

# PAMS BRANDS

## PEOPLE, PRODUCTS, PLATFORMS

BROUGHT TO YOU BY SOUTH AFRICA'S FUSION LEADERS

### THREE FUSED STUDIES GIVE YOU TRIPLE THE INSIGHTS



# TODAY'S PRESENTATION

**Welcome by the CEO**

**The PRC Fusion Journey**

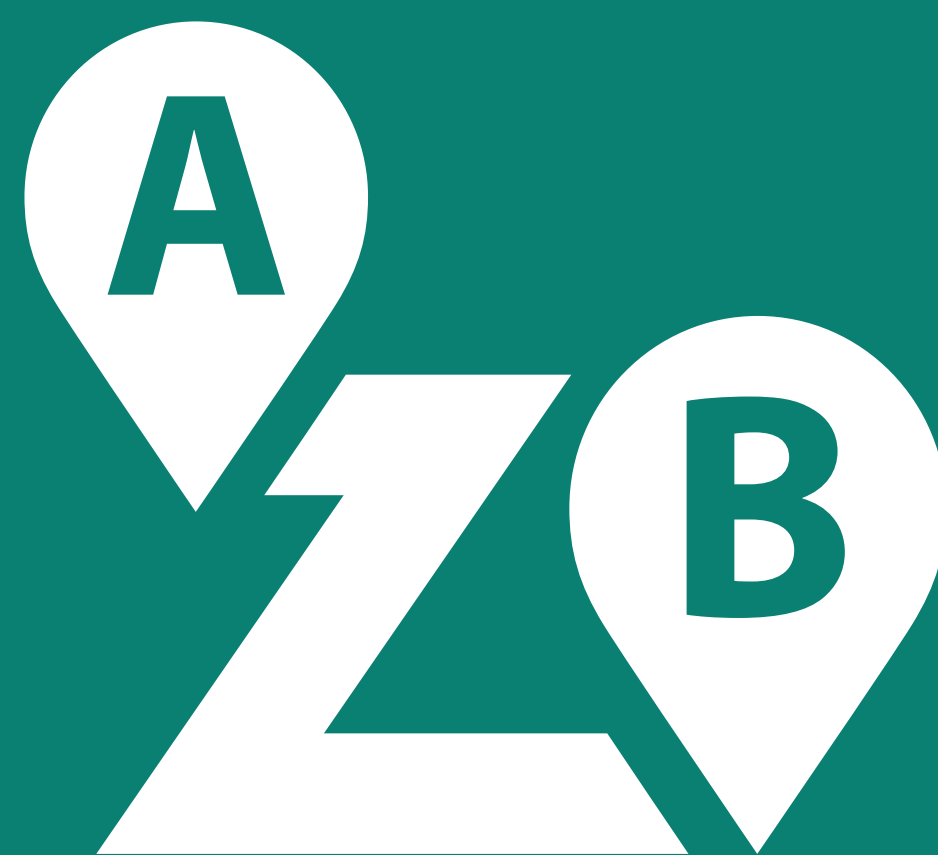
**Fusion Overview and PAMS BRANDS recap**

**Nielsen Digital PPP Study**

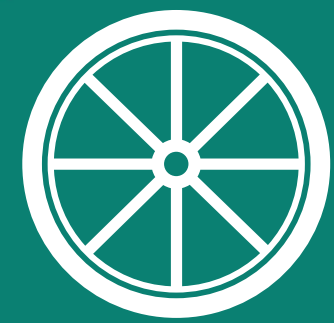
**Examples of the power of the data**



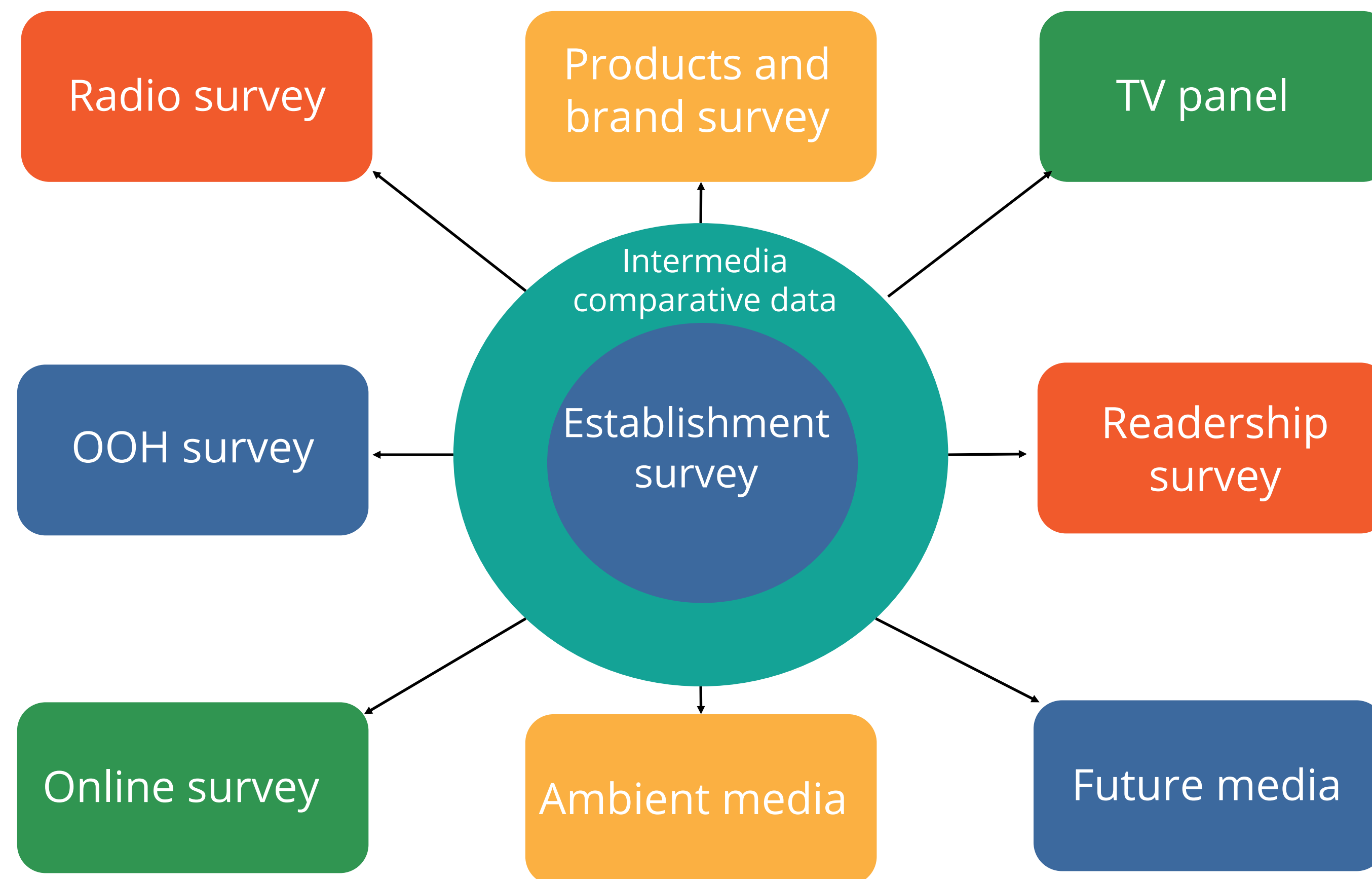
# WELCOME BY THE CEO



# THE SA FUSION JOURNEY



# 2013 FUSION MODEL – HUB AND SPOKE







# 2018/19 FUSION ACTUAL – CHAIN





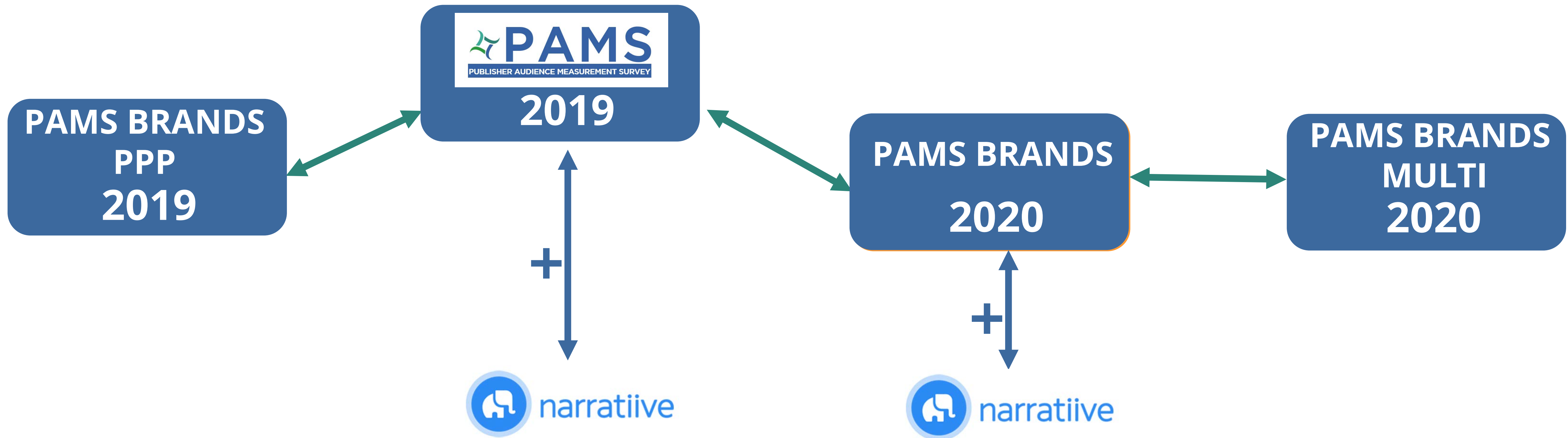
# 2020 FUSION FUTURE – LINKS ADDED TO CHAIN



APRIL

JULY

OCT



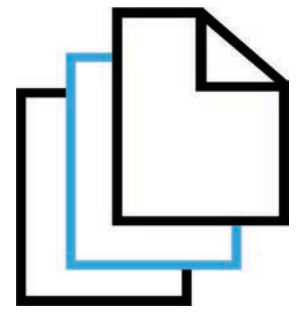


# FUSION OVERVIEW AND PAMS BRANDS RECAP

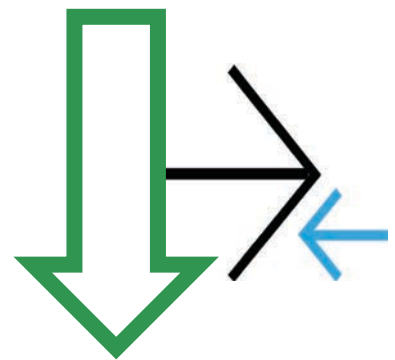




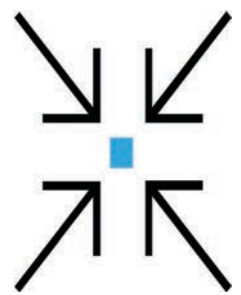
# FUSION METHODOLOGY FOR THE NEW MILLENNIUM



Data Fusion is the process of **integrating multiple data sources** by using common variables to match two or more datasets at the respondent level and create **one unified database**



**Fusion** reduces the cost and technical difficulties in capturing all the data of interest in a single-source survey



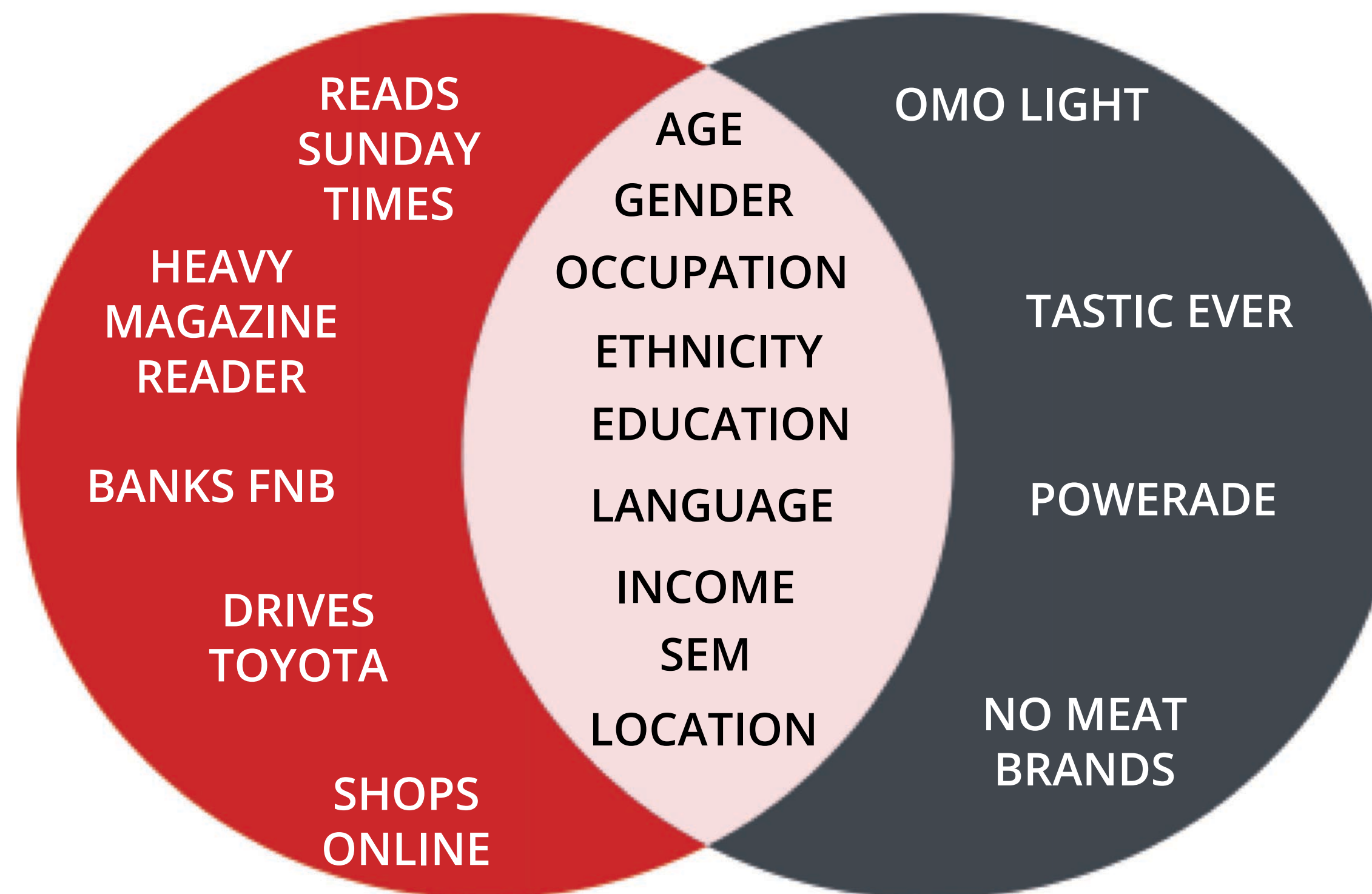
Bringing previously separate media assets together for the most granular view of **People's** behaviour across media **Platforms**, and **Product** consumption



# FUSION HOW IT WORKS



We start by looking for linking variables (fusion hooks) between the 2 sets of data:



VARIABLE	GROUPS	CELLS
AGE	4	4
GENDER	2	8
OCCUPATION	8	64
ETHNICITY	4	256
EDUCATION	6	1 536
LANGUAGE	9	13 824
INCOME	6	82 944
SEM	10	829 440
LOCATION	9	7 464 960
BEHAVIOURAL	7	52 254 720

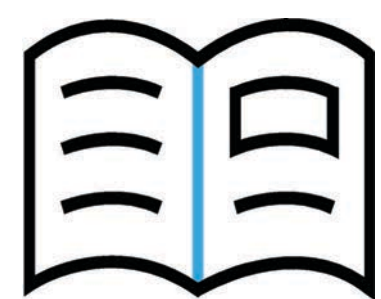




# FUSION HOW IT WORKS



Statistical analytics and modelling in order to create a single data set that incorporates the attributes from both



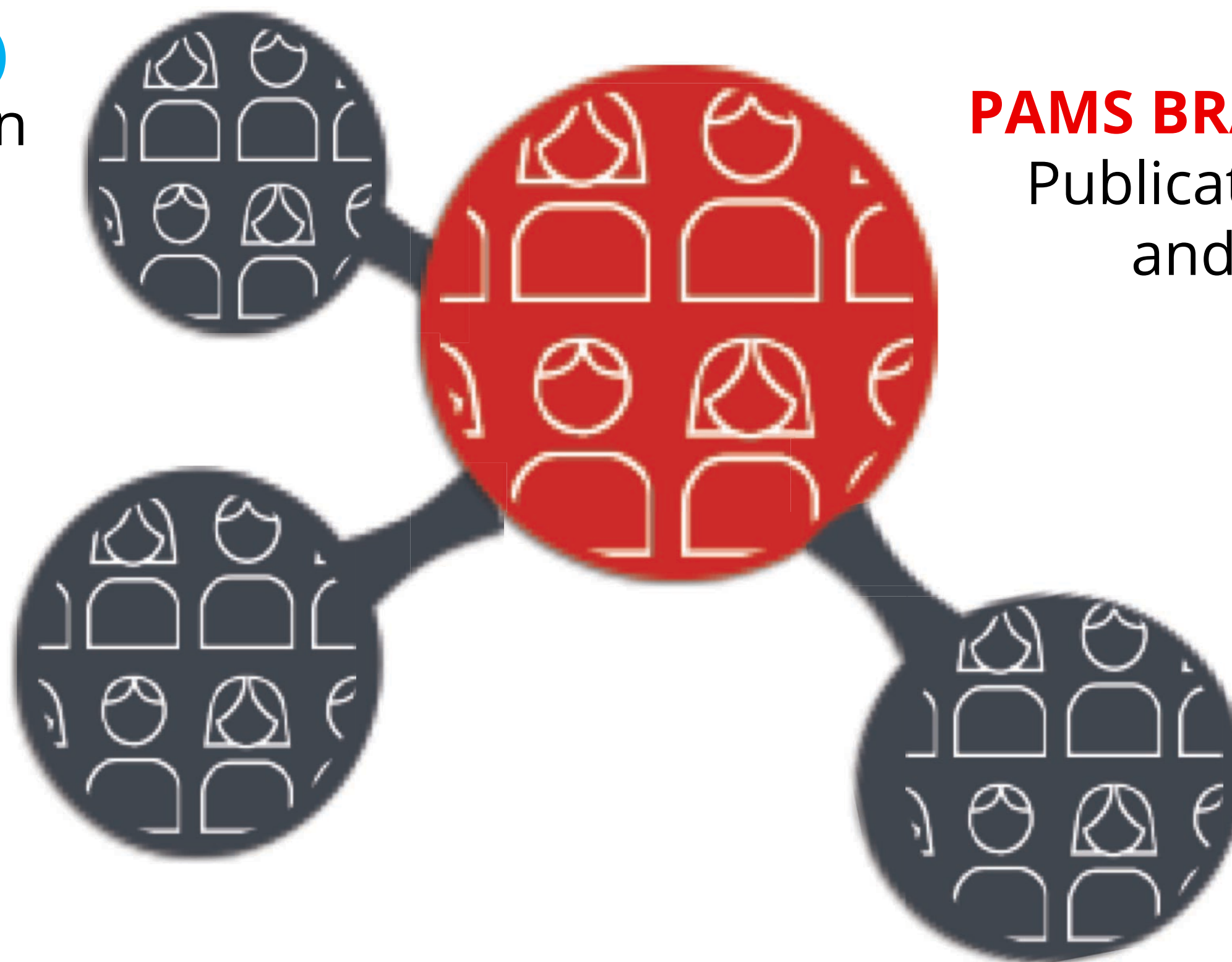
## PAMS Set 1: (Base)

Demos & publication  
title reading  
by platform



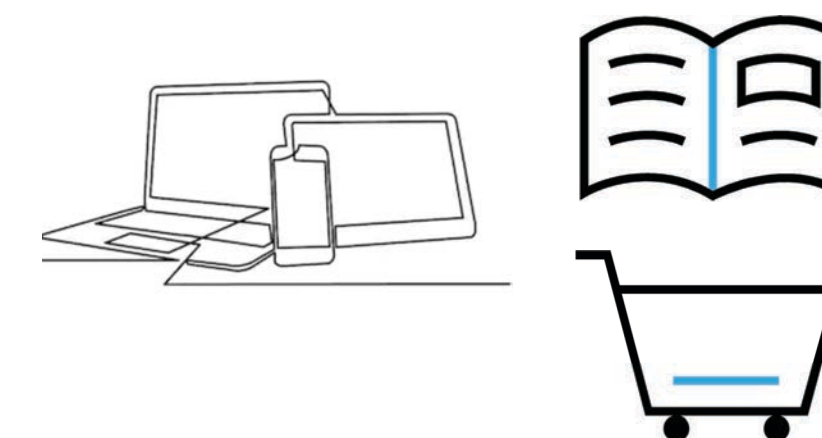
## CPS Data Set 2: (Donor)

FMCG brand  
consumption



## PAMS BRANDS PPP Set 5: (multi-links)

Publication title/retail brands/FMCG  
and digital usage by daypart



## Data Set 4: PPP (Donor)

Nielsen Digital Study







# FUSION

## THE SAME AS SINGLE SOURCE – BUT WAY MORE DATA



Survey : People Products Platforms: Fusion Survey 2018 ( PPPF181 )

Category Filters: None Apply Clear

Selection Tree

- Listening
- Viewing
- Home information
- Local infrastructure
- Equipment
- Brands - Ever
- Brands - LMH
- Internet
- Media Habits and Preferences
- Internet TV/Video on Demand
- Time Spend With Different Media
- Different Devices & Media Usage Throughout The Day
- Using Different Media At The Same time
- Internet Computer Technology
- Social Networking and Other 'Social' Activities
- Social TV

Selection C

Auto

Any

All

OR

AND

NOT

SUM

(..)

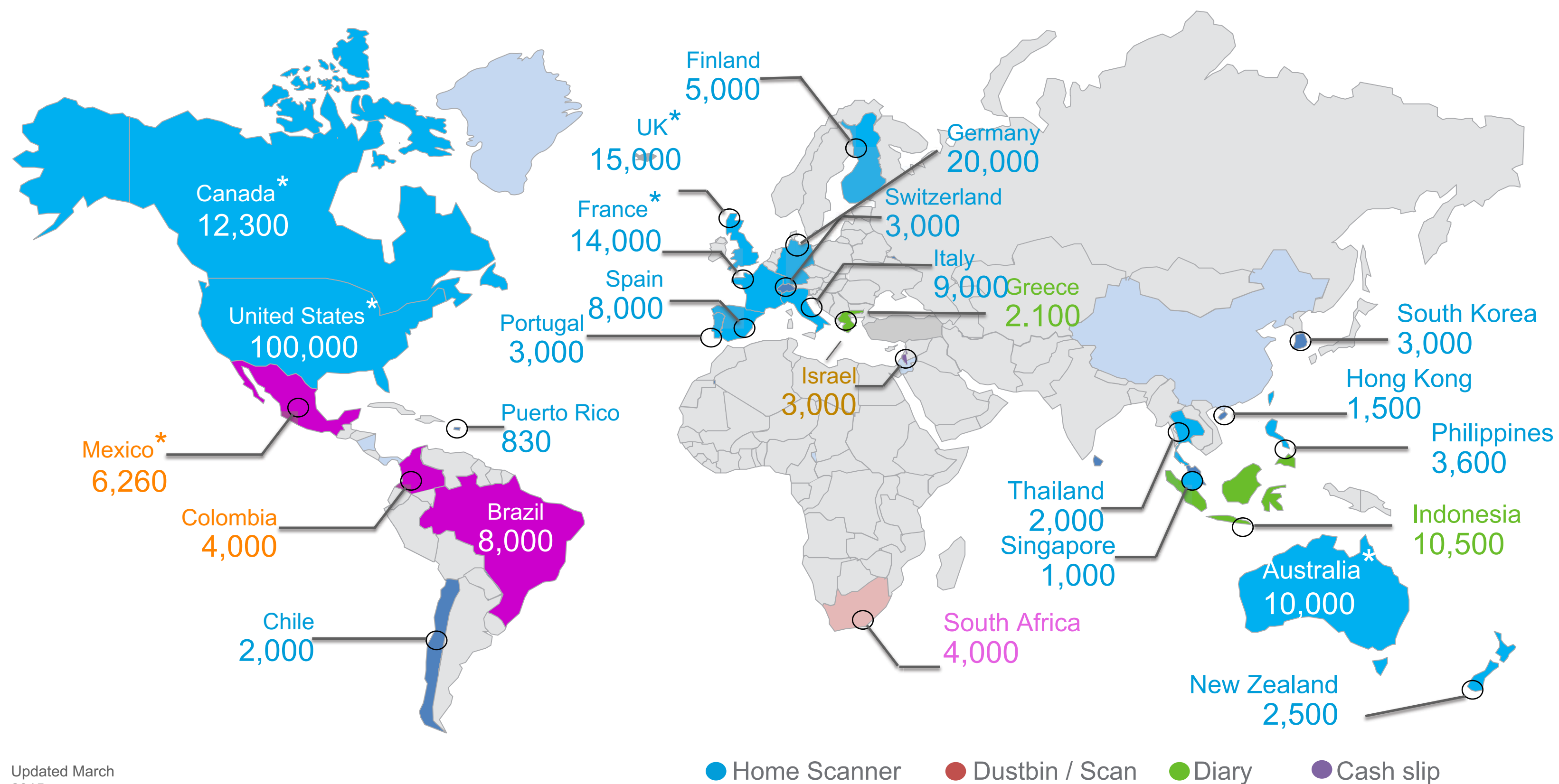
1 Table	5 Columns	0 Rows
	Title	
1	SG 1	
2	SG 2	
3	SG 3	
4	SG 4	
5	SG 5	
6		
7		
8		
9		
10		
11		
12		
13		
14		
..		



# PAMS BRANDS (PAMS 2017 & NIELSEN CPS 2018)



Homepanel Global Footprint of over 230,000 Households in 24 countries







## Household Panel of 4000

(Remember TAMS is 3000)



**Demographically &  
Geographically**  
representative of  
all SA Households



**Actual Audited  
Consumption**  
(not claimed) of HH's  
FMCG usage across all  
retail outlets

**URBAN HOUSEHOLDS ARE AUDITED TWICE A MONTH, RURAL HOUSEHOLDS ONCE A MONTH**

New brands are automatically picked up with new incidence



# WHAT CPS PANELLISTS DO

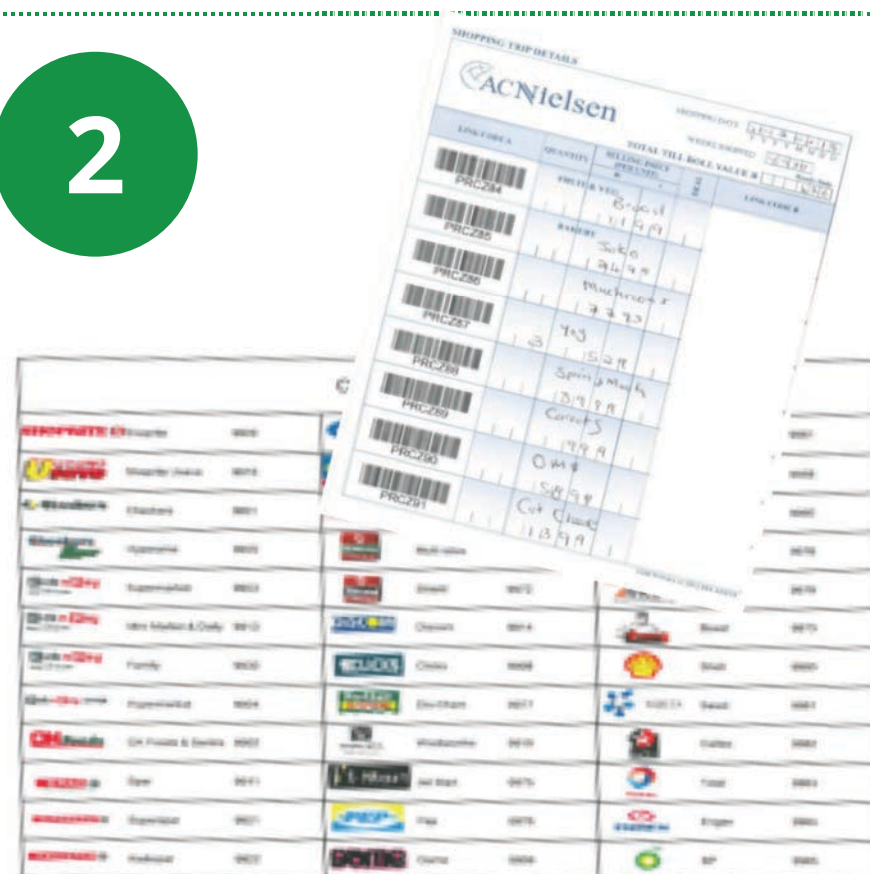


1



Panel members purchase their FMCG goods and take them home.

2



At home they record their purchases in their barcode diary. Documenting when they shopped, where they shopped and each individual item they purchased.

3



Once they have recorded a product in their diary, they take the corresponding Nielsen barcode sticker and attach it to the product purchased beside the actual barcode. This is so the auditor can later cross-reference the product with what is recorded in the panellists diary.

4



The panellists keep their till receipts for the auditor, product packages are then either stored in the pantry or disposed of in a Nielsen dustbin. The auditor uses packaging to verify the information collected in the barcode book and vice versa.





# WHAT CPS AUDITORS DO



1



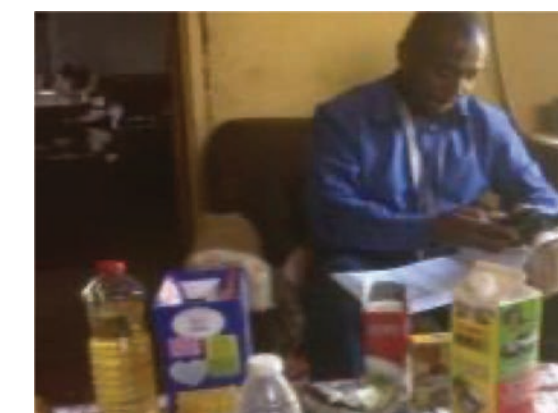
Auditors go to the panellists diary and scan all items that have been recorded as purchased since their last visit.

2



They check that all items on the till slips have been recorded.

3



They check the pantry to cross-reference the information provided in the diary, and to ensure nothing has been excluded from the read.

4



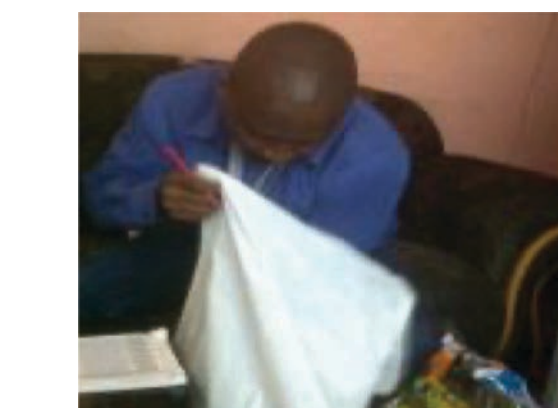
They use their handheld scanner to immediately send all of the information they collected back to Nielsen.

5



They cross out the product barcode and the diary barcode on all products they have scanned to ensure they won't be scanned again in future.

6



They then go through the panellists rubbish bin to check their discarded packaging.



# AUDITED ACTUAL VS. CLAIMED



## QUESTION:

If the AMPS paper product diary leave behind was accurate, how come over 35 manufacturers each year have purchased Nielsen audited CPS data at around R2M per category for the past 20 years?

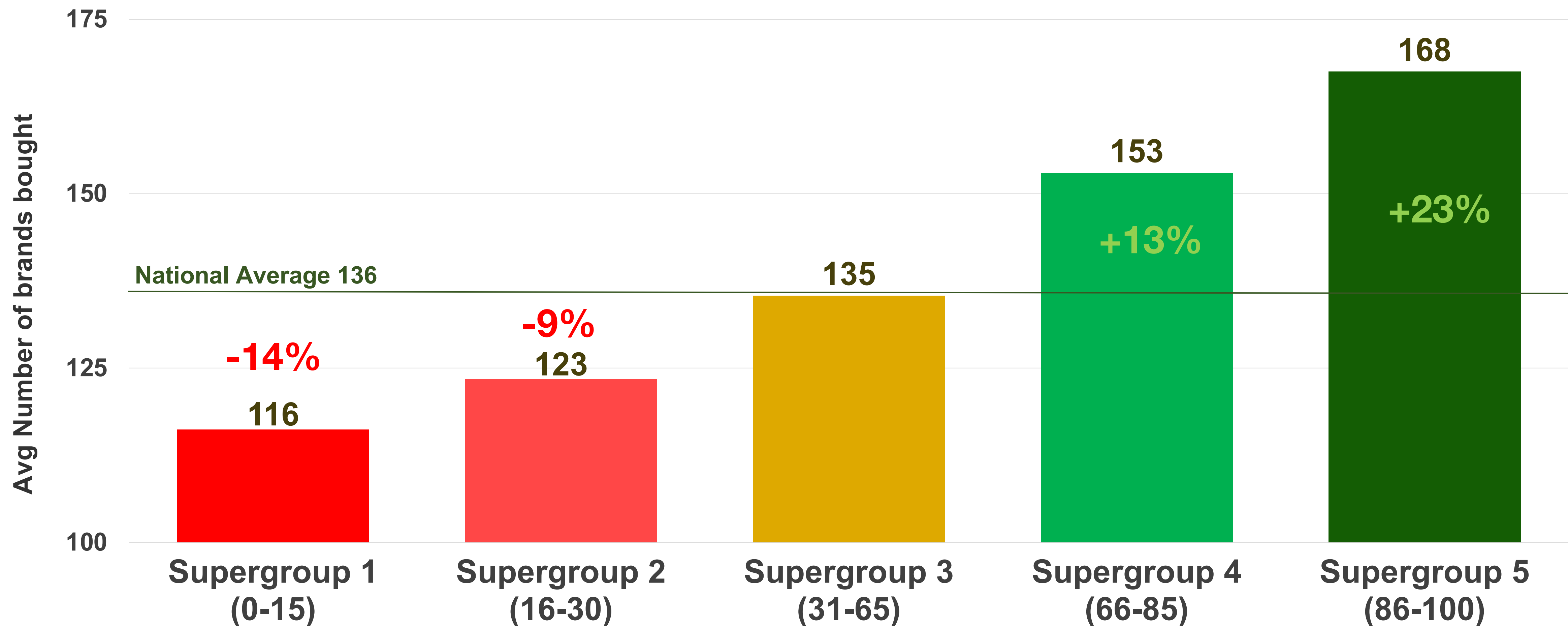
## ANSWER:

A diary is not worth the paper it is written on.

It is **claimed** purchases, based on the **fallible memory** of **one** HH purchaser, over a **single week**, on a limited number of advertised brands, with over 50 pages completed hurriedly at the **last moment**.



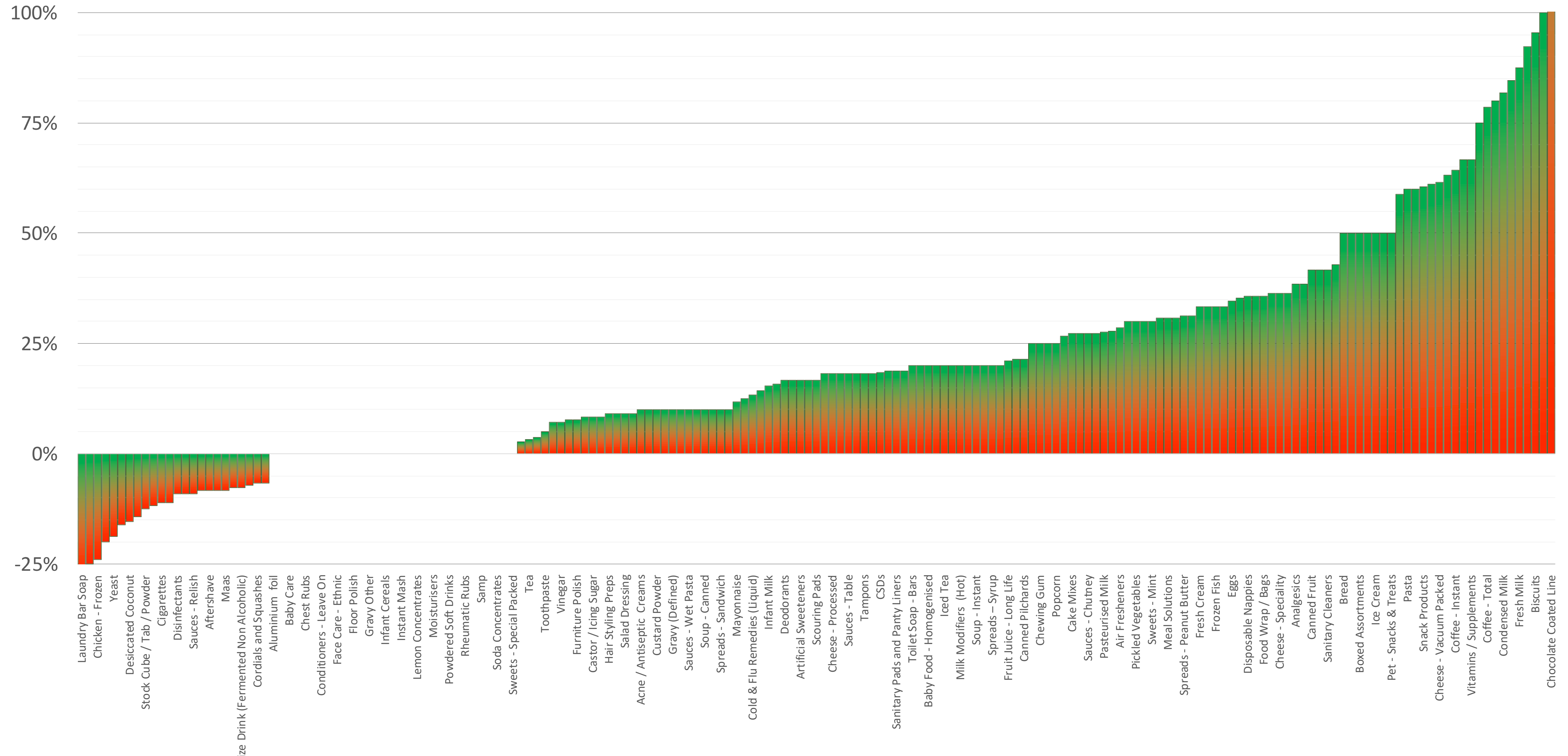
# FMCG BRANDS BOUGHT P12M





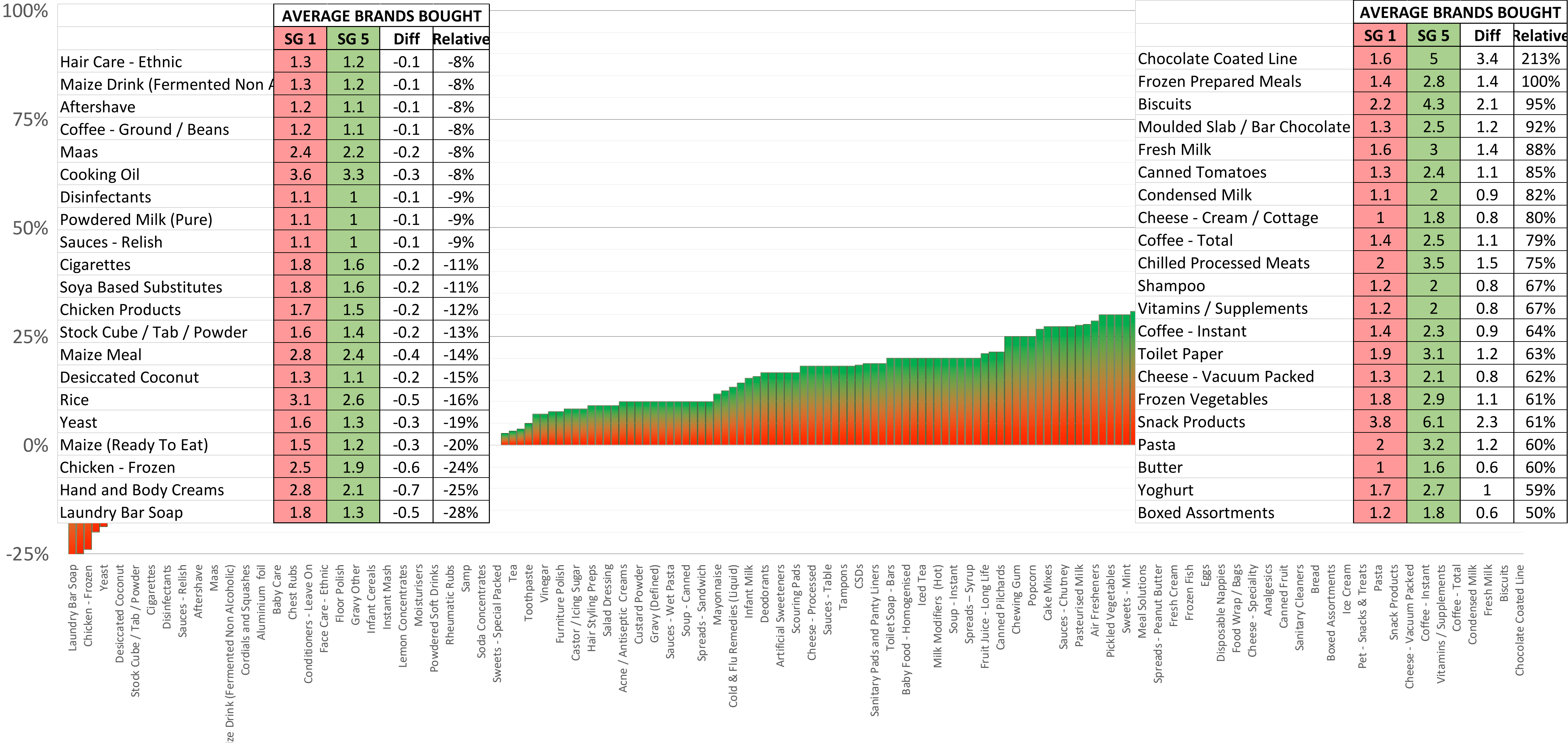


# RELATIVE DIFFERENCE IN NUMBER OF BRANDS BOUGHT BY CATEGORY SG5 VS. SG1



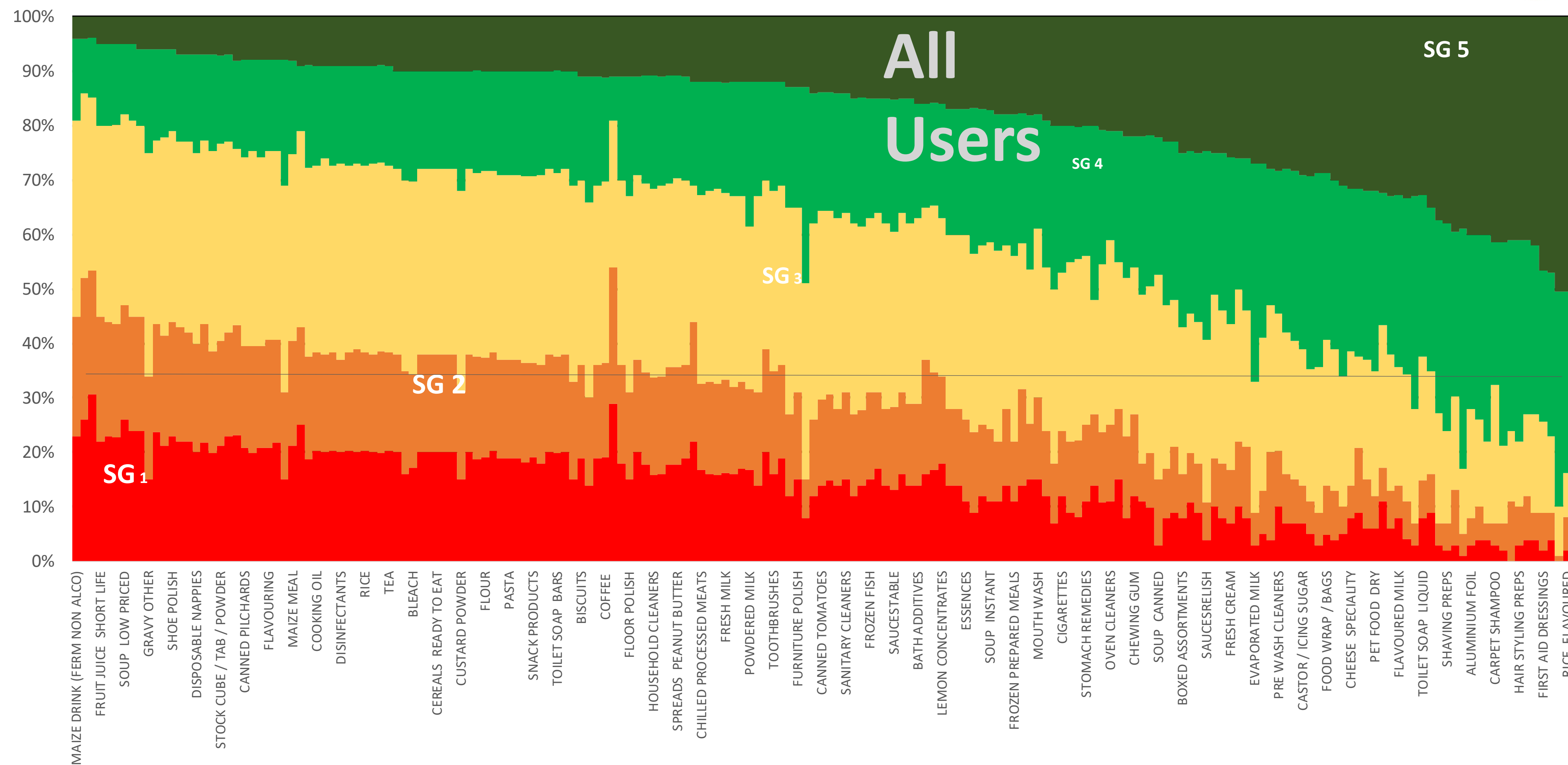


# RELATIVE DIFFERENCE IN NUMBER OF BRANDS BOUGHT BY CATEGORY SG5 VS. SG1





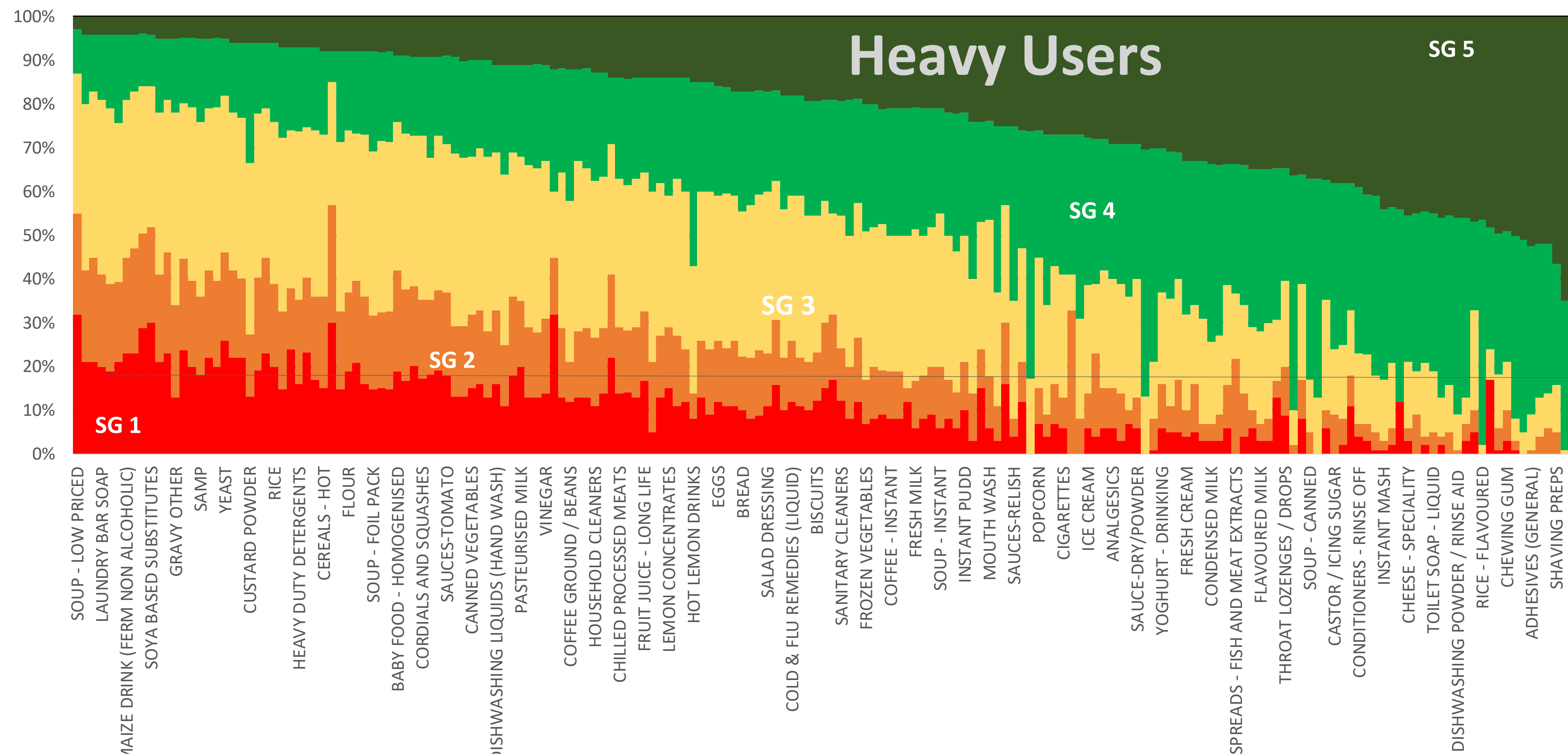
# SEM PROFILE BY CPS CATEGORY



Source: PAMS Brands 2018

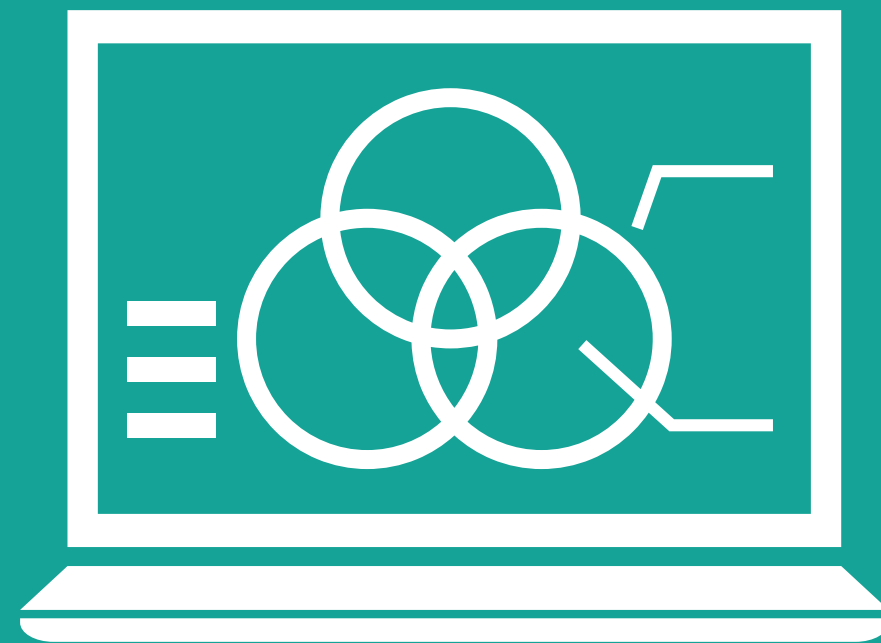


# SEM PROFILE BY CPS CATEGORY



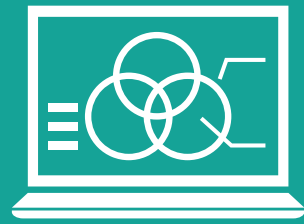
Source: PAMS Brands 2018





# NIELSEN DIGITAL PPP STUDY & FUSION

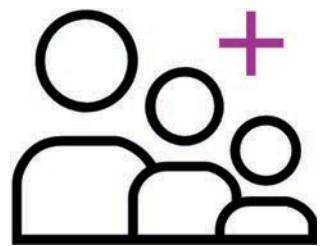




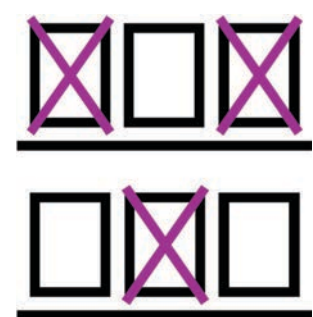
# THE NIELSEN DIGITAL STUDY



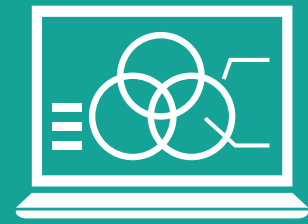
The study was conducted in **South Africa** from **September to November 2018**.



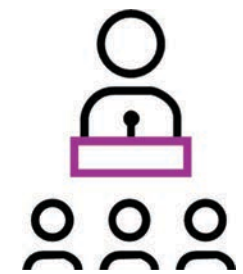
A **sample of 1,104 past month online** users aged 15 years and above was captured; using an online survey methodology. Participants were sent an email and invited to complete the online survey; via **any connected device**.



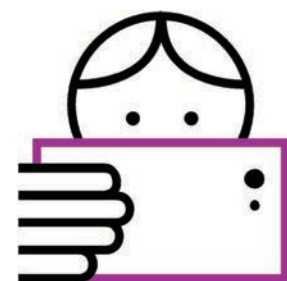
**Quotas were set** based on key demographic variables, to ensure a sample representative of the past month online population was obtained. These were set for **age, gender, population group and province**. In line with the online profile, the sample was largely metropolitan/large urban.



# THE NIELSEN DIGITAL STUDY



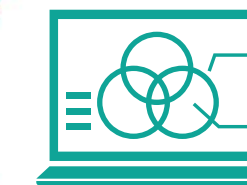
The data provided has been **weighted to IHS population estimates**, in order to deliver a complete **representative sample**.



The study focuses on the **online population**. There is **no analysis of the behaviour or profile of consumers who do not use the internet**.



# MARKETS SURVEYED



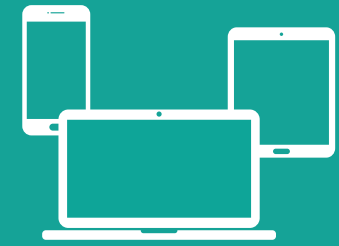
## 15 Markets

### EAST

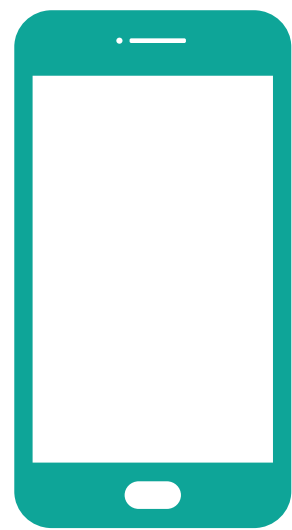
Indonesia  
Malaysia  
Philippines  
South Korea  
Thailand

### WEST

Belgium      Netherlands  
Brazil        Spain  
Greece       South Africa  
Italy          Ukraine  
Mexico        UK



# TYPES OF DEVICES USED



**SMARTPHONE**

**45%**



**COMPUTER**

**48%**

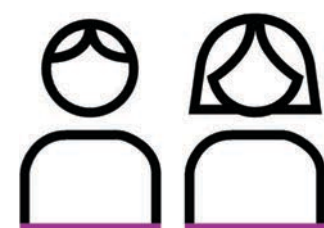
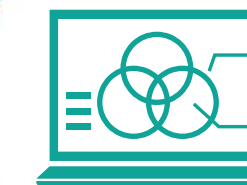


**TABLET**

**7%**



# TARGET QUOTAS



## GENDER

Male  
Female



## AGE

15 – 24  
25 – 34  
35 – 49  
50 +



## PROVINCE

Eastern Cape  
Free State  
Gauteng  
KwaZulu-Natal  
Limpopo  
Mpumalanga  
North West  
Northern Cape  
Western Cape



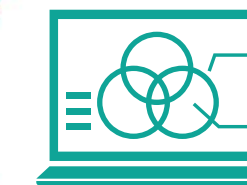
## POPULATION GROUP

Black  
Coloured  
Indian/Asian  
White





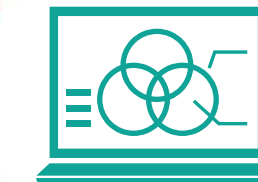
# UNWEIGHTED SAMPLE



Demographic	%	Quota
<b>Male</b>	49.21	541
<b>Female</b>	50.79	559
<b>15 – 24</b>	29.49	324
<b>25 – 34</b>	33.43	368
<b>35 – 49</b>	25.09	276
<b>50+</b>	11.99	132
<b>Black</b>	74.17	816
<b>Coloured</b>	9.35	103
<b>Indian/Asian</b>	3.47	38
<b>White</b>	13.01	143

Province	%	Quota
<b>Eastern Cape</b>	10.81	119
<b>Free State</b>	4.71	52
<b>Gauteng</b>	31.32	345
<b>KwaZulu-Natal</b>	17.44	192
<b>Limpopo</b>	7.85	86
<b>Mpumalanga</b>	7.03	77
<b>North West</b>	5.64	62
<b>Northern Cape</b>	1.64	18
<b>Western Cape</b>	13.55	149

# WHAT DO YOU GET IN THE FUSION



1

## PEOPLE

SEMs

LSMs

Demos

Geos

2

## PRODUCTS

Automotive

Banking

Cellular

Retail (FFF)

FMCG

3

## PLATFORMS

TV

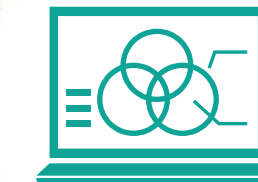
Print

Digital

Radio

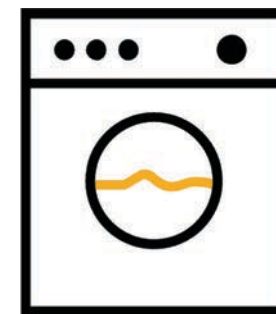


# PEOPLE



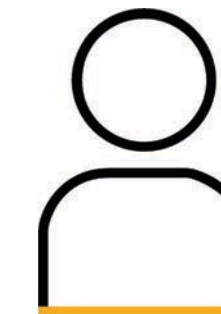
## SEMs

**SEM groups**  
**Socio-Economic**  
**Measure**



## LSMs

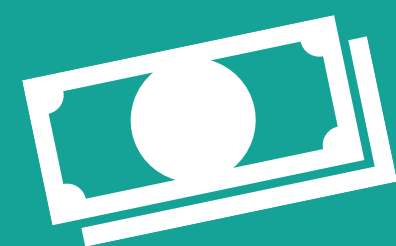
**LSM groups**  
**Living Standards**  
**Measure**



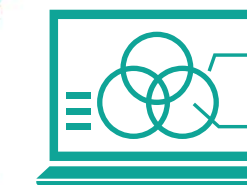
## DEMOS

**Demographic**  
**audience profile**





# FINANCE



## Financial Institution

Where accounts or cards are held

11

Financial Institutions



## Main Bank

Which bank

11

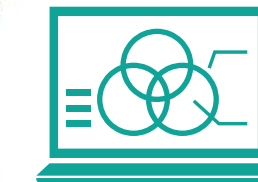
Banks



## Credit Cards

Personal usage

# AUTOMOTIVE



## Number of Vehicles

In household



## Person Ownership/ Usage

Own or company car



## Vehicle Brand

Personally driven



## Vehicle Obtained

New or second-hand

**56**  
Vehicle Brands

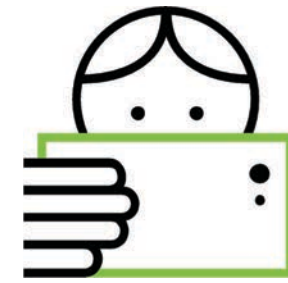


# CELLULAR



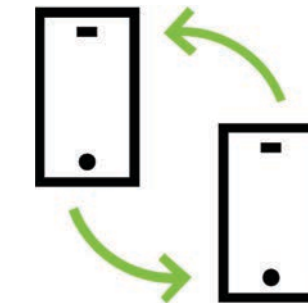
## Number of cellphones

In household



## Personal ownership

Own or use



## Type used most often

Ordinary  
feature  
smartphone

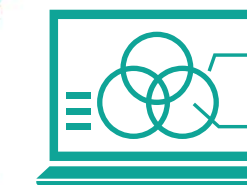


## Network provider

Vodacom  
Cell C  
Telkom  
MTN

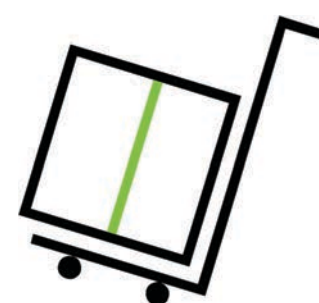


# RETAIL OUTLETS



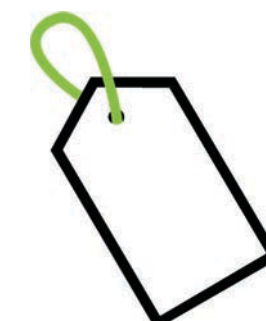
**Food and  
Grocery**

**12  
Stores**



**Furniture and  
Appliances**

**25  
Stores**



**Fashion**

**22  
Stores**

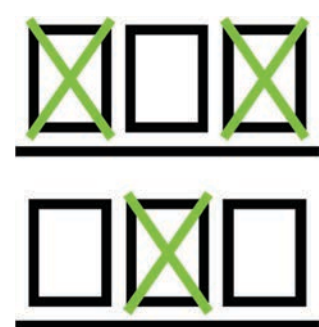
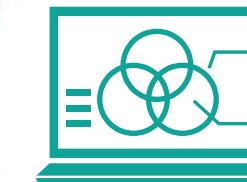


**Store Cards**





# FMCG



## Categories

200 Categories



## Brands

>3000 Brands

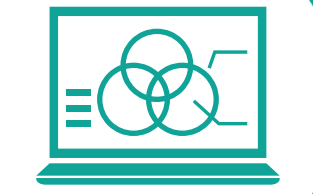


## Usage

Heavy, medium, light  
consumption



# PLATFORMS



## TV

**Standard Live TV**  
**Time-Shifted TV**  
**OTT/Streaming**  
(Netflix/YouTube/ShowMax  
etc.)



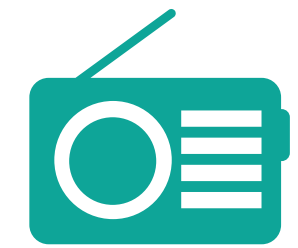
## Print

**Newspaper/Magazines**  
**Paper**  
**Digital**



## Digital

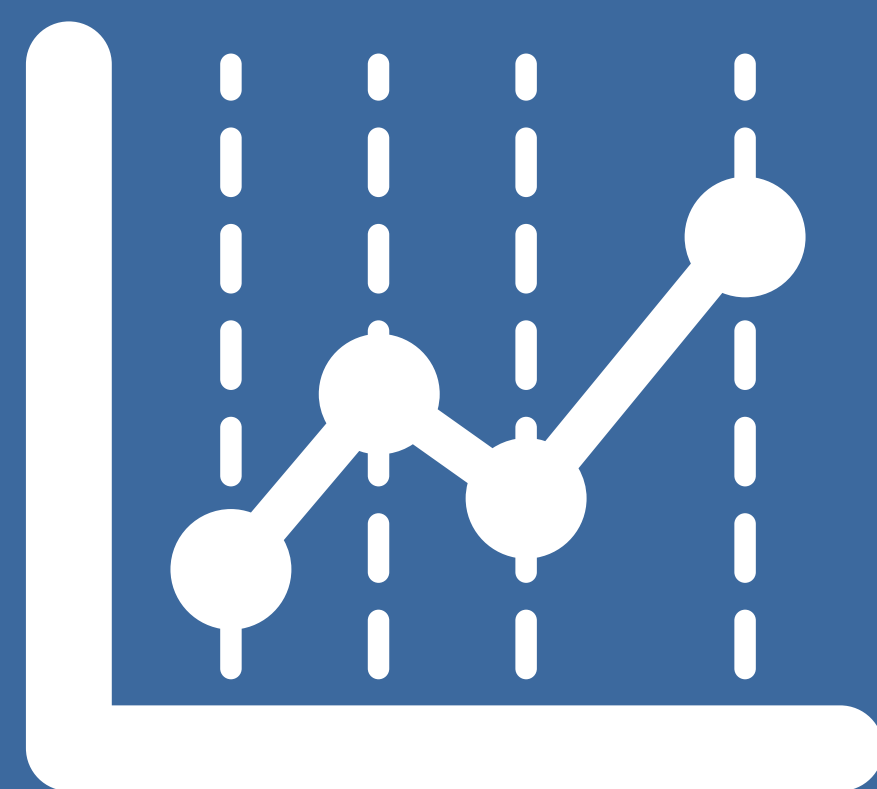
**Internet usage**  
**Social Media**  
**Devices/Apps**  
**Tech in Home**



## Radio

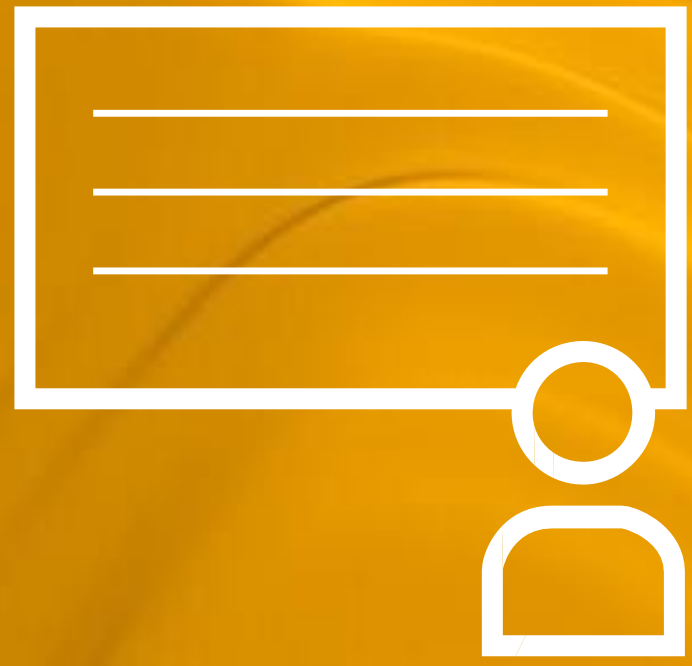
**Radio Live Listening**  
**Radio Online**  
**Streaming**

**Different devices and media throughout the day (a day in the life)**



# EXAMPLES OF THE POWER OF THE DATA



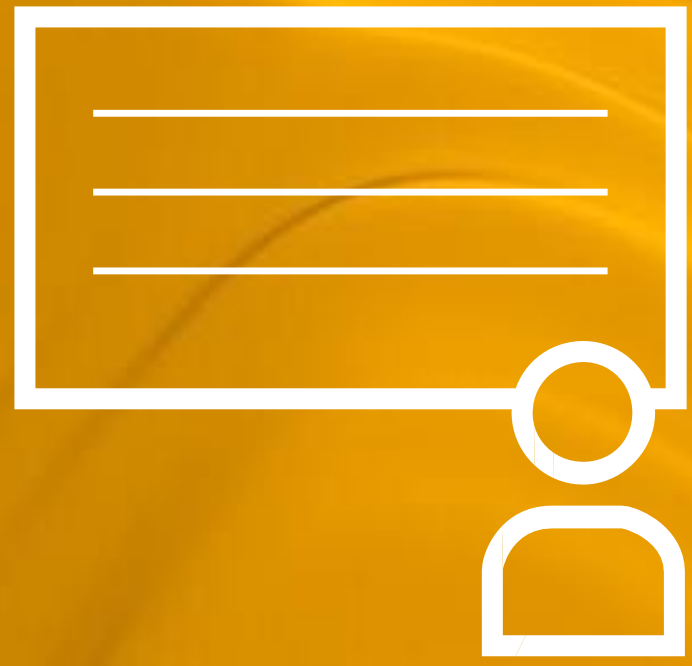


**“THE PROLIFERATION OF DIGITAL DEVICES AND PLATFORMS IS DRIVING THE MEDIA REVOLUTION AND RENDERING OBSOLETE THE SILOS OF TRADITIONAL MEDIA STRATEGY.”**

## **Digital Consumer Survey 2019 Report**

This artwork was created using Nielsen data.





**“THE MEDIA LANDSCAPE IN SOUTH AFRICA MAY HAVE CHANGED  
INEXORABLY, BUT TO SKETCH THE DIGITAL LANDSCAPE, TO THE  
EXCLUSION OF OTHER TRADITIONAL MEDIA PLATFORMS, IS  
PREMATURE.”**

**Digital Consumer Survey 2019 Report**

This artwork was created using Nielsen data.

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# WEIGHTING AND UNIVERSE NOTE



- When using any of the categories/brands in PAMS any weight can be used
- When using any of the categories/brands in PAMS BRANDS use HH weight
- When using some of the questions in PPP you should use a matched universe *i.e. code past month internet access*

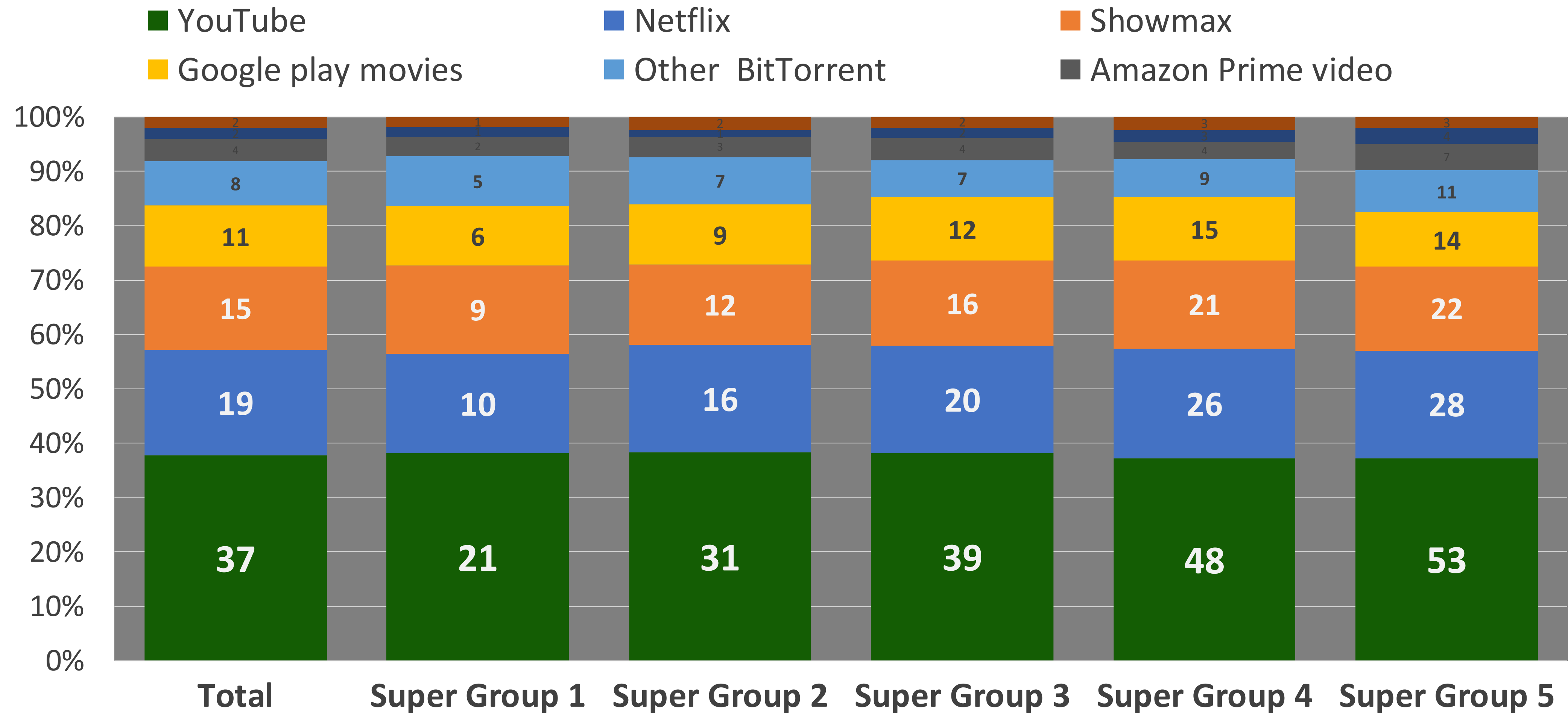


# WAYS TO WATCH TV/MOVIES THESE DAYS



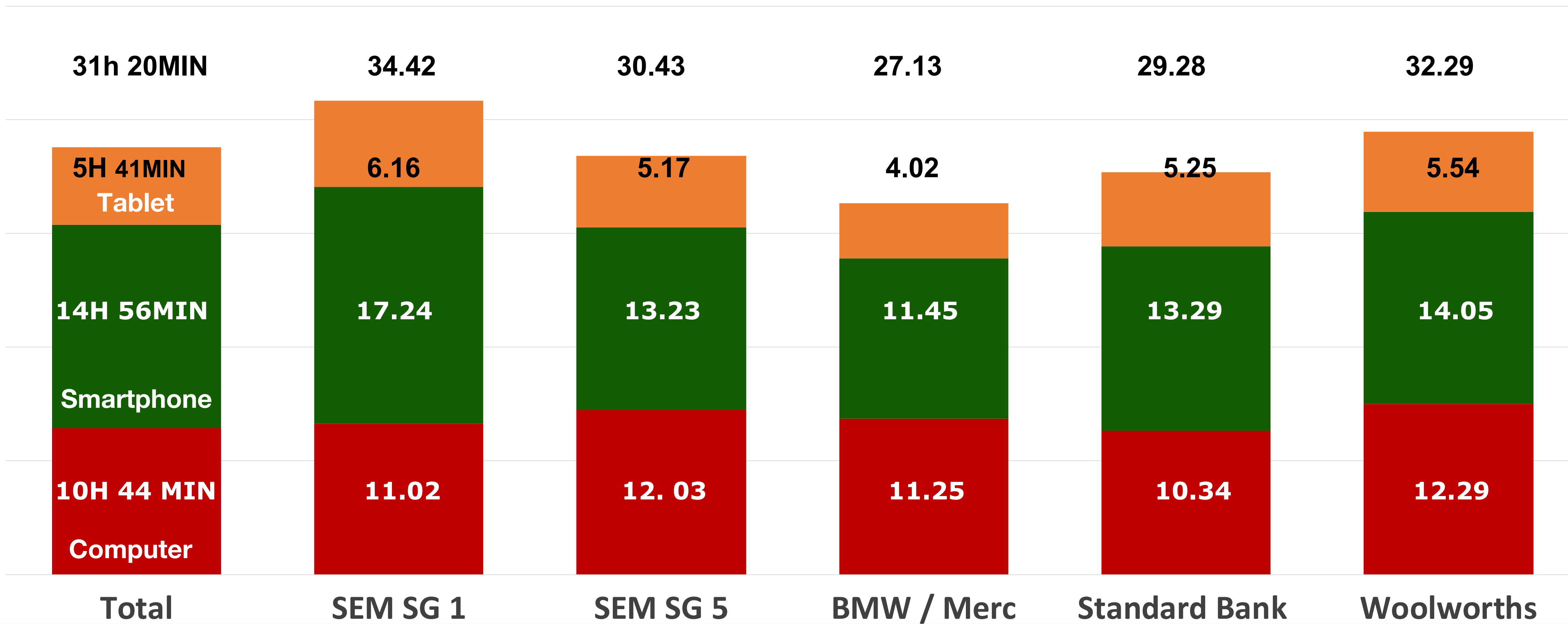
		Total	Hi-Fi Corp	Makro	Game	Other Outlet
Standard live broadcast TV and DStv (i.e. TV set)	%Col	42	59	64	60	47
Time-shifted TV (i.e. recorded TV program using a smart TV or connected device (PVR/DVR, DStv)	%Col	18	30	30	26	20
TV programs and movies you source from the internet (e.g. online 'catch up TV', 'IPTV' or 'video on demand' services)	%Col	19	27	28	27	21
TV or movie clips or entire shows streamed on sites like YouTube, Vimeo etc.	%Col	29	42	46	42	32
Internet Subscription of TV Shows/Movies (e.g. Iflix, Showmax, Amazon Prime)	%Col	19	32	45	34	20
User generated content from sites like YouTube	%Col	23	37	36	29	25
<b>AVERAGE NUMBER WAYS</b>		<b>1.5</b>	<b>2.3</b>	<b>2.5</b>	<b>2.2</b>	<b>1.7</b>

# ONLINE SOURCES AND SERVICES FOR TV/MOVIES



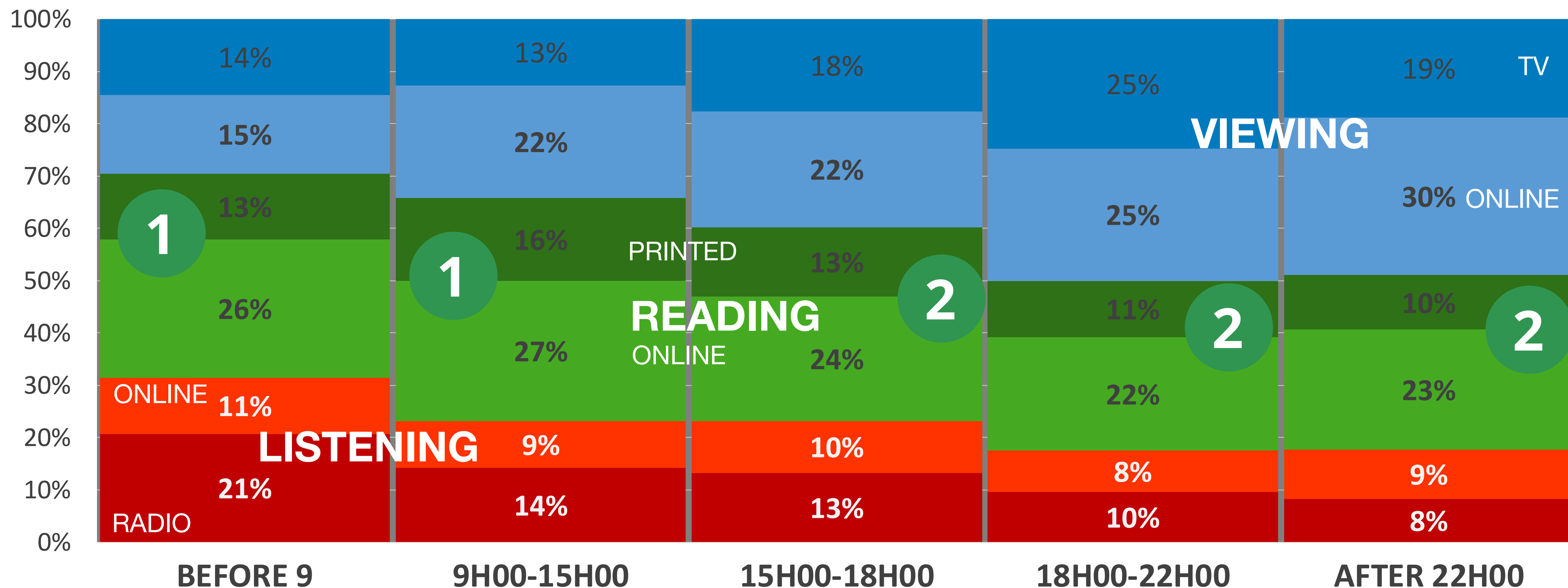


# TIME SPENT PER WEEK ON THE INTERNET BY DEVICE



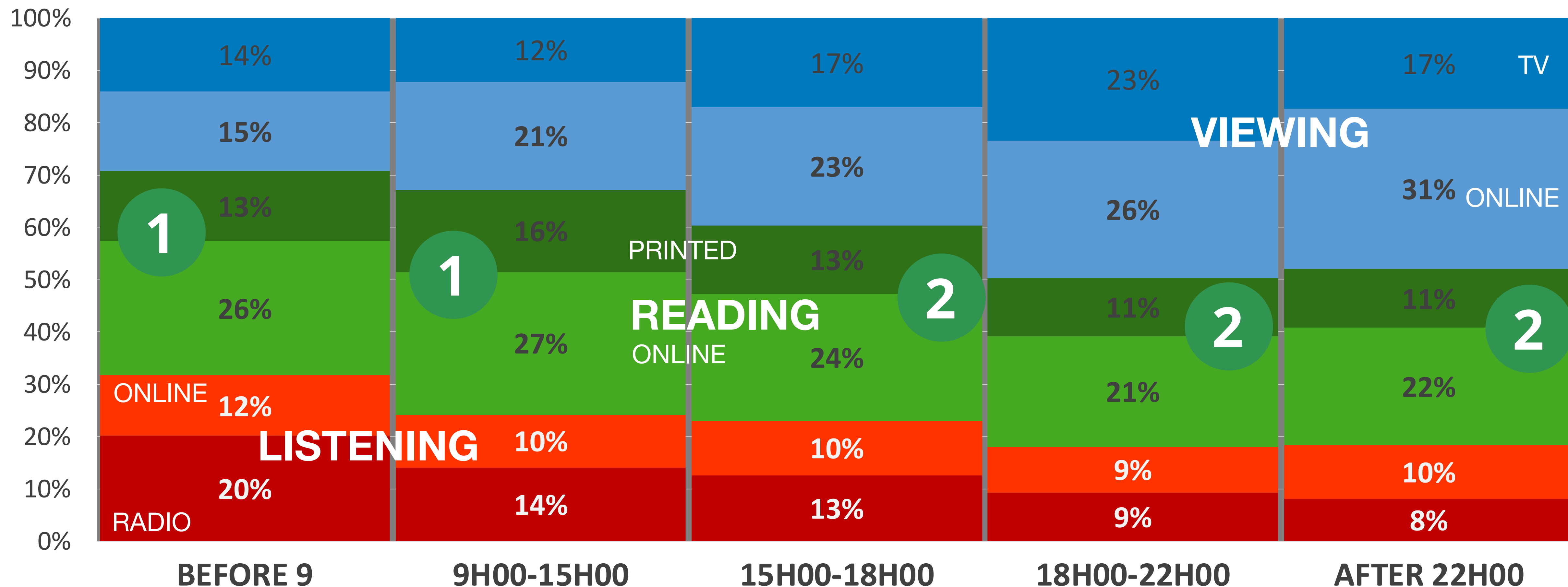
# ACTIVITY BY PLATFORM BY DAYPART

## TOTAL ADULTS (ONLINE UNIVERSE)



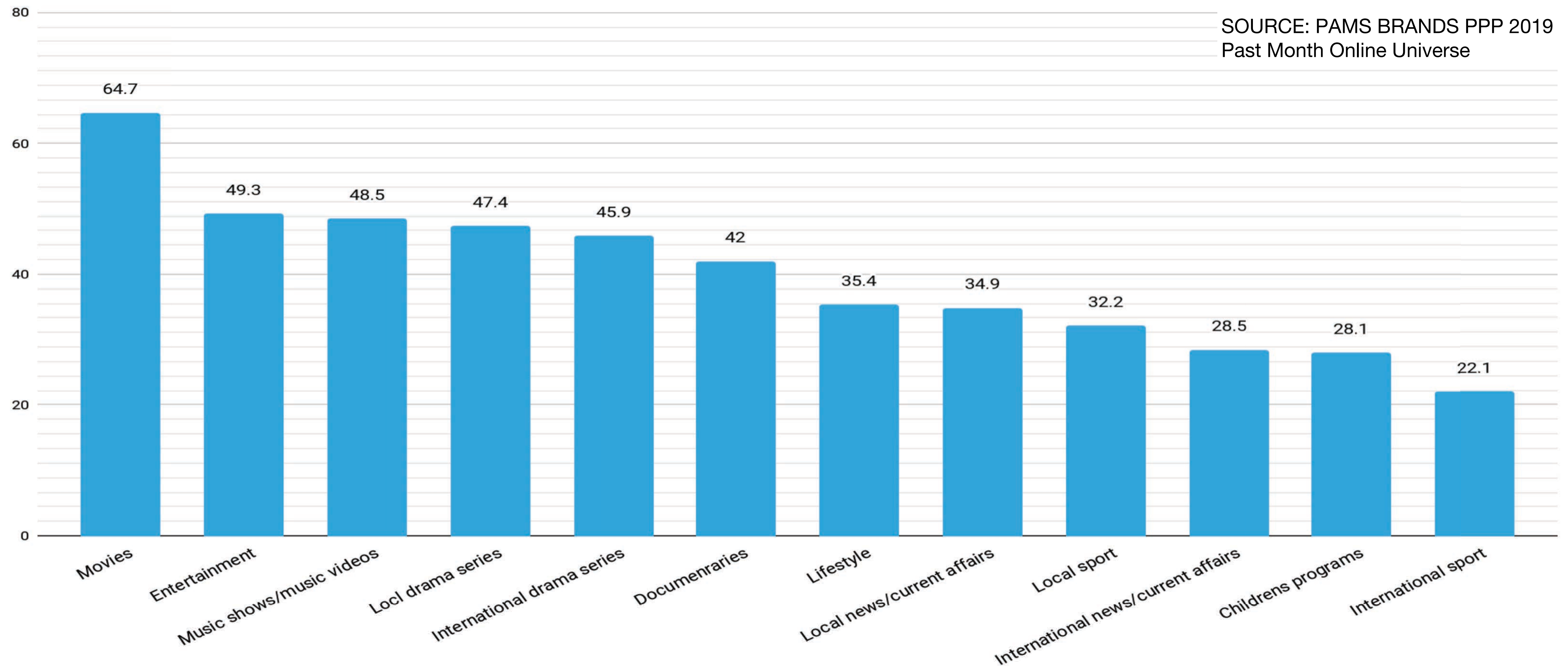
# ACTIVITY BY PLATFORM BY DAYPART

## CAPITEC (ONLINE UNIVERSE)



SOURCE: PAMS BRANDS PPP 2019  
 Past Month Online Universe. Activities aggregated and profiled. Reading is  
 News and Magazine only

# TYPES OF PROGRAMMES WATCHED VIA THE INTERNET





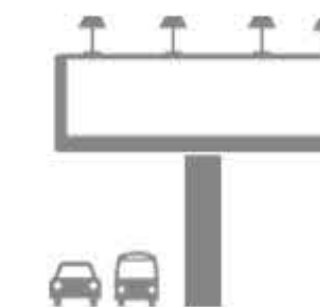
# WATCH TV AND USE THE INTERNET AT SAME TIME



		Total	SEM SG 1	SEM SG 5	Mr Price	Edgars	Woolworths	Online retailer e.g. Superbalist
Daily	%Col	39	43	33	42	38	37	29
Almost every day	%Col	28	29	28	27	29	28	33
Several times per week	%Col	14	11	14	14	14	12	16
Once per week or less	%Col	12	9	14	10	10	13	10
Never	%Col	8	7	11	7	8	9	11

SOURCE: PAMS BRANDS PPP 2019  
Past Month Online Universe

# QUALITY OF ATTENTION – READERS ARE FOCUSED



Not doing something else	56	50	37	28	24	18	18
Eating or drinking	27	27	24	32	62	41	6
Watching TV	12	14	19	35	-	6	3
Listening to the radio	11	13	11	19	4	-	4
Socialising	7	9	16	25	20	22	7
Travelling or driving	4	5	5	12	1	25	65
Activities in the home such as cooking, housework, child care, etc.	3	4	3	6	12	27	-
Accessing social media	3	4	8	-	12	8	2
Using your mobile phone or tablet	2	3	10	16	12	11	3
Working or studying	2	2	10	6	2	14	1
Avg. no. activities	0.8	0.9	1.2	1.7	1.4	1.8	1.1

# THANK YOU

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📍 Unit 8 Burnside Office Park 410 Jan Smuts Ave Craighall JHB South Africa

☎ +27 11 326 4041

+27 82 604 5940

🌐 [www.prc.za.com](http://www.prc.za.com)

✉ [josephine@prc.za.com](mailto:josephine@prc.za.com)