

BRC TAMS UPDATE OCTOBER 2019



Outline

- 1. CURRENT TAMS PANEL HEALTH
- 2. TAMS UNIVERSE UPDATE
- 3. NEW SEM RIM WEIGHTS
 - RESULTS
 - RESULTS BY STATION
 - VIEWING BEHAVIOUR
- 4. ZERO RATINGS



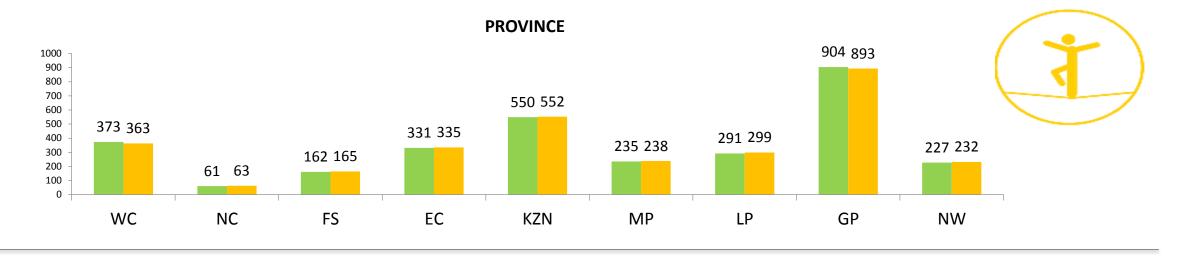


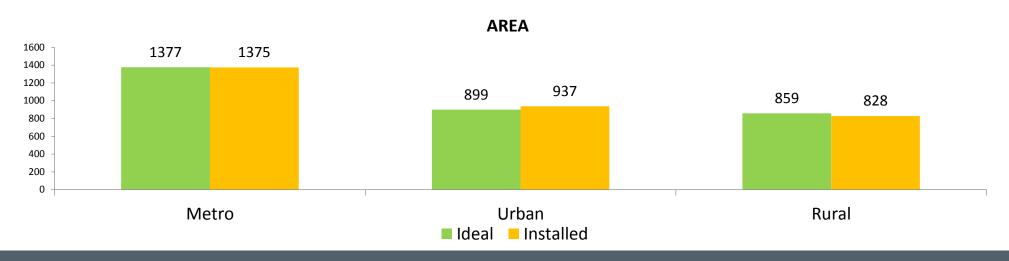


CURRENT TAMS PANEL HEALTH



Panel balance 2019 week 40

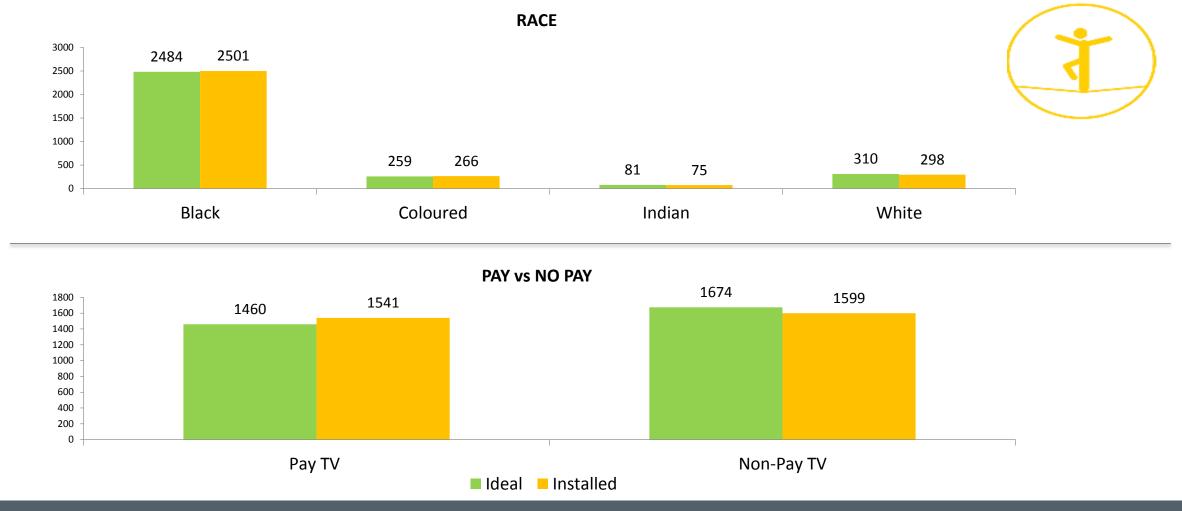








Panel balance 2019 week 40







Panel composition 2019

Total panel households 3,134 (100%)

Free-to-Air households 1,599 (51%)

DStv households 1,541 (49%)

Open View households 251 (8%)

DTT households 150 (5%)

25 households have both DStv and Open View

11 households have both DStv and DTT





TAMS Sample Overview



INSTALLED VS. REPORTING HOUSEHOLDS



Installed Households ——Reporting Households





Weighting Efficiency

Efficiency Indicators – Last 6 Weeks 2019

Weekly Avg		Week 35	Week 36	Week 37	Week 38	Week 39	Week 40	Target
INDIVIDAL WEIGHTING EFFICIENCY	*	90,9%	89,7%	89,6%	89,3%	89,5%	89,5%	70%
INDIVIDUAL MAXIMUM WEIGHT	*	14,241	13,412	11,404	11,920	12,288	12,188	
								Target
HOUSEHOLD WEIGHTING EFFICIENCY	(Î) Â	70,0%	69,8%	69,6%	69,3%	69,3%	69,6%	70%

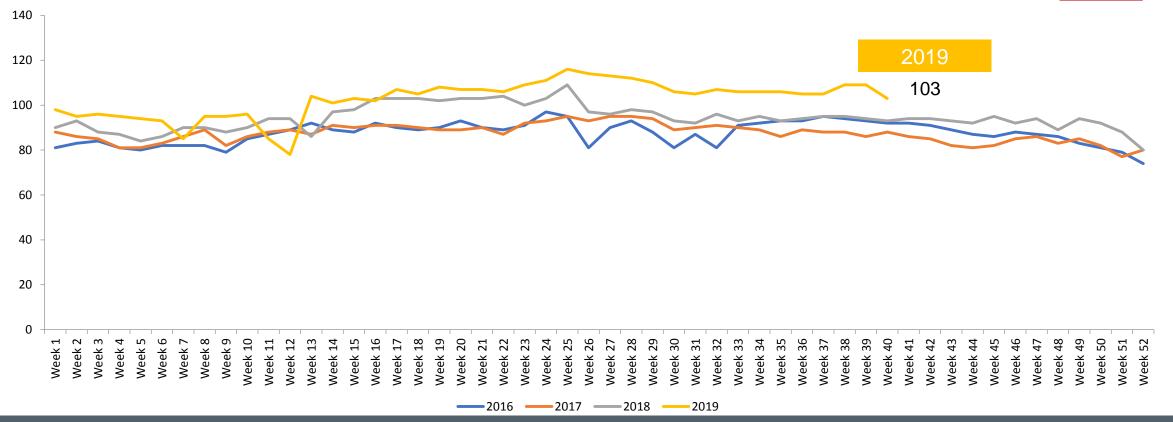




Average Time Viewed - ATV (Minutes)

52 Weeks









SCREEN SHARE 2019

SCREEN SHARE: ALL DAY - ALL INDIVIDUALS

Non-Reference												
Non-Broadcast D	8.36%	8.57%	9.65%	10.48%	10.26%	9.18%	8.55%	8.35%	8.38%	8.48%	8.37%	8.70%
Open View	7.54%	7.22%	7.50%	7.22%	6.82%	7.01%	7.44%	7.14%	7.06%	7.30%	7.78%	7.55%
	5.33%	5.38%	5.61%	5.26%	5.62%	5.94%	5.82%	6.19%	6.49%	6.32%	6.58%	6.09%
e	14.4%	14.1%	14.1%	13.2%	14.7%	14.4%	14.6%	14.1%	14.2%	14.0%	13.1%	14.1%
	3.5%	3.0% 7.8%	3.0%	3.1%	3 7%	3.3%	3.2%	3.3%	3.4%	3.2%	3.1% 7.4%	3.0%
SABC	7.8%	7.876	7.9%	8.9%	7.9%	7.6%	8.0%	8.2%	8.3%	8.0%	7.476	8.0%
	19.9%	21.5%	20.7%		20.40/	20.8%	21.1%	21.0%	20.5%	19.9%	19.9%	20.0%
SABC 2	25.576	211370	20.778	23.0%	20.4%	20.870	21.176	21.076	20.3%	13.570		20.070
SABC												
JABC	33.1%	32.3%	31.5%	20.00/	31.0%	31.8%	31.4%	31.7%	31.8%	32.9%	33.7%	32.6%
DSb/	33.17	32.370	31.370	28.9%	31.0%	31.070	31.4/0	31.770	31.070	32.376		32.0%
	Week 29	Week 30	Week 31	Week 32	Week 33	Week 34	Week 35	Week 36	Week 37	Week 38	Week 39	Week 40

SCREEN SHARE: PRIME TIME - ALL INDIVIDUALS

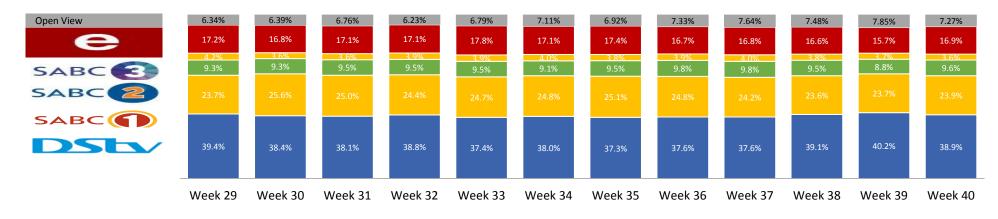
Non-Reference	= 040/	= 0=0/					E 050/	F 600/	F 670/	= 000/	= 0=0/	G 444/
Non-Broadcast D	5.81% 5.72%	5.95% 5.74%	6.74% 5.74%	7.35% 6.03%	7.10% 5.25%	6.38% 5.28%	5.96% 5.81%	5.68% 5.34%	5.67% 5.27%	5.89% 5.44%	5.95% 5.99%	6.11% 5.71%
Open View	4.86%	5.05%	5.08%	4.65%	5.01%	5.34%	5.32%	5.53%	5.88%	5.72%	5.88%	5.69%
	16.3%	15.9%	16.0%	16.0%	16.7%	16.1%	16.4%	16.4%	16.3%	16.1%	15.7%	15.9%
e	2.7% 8.5%	2.1% 8.7%	2.2% 8.7%	2.3% 8.6%	2.3% 8.9%	2.5% 8.7%	2.4% 8.6%	2.4% 9.0%	2.4% 9.1%	2.4% 9.2%	2.2% 8.5%	2.3% 8.9%
SABC												
SABC 2	27.7%	28.9%	28.6%	27.4%	27.8%	28.2%	28.6%	28.5%	28.1%	27.2%	27.1%	27.1%
SABC	22.44									22.11	20.50/	22.11
DSb	28.4%	27.7%	26.9%	27.7%	26.9%	27.5%	26.9%	27.2%	27.3%	28.1%	28.6%	28.4%
	Week 29	Week 30	Week 31	Week 32	Week 33	Week 34	Week 35	Week 36	Week 37	Week 38	Week 39	Week 40



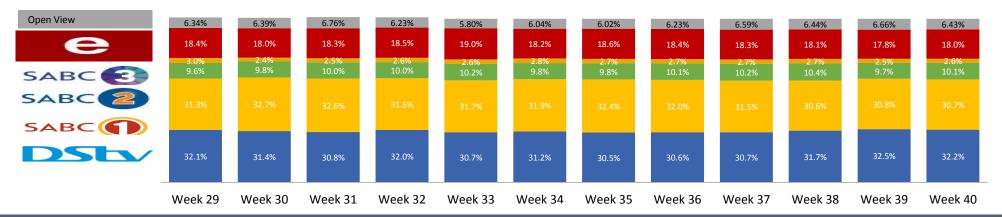


Broadcast Share 2019

BROADCAST SHARE: ALL DAY - ALL INDIVIDUALS



BROADCAST SHARE: PRIME TIME - ALL INDIVIDUALS









TAMS UNIVERSE UPDATE



Universe Update Periods

As of 2019 the TV universe updates are based on 12 month rolling ES data:

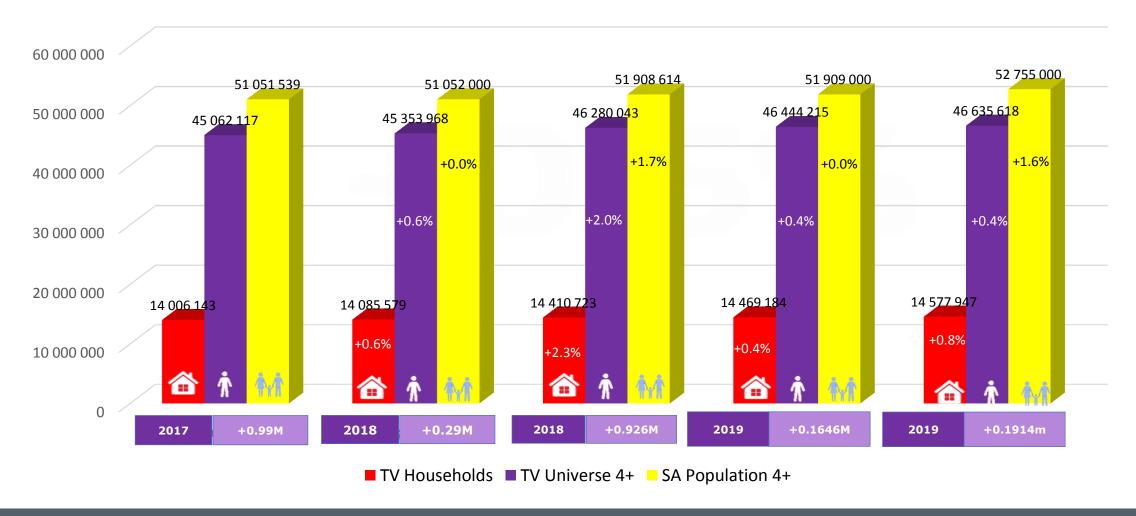
May 2019 TV universe update ES January – December 2018

• The advantages of using 12 month data is greater stability and less noise created by shorter ES fieldwork periods.





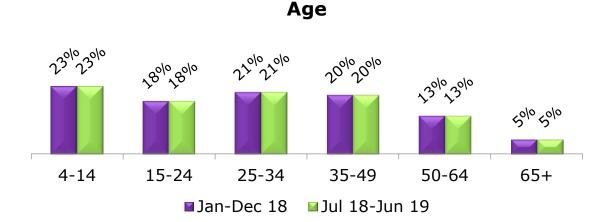
ES universe changes: trended

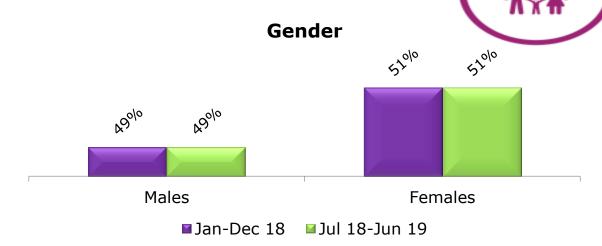


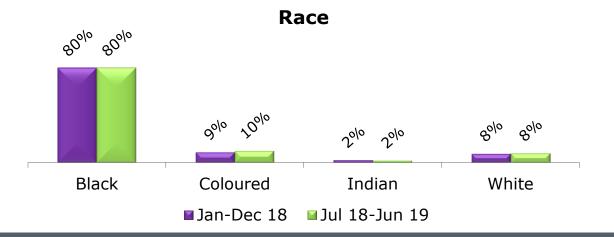


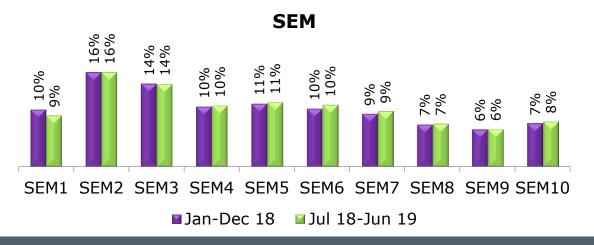


Total TV universe profile comparisons







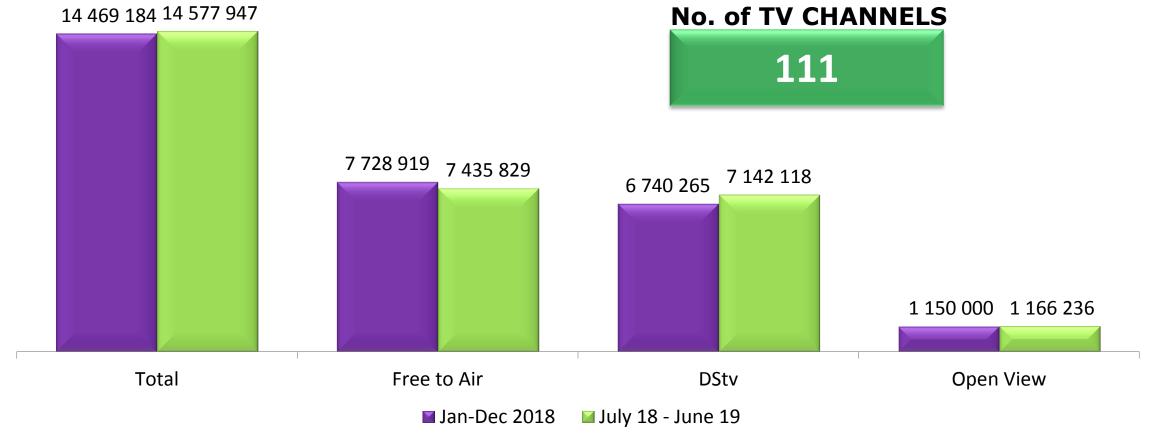






Changes in TAMS platforms: TV households











NEW SEM RIM WEIGHTS



SEM RIM Weighting

- Although most industry currencies include LSMs and income, SEMs were developed for the BRC/PRC as a more relevant and stable socio-economic segmentation for South Africa.
- The SEMs have been in TAMS data since 2017/18 the industry requested this
 measure be included in the TAMS weighting structure in order to maximise its
 stability.
- This will support trading between agencies and media owners based on this measure.





Establishment Survey SEM™ scoring system comprises 14 variables

Final variables:



Post office near where you live



Police station near where you live



Built-in kitchen sink



Home security service



Motor car



Floor material



Water source



Type of toilet



Roof material



Number of sleeping rooms



Deep freezer which is free standing / side-by-side fridge freezer



Microwave oven



Floor polisher or vacuum cleaner

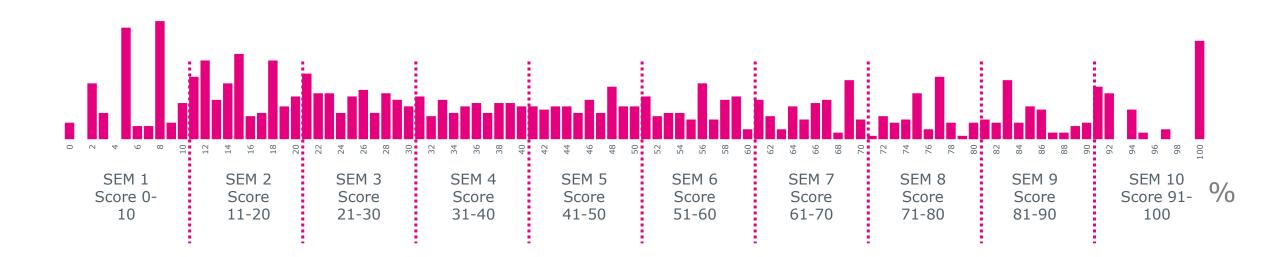


Washing machine





SEM Distribution







SEM inclusion in RIM weighting from October 2019

- Extensive evaluation of RIMs inclusion took place during 2019.
- Nielsen Data Science collaborated with Robert Ruud (TAMS independent auditor) in the inclusion of SEMs into the RIM weighting calculations.
- The results were positive and the 3 SEM Super Groups L,M,H were introduced into the matrix.
- The 3 Super Groups are sufficiently stable and are effective as weighting variables in the universe update release from 28 October 2019.
- SEMs in the RIM weighting allows for a weighted trading variable that is linked to a socio-economic scale.





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	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: 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.

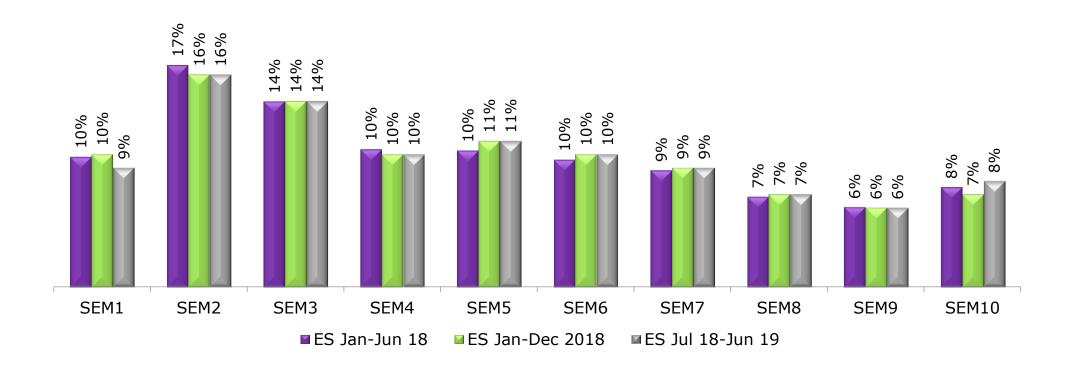
	3 Supergroups Jan 2019							
3 Supergroups	SEM 1	SEM 2	SEM 3	Moved				
Jul 2018	(0-30)	(31-65)	(66-100)	out of				
SEM 1 (0-30)		61		61				
SEM 2 (31-65)	61		60	121				
SEM 3 (66-100)		47		47				
Moved into	61	108	60	229				

- 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





ES TV universe SEM profile past 3 releases







RIM Weighting structure: Individuals

Current RIMs – 48 categories

Age	8
Kids / Adults x Gender	4
Kids / Adults x Area (M/U/R)	6
Kids/Adults x Pay TV/Non-Pay TV	4
Kids/Adults x Race	8
Kids/Adults x Province	18

Including SEM RIMs – 54 categories

Current Variables



SEM Groups (6) Kids Super Group 1/2 (0-30)

Kids Super Group 3 (31-65)

Kids Super Group 4/5 (66-100)

Adults Super Group 1/2 (0-30)

Adults Super Group 3 (31-65)

Adults Super Group 4/5 (66-100)





Weighting Efficiency: Individuals

TEST DATA: 21 and 22 September 2019

INDIVIDUALS

(Target: 70%)

21 September

Current RIM

Test RIM

22 September

Current RIM

Test RIM

Min	AVG Factor	Max	Efficiency Index
1240.8	4194	12006.4	89.23
1246.3	4211.3	14888	86.95
Min	AVG Factor	Max	Efficiency Index
1220.2	4178.5	11577.2	89.32
1227.8	4195.7	13569.5	87.39





RIM Weighting structure: Household

There is no change in household weight structure

Current RIMs – 20 categories

Province	9
Race	4
Area (M/U/R)	3
Pay TV/Non-Pay TV	2
Household size	2



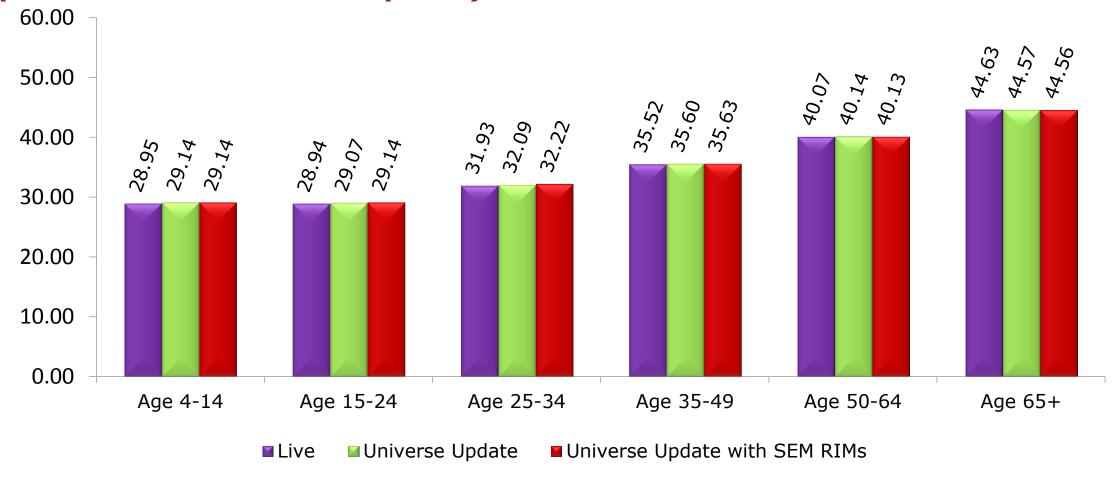




NEW SEM RIM WEIGHTS: RESULTS



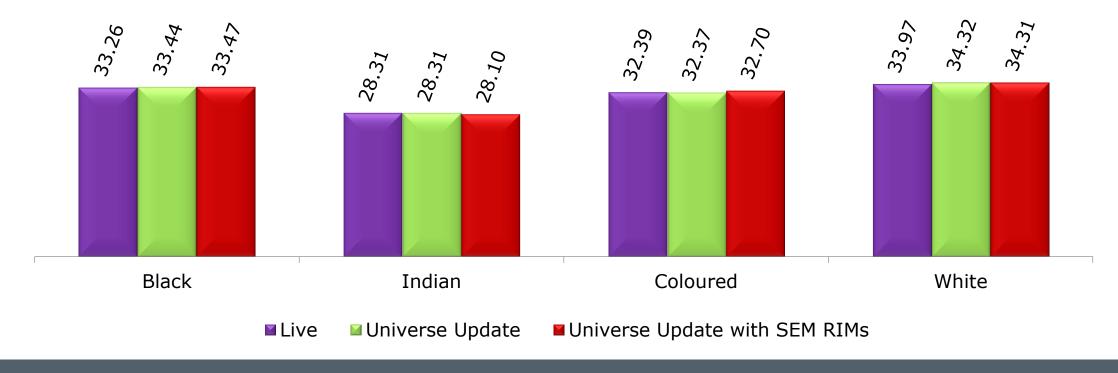
AMR% prime time comparisons by Age (Total TV) (October 2019 Universe Update)







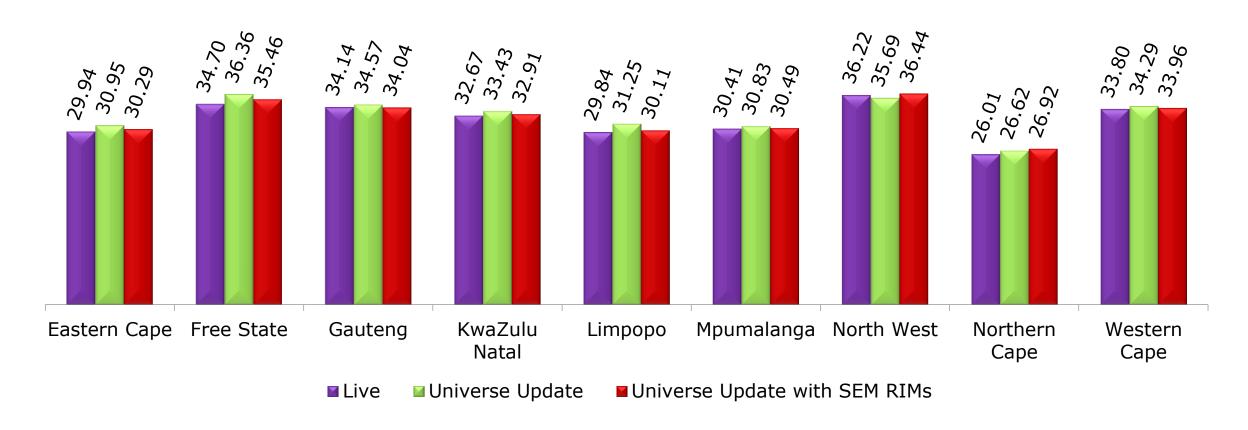
AMR% prime time comparisons by Race(Total TV) (October 2019 Universe Update)







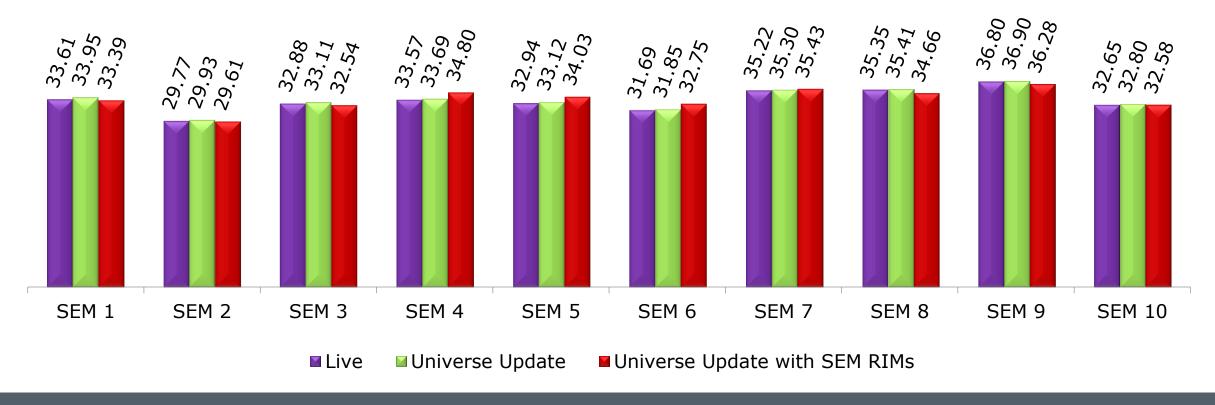
AMR% prime time comparisons by Province (Total TV) (October 2019 Universe Update)







AMR% prime time comparisons by SEM (Total TV) (October 2019 Universe Update)





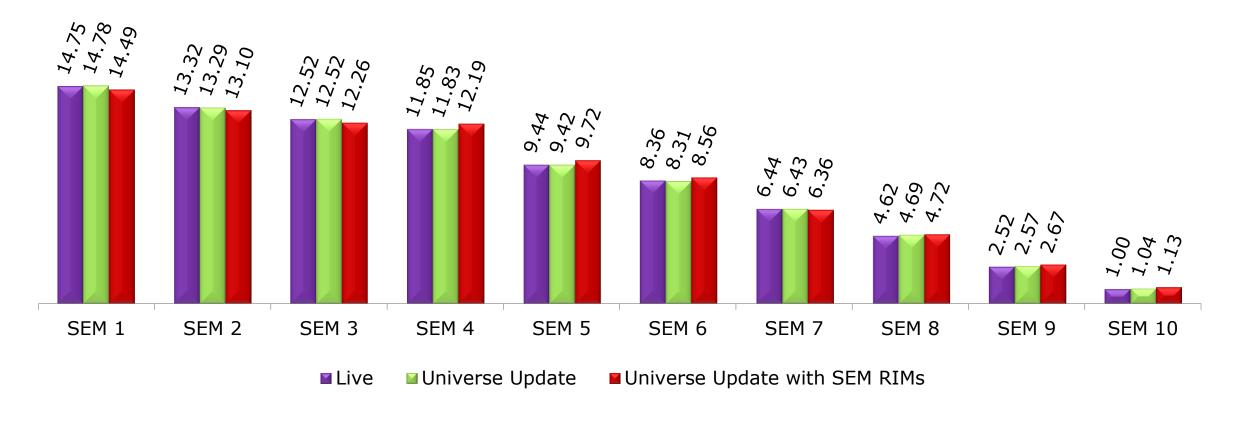




NEW SEM RIM WEIGHTS: RESULTS BY STATION



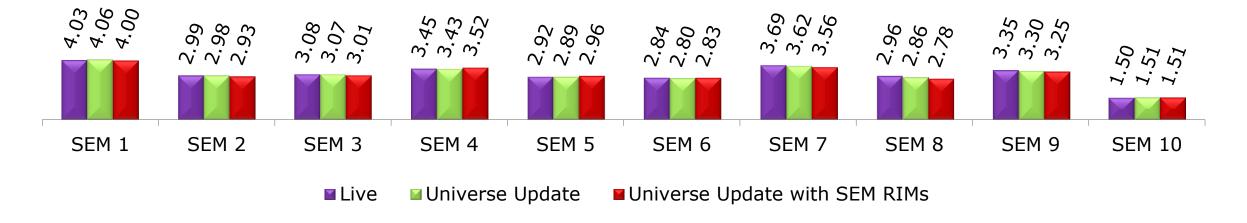
AMR% prime time comparisons by SEM for SABC 1 (October 2019 Universe Update)







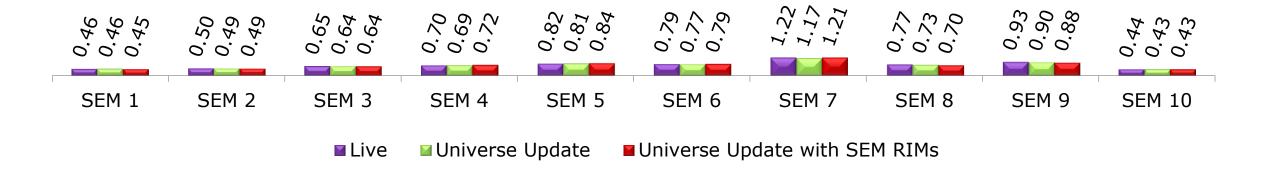
AMR% prime time comparisons by SEM for SABC 2 (October 2019 Universe Update)







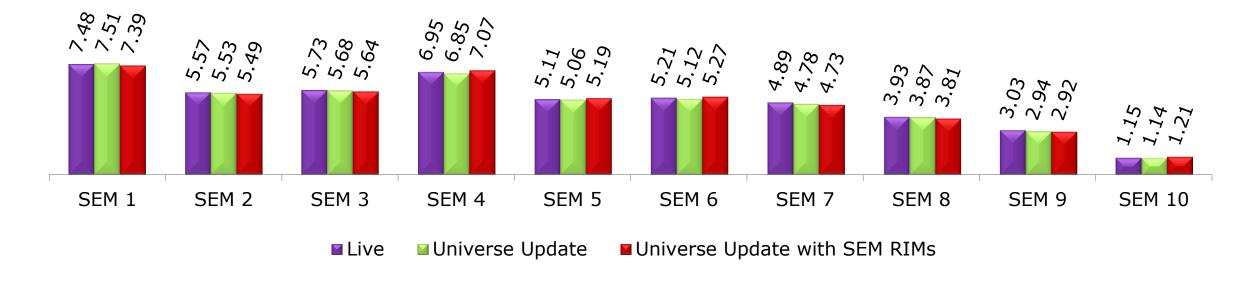
AMR% prime time comparisons by SEM for SABC 3 (October 2019 Universe Update)







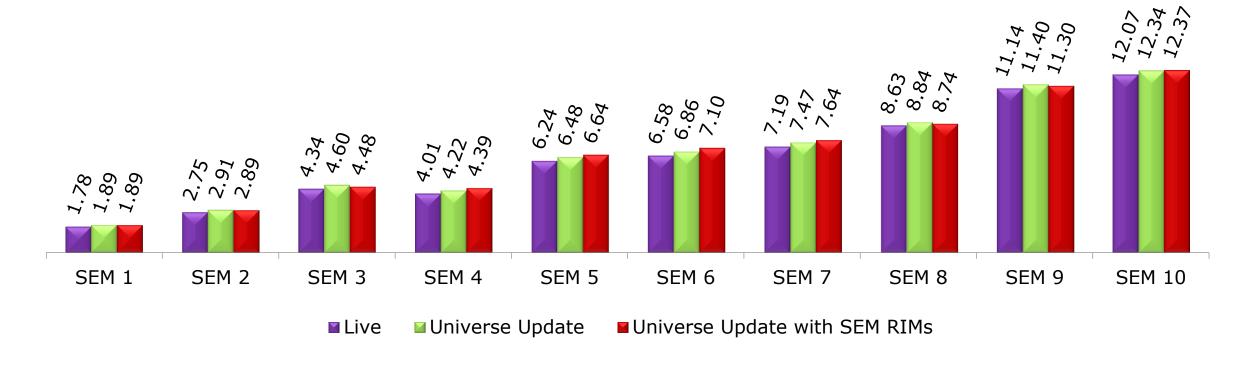
AMR% prime time comparisons by SEM for etv (October 2019 Universe Update)







Ratings prime time comparisons by SEM for DStv (October 2019 Universe Update)







AMR% prime time comparisons by SEM for Open View (October 2019 Universe Update)



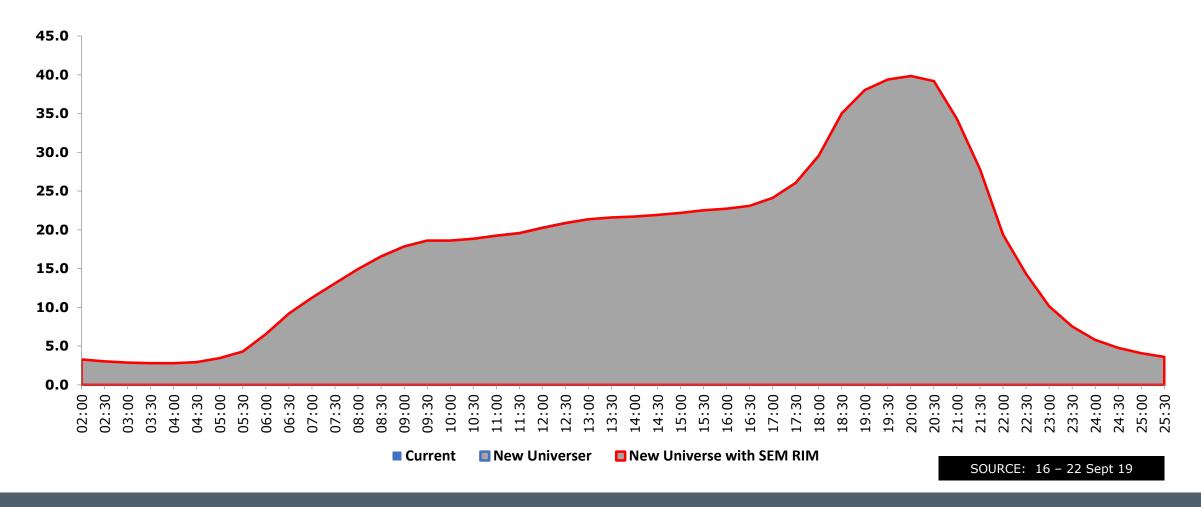








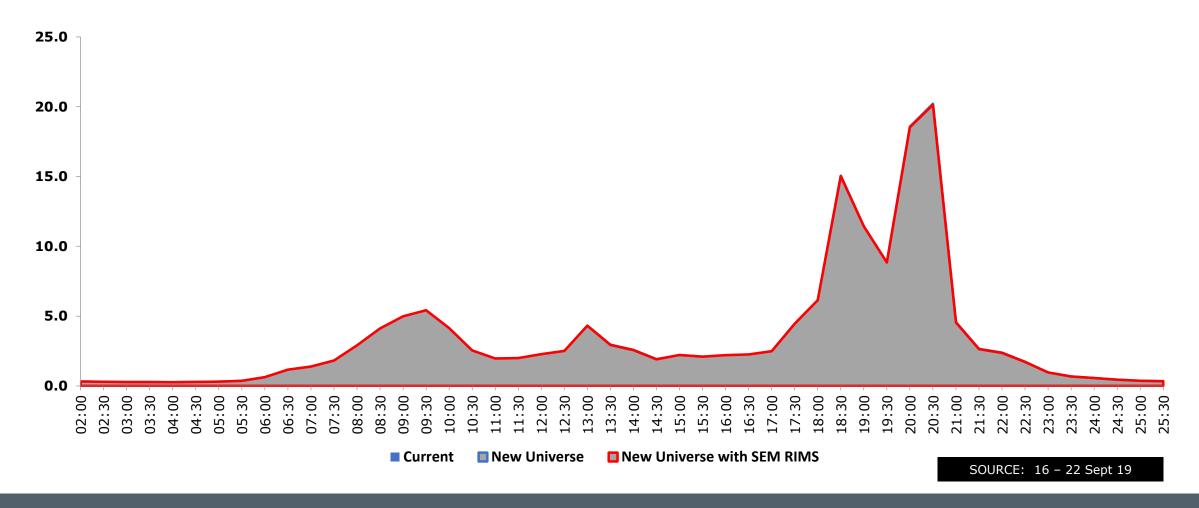
Total television







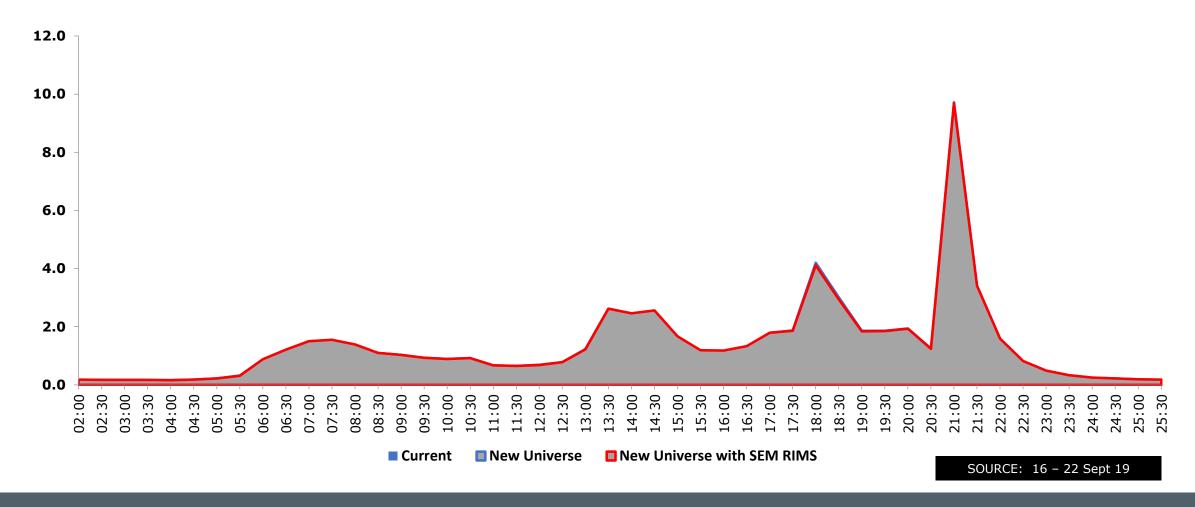
SABC 1







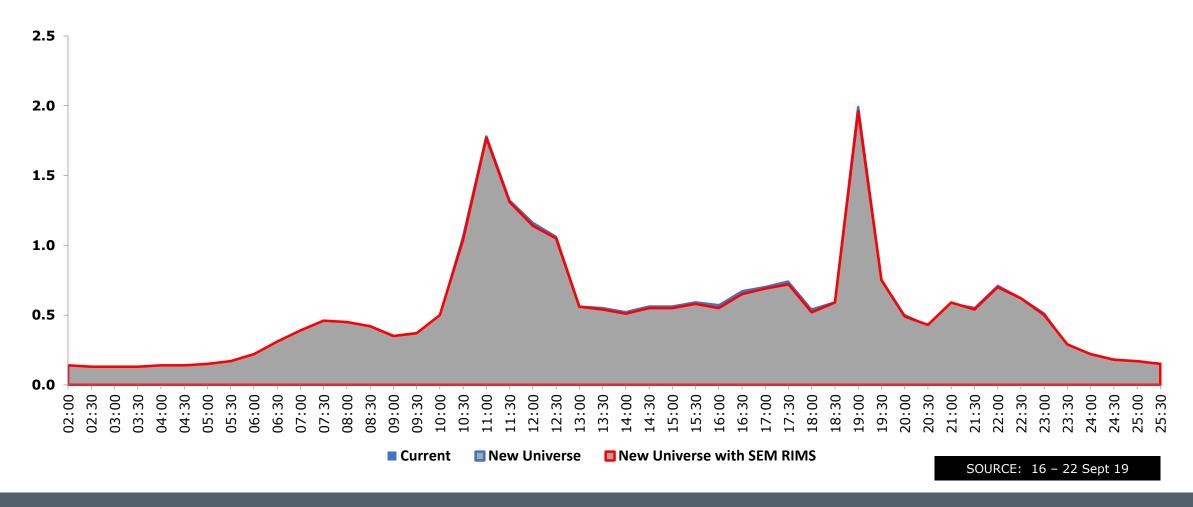
SABC 2





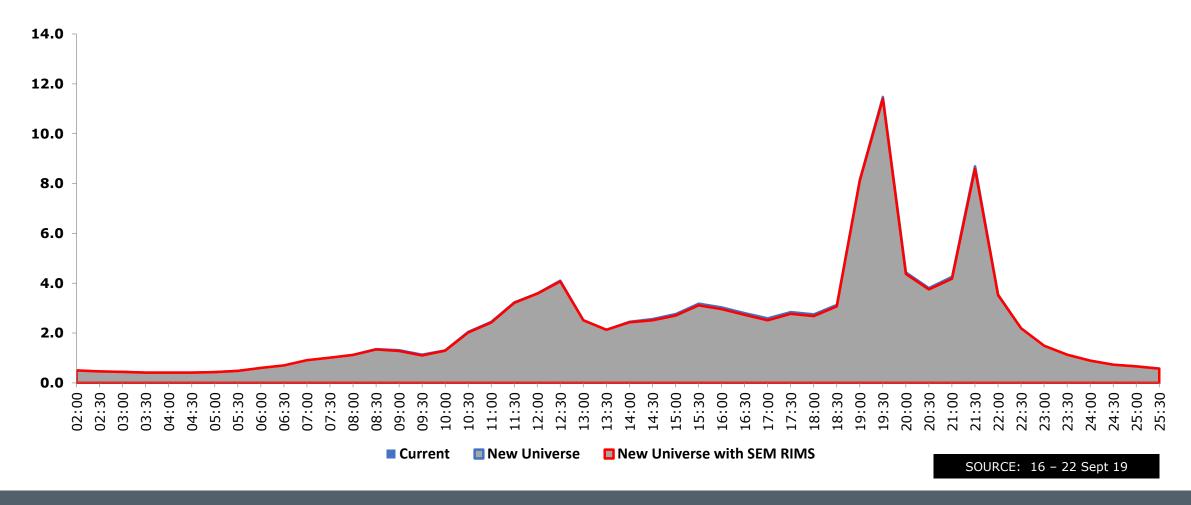


SABC 3







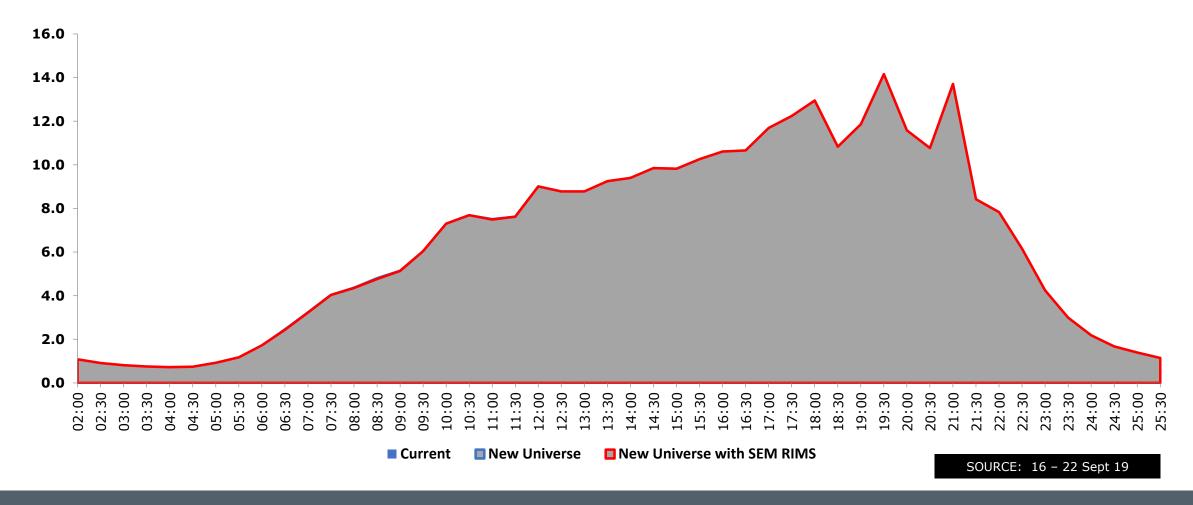






Total DStv

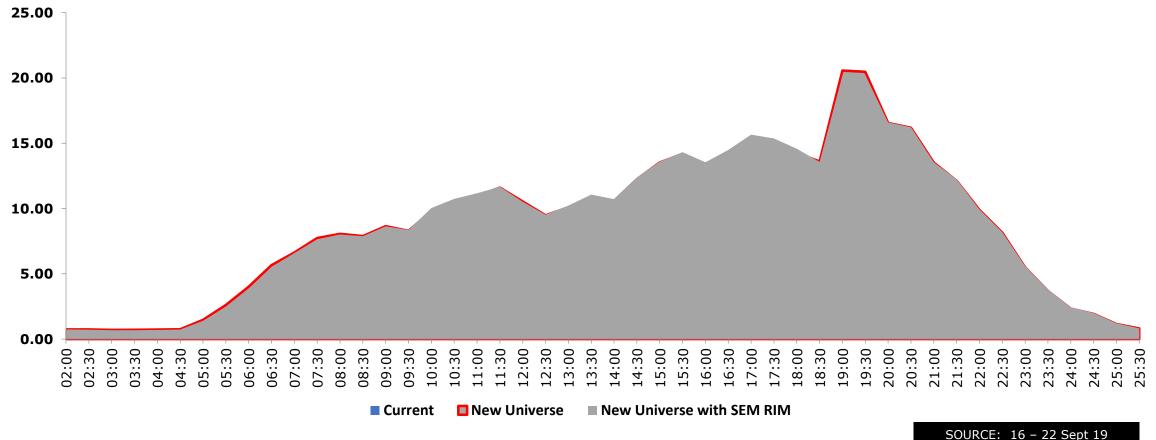
base: individuals in DStv households

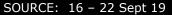






Total Open View base: individuals in Open View households











ZERO RATINGS



Zero Ratings Issue

2019 has seen post campaigns yielding zero rating spots

This is a global TAMS phenomenon where a "long tail" develops from fragmented viewing

SA TAMS panel has 11000 individuals

50% have DStv: 5500

If eg Men are the target group: 2250

10% watching any TV: 225

Some respondents have 120+ channels as well as OTT services as their viewing options

Many channels are likely to yield zero ratings

BRC is reviewing solutions





Case study:

Target market sample = 159 (small target market)

- The sample size represents the number of people available to watch TV on a specific day, not a specific time
- Out of the 159 available audience, not everyone watched TV on the day
- In fact on average the incidence for this particular target market is around 50 for the day
- The incidence of viewing between 20:00 and 23:00 is around 52

Market	Target	Activity				
National	Target Market	Live + VOSDAL				
	Channel	DSTV Total				
		07/08/2019	08/08/2019	23/08/2019	25/08/2019	
Day Part group	Day Part\ ^{Variable}	Number of People watched				
20:00:00 - 22:59:59 Complete Time Band	20:00:00 - 22:59:59	58	47	48	56	





Case study:

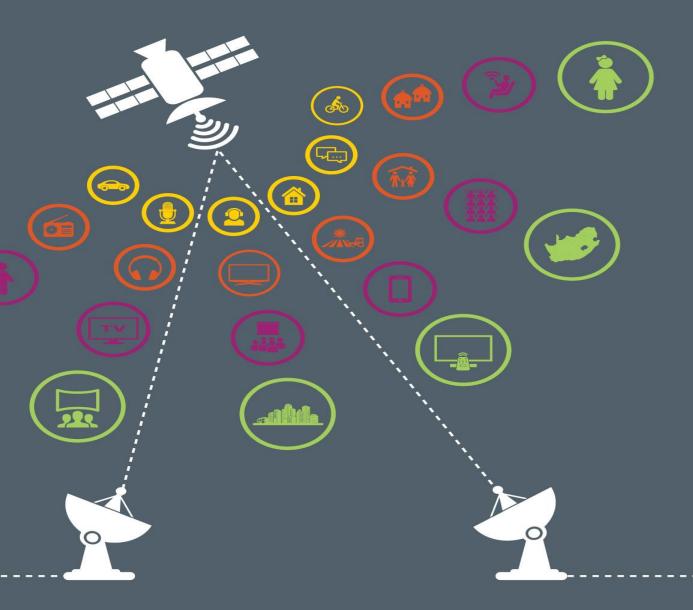
- We also need to consider the fact that these individuals have many channels available on DStv and FTA to watch
- The top 10 channels watched by target market between 20:00 – 23:00, along with incidence of reporting respondents

 A channel containing placed spots could potentially not feature in the top 10 selection

Market	Target	Day Part group	Activity			
National	Target Market	20:00:00 - 20:29:59	Live + VOSDAL			
	Year	2019				
	Date	07/08/2019				
	Month	August				
Counter	Channel\Variable	AMR %	(r) AMR	TSUSHR %	# Respond ents	
1	SABC 1	9.47	87,442	25.20%	17	
2	Universal Channel	3.75	34,646	9.99%	5	
3	kykNET & kie	2.56	23,600	6.80%	4	
4	M-Net	2.06	19,014	5.48%	2	
5	Idols	1.79	16,531	4.76%	3	
6	SABC 2	1.65	15,203	4.38%	4	
7	e.tv	0.98	9,071	2.61%	4	
8	CBS Reality	0.91	8,408	2.42%	1	
9	1Magic	0.85	7,832	2.26%	2	
10	MTV Base	0.84	7,732	2.23%	1	







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