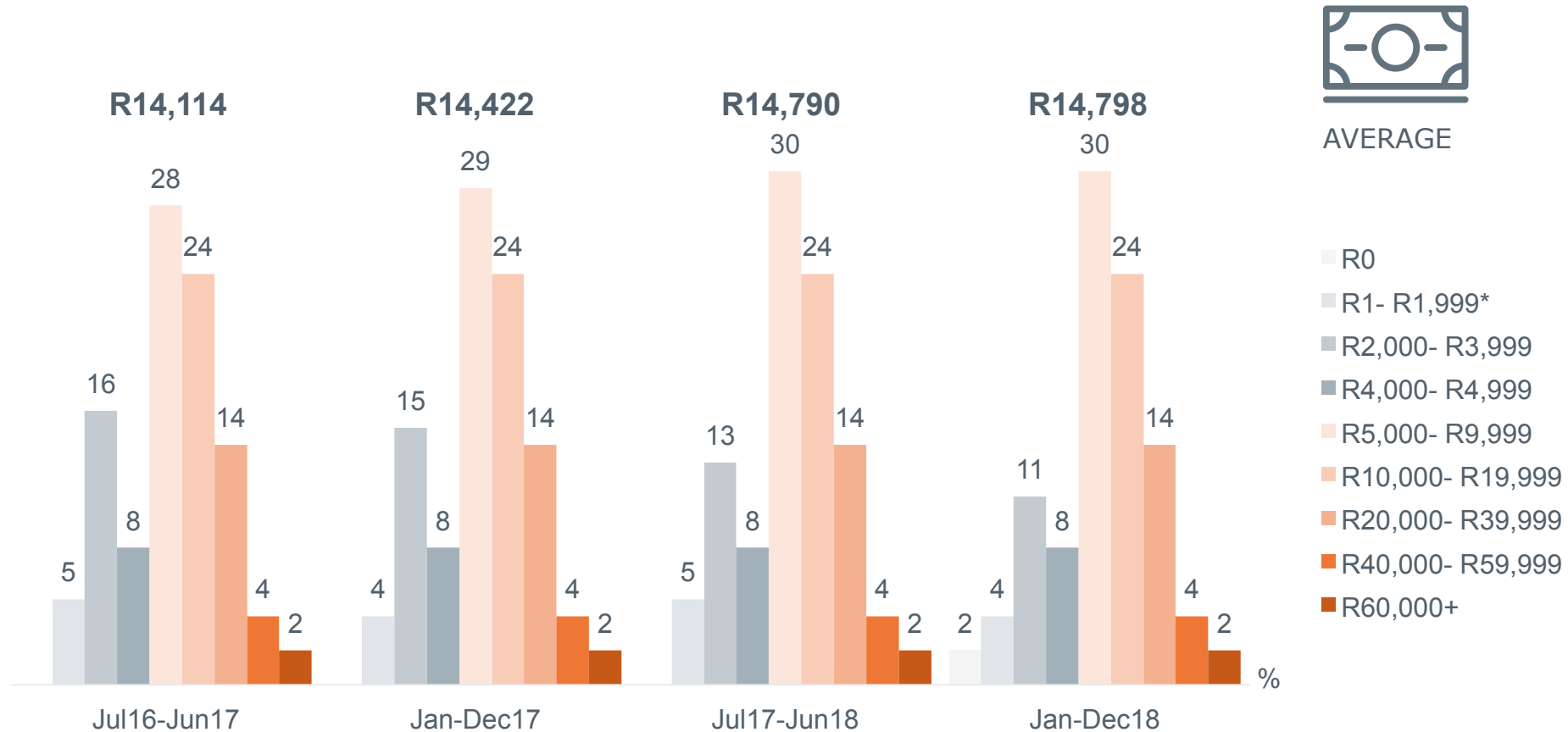


ADULTS 15+

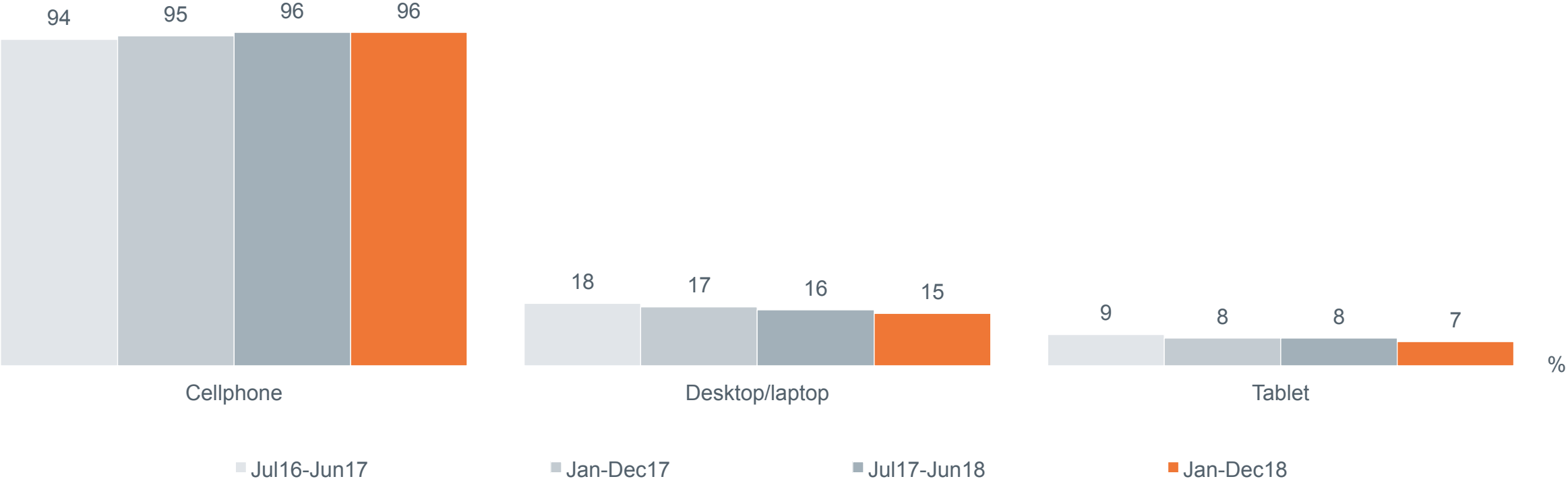


Past 7 day Internet users

Monthly household income

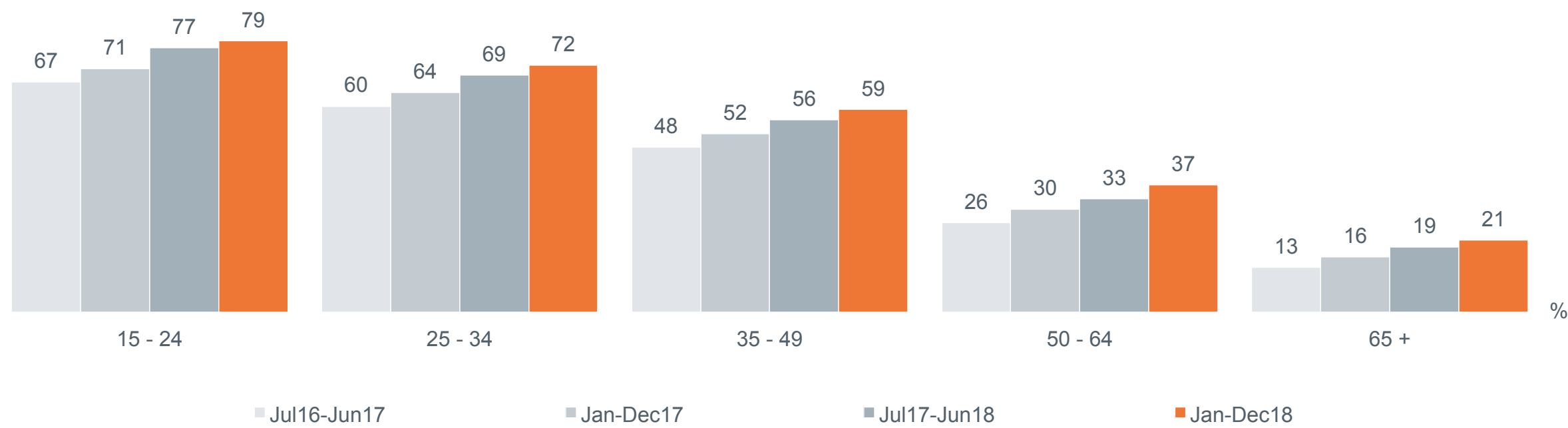


Digital devices

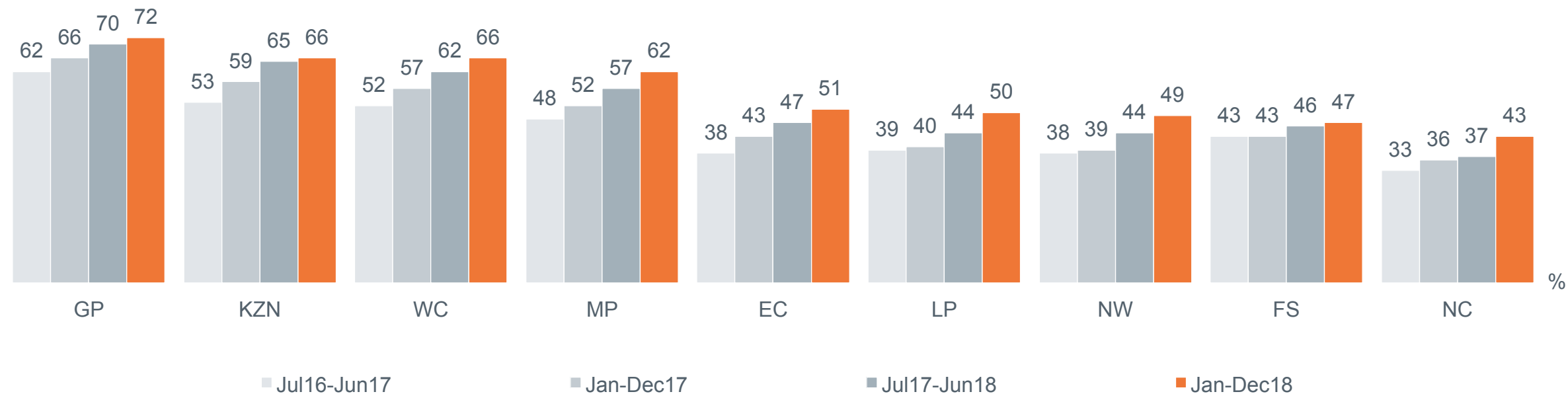


Past 7 day internet usage by age

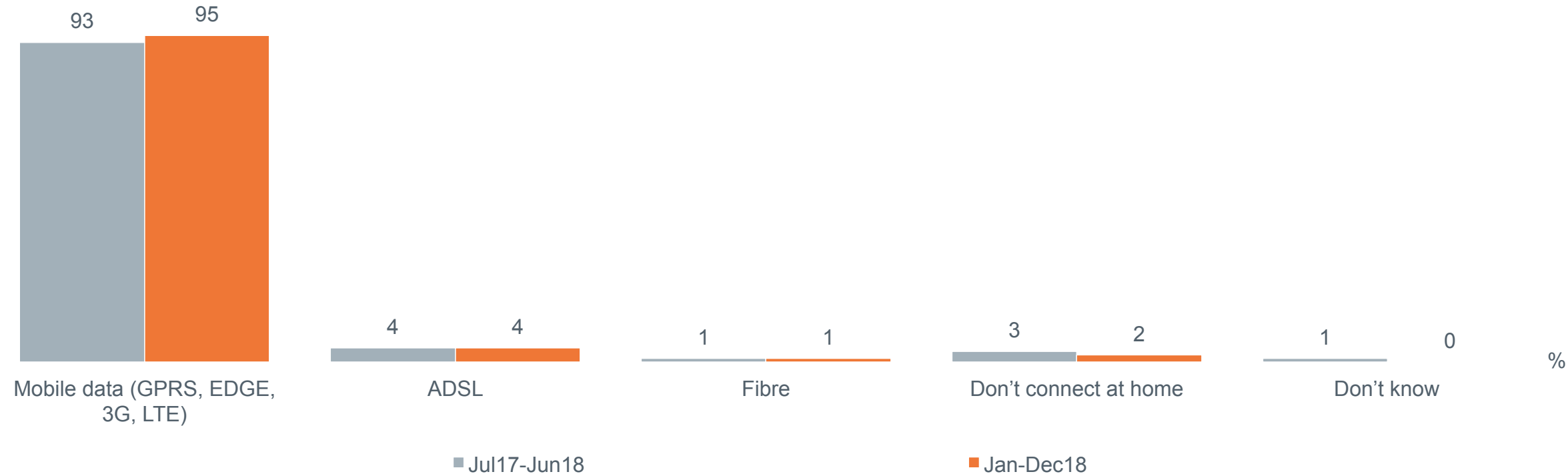
Steady increases across all age groups



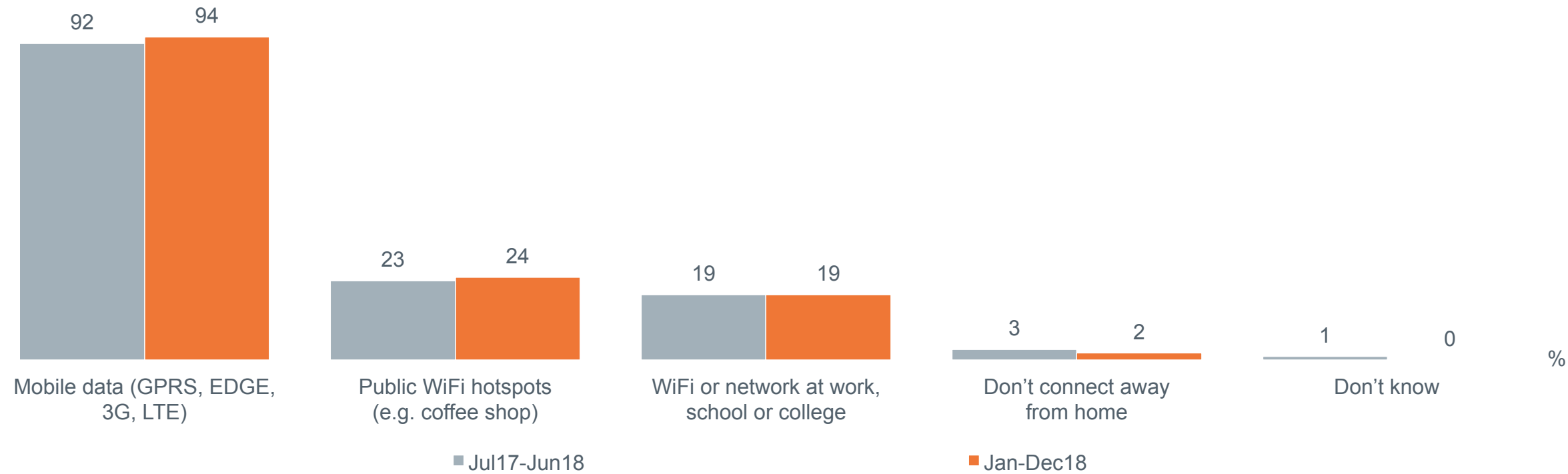
Past 7 day internet usage by province



Connection to the internet: At home



Connection to the internet: Away from home



Websites usually visited



%

5.
CINEMA
Past month



Cinema reach

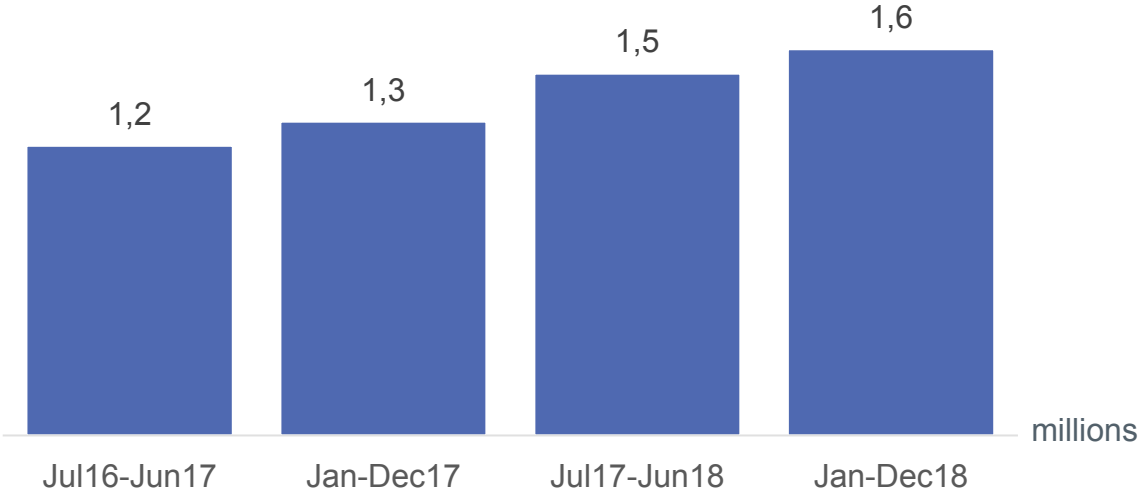


Past month Cinema goers

Population

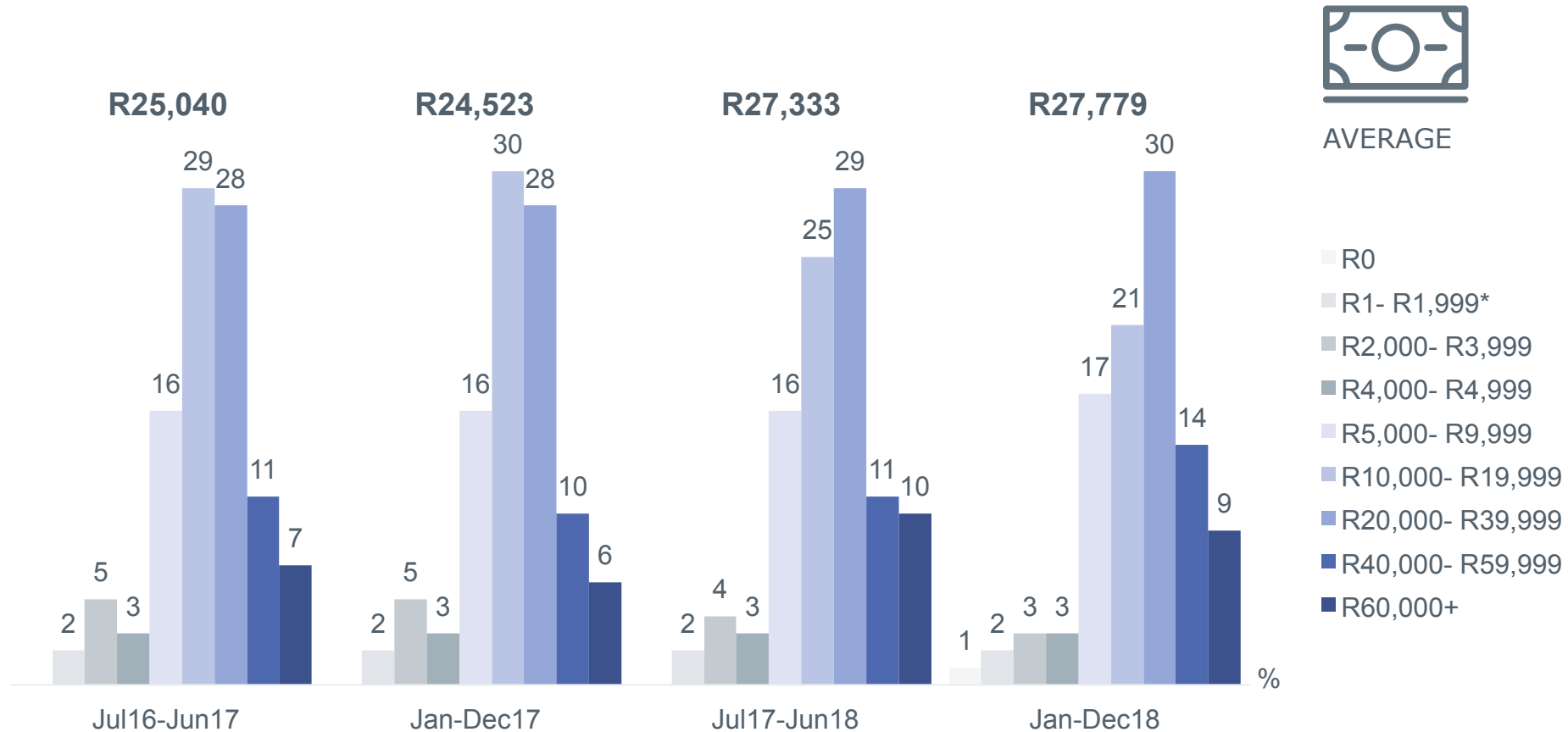


ADULTS 15+



Past month Cinema goers

Monthly household income



ESTABLISHMENT SURVEY SEM 2018™





Establishment Survey

SEMTM 2018

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

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

The power of SEM



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



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



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



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



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)

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

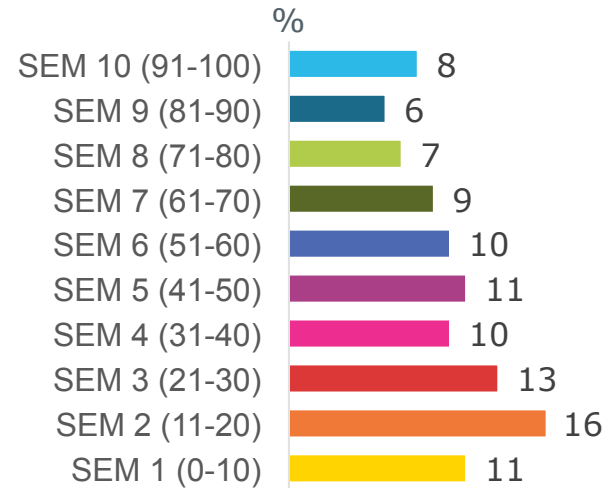


Fully customisable: The SEM continuum allows flexibility to group based on any combination of SEM scores to meet your target market requirements

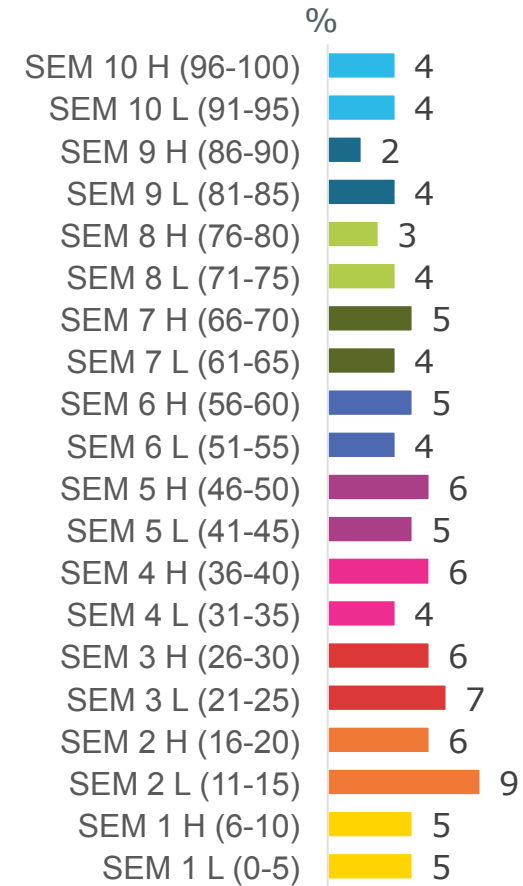
For example: 0-40; 41-95; 96-100

Different standard SEM outputs available

10 groups:
For ease of use



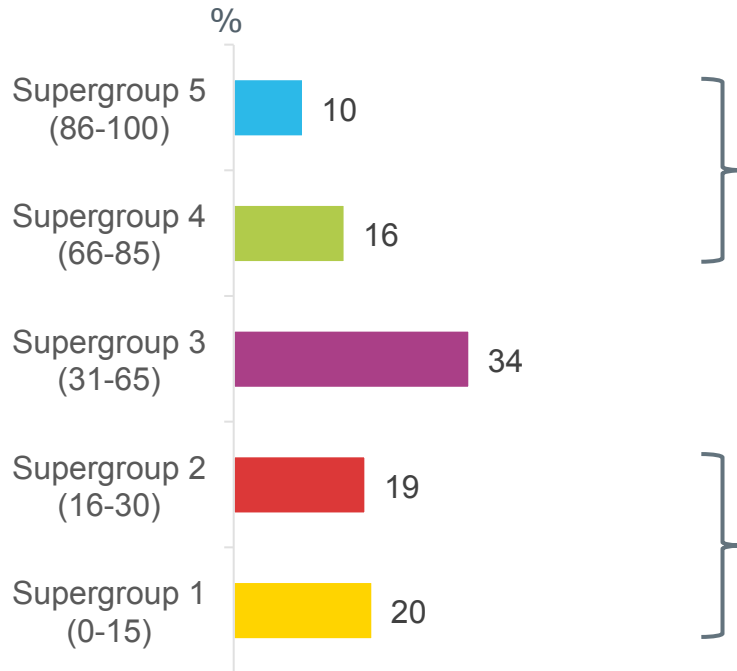
20 groups:
For finer targeting



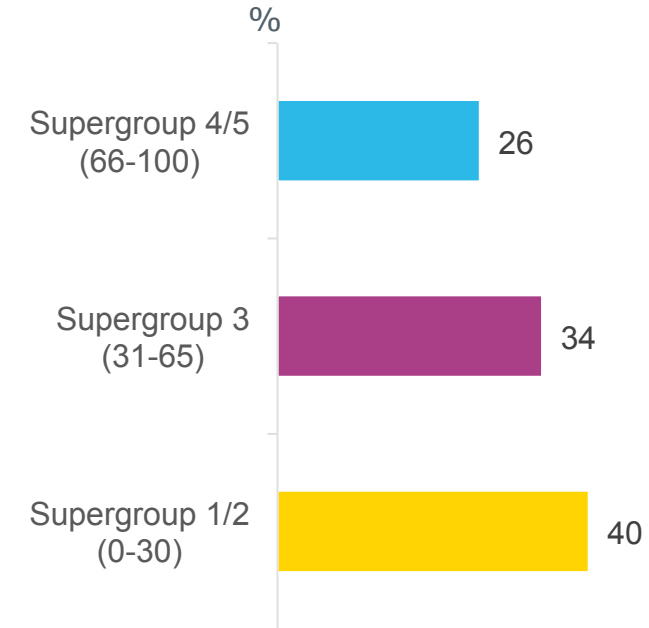
Both of these outputs are based on equal distribution of scores (SEM has been validated as a good continuum)

Different standard SEM outputs available

5 supergroups:
For simpler targeting

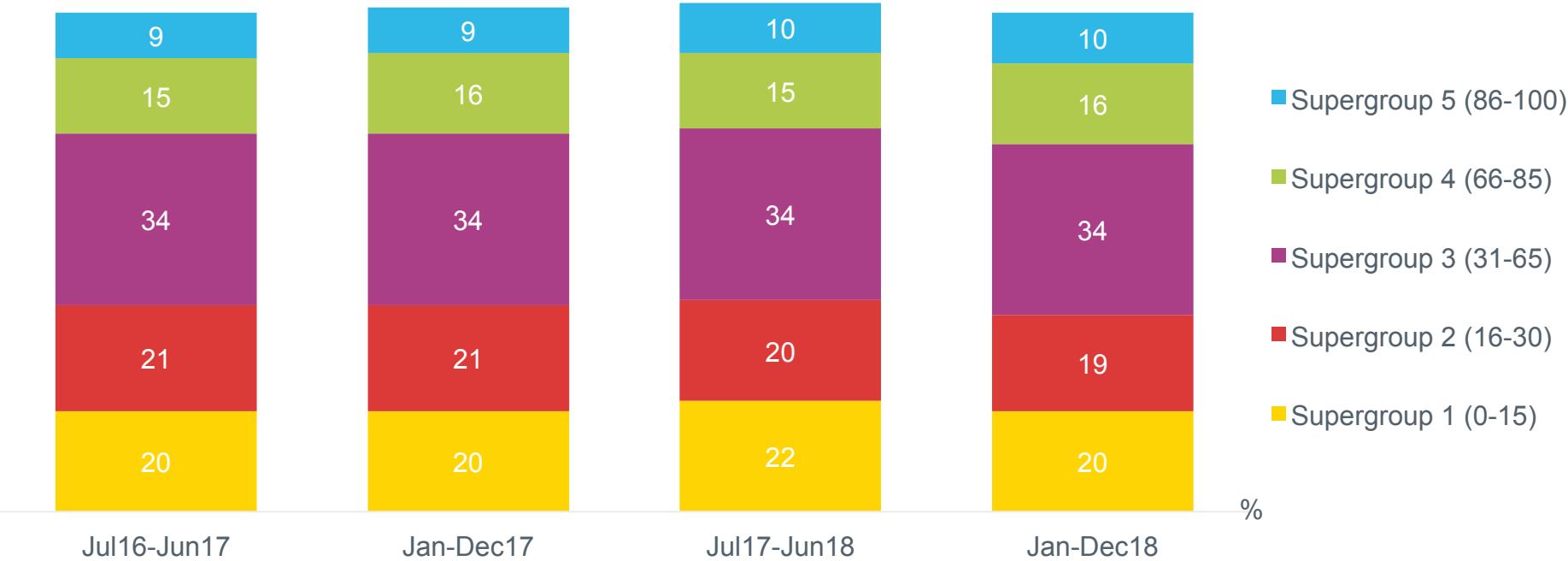


3 supergroups:
For macro targeting and mobile solutions



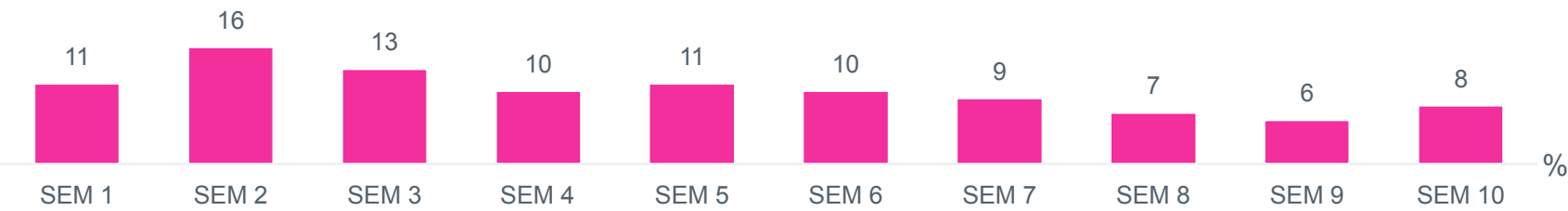
Supergroup cut-points are based on where changes in lifestyle can be noted from segment profiling

SEM supergroups tracked

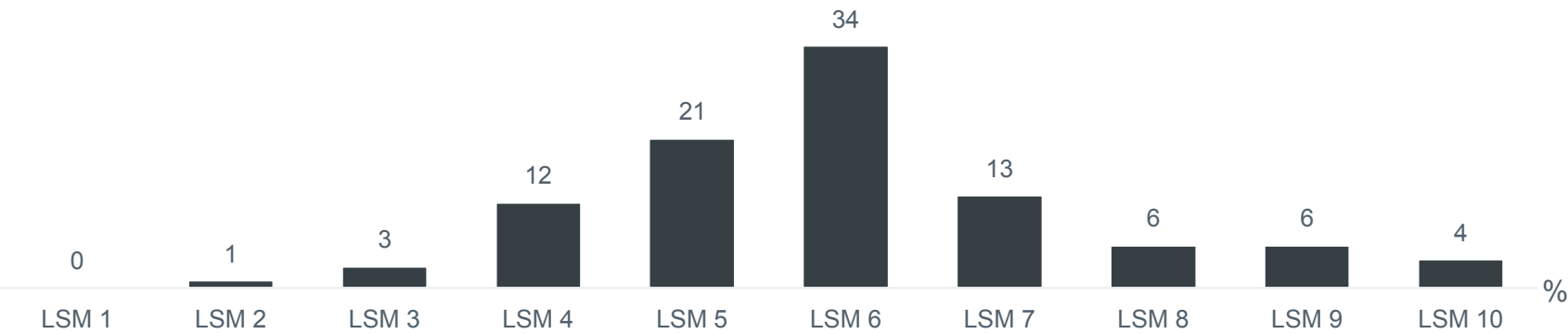


ES SEM vs. ES LSM

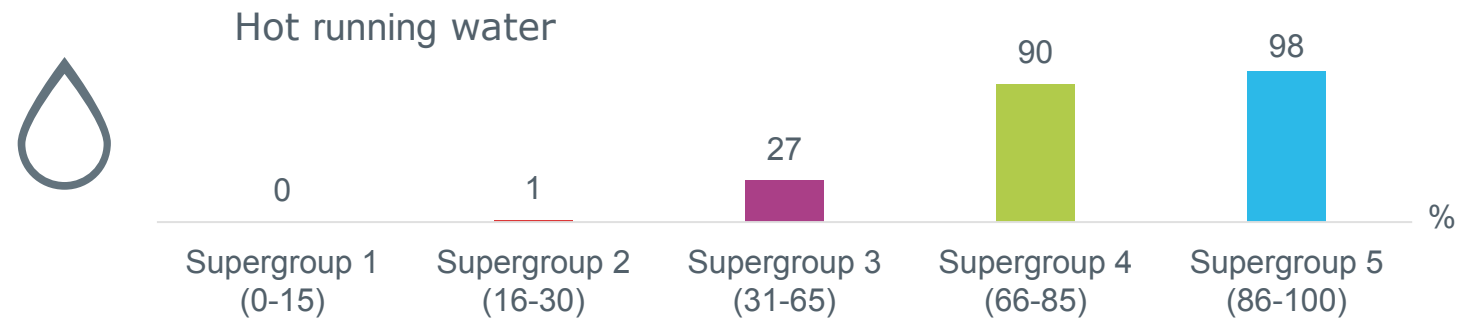
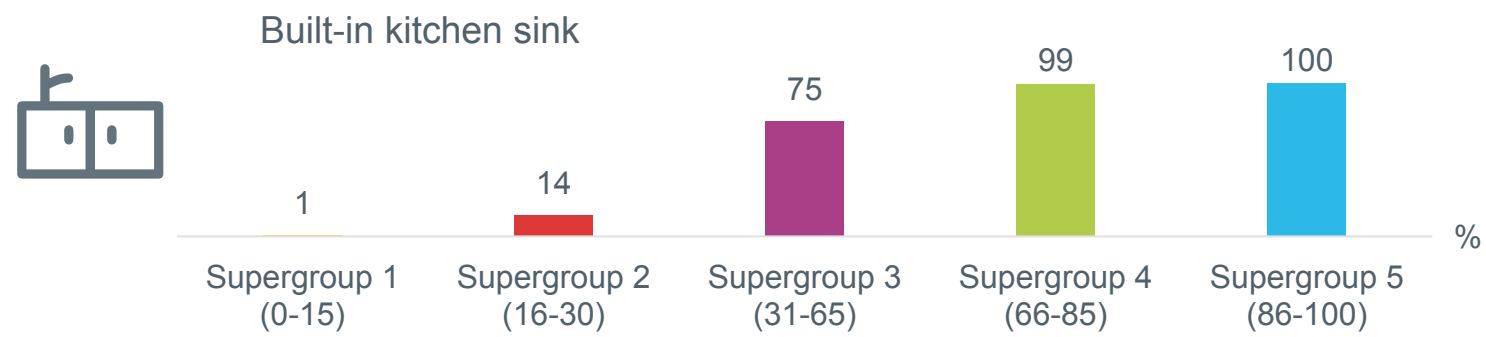
SEM:



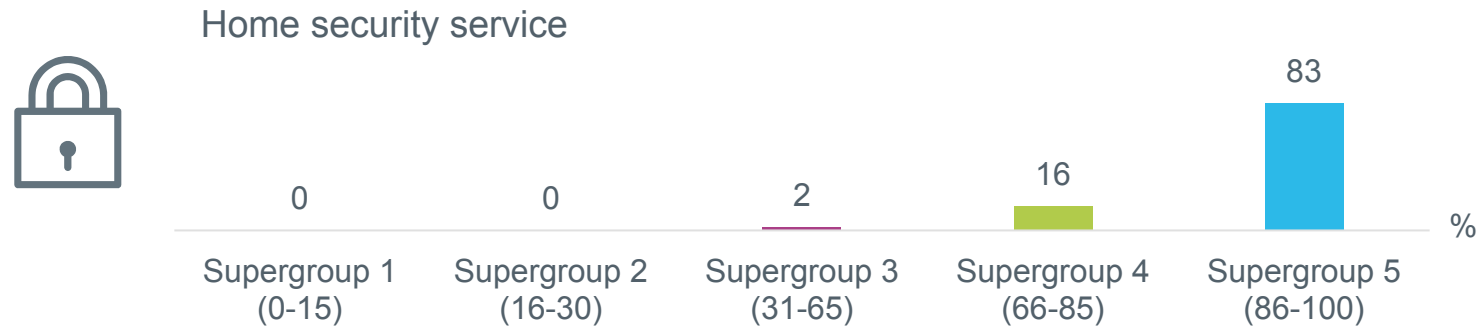
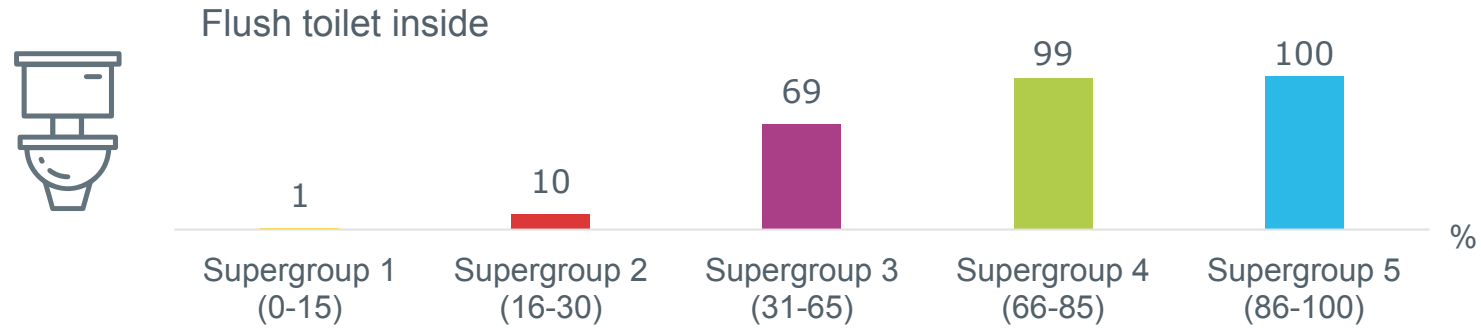
LSM:



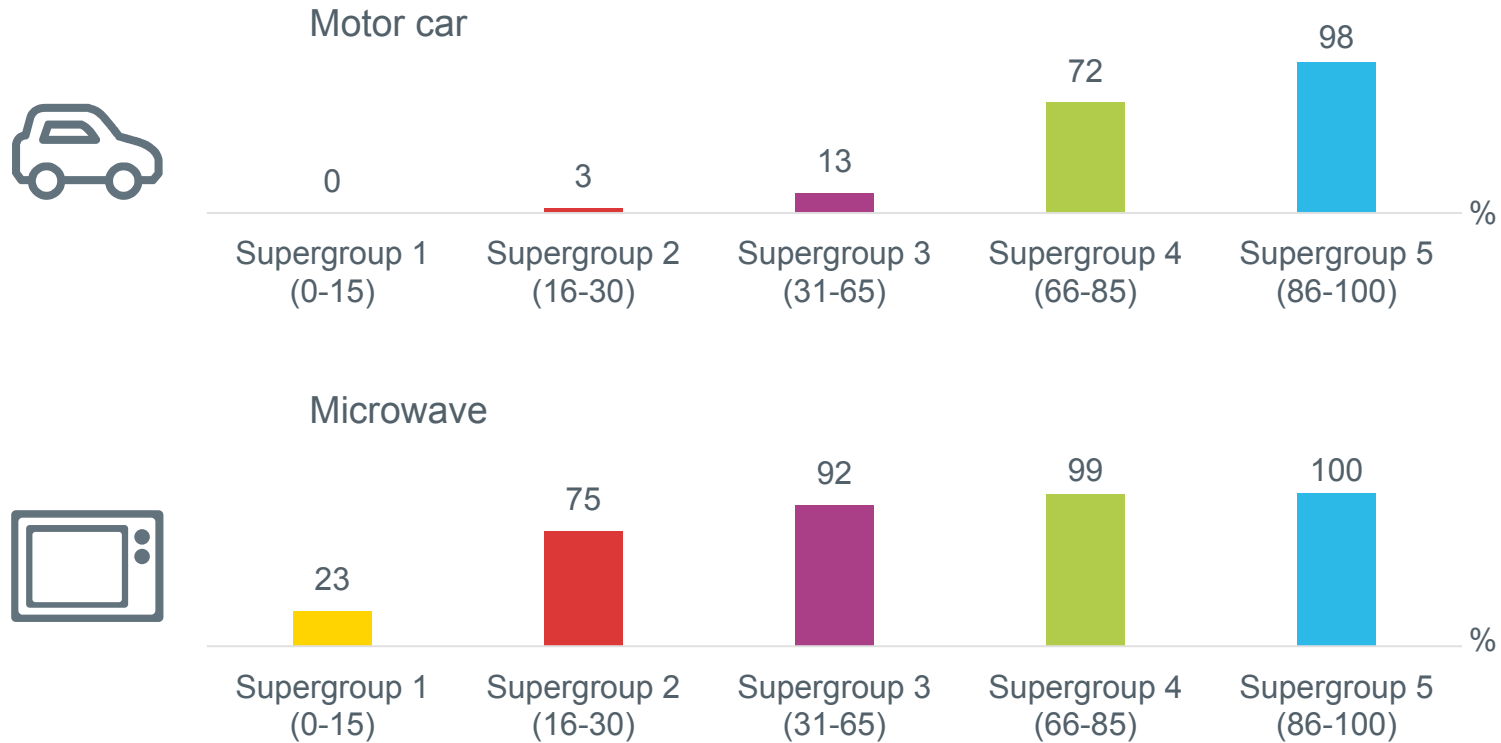
SEM 2018 key input variables



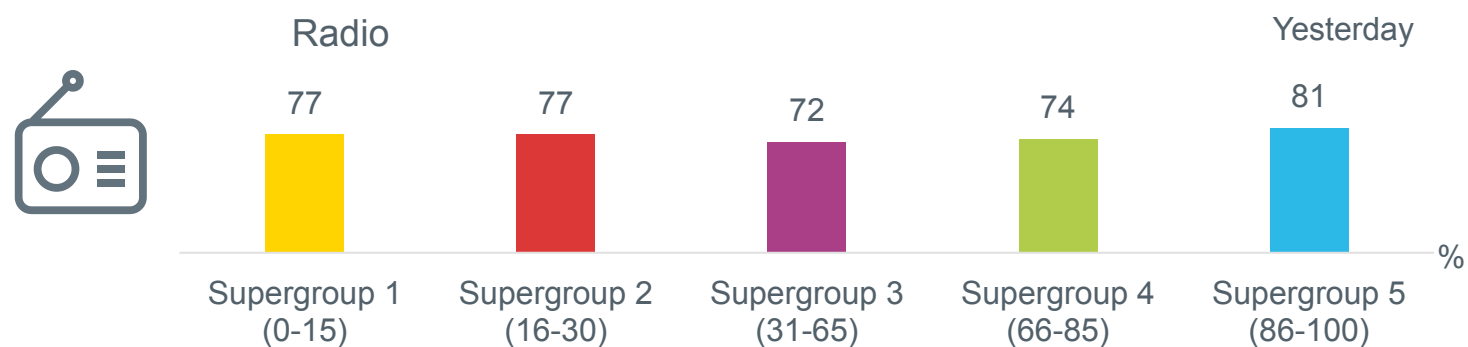
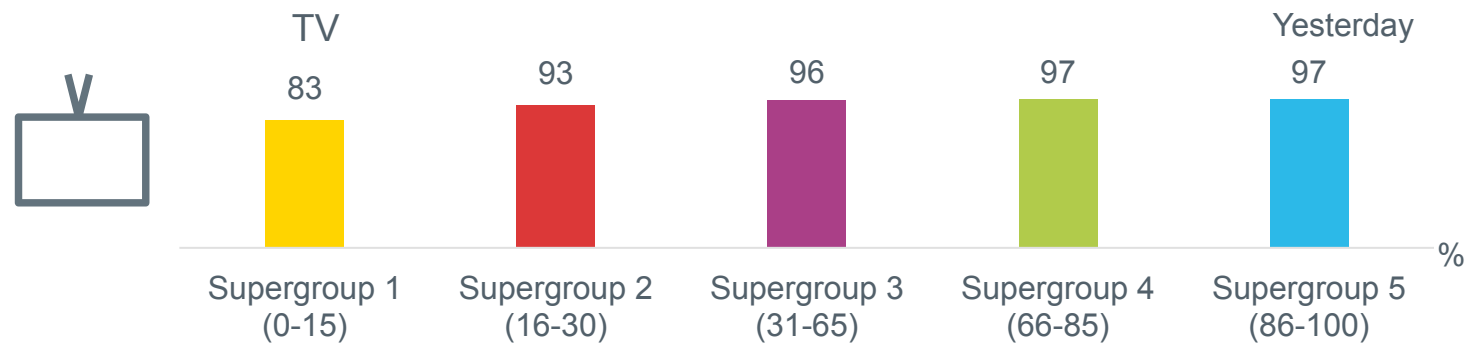
SEM 2018 key input variables



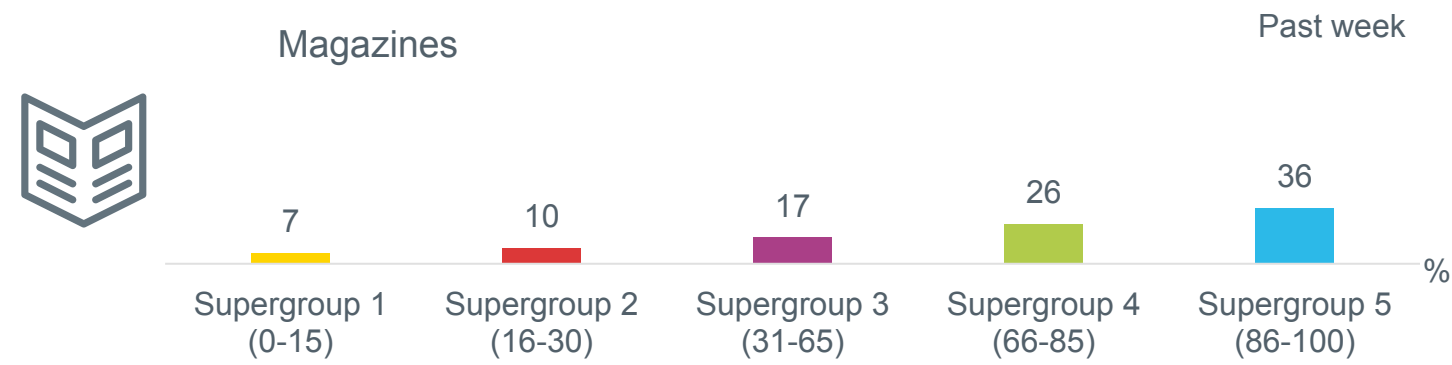
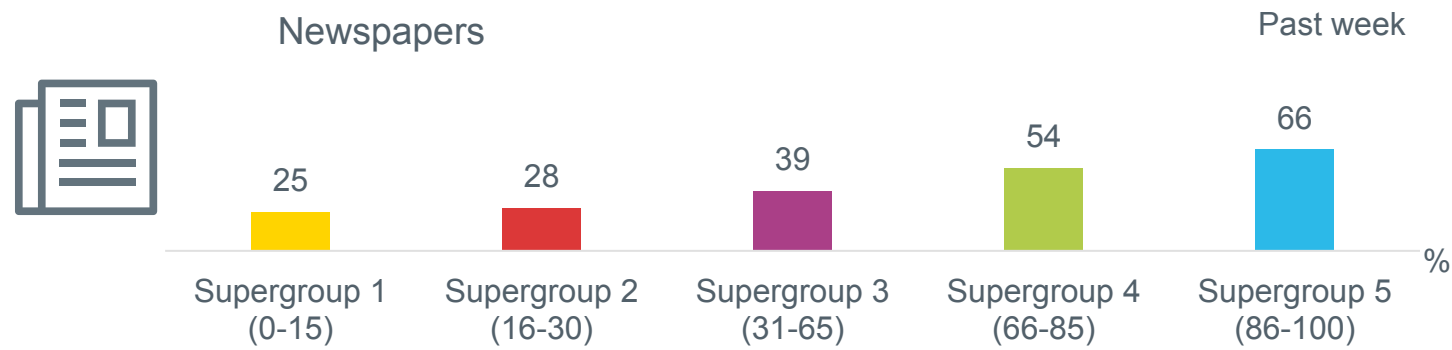
SEM 2018 key input variables



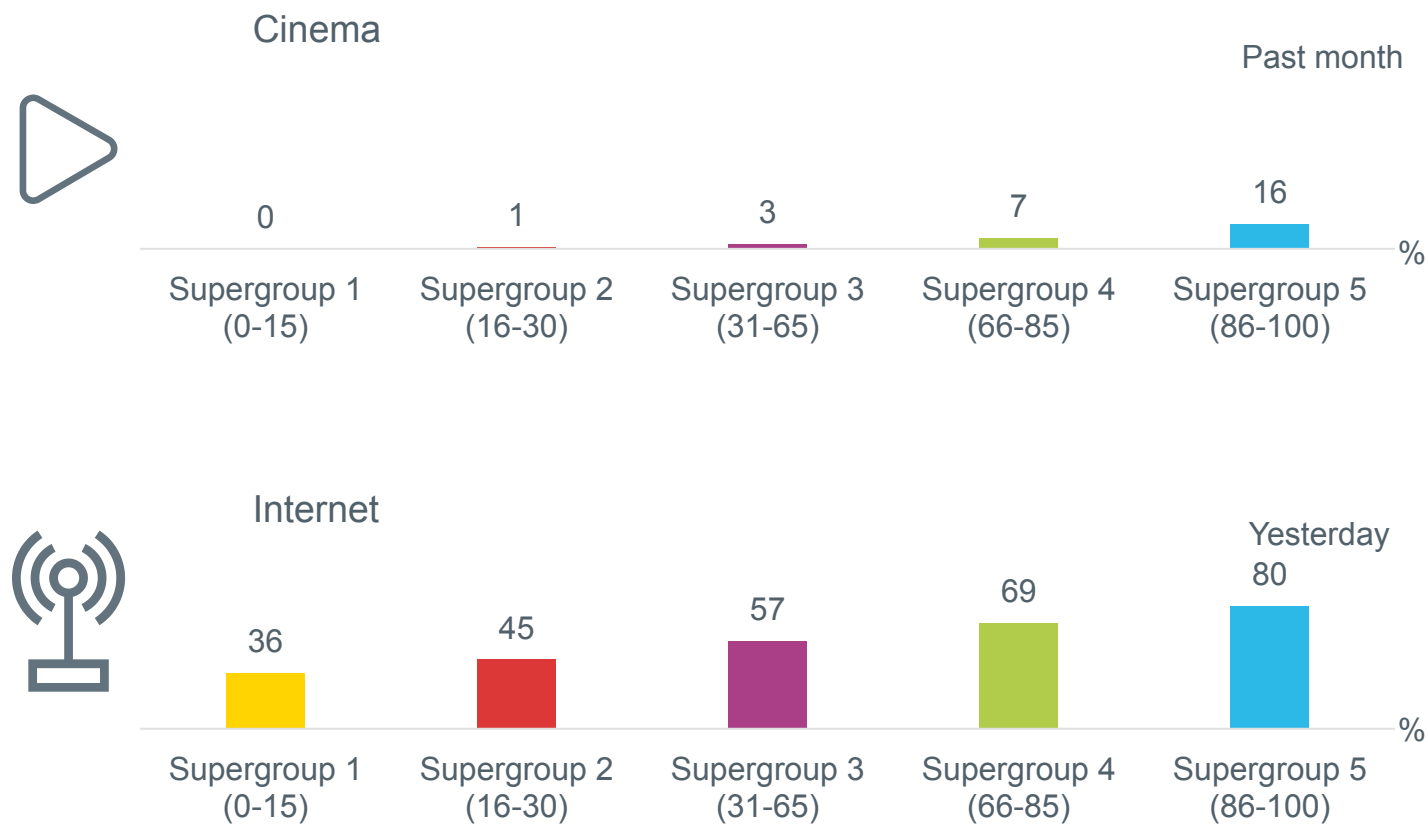
SEM 2018 media profiles



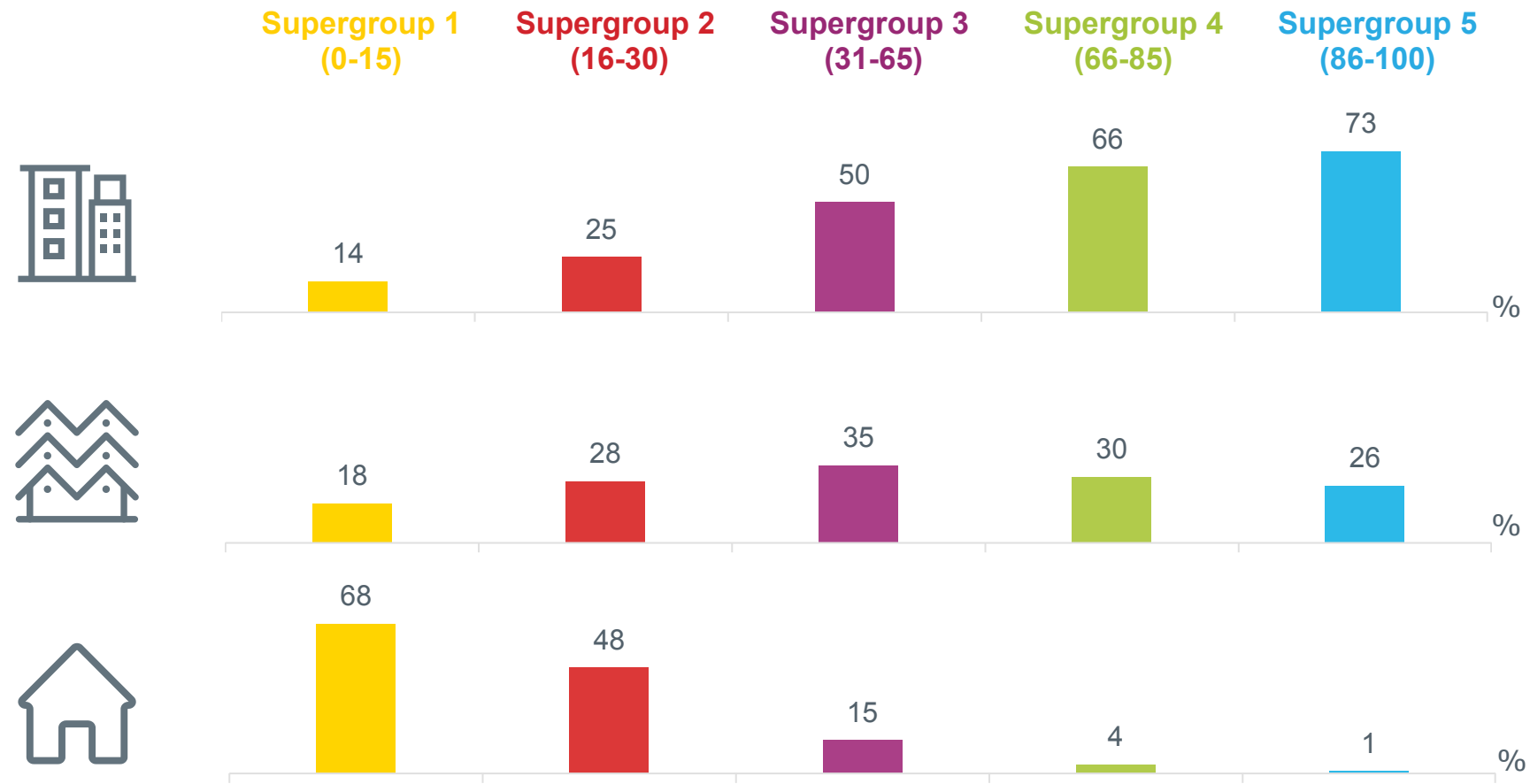
SEM 2018 media profiles



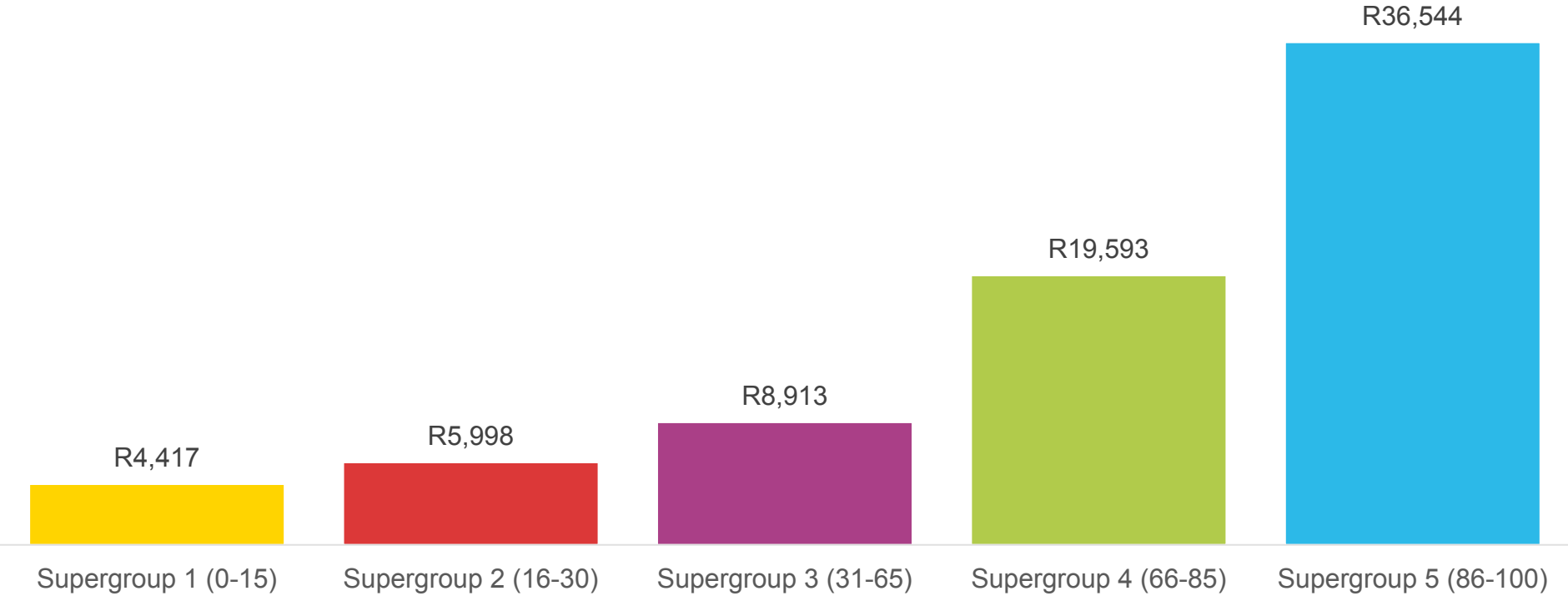
SEM 2018 media profiles



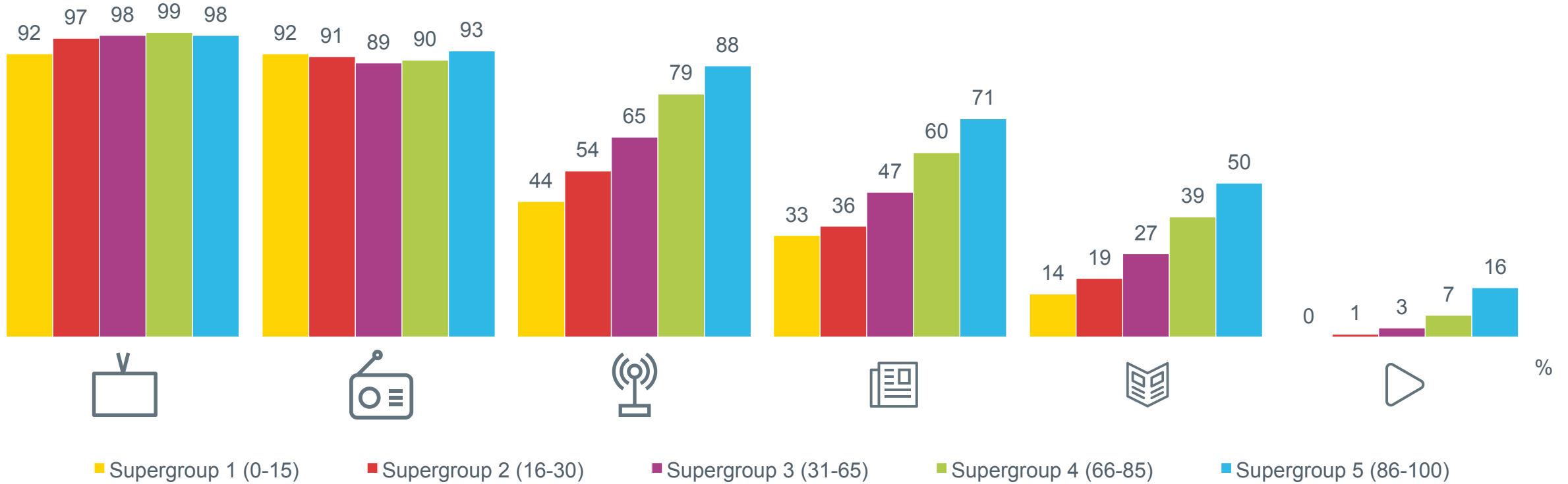
Demographic landscape by SEM



Monthly household income by SEM supergroup



Monthly media reach by SEM supergroup



March 2019 release

