



60

O

0

O



### TAMS 2019 Audit Feedback

### Scope of 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)

 $\blacksquare$  Polling dashboard

☑ RIM Weights

☑ SEMS

☑ Panel Updates

☑ Inventory (meter stock report)

☑ Coincidental Study

 $\ensuremath{\boxtimes}$  Household visits







# TAMS 2019 Audit Feedback...

Household & individual weights

### Household and individual weights

- There is a "hump" in the weighting distribution that is evident throughout 2018.
- The outlier households are not causing any problems to the individual weights.
- However it is something that should be investigated further by Nielsen and closely monitored.





#### Household weights (2018 selected dates)







### **Individual weights**

- The individual weight dispersion gets a top score and is consistent across the year.
- Weights and efficiencies are within the ranges (averaged over the past 6 months) as recommended in the GGTAM (Global guidelines for television audience measurement).





#### **Individual weights**









### Aligning the SEM algorithm

# Minor scoring adjustments were made to ES SEMs in Jun 18

- In the initial model provided by TNS for the industry, SEMs only included the scores for a **free standing deep freezer**
- In the subsequent model refined in 2018 the SEM scores were adjusted to include side-by side fridge freezer

Deep freezer which is free standing (SEM 2018 includes Side-by-side fridge and freezer)
Flush toilet inside the house
Hot running water from the geyser
Water inside the house/Store bought water
Cement, concrete, raw wood, etc.
Finished floor with parquet, carpet, tiles, ceramic, etc.
Built-in kitchen sink
Floor polisher or vacuum cleaner
Home security service
Microwave oven
Motor car
Police station nearby
Post Office nearby
Concrete/Tiles
Three or more sleeping rooms
Two sleeping rooms
Washing machine





#### **TAMS results of SEM algorithm alignment**

Market	Activity	LIVE		Market	Activity	TEST				
National	Live + VOSDAL			National	Live + VOSDAL					
	Variable	Universe	Sample		Variable	Universe	Sample	ι	Jniverse	Sample
	Date	27/02/2019	27/02/2019		Date	27/02/2019	27/02/2019		Differe	ences
Channel	Target (Year	2019	2019	Channel	Target \Year	2019	2019	2	2019	2019
Total TV	Total Indv (incl guests)	46 280 040	10 967	Total TV	Total Indv (incl guests)	46 280 045	10 974		0,0%	0,1%
	Supergroup 1	15 253 804	3 448		Supergroup 1	15 252 351	3 448		0,0%	0,0%
	Supergroup 2	20 772 694	5 077		Supergroup 2	20 779 343	5 081		0,0%	0,1%
	Supergroup 3	10 253 541	2 442		Supergroup 3	10 248 351	2 445		-0,1%	0,1%
	Sem Cluster 1	4 573 465	974		Sem Cluster 1	4 572 709	974		0,0%	0,0%
	Sem Cluster 2	10 680 340	2 474		Sem Cluster 2	10 679 642	2 474		0,0%	0,0%
	Sem Cluster 4	7 969 911	1 904		Sem Cluster 4	7 968 522	1 907		0,0%	0,2%
	Sem Cluster 5	2 283 630	538		Sem Cluster 5	2 279 829	538		-0,2%	0,0%
	SEM 1	2 004 253	413		SEM 1	2 003 900	413		0,0%	0,0%
	SEM 2	5 656 545	1 249		SEM 2	5 655 957	1 249		0,0%	0,0%
	SEM 3	7 593 006	1 786		SEM 3	7 592 494	1 786		0,0%	0,0%
	SEM 4	7 008 098	1 661		SEM 4	7 005 407	1 661		0,0%	0,0%
	SEM 5	5 776 166	1 426		SEM 5	5 774 630	1 426		0,0%	0,0%
	SEM 6	5 538 896	1 392		SEM 6	5 552 254	1 396		0,2%	0,3%
	SEM 7	5 035 776	1 235		SEM 7	5 030 142	1 235		-0,1%	0,0%
	SEM 8	3 422 224	818		SEM 8	3 415 877	818		-0,2%	0,0%
	SEM 9	2 522 389	587		SEM 9	2 529 659	590		0,3%	0,5%
	SEM 10	1 722 686	400		SEM 10	1 719 724	400		-0,2%	0,0%







#### TAMS 2019 Audit Feedback...

### Stability of the SEMs

### **Stability of the SEMS**

- The SEMS were introduced in 2016 to replace LSMs as a more stable and realistic socio-economic breakdown of the SA population.
- They were introduced into TAMS in 2017.
- With just over a year worth of SEM data available, an analysis has now been conducted to determine how stable they are within a panel environment.
- This is a key determining factor in deciding whether they can be introduced into the RIM weighting model.





### LSM issues on TAMS panel

#### Change matrix for LSMs: Jan to June 2014



- 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										
Jai	n-14	LSM 3	LSM 4	LSM 5	LSM 6	LSM 7	LSM 8	LSM 9	LSM 10	MOVED OUT OF	
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	
<b>MOVED INT</b>	ГО	2	17	71	144	123	85	62	18	522	





### LSM issues on TAMS panel

#### Change matrix for LSMs: Jan to June 2015

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									
Jan-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 INTO	8	<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 SEMs: Dec 17 to Dec 18**

- 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	<b>SEM 10</b>	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 SEMs: July 18 to Jan 19

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 Jan 2019									
10 SEM Groups Jul 2018	SEM 1	SEM 2	SEM 3	SEM 4	SEM 5	SEM 6	SEM 7	SEM 8	SEM 9	<b>SEM 10</b>	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
<b>SEM 10</b>								1	8		9
Moved into	24	59	86	87	79	84	84	50	23	18	594





### **SEM movement on TAMS panel:** 5 Super Groups

#### Change matrix for SEMs: July 18 to Jan 19

During these 7 months, 321 (11%) out of 2,824 households moved between the 5 SEM Super Groups.

Households changed SEM after having completed their update questionnaire.

	5 Supergroups Jan 2019								
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 Super Groups

#### Change matrix for SEMs: July 18 to Jan 19

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 Supergroups Jan 2019							
3 Supergroups	SEM 1	SEM 2	SEM 3	Moved				
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 determine which variables are creating instability/movement
- Conversations with Kantar/industry to further stabilise the SEM variables
- Recommendation to explore introducing the 3 Super Groups into the weighting matrix





### **SEM potential for RIM weighting**

- From June 19 Evaluating RIMs potential inclusion for the universe update in October 2019.
- Nielsen Data Science in collaboration with Robert Ruud (TAMS independent auditor) are exploring the viability of including SEMs into the RIM weighting calculations.
- If the results are positive the 3 SEM Super Groups H, M, L will introduced into the matrix and not the individual SEMs. This is due to greater stability of the data at this level.
- SEMs in the RIM weighting allow for a weighted trading variable that is linked to a socio-economic scale.







#### TAMS 2019 Audit Feedback...

A load shedding report

### Load shedding reporting

 The audit results recommended that a "load shedding" monitor be included that will identify the days, stages and viewing impact.

#### Impact of load shedding:

- Data runs covering February 2019, showing how the "Power Outage" target market works
- Between 58 595 individuals are excluded from **SAMPLE** due to power outages

Target	04/02/2019 - 10/02/2019	11/02/2019 - 17/02/2019	18/02/2019 - 24/02/2019
Total Individuals Currency	10,963	10,648	10,957
Total Individuals Excl. Power Outage HHS	10,823	10,053	10,899





### Load shedding reporting

#### Impact of load shedding:

 This means that from the Total TV UNIVERSE, between 261 745 to 2 709 926 TV viewers were not available to view due to power outages

Target\Week	04/02/2019 - 10/02/2019	11/02/2019 - 17/02/2019	18/02/2019 - 24/02/2019
Total Indv (excl guests)	46,280,042	46,280,043	46,280,044
Total Individuals with no Load Shedding	45,646,558	43,570,117	46,018,299

• A slight lift in **TV RATING** is observed when power outage viewers are excluded

Target\Week	04/02/2019 - 10/02/2019	11/02/2019 - 17/02/2019	18/02/2019 - 24/02/2019
Total Indv (excl guests)	12.7	12.0	13.0
Total Individuals with no Load Shedding	14.2	13.5	14.6





#### In-tabs January – April 2018









#### **Panel expansion**

### TAMS sample overview: base and expanded 2018







#### Panel balance 2019 week 18









TAMS TECHNICAL COMMITTEE REPORT

#### Panel balance 2019 week 18







TAMS TECHNICAL COMMITTEE REPORT



The panel, weighting efficiencies & panel health

### **RIM weighting structure**

Household RIMS	Categories
Province	9
Race	4
Area (M/U/R)	3
Pay TV / Non-Pay TV	2
Household size	2
TOTAL NUMBER OF CATEGORIES	20

Individual RIMS	Categories
Age group	8
Kids/Adults x Pay TV/Non-Pay TV	4
Kids/Adults x Gender	8
Kids/Adults x Province	18
Kids/Adults x Race	8
Kids/Adults x M/U/R	6
TOTAL NUMBER OF CATEGORIES	48





### **Weighting Efficiency**



#### Efficiency Indicators – Last 6 Weeks 2019

Weekly Avg	Week 13	Week 14	Week 15	Week 16	Week 17	Week 18	
<b>INDIVIDAL</b> WEIGHTING EFFICIENCY	89.5%	89.4%	89.6%	89.3%	89.2%	90.5%	Target 70%
<b>INDIVIDUAL</b> MAXIMUM WEIGHT	12,221	13,065	13,872	12,520	12,350	11,741	
HOUSEHOLD WEIGHTING EFFICIENCY	71.4%	71.8%	71.7%	71.2%	70.9%	71.5%	Target 70%







#### **Universe update periods**

- Previously TV universe updates were based on 6 month ES data
- As of 2019 the TV universe updates will be based on 12 month rolling ES data:
  - May 2019 TV universe update ES January December 2018
  - October 2019 TV universe update ES July 2018 June 2019
- The advantages of using 12 month data is greater stability and less noise created by shorter ES fieldwork periods.





#### **ES universe changes: trended**



TV Households TV Universe SA Population 4+











### **Total TV universe profile comparisons**





Race 80010 80010 8010 000 0010 8010 3010 3010 Black Indian White Coloured

■2018 ■2019









#### **Total television** *base: total viewers*



Current New Universe

SOURCE: 18 Feb - 3 Mar 19





#### **SABC 1** *base: total viewers*



THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA



#### **SABC 2** *base: total viewers*



THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA



#### **SABC 3** *base: total viewers*



Current New Universe

SOURCE: 18 Feb - 3 Mar 19





#### etv base: total viewers



Current New Universe

SOURCE: 18 Feb - 3 Mar 19





#### **Total DStv** *base: DStv viewers*



THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA



#### **Total Open View** *base: Open View viewers*



THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA





## What's next?

BRC to evaluate future of TV measurement requirements to incorporate OTT and other services in the second half of 2019.





#### www.brcsa.org.za