



P A M S 2019

PUBLISHER AUDIENCE MEASUREMENT SURVEY

LAUNCH PRESENTATION

7th APRIL 2020



COMPLETE READER MEASURE



The most complete measurement of reader audiences, across **all platforms**, to inform effective advertising investment



IN LINE WITH GLOBAL BEST PRACTICE



PAMS provides an innovative
“Gold Standard”

Reader Audience Measurement,
founded on global and local
best-in-class practice,
expertise and resources



SURVEY DETAILS



SURVEY DETAILS

- **Fieldwork: 1 August 2019 – 4 December 2019**
- **Total sample of 15 250**
- **Weighted to the 2019 GeoTerraImage (GTI) population of 41 874 000 (Adults 15+)**
- **Publications measured:**

Newspapers	Magazines	Online News Sites	Total
50	70	12	132

FLOODING – INCREASED SAMPLE BY 50%



Significant cost efficiency generated through flooding methodology

10 000

Households

1,5

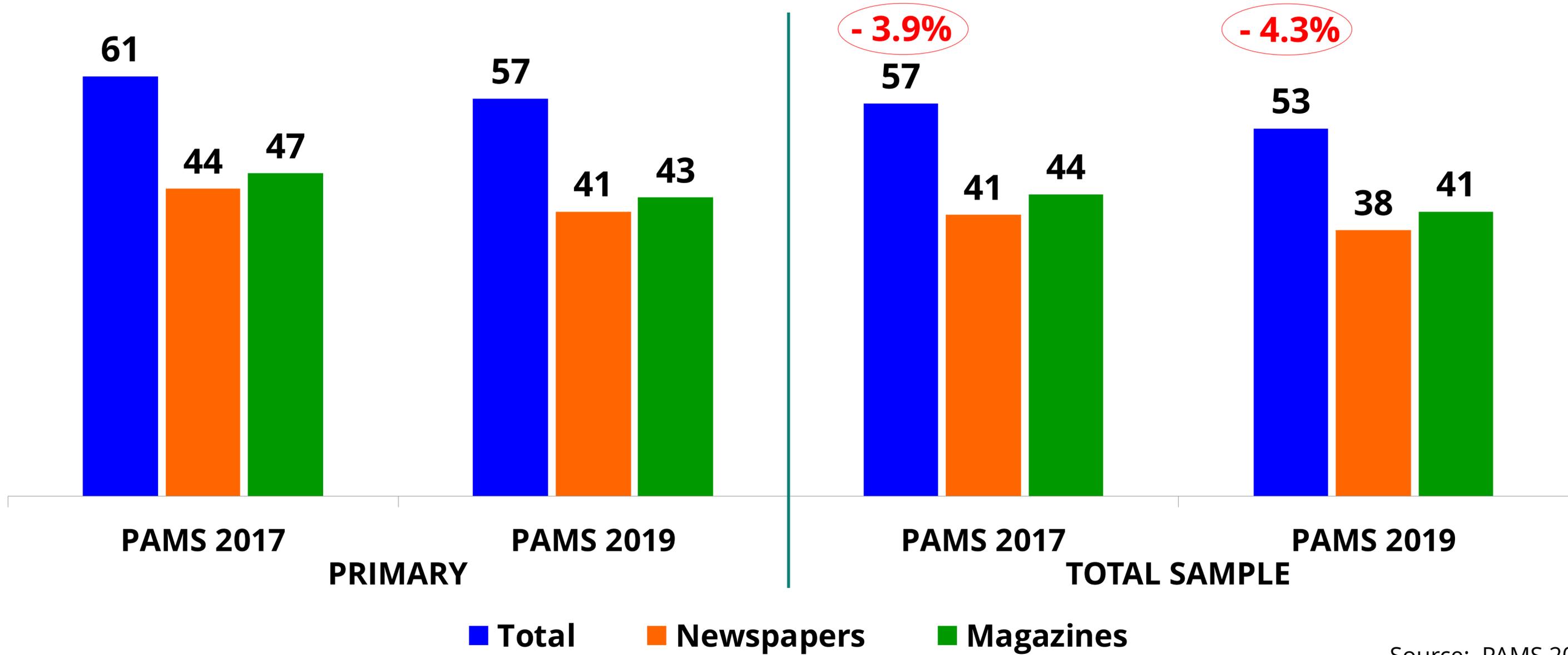
Average
Flooded Rate

15 250

Total
Respondents



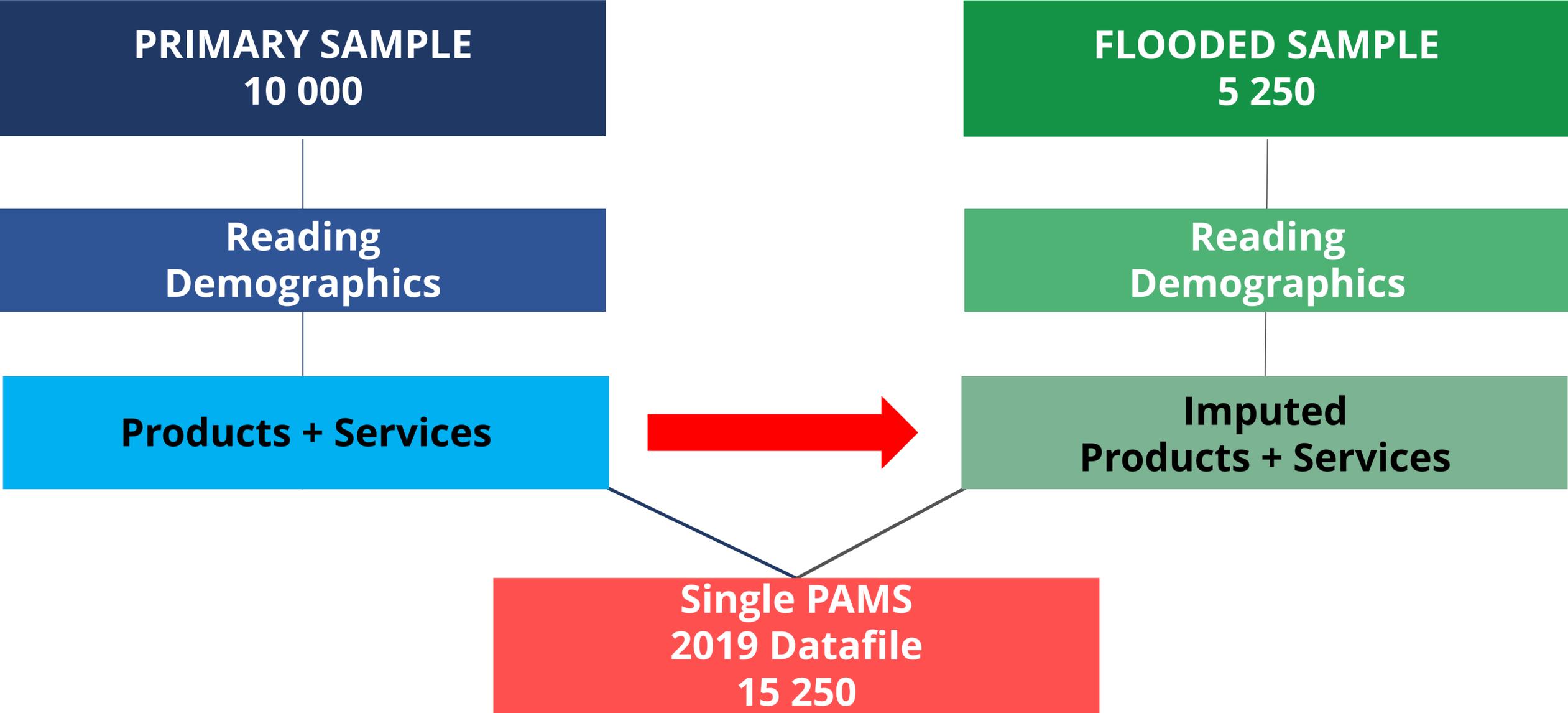
FLOODING – ACTUALLY REDUCES READERSHIP BY 4%

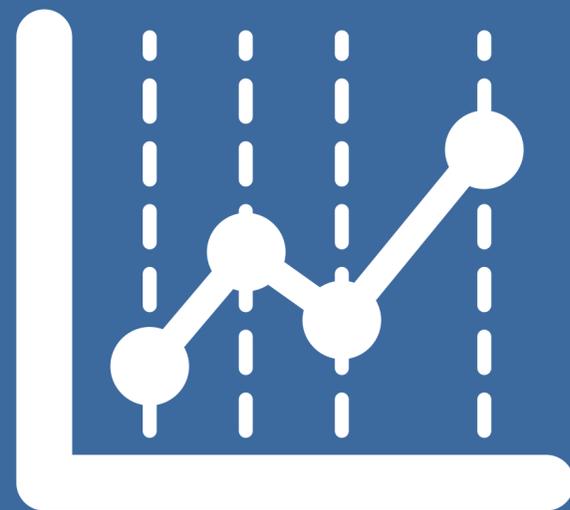


Source: PAMS 2019



A SINGLE DATABASE THROUGH IMPUTATION





SAMPLE AND WEIGHTING

NEW INNOVATIVE SAMPLING DESIGN



The PRC introduced a *new innovative sampling design* for PAMS 2019

Income was used as an additional sampling *variable*

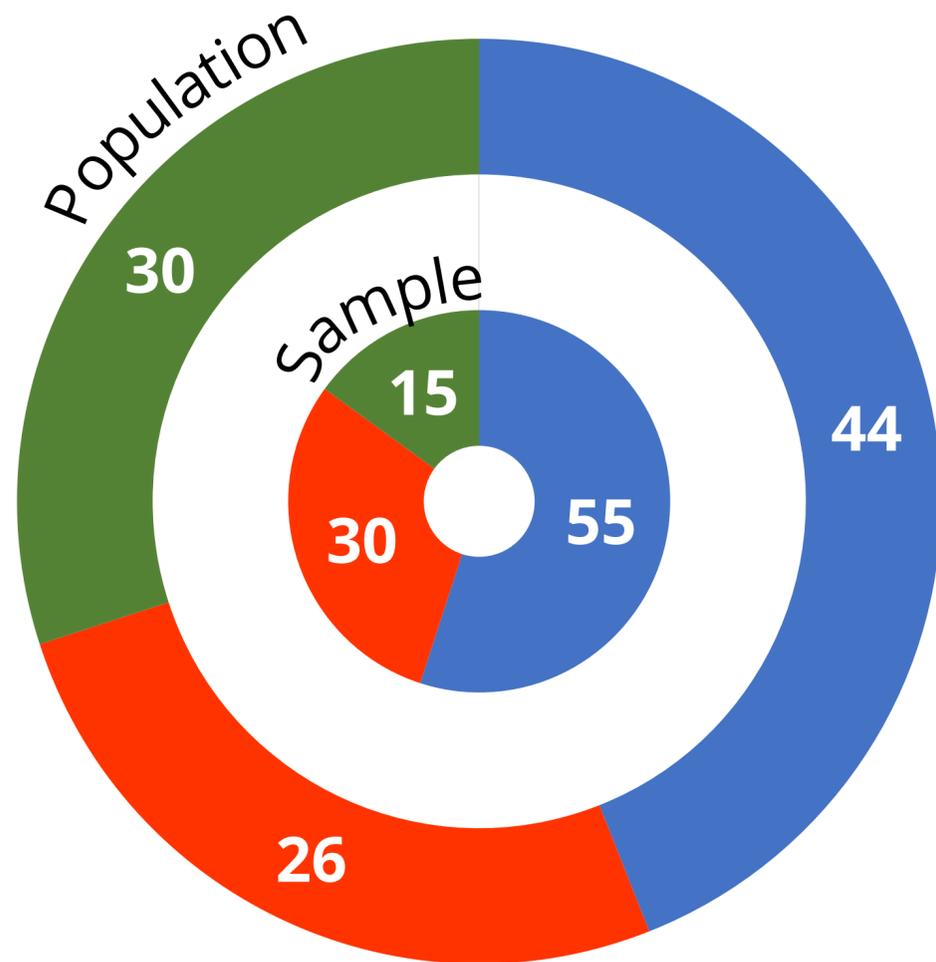


NEW SAMPLING VARIABLE

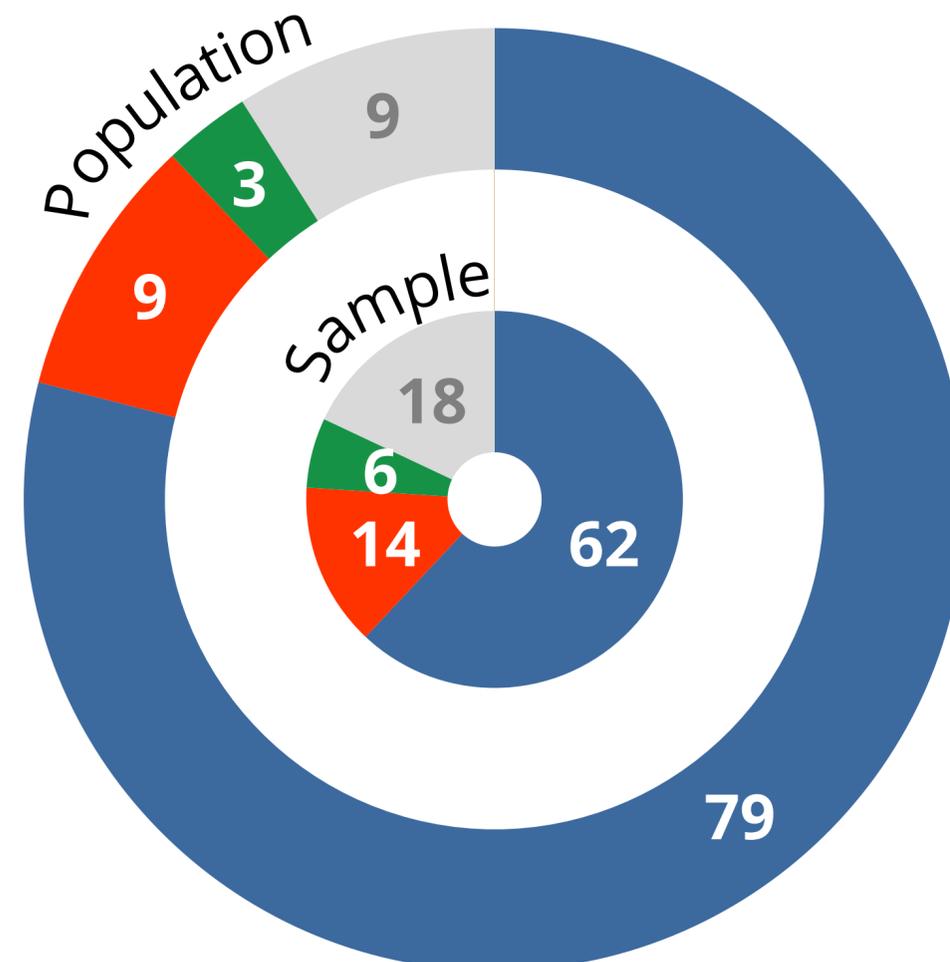
- The Neighbourhood Lifestyle Index^{®©} (NLI^{™©}), developed by GTI, was used
- The NLIs are developed by using **more variables**, than only household income
- Other variables used include e.g. **Type of Dwelling** and **Household Size**
- As income is one of the main variables, the groups are **expressed in income intervals**

NLI	%
1-3 (R0 – R11 159)	50
4-6 (R11 160 – R39 691)	30
7-10 (R39 692 +)	20

DISPROPORTIONAL DESIGN IN LINE WITH INCOME SHARE



■ Rural ■ Urban ■ Metro



■ Black ■ Coloured ■ Indian ■ White

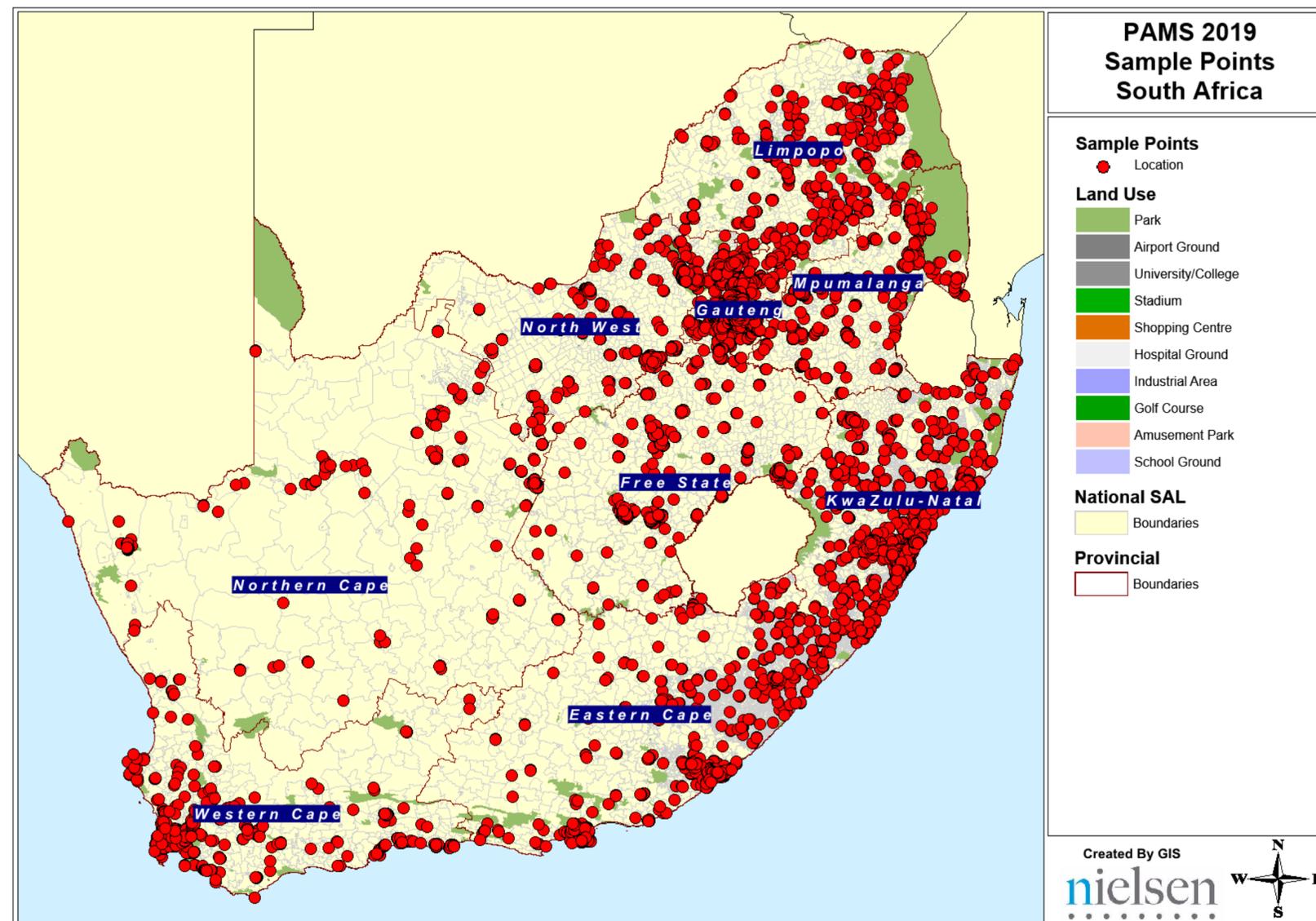
100% OF MUNICIPALITIES SAMPLED



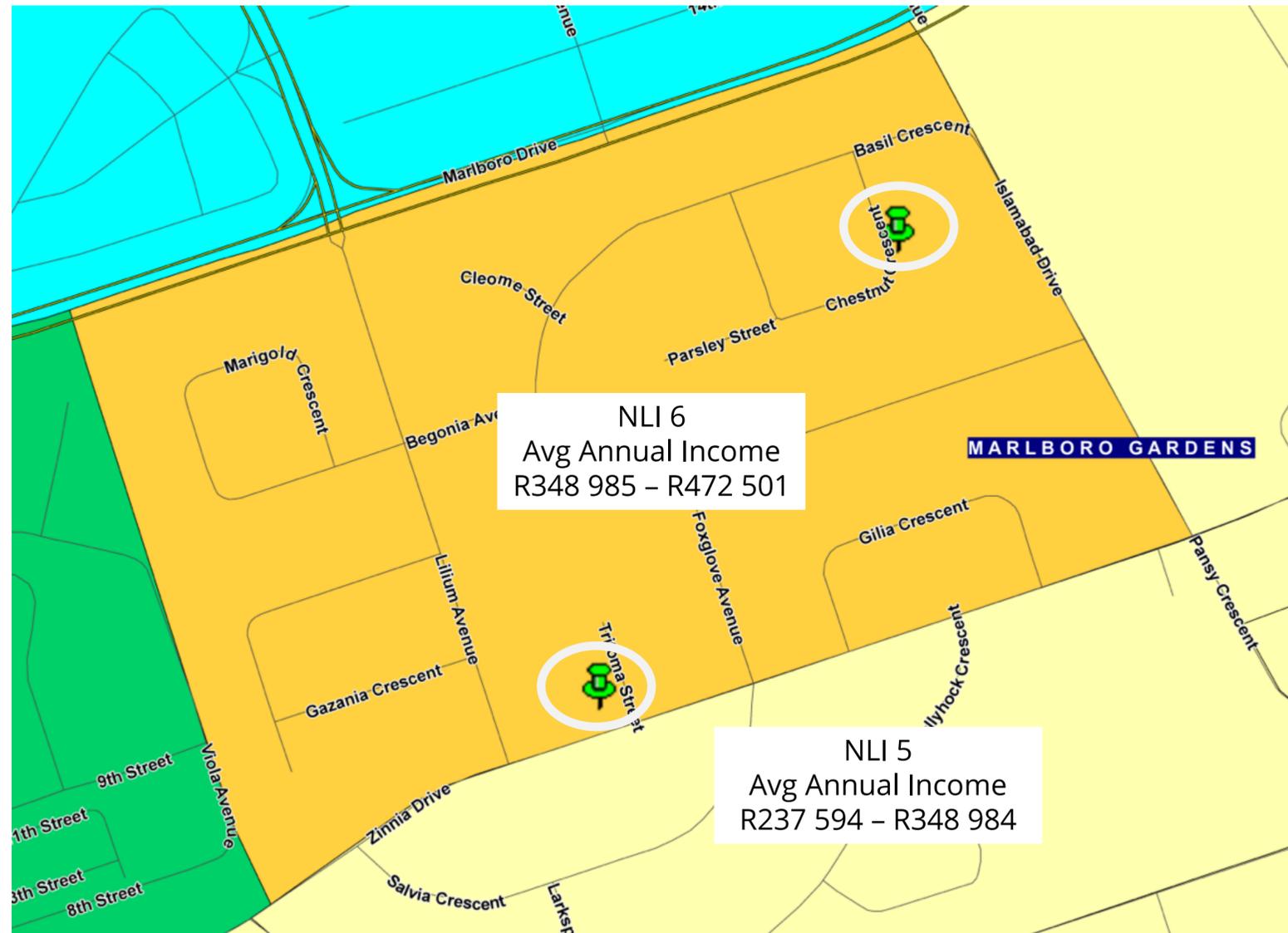
PAMS 2019
coverage...

All 233

Municipalities sampled



SAMPLE POINTS STRETCHED TO MAXIMISE DIVERSITY



Limited to
Points of 2
per Enumerated
Area (EA)

And stretched to
maximise diversity
and national
representivity

NEW INNOVATIVE SAMPLING DESIGN



“I have audited TAMS over the past few years as well as specific parts of the Establishment Survey in South Africa. I can confirm that the PAMS 2019 sample design as developed by Prof. Ariane Neethling seems to be well adapted to the particular socio-economic landscape of the South Africa market. The innovations adopted in terms of appointing a new demographic data partner GTI to provide very accurate population movements into metro areas, combined with the inclusion of the PRC inspired income sampling and weighting should result in a well-balanced and efficient sample is in line with global best practice.

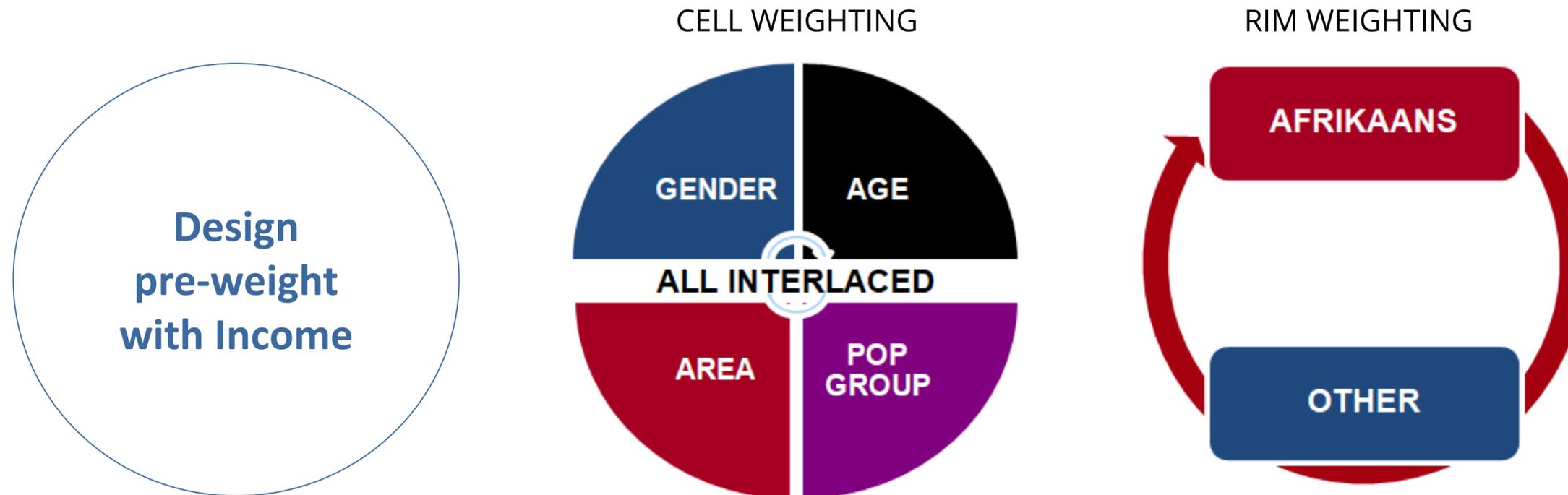
In my opinion the sampling is well designed for the particular socio-economic landscape of the South African market.”

- ROBERT RUUD Auditor 3M3A

HYBRID OF CELL AND RIM WEIGHTING



- An Interlaced Random Iterative Method (RIM) approach was used – a hybrid of cell and RIM weighting, with a design pre-weight including income



Interlaced demographic control, for in-depth analysis reliability

WEIGHTING EFFICIENCY



74%



70%



International Standard

Measure of how well PAMS sample is aligned to the population

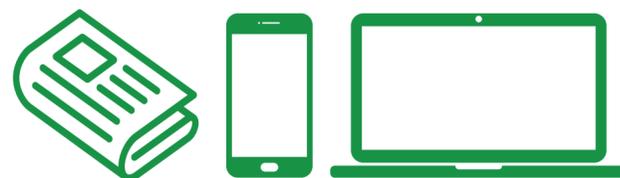


QUESTIONNAIRE DESIGN

QUESTIONNAIRE FLOW



1 PLATFORM FILTER

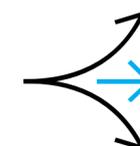


On Paper
On a Cellphone
On a Computer
On a Tablet
On another device
None of these

2 Computer Assisted Self-Interviewing (CASI) SELF-SELECTION

Paper	Online
<input type="checkbox"/> Alternate Monthly Magazine 1 	<input type="checkbox"/> Online 1
<input type="checkbox"/> Monthly Magazine 2 	<input type="checkbox"/> Online 2
<input type="checkbox"/> Monthly Magazine 3 	<input type="checkbox"/> Online 3
<input type="checkbox"/> Monthly Magazine 4 	<input type="checkbox"/> Online 4
<input type="checkbox"/> None on this screen	

3 ROUTING PAPER/ONLINE QUESTIONS



Frequency
When Last for Average Issue Readership (AIR)
Pick ups
Origin of Copy
Time Spent Reading
Device/Platform

4 PRODUCT/ BRAND/RETAIL BEHAVIOUR



Mobile/Online behaviour
Motoring/Financial
Retail: Food and Groceries/Furniture and Appliances/Clothing

CASI – SELF-SELECTION OF TITLES



Design

- Masthead **rotations**
- Only **4 titles** per screen
- Newspaper prompts **regionalised** by province
- **Shortens** questionnaire length
- Publications reported by **Platform and in Total**
- Increases respondent **interest**
- Saves **time**

Outcome

- **Removes bias**
- More **focus** on EACH title
- **Zero** incompletes
- More “Niche” publications **hitting the radar**
- **Removes** status induced **over-claim**

<u>Paper</u>	<u>Online</u>
<input type="checkbox"/> Alternate Monthly Magazine ¹ Good <i>Housekeeping</i>	<input type="checkbox"/> Online ¹ Good <i>Housekeeping</i>
<input type="checkbox"/> Monthly Magazine ² COSMOPOLITAN	<input type="checkbox"/> Online ² COSMOPOLITAN
<input type="checkbox"/> Monthly Magazine ³ Essentials	<input type="checkbox"/> Online ³ Essentials
<input type="checkbox"/> Monthly Magazine ⁴ woman&home	<input type="checkbox"/> Online ⁴ woman&home
<input type="checkbox"/> None on this screen	



QUESTIONNAIRE CHANGES

NEW BENCHMARK FOR PAMS 2019



- **PAMS 2019 data is not comparable to PAMS 2017 – even the Paper measure:**
 - **Questionnaire changes**
 - **Dual Online newspaper masthead prompts**
 - **New Sample Design using Income**



EXPANSION OF VISUAL ONLINE PROMPTS DEFINITION OF READING

ALL PLATFORMS

By Reading we mean, that you have personally read, paged through or viewed all or any part of any of these, for one minute or longer.

You could have read a paper version, including any of the separate parts or sections that come with it, OR you could have read these online on your cellphone, computer or tablet.

It does not matter if you paid for them or if they were free. It also does not matter where you read them.



DIGITAL ONLY

Now, thinking about your online reading or viewing of news/stories/features/articles on a website, an App or on social media.

You might have been using a cellphone, computer, tablet or any other device with internet access.

You could have been anywhere - at home, at work, at an internet cafe, at a friend's place or out and about. It does not matter how much or how long you have spent reading or viewing content online.



EXPANSION OF VISUAL ONLINE PROMPTS PLATFORM FILTER QUESTION



NEWSPAPER or ONLINE NEWS SITE

B1. In which of these ways, if any, have you personally read, paged through or viewed any copy of a NEWSPAPER or ONLINE NEWS SITE, at least once, in the PAST 12 MONTHS - for one minute or longer?

- On Paper
- On a Cellphone (Website/App/Social Media)
- On a Computer (Desktop/Laptop) (Website/App/Social Media)
- On a Tablet (Website/App/Social Media)
- On another device (Website/App/Social Media)
- None of these

MAGAZINE or ONLINE MAGAZINE CONTENT

B2. In which of these ways, if any, have you personally read, paged through or viewed any copy of a MAGAZINE or ONLINE MAGAZINE CONTENT, at least once, in the PAST 12 MONTHS - for one minute or longer?

MASTHEADS NEWSPAPER MASTHEADS



DUAL ONLINE MASTHEADS

- Dual mastheads were incorporated for online newspapers, as per PAMS 2018 Pilot results
- Umbrella Sites were positioned above Actual Title
- Actual Title was smaller than the Umbrella Site



PAPER	ONLINE
<input checked="" type="checkbox"/> Daily Newspaper The Star Monday to Friday	<input type="checkbox"/> Online IOL The Star
<input checked="" type="checkbox"/> Weekly Newspaper SATURDAY STAR Saturday	<input type="checkbox"/> Online IOL SATURDAY STAR
<input type="checkbox"/> Weekly Newspaper Sunday Times Sunday	<input type="checkbox"/> Online Times LIVE Sunday Times
<input type="checkbox"/> Daily Newspaper BusinessDay Monday to Friday	<input type="checkbox"/> Online Business LIVE BusinessDay
<input type="checkbox"/> None on this Screen	

WORDING CHANGE ISSUE/COPY



NUMBER OF ISSUES

B4. For each paper **copy/issue** of the Newspaper and/or Magazine you have read or paged through in the PAST 12 MONTHS, I am going to ask you about the number of different **copies/issues** you normally read or page through over a certain period of time.

B4a. Thinking of (MENTION DAILY NEWSPAPER), there are FIVE copies published from MONDAY to FRIDAY.
How many different **copies** do you normally read or page through?

Monday	Tuesday	Wednesday	Thursday	Friday
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NUMBER OF **COPIES** OUT OF 5:

- In the frequency question, first reference became “**copy/issue**”
- Subsequent reading questions refer to “**copy**” only
- This is in line with **PAMS 2018 Pilot findings**

UPDATED INCOME



HOUSEHOLD INCOME

Please tell me into which of these categories you estimate that your TOTAL monthly HOUSEHOLD INCOME falls? By this I mean the total income of all members in your household before tax or any other deductions. **Please include all sources of Income i.e. salaries, pensions, government grants, rentals, informal trading, 'stokvels', income from investments and family.**

➤ **HAND TABLET TO RESPONDENT TO SELECT ANSWER**

- | | |
|--|---|
| <input checked="" type="checkbox"/> R1 - R999 | <input type="checkbox"/> R20 000 - R24 999 |
| <input type="checkbox"/> R1 000 - R1 999 | <input type="checkbox"/> R25 000 - R29 999 |
| <input type="checkbox"/> R2 000 - R2 999 | <input type="checkbox"/> R30 000 - R39 000 |
| <input type="checkbox"/> R3 000 - R3 999 | <input type="checkbox"/> R40 000 - R49 000 |
| <input type="checkbox"/> R4 000 - R4 999 | <input type="checkbox"/> R50 000 - R59 000 |
| <input type="checkbox"/> R5 000 - R5 999 | <input type="checkbox"/> R60 000 - R79 999 |
| <input type="checkbox"/> R6 000 - R7 999 | <input type="checkbox"/> R80 000 - R99 999 |
| <input type="checkbox"/> R8 000 - R9 999 | <input checked="" type="checkbox"/> R100 000 + |
| <input type="checkbox"/> R10 000 - R11 999 | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> R12 000 - R13 999 | <input type="checkbox"/> Refused |
| <input type="checkbox"/> R14 000 - R15 999 | |
| <input type="checkbox"/> R16 000 - R19 999 | |

The first income group changed to R1 – R999

Top group expanded to R100 000

UPDATED INCOME



PERSONAL INCOME

R11. And can you tell me into which of these categories you estimate that your total monthly PERSONAL INCOME falls? This is before tax or any other deductions.

- R1** - R999
- R1 000 - R1 999
- R2 000 - R2 999
- R3 000 - R3 999
- R4 000 - R4 999
- R5 000 - R5 999
- R6 000 - R7 999
- R8 000 - R9 999
- R10 000 - R11 999
- R12 000 - R13 999
- R14 000 - R15 999
- R16 000 - R19 999
- R20 000 - R24 999
- R25 000 - R29 999
- R30 000 - R39 000
- R40 000 - R49 000
- R50 000 - R59 000
- R60 000 - R79 999
- R80 000 - R99 999
- R100 000 +**
- No Personal Income**
- Don't know
- Refused

- The first income group changed to**
R1 - R999
- Top group was expanded to**
R100 000+
- New option was included for**
"No Personal Income"

NEW QUESTIONS



FINANCE

F1. Do you personally have/make use of a SASSA government grant card?

- Yes
- No

F4. Do you personally make use of a credit card from a financial institution? This includes all Visa and Mastercard, as well as American Express, Diners Club, Discovery credit card.

- Yes
- No

LOYALTY/STORE CARDS

J3. Which of these store cards, if any, do you PERSONALLY have, which may earn you loyalty points or give you discounts?

- Ackermans
- Clicks
- Dis-Chem
- Edgars
- Jet
- Makro
- Pep
- Pick 'n Pay
- Spar
- Woolworths
- Other
- None

NEW QUESTIONS



ADDITIONAL LISTENING QUESTION

K2. On average, how many hours per day do you personally listen to the radio?

- Less than one hour
- 1 - 2 hours
- 3 - 4 hours
- More than 4 hours

ADDITIONAL VIEWING QUESTION

L2. On average, how many hours per day do you personally watch television?

- Less than one hour
- 1 - 2 hours
- 3 - 4 hours
- More than 4 hours

NEW QUESTIONS



INFLUENCER QUESTION

M1. Here are a few comments that other people have made about themselves. For each one, please indicate how well it describes you, using the options on the screen.

This is not me

This doesn't really describe me

This describes me quite well

This describes me perfectly

STATEMENTS

- I would like to believe that I am better informed and up to date on what's going on in South Africa at the moment than the average person
- I have more friends on Facebook than most people
- I earn and think more than most South Africans
- I have been quoted by my friends or in the media on a few occasions
- People sometimes ask me for my opinion or advice
- I like to keep abreast of the changes in my industry and read quite a bit to stay informed
- I have more followers on Twitter than most, and tweet often
- I am one of the decision-makers at my place of work when it comes to buying products and services
- I am on at least one committee at work, the kids' school, a local society or sport club, our neighbourhood

NEW QUESTIONS



VOTING

R16a. Did you vote in the 2019 General Election?

- Yes
- No

R16b. Are you registered to vote?

- Yes
- No

INTERVIEWER OBSERVATION

P2a. TYPE OF HOME?

- House (free-standing)
- Cluster/Townhouse
- Flat (in a block of flats)
- Matchbox/RDP house
- Traditional Hut
- Hostel/Compound
- Single room in a larger dwelling or backyard
- Temporary structure/Shack
- Other

P2b. ELECTRICITY IN HOME?

- Yes
- No

EXCLUSIONS



**STORE MAGAZINES WERE EXCLUDED FROM
PAMS 2019**

AVERAGE ISSUE READERSHIP (AIR) BASED ON RECENCY



Paper AIR

Last read in Issue period



Online AIR

Last read in 7 days

Last read in 4 weeks

Total Multi-platform AIR

(7 Day online/4 week online)

MULTIPLE PICK-UPS OPPORTUNITIES TO SEE (OTS)



B6. Thinking about the paper copy of **Sunday Times** you last read, how many times did you pick it up before you finished with it?



- Once only
- 2 - 3 times
- 4 - 5 times
- 6 or more times

B6. Thinking about the paper copy of **BONA** you last read, how many times did you pick it up before you finished with it?

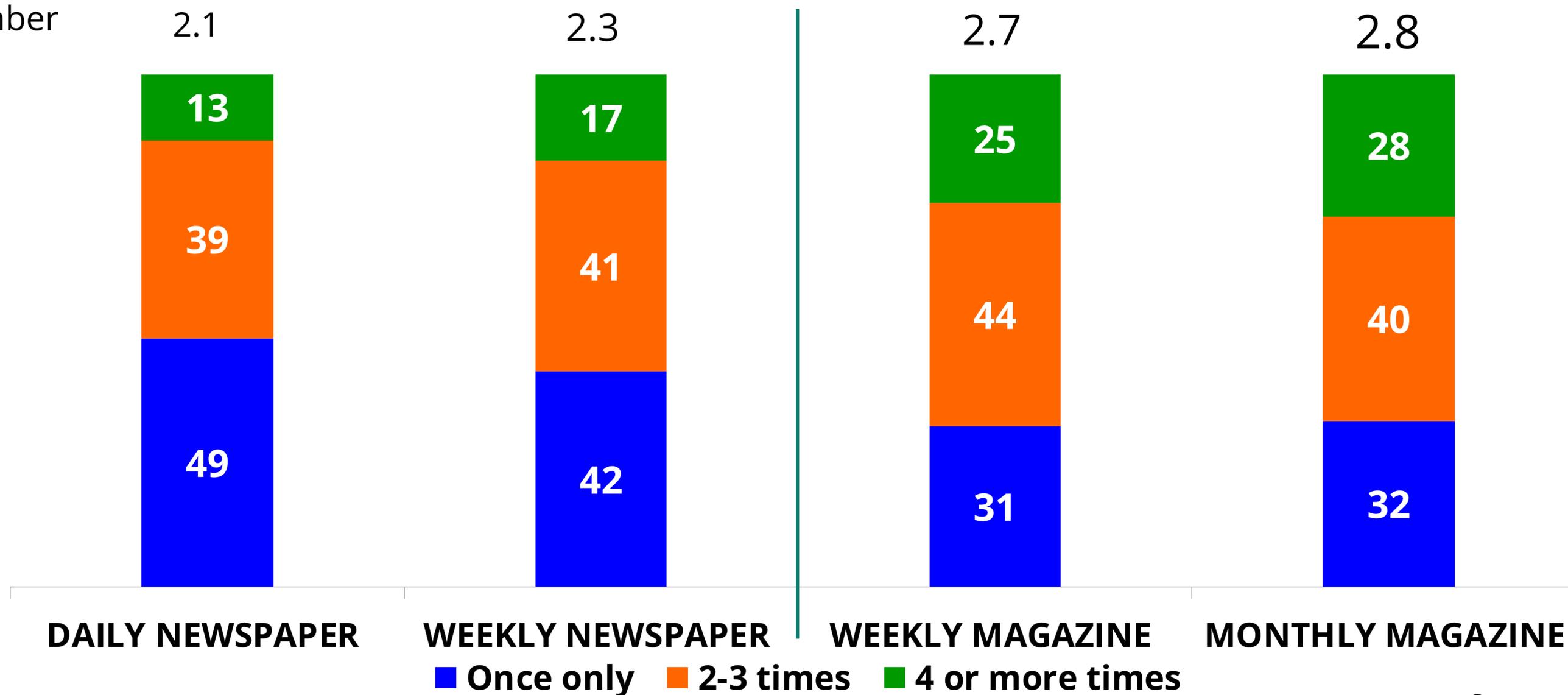


- Once only
- 2 - 3 times
- 4 - 5 times
- 6 or more times

NUMBER OF PICK-UPS



Average number
Pick-ups



Based on 12 month Readers

Source: PAMS 2019

TIME SPENT READING (TSR)



B8. Thinking of your reading of **Daily Dispatch**, on average, how long do you spend reading or paging through the paper copy of **Daily Dispatch**?



- Less than 30 minutes
- Between 30 minutes – 1 hour
- Between 1 - 2 hours
- Between 3 - 4 hours
- 4 hours or more

B6. Thinking of your reading of **Kuier**, on average, how long do you spend reading or paging through the paper copy of **Kuier**?



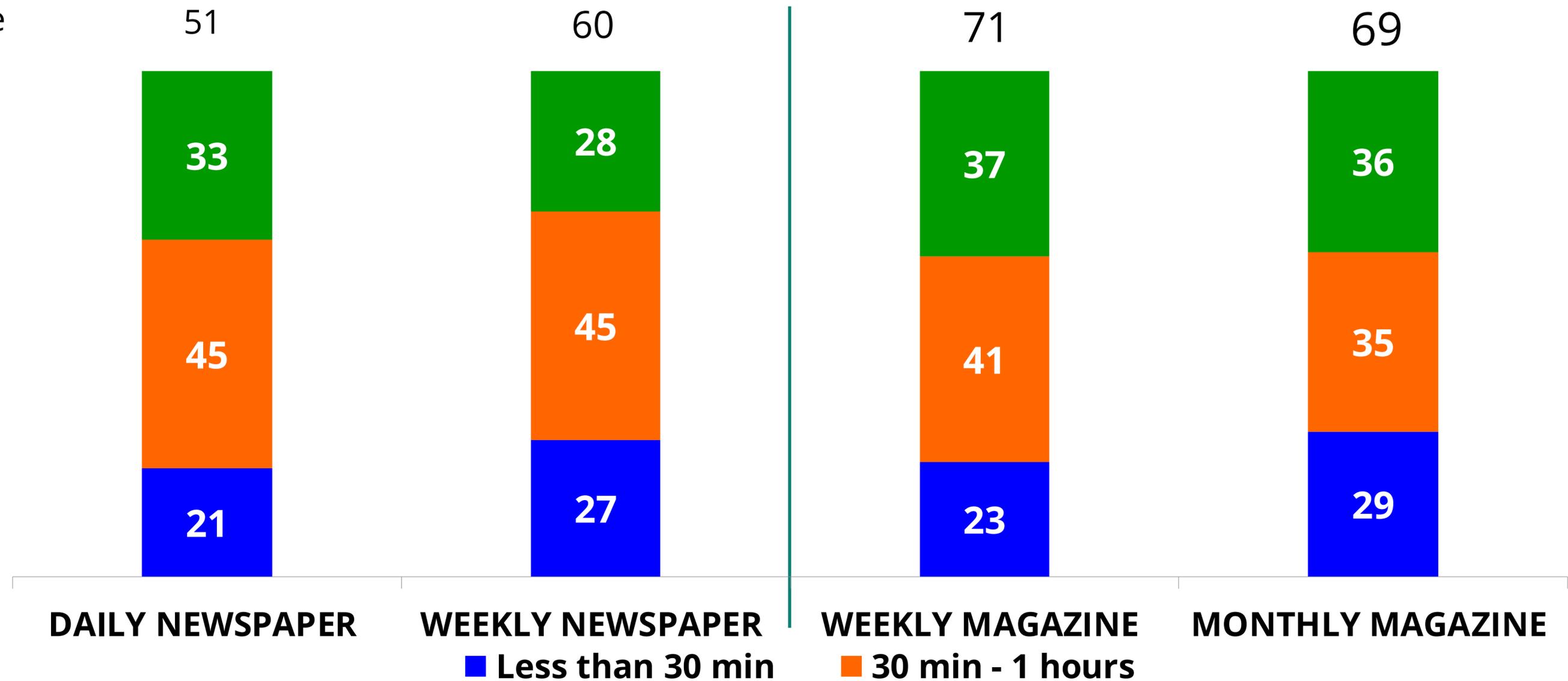
- Less than 30 minutes
- Between 30 minutes – 1 hour
- Between 1 - 2 hours
- Between 3 - 4 hours
- 4 hours or more

Source: PAMS 2019

TIME SPENT READING



Average time
minutes



Based on 12 month Readers

Source: PAMS 2019

USAGE OF ADVERTISING INSERTS/LEAFLETS



Thinking about advertising pamphlets, leaflets or inserts such as these, do you...

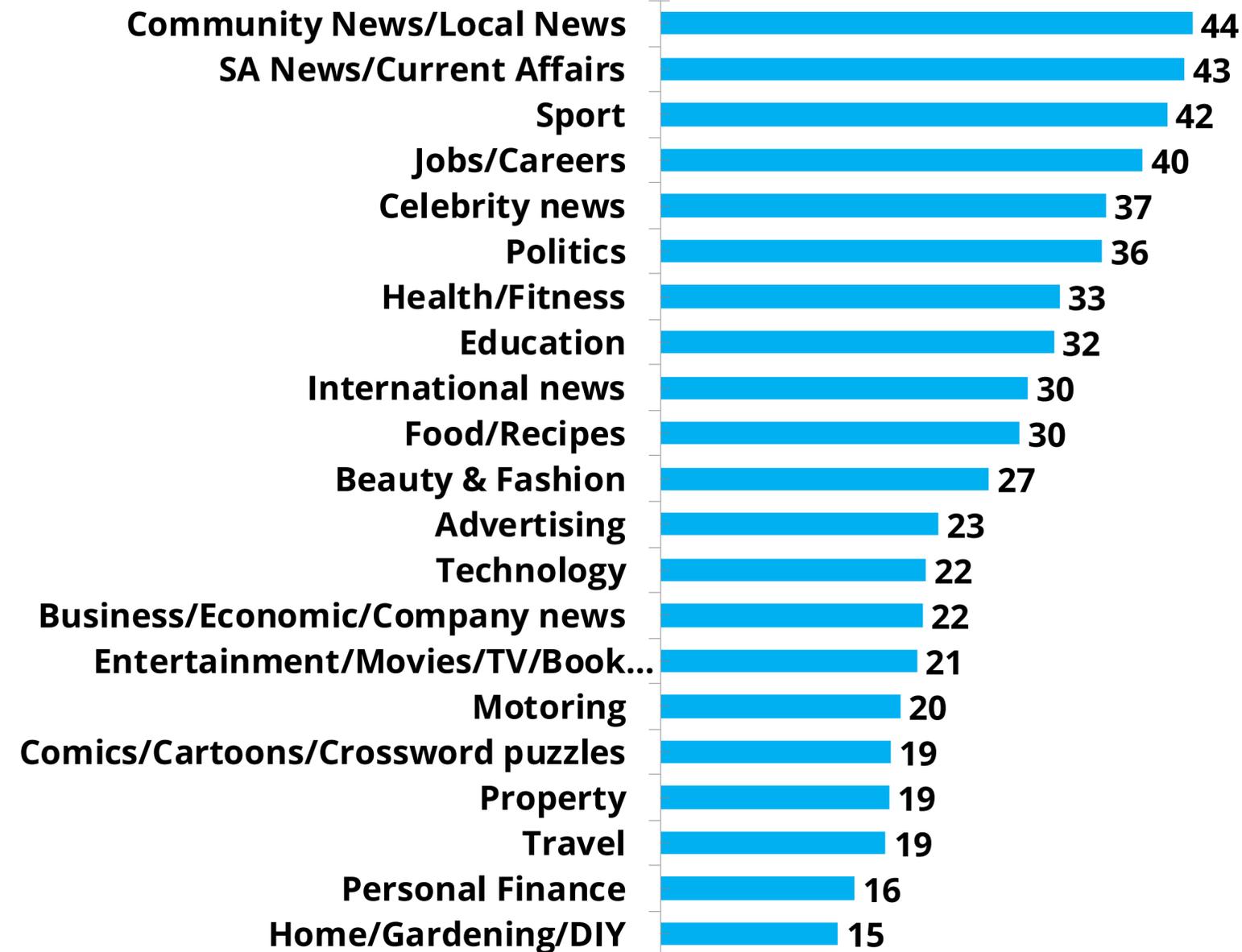
%

- Use them to compare **prices** 61 %
- Use them to **plan** your shopping 53 %
- **Buy** products as a result of seeing them 33 %
- Glance or page through to see if anything **interests** you 33 %
- **Don't** look at them 12 %



Source: PAMS 2019

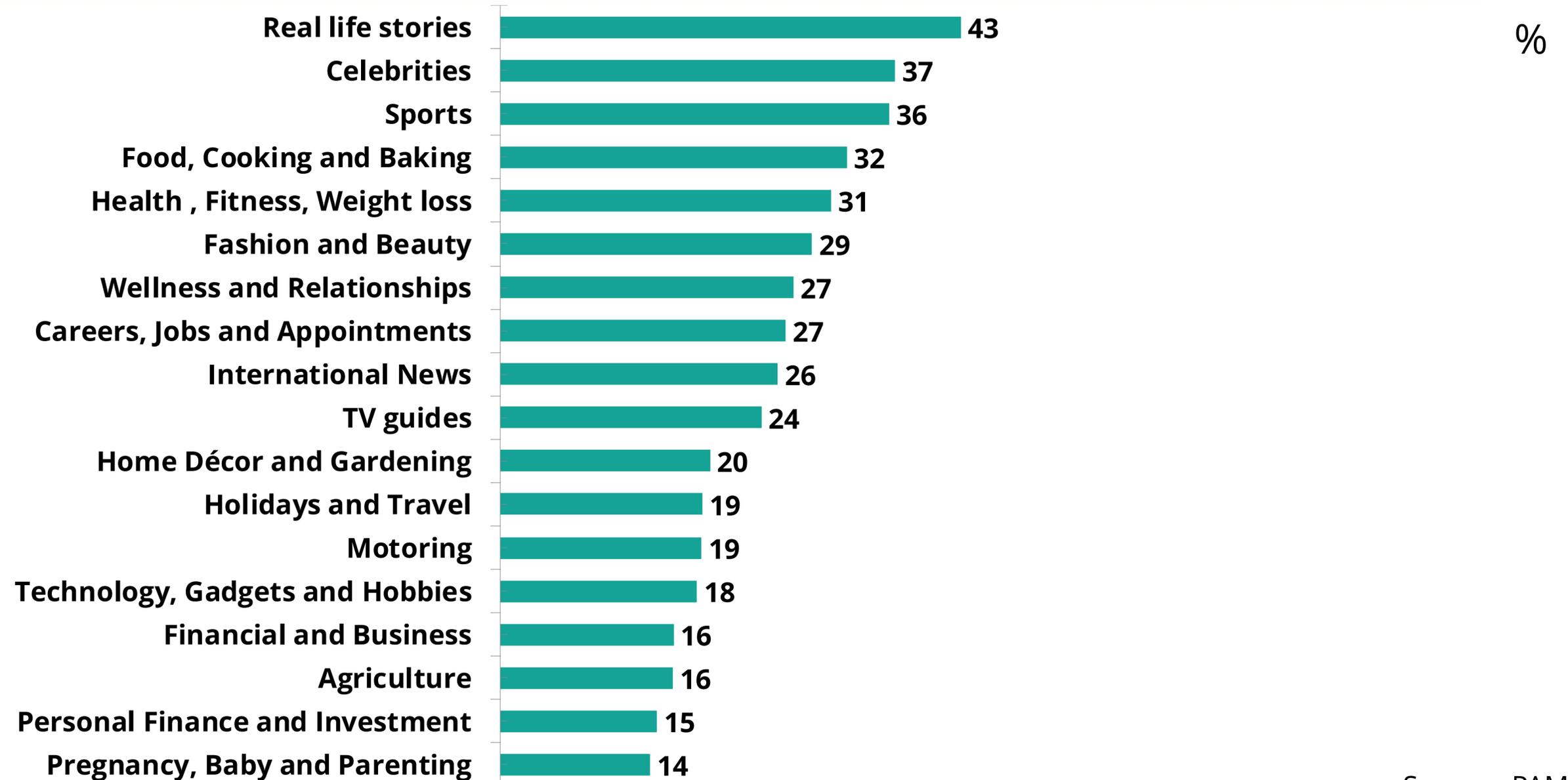
TOPICS/INTERESTS QUESTION - NEWSPAPERS



%

Source: PAMS 2019

TOPICS/INTERESTS QUESTION - MAGAZINES

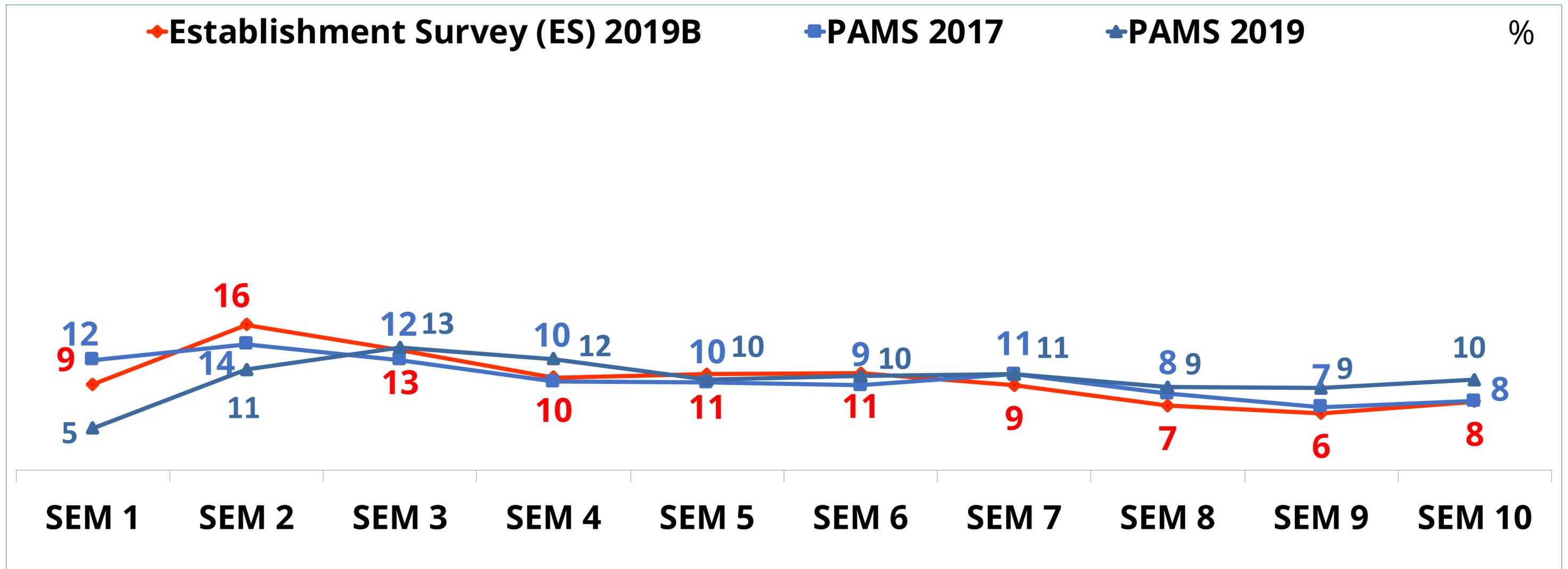


Source: PAMS 2019



KEY DEMOGRAPHICS

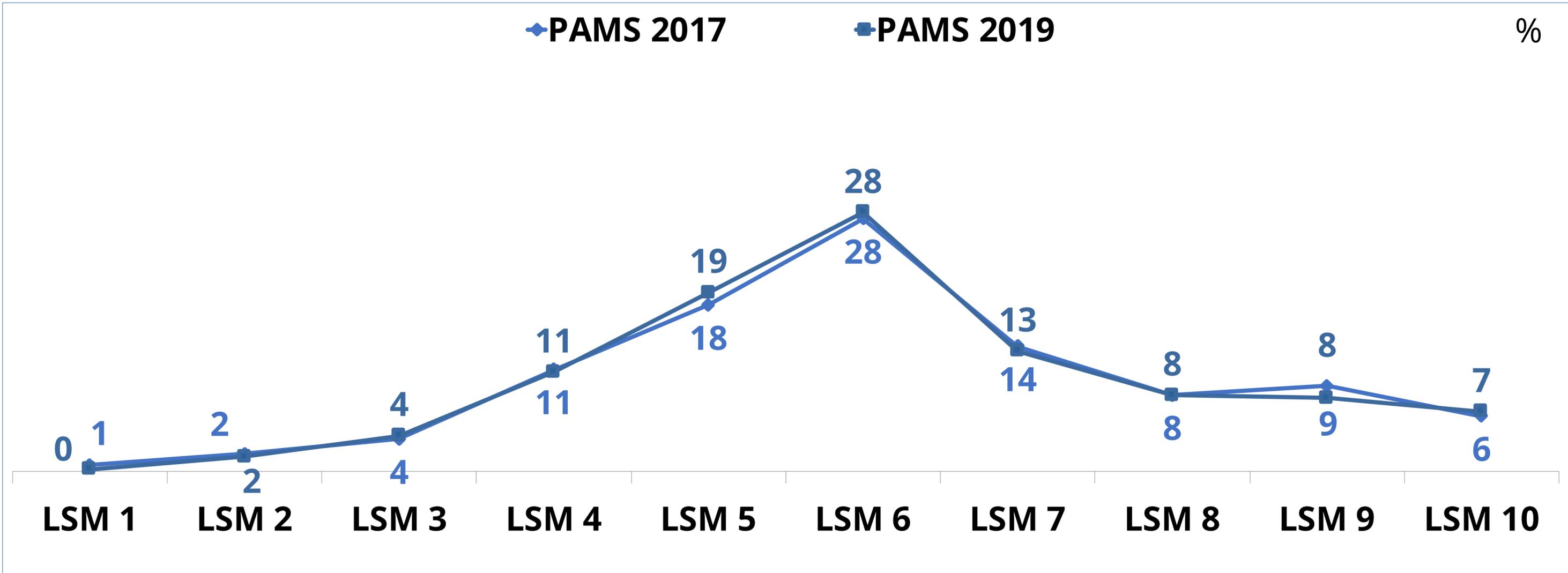
SOCIO-ECONOMIC MEASURE (SEM)



Source: PAMS 2019



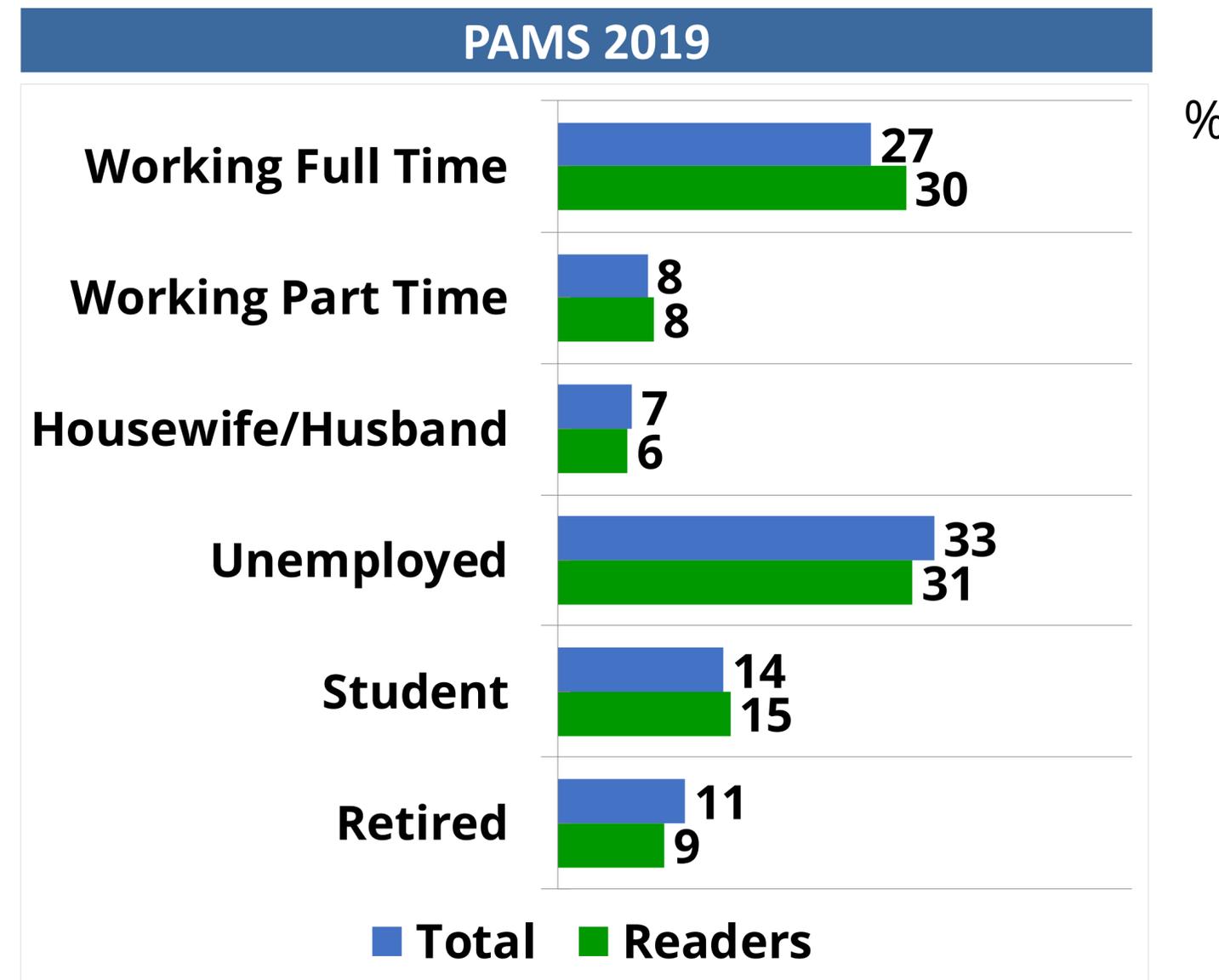
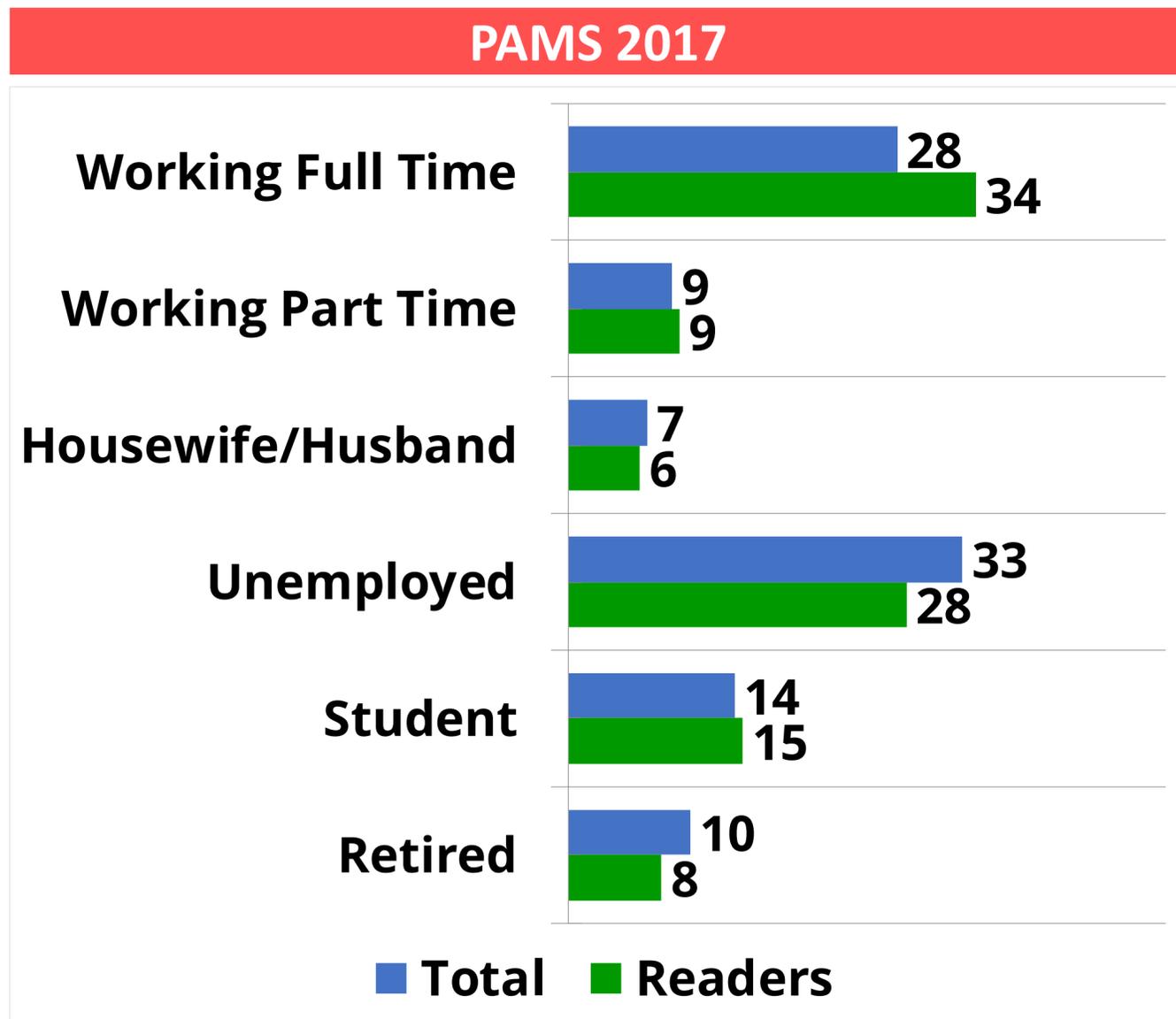
LIVING STANDARDS MEASURE (LSM)



Source: PAMS 2019



EMPLOYMENT HIGHER AMONGST READERS

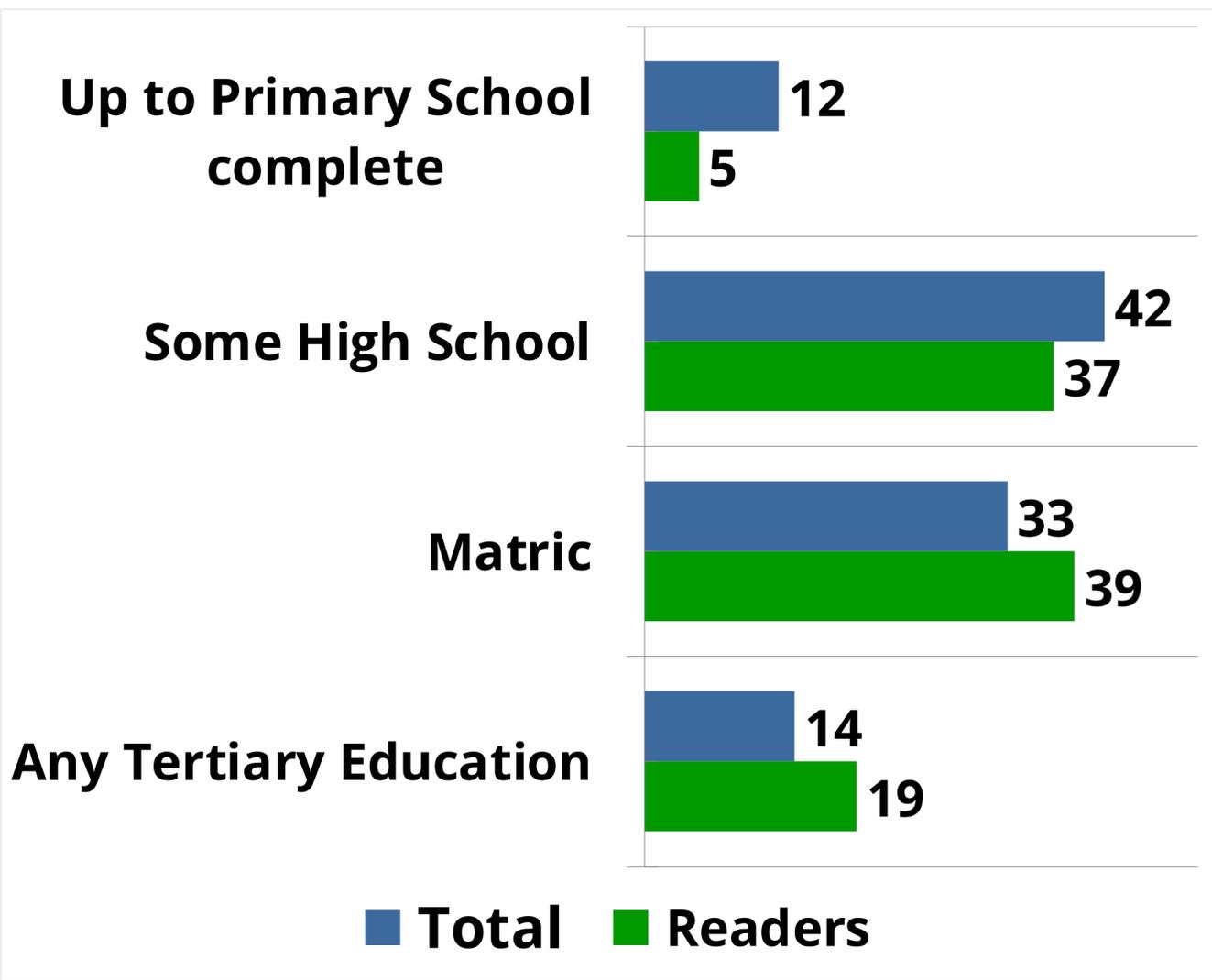


Source: PAMS 2019

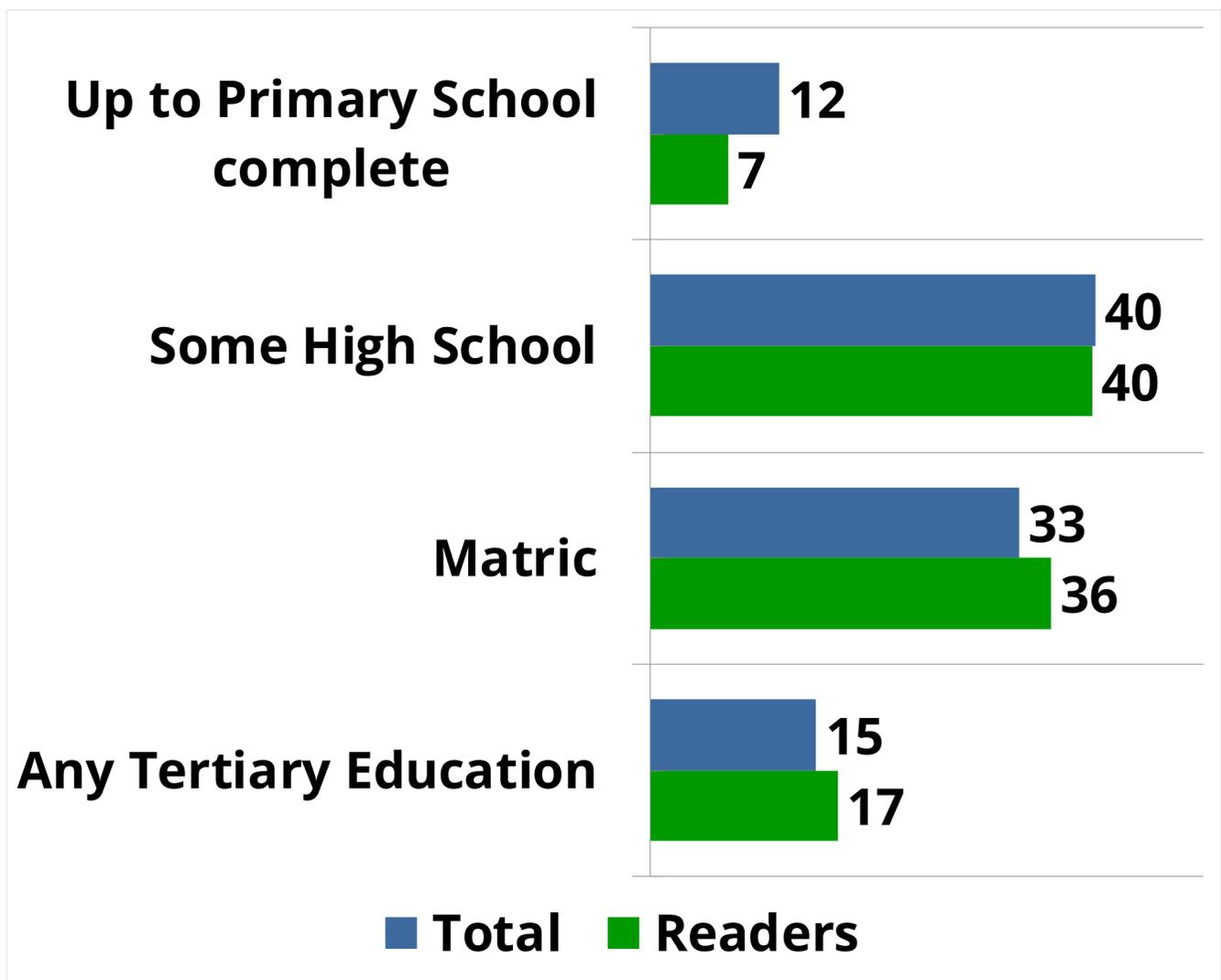


EDUCATION HIGHER AMONGST READERS

PAMS 2017



PAMS 2019



%

Source: PAMS 2019

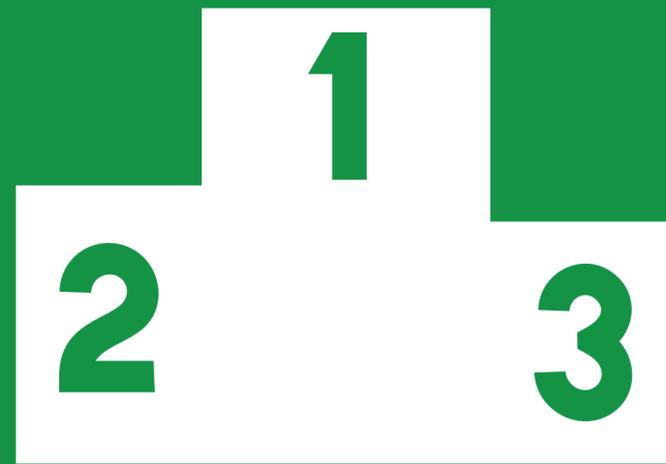


MONTHLY HOUSEHOLD INCOME

	TOTAL		READERS	
	PAMS 2017 %	PAMS 2019 %	PAMS 2017 %	PAMS 2019 %
Up to R4 999	43.0	36.0	38.8	32.8
R5 000 to R9 999	25.9	27.6	27.3	27.7
R10 000 to R19 999	18.0	19.4	19.5	20.3
R20 000 to R39 999	8.8	11.0	9.6	12.2
R40 000 to R59 000	2.9	4.1	3.3	4.8
R60 000 to R79 999	0.8	1.0	0.9	1.1
R80 000 to R99 000	0.5	0.5	0.6	0.6
R100 000 +		0.4		0.5
Average	R10 837	R13 230	R11 616	R14 411
		+ 22%		+ 24%



Source: PAMS 2019



RESULTS

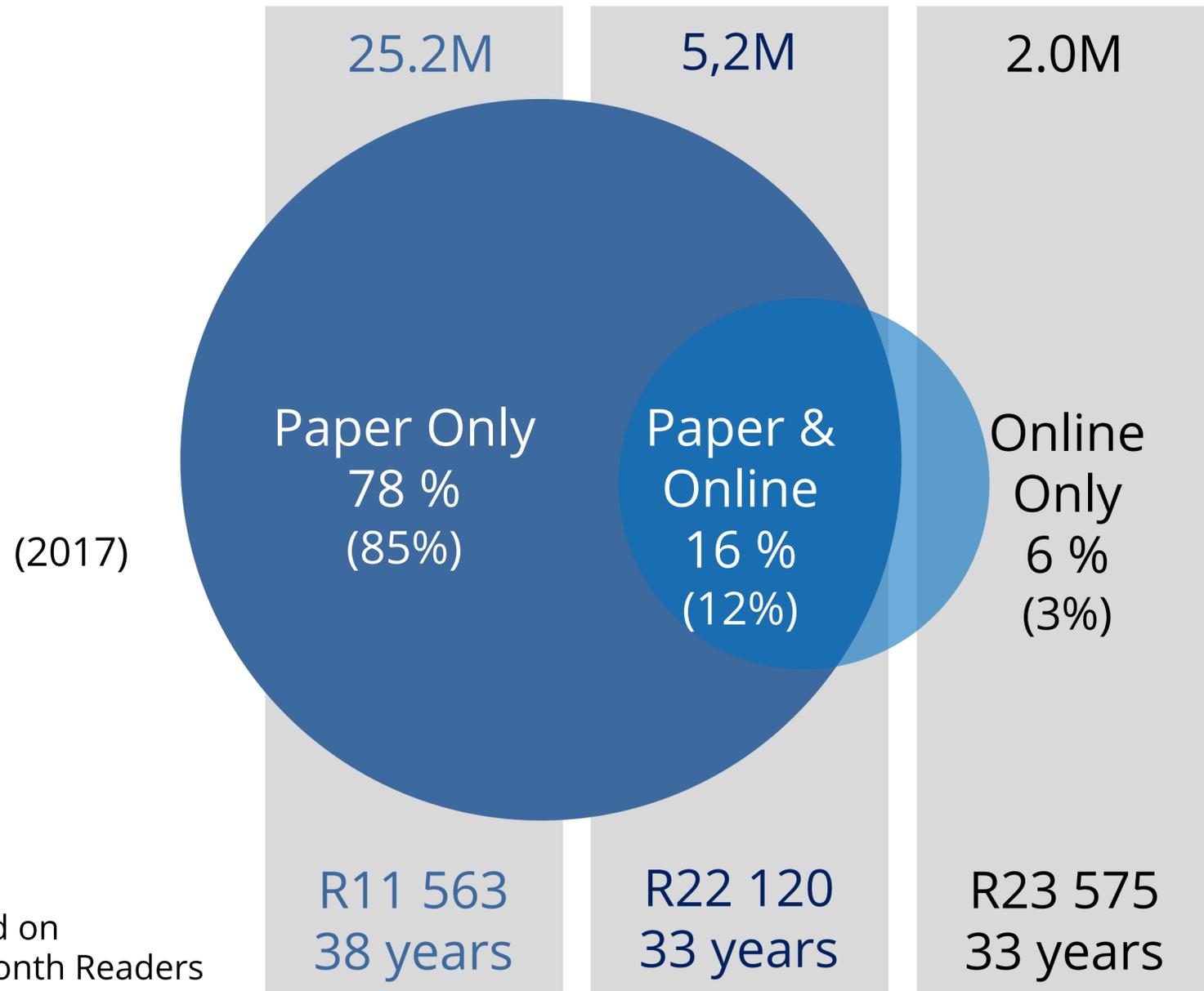
PAMS READER UNIVERSE



The figures in this presentation
only reflect the publications
measured in PAMS

Source: PAMS 2019

FROM PAPER TO PHONE



Device used for Online:	
Cellphone	16.4 %
Computer	1.8 %
Tablet	0.6 %

Based on
12 month Readers

R11 563
38 years

R22 120
33 years

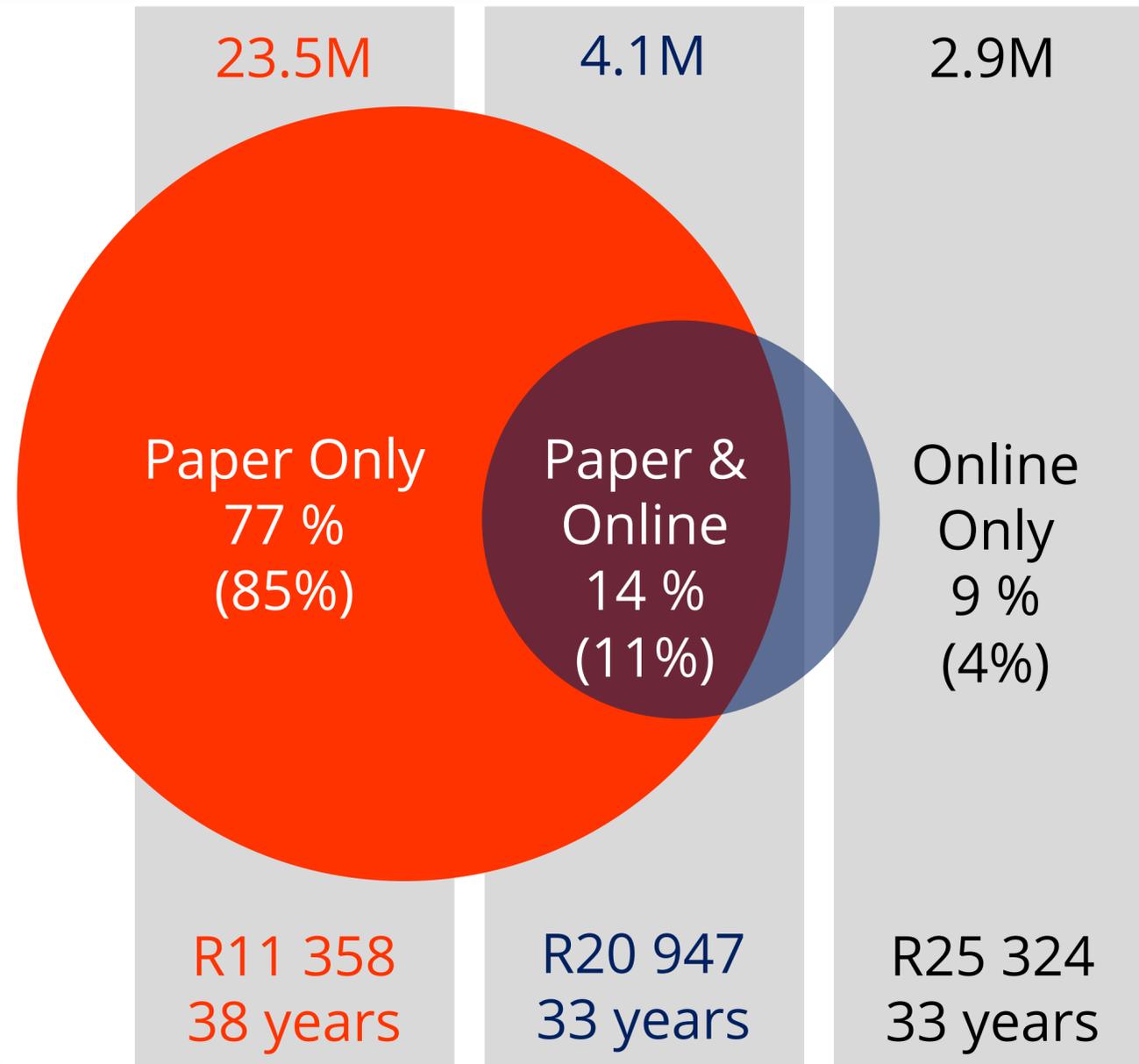
R23 575
33 years

Source: PAMS 2019

NEWSPAPER PLATFORM OVERLAP AND CHANGE



(2017)



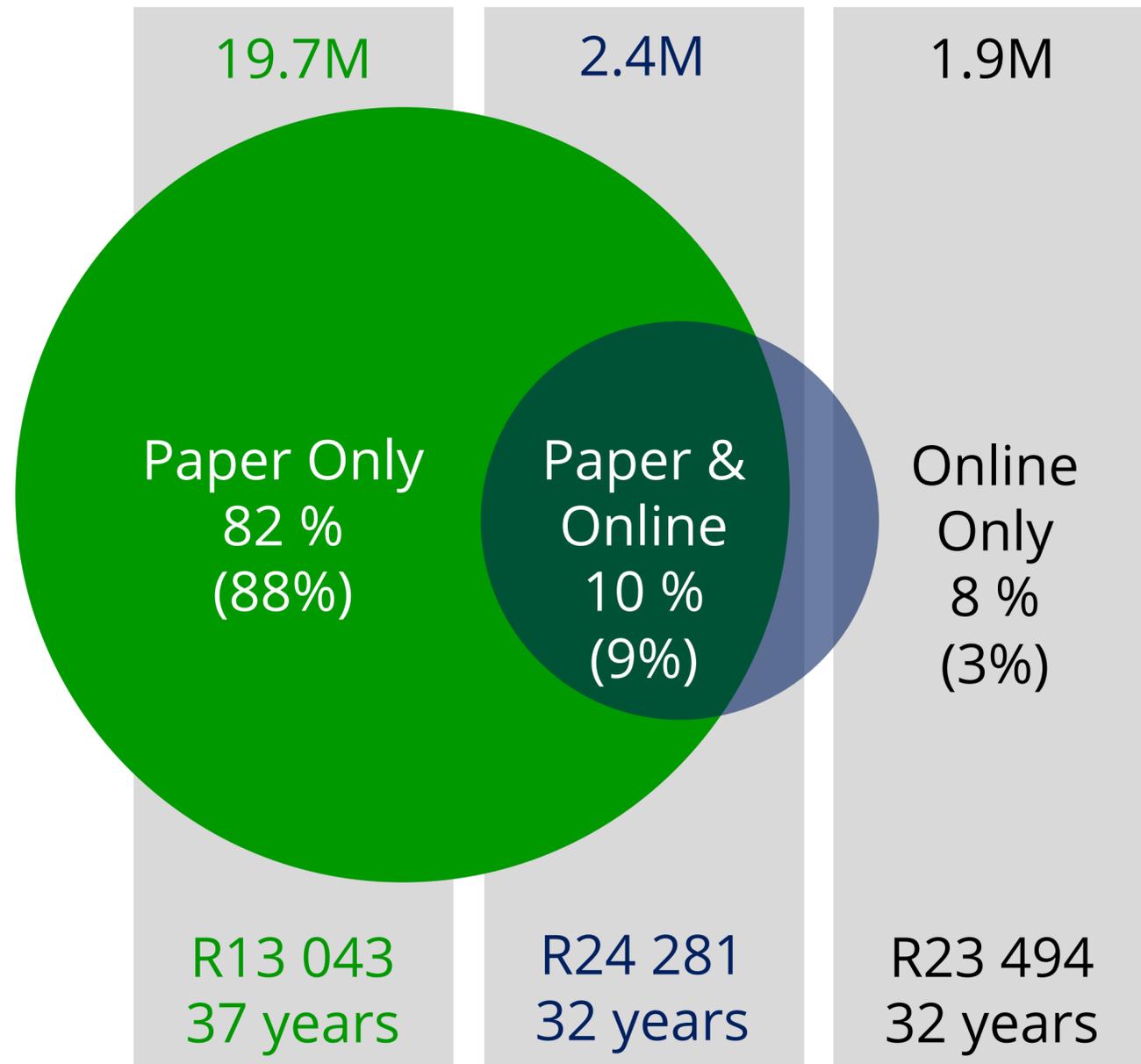
Based on 12 month Readers

Source: PAMS 2019

MAGAZINE PLATFORM OVERLAP AND CHANGE



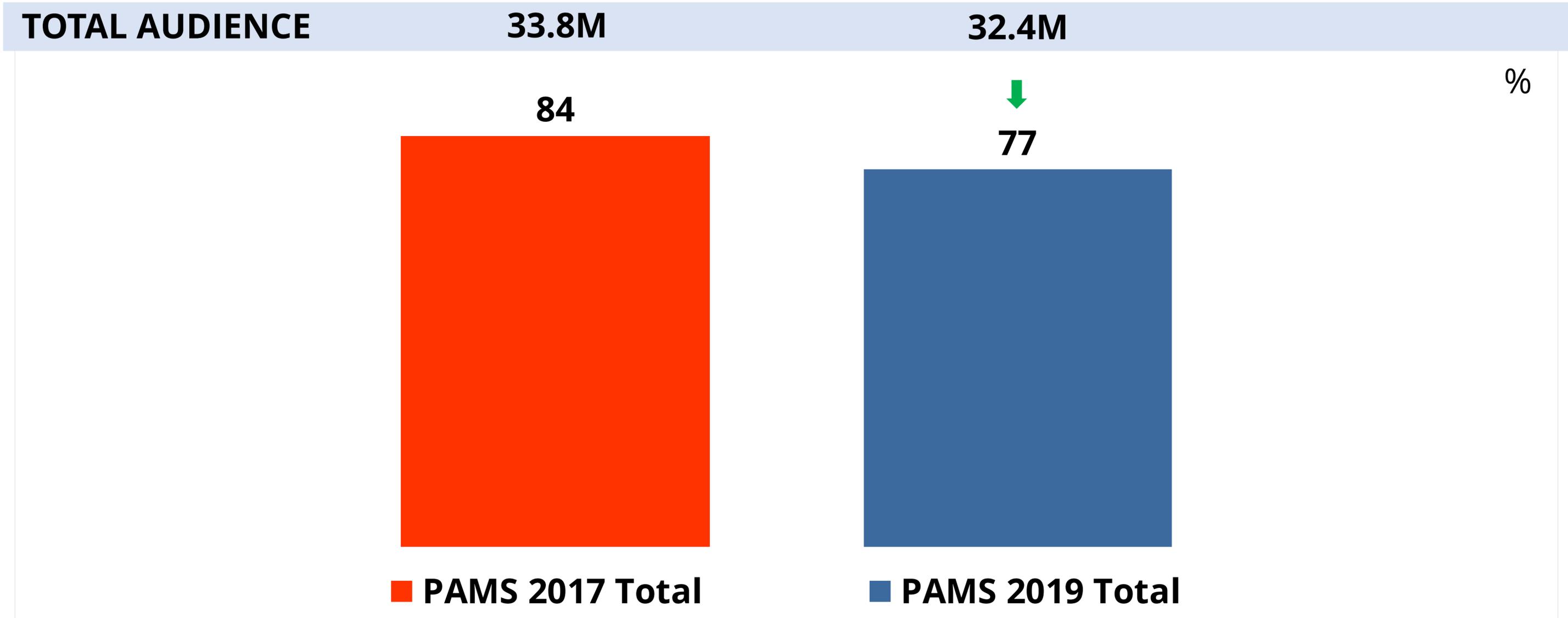
(2017)



Based on 12 month Readers

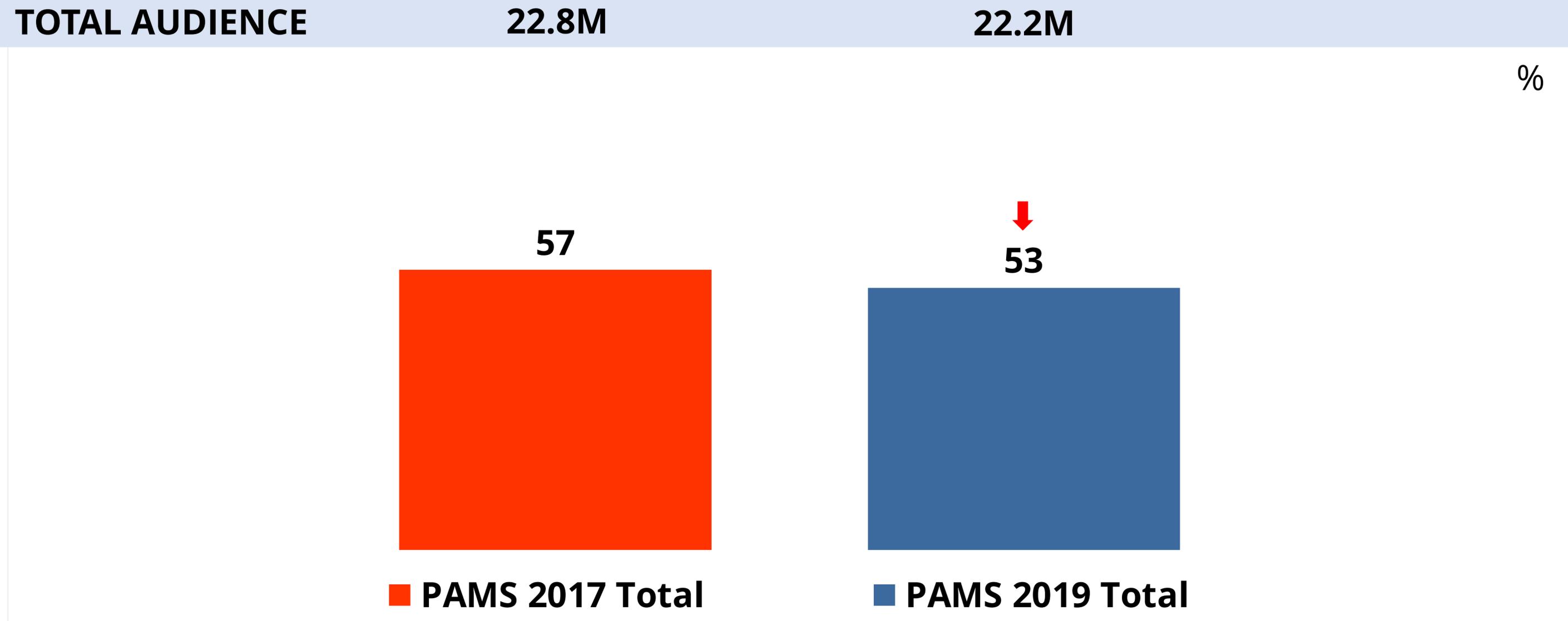
Source: PAMS 2019

TOTAL READERS 12 MONTHS



Source: PAMS 2019

TOTAL READERS AIR



Source: PAMS 2019

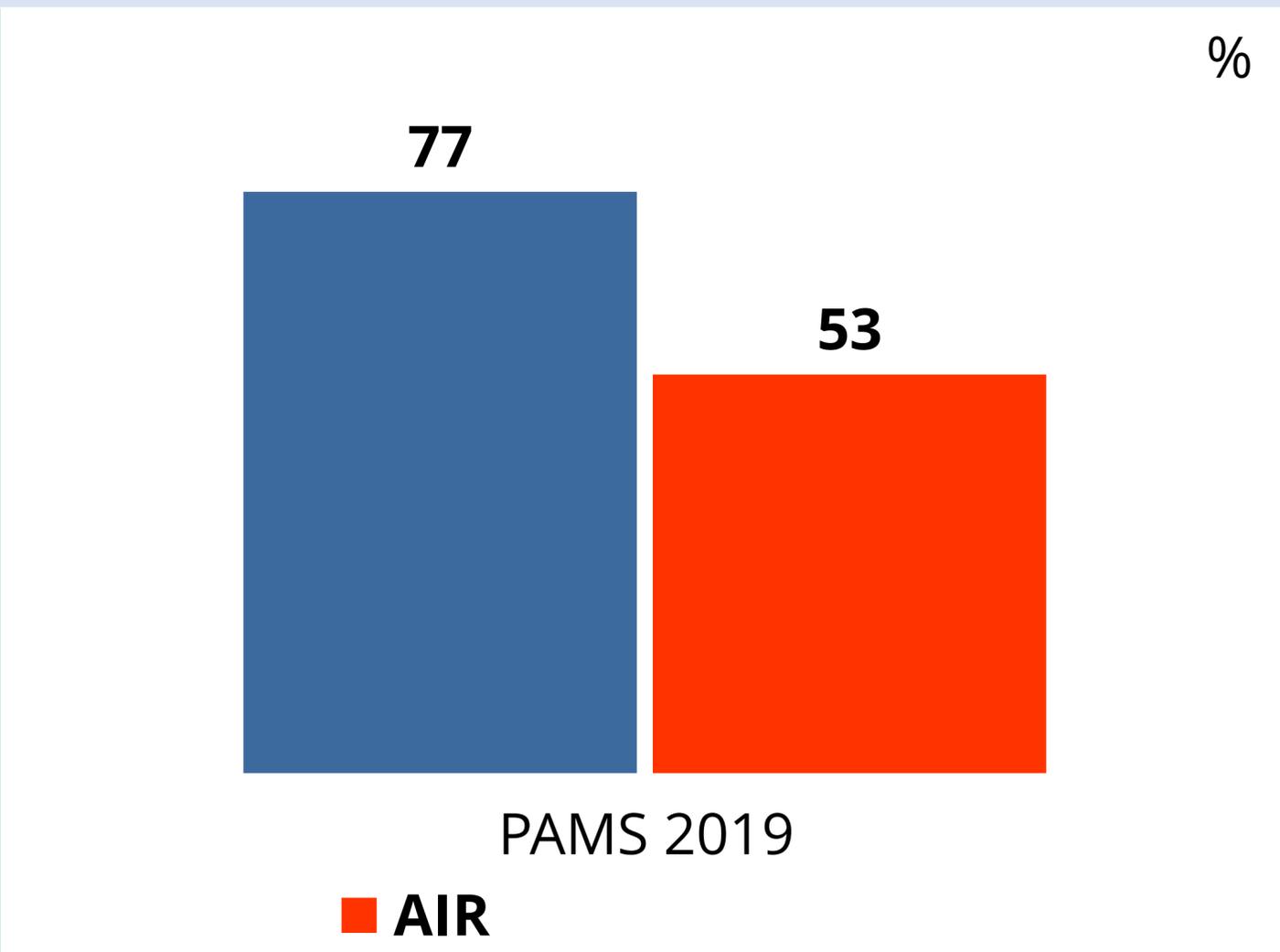
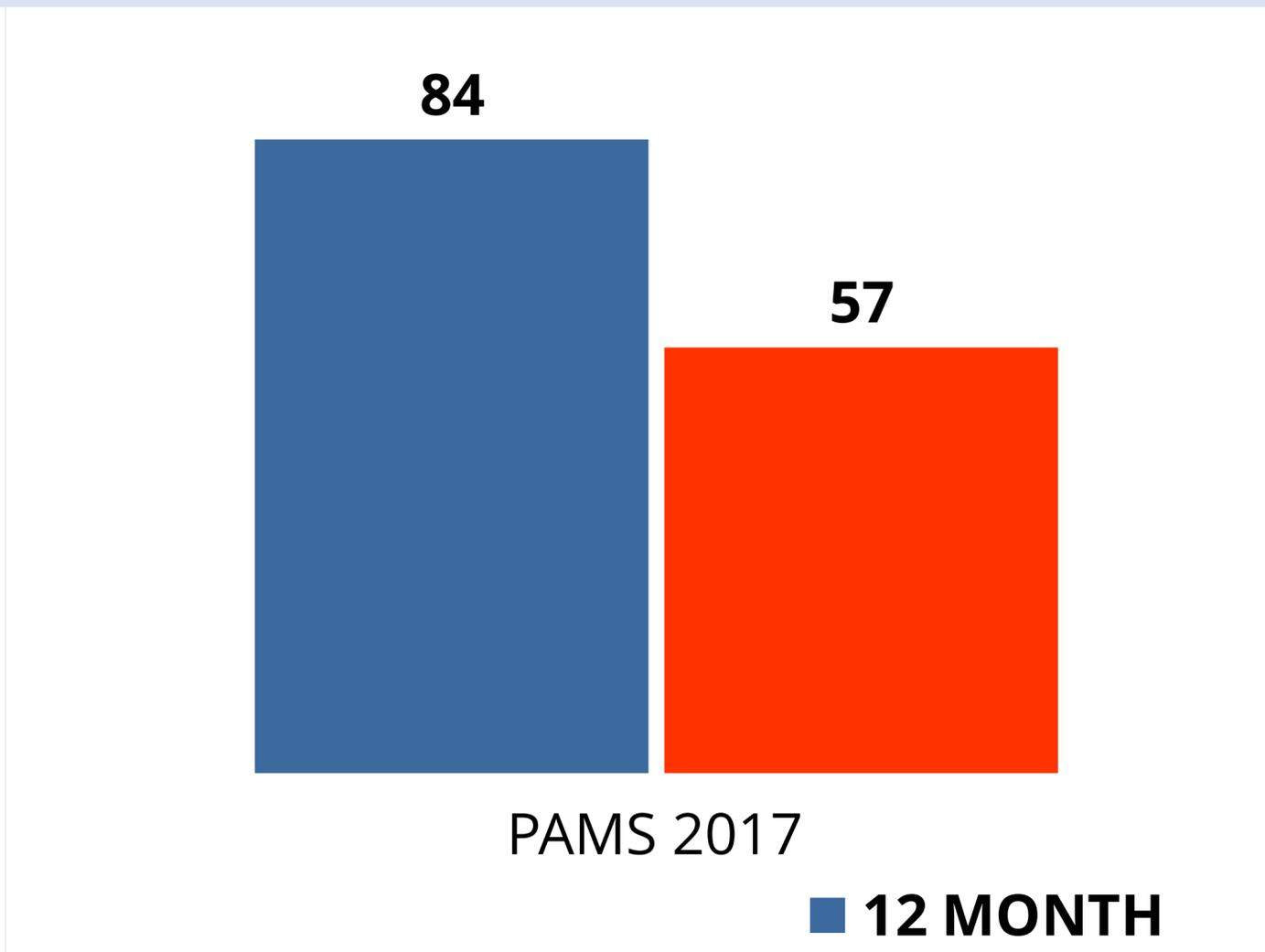
TOTAL READERS STEPDOWN



% VARIANCE

28 %

24 %



Source: PAMS 2019

READING PLATFORMS PAST 12 MONTHS



Paper



Cellphone



Desktop/Laptop
Computer



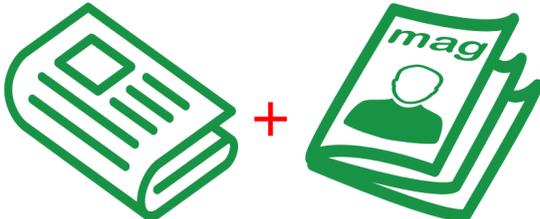
Tablet

	Paper	Cellphone	Desktop/Laptop Computer	Tablet	%
PAMS 2017 TOTAL	82	10	2	1	
Newspapers	73	9	2	1	
Magazines	62	6	1	1	
PAMS 2019 TOTAL	72	16	2	1	
Newspapers	66	16	2	1	
Magazines	53	10	1	1	

Source: PAMS 2019

AVERAGE NUMBER OF PUBLICATIONS



	PAMS 2017			PAMS 2019		
	PAPER	ONLINE	TOTAL	PAPER	ONLINE	TOTAL
	2.0	2.6	2.2	2.0	2.5	2.3
	2.6	3.1	2.8	2.7	3.2	3.1
	3.3	4.1	3.6	3.5	4.2	4.1

Source: PAMS 2019

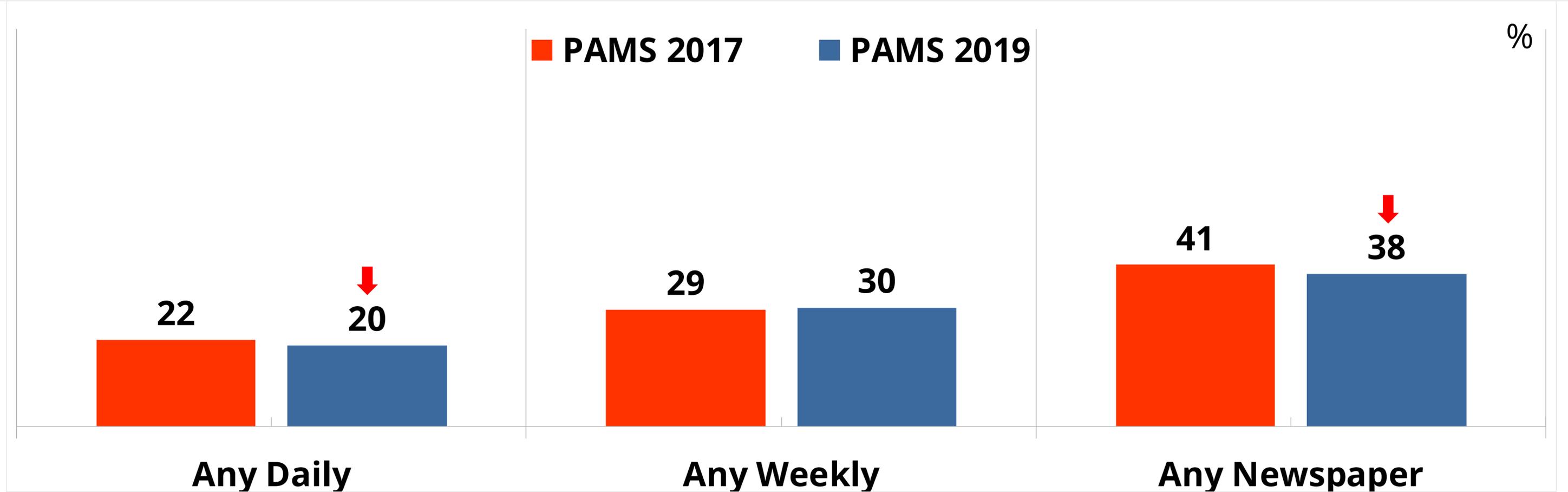


NEWSPAPERS

NEWSPAPERS AIR



Total Audience (000)			
PAMS 2017	8 756	11 797	16 251
PAMS 2019	8 560	12 514	16 082
ABC PAPER % CHANGE	-21.1%	-22.6%	-22.1%



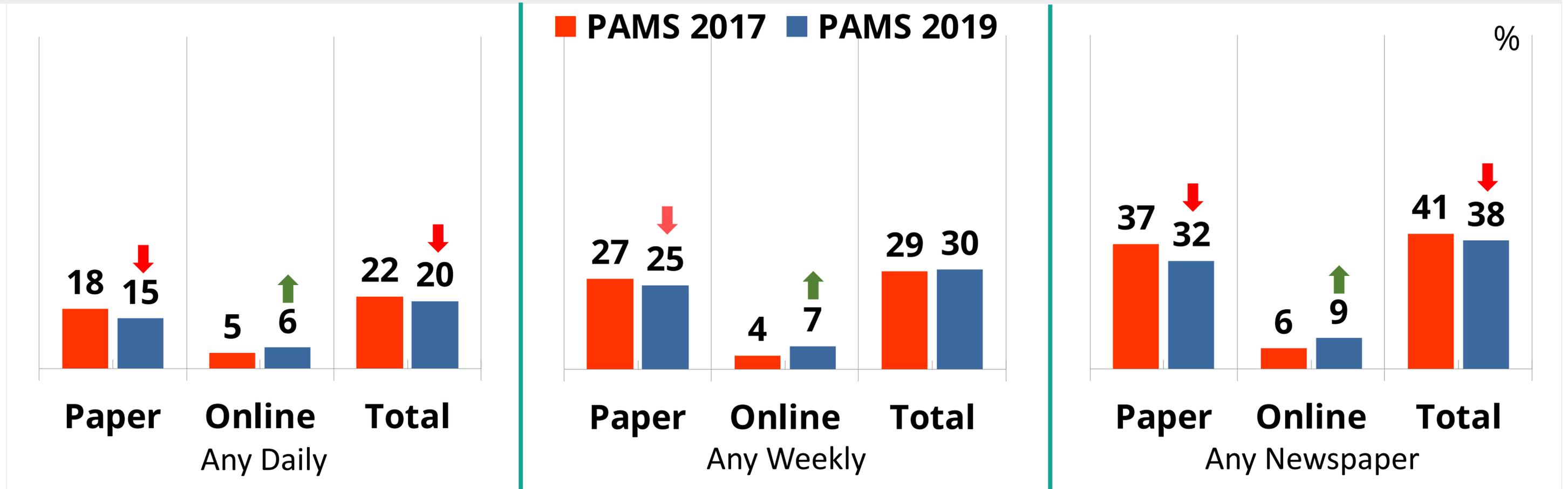
Source: PAMS 2019

NEWSPAPERS AIR



Total Audience (000)

PAMS 2017	8 756	11 797	16 251
PAMS 2019	8 560	12 514	16 082
ABC PAPER % CHANGE	-21.1%	-22.6%	-22.1%

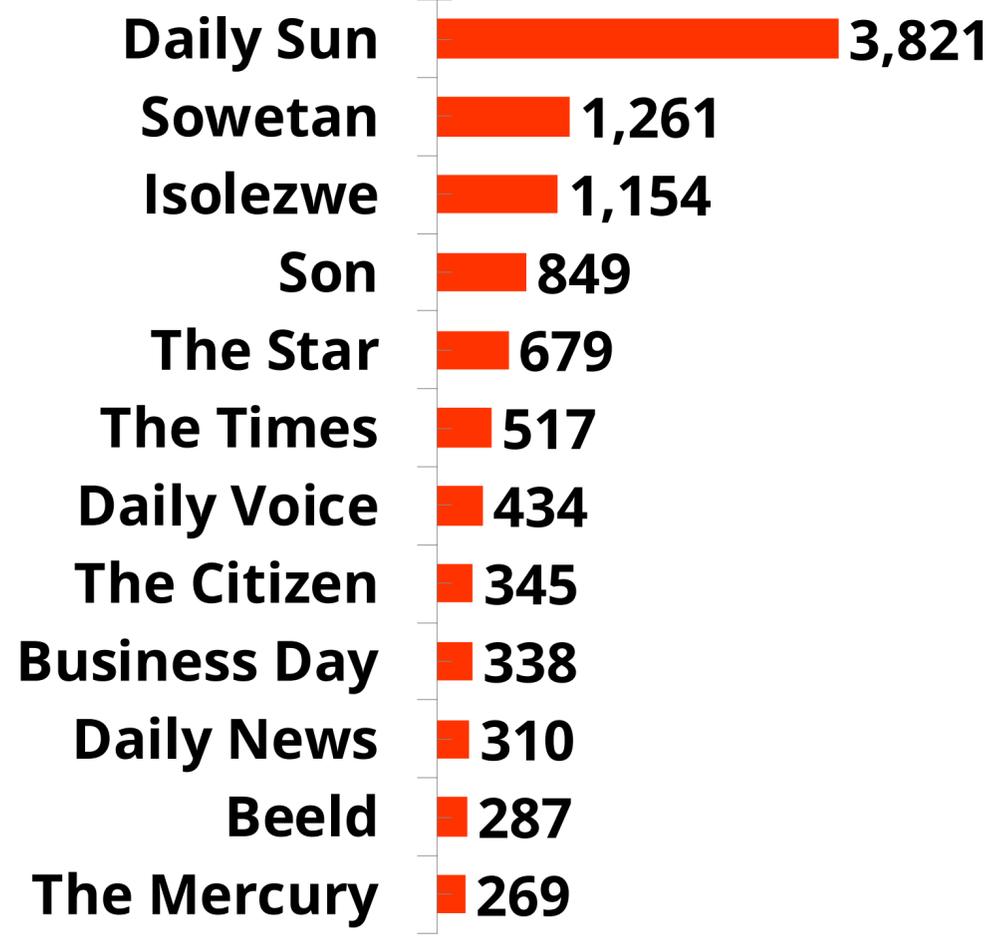


Source: PAMS 2019

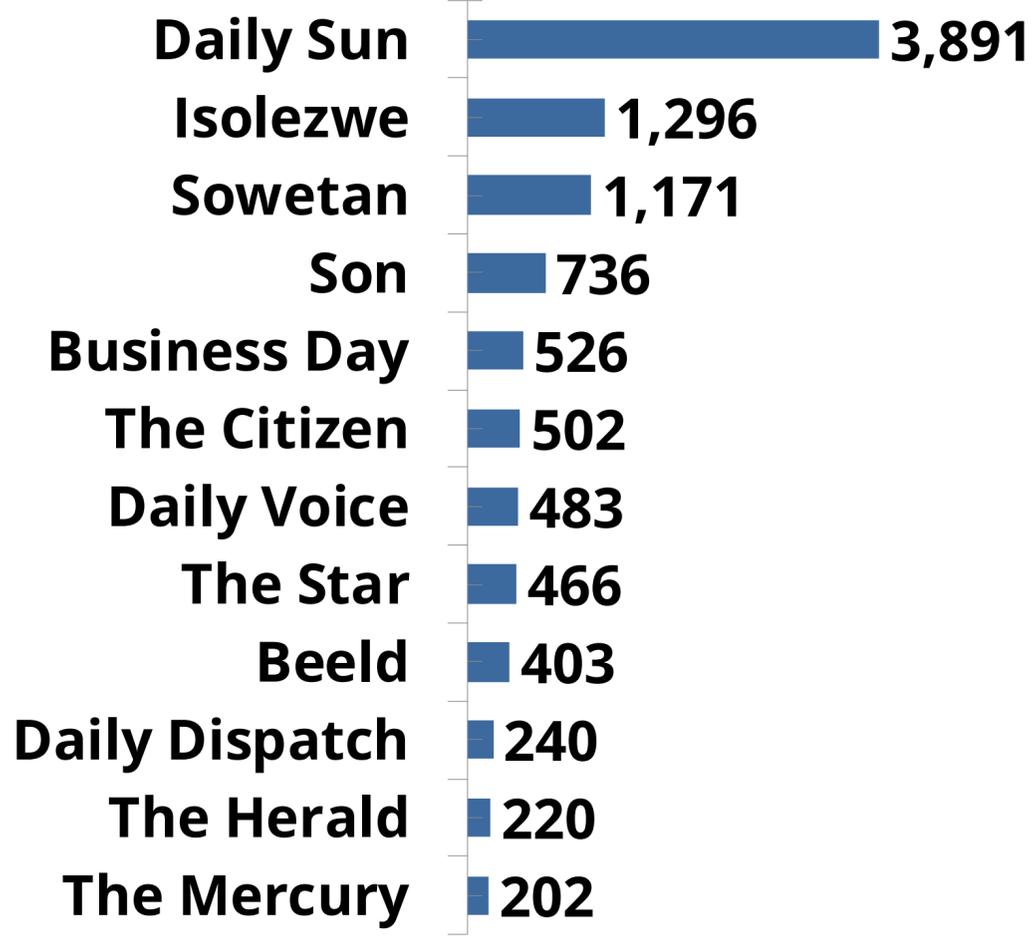


RANKINGS – DAILY NEWSPAPERS

PAMS 2017



PAMS 2019



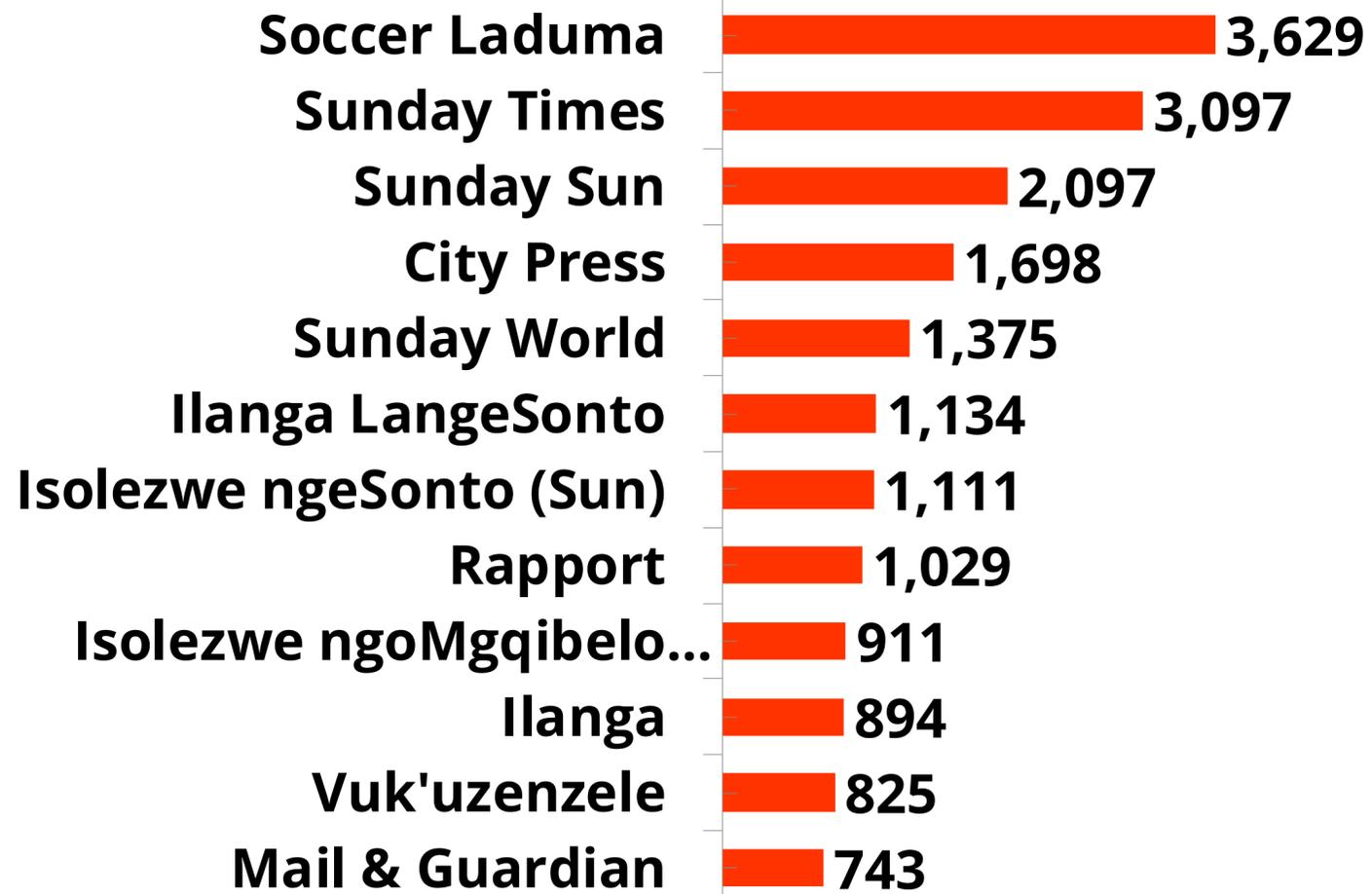
Thousands

Source: PAMS 2019

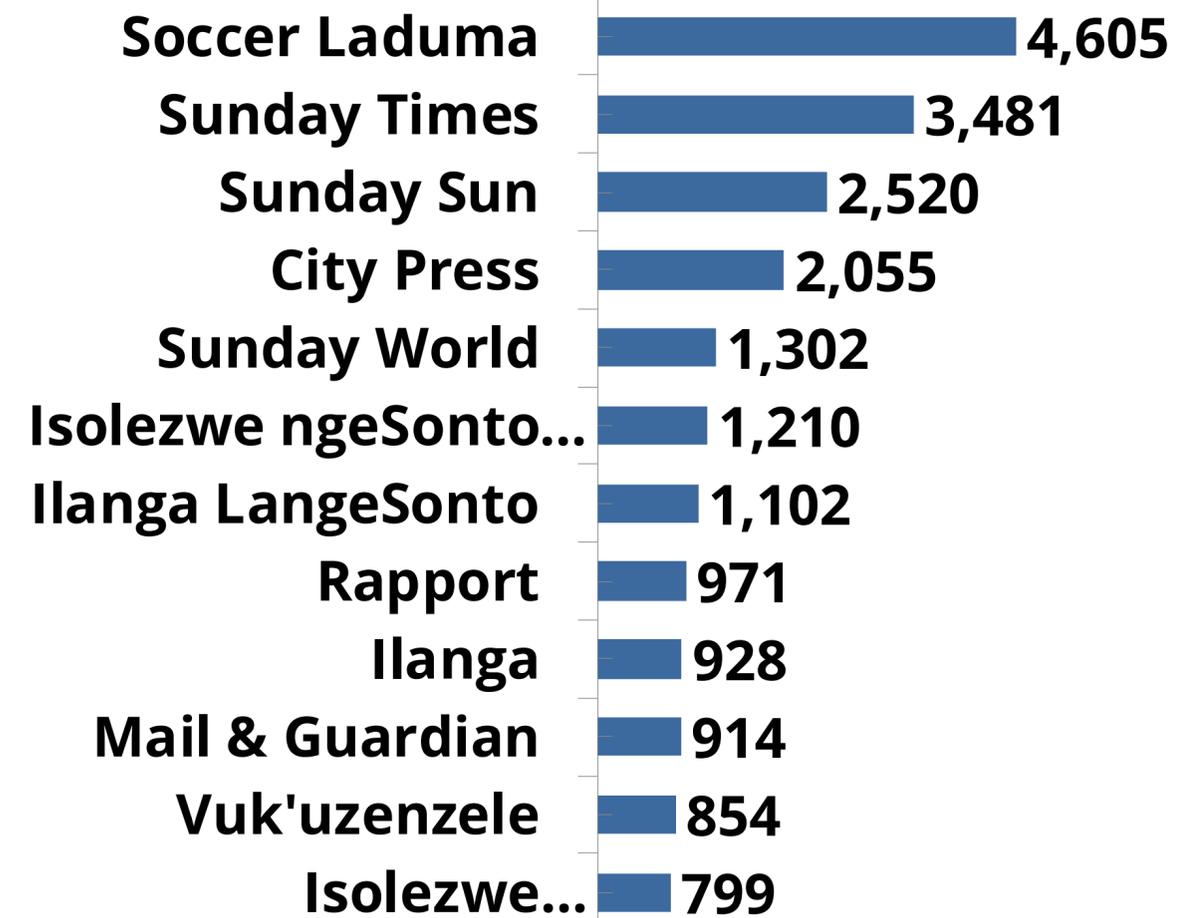
RANKINGS – WEEKLY NEWSPAPERS



PAMS 2017



PAMS 2019



Thousands

Source: PAMS 2019



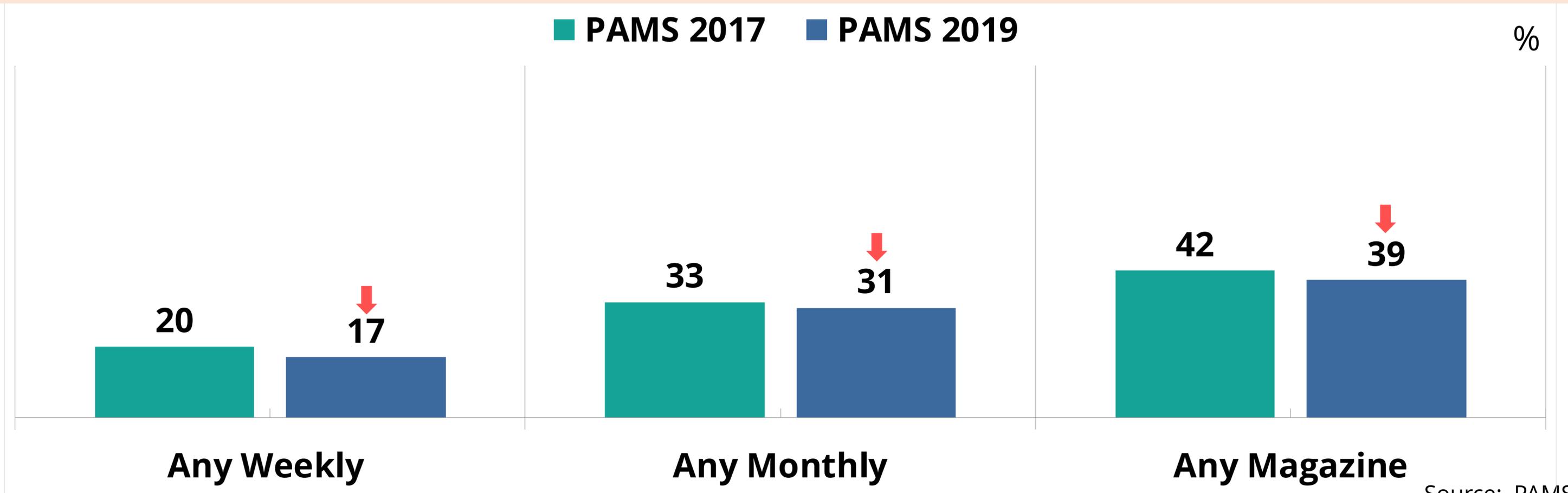
MAGAZINES

MAGAZINES AIR



Total Audience (000)

PAMS 2017	8 063	13 143	16 712
PAMS 2019	7 166	13 080	16 316
ABC PAPER % CHANGE	- 21.1%	- 18.5%	- 21.1%



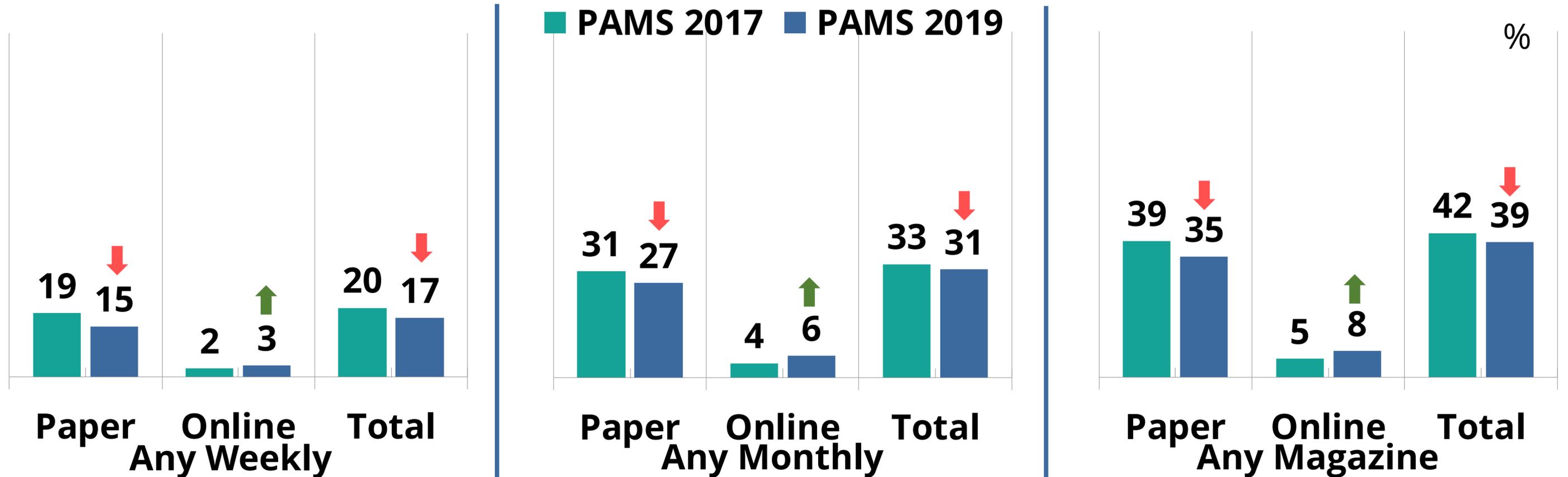
Source: PAMS 2019

MAGAZINES AIR



Total Audience (000)

PAMS 2017	8 063	13 143	16 712
PAMS 2019	7 166	13 080	16 316
ABC PAPER % CHANGE	- 21.1%	- 18.5%	- 21.1%

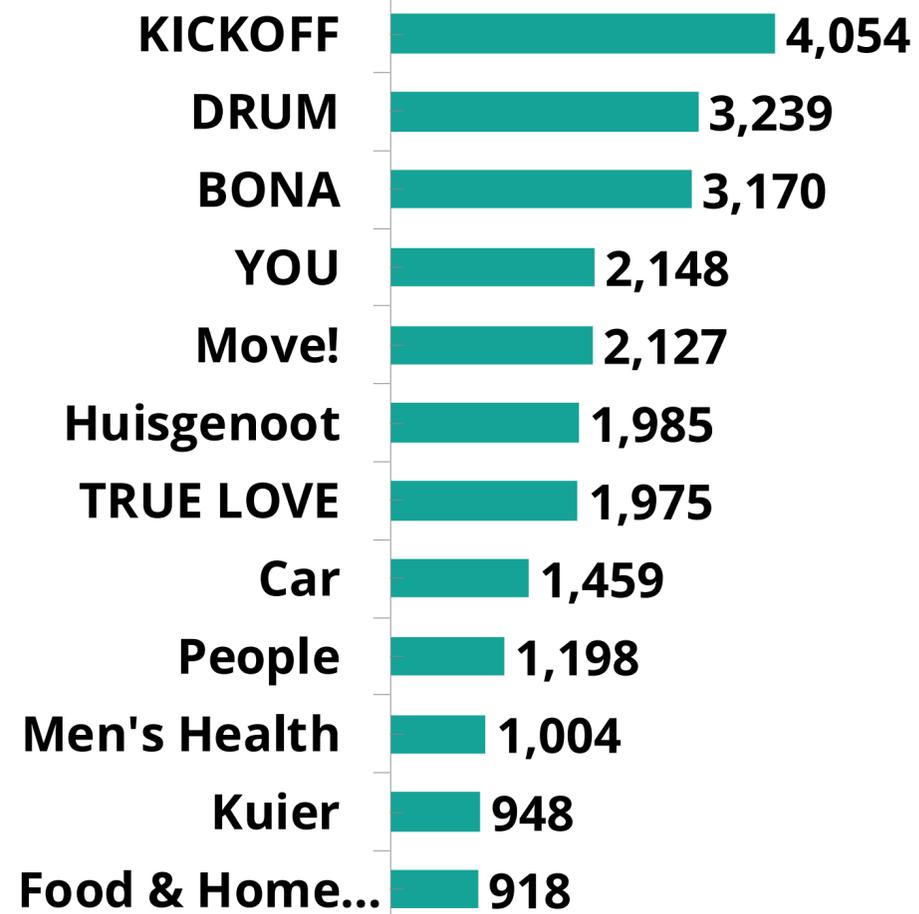


Source: PAMS 2019

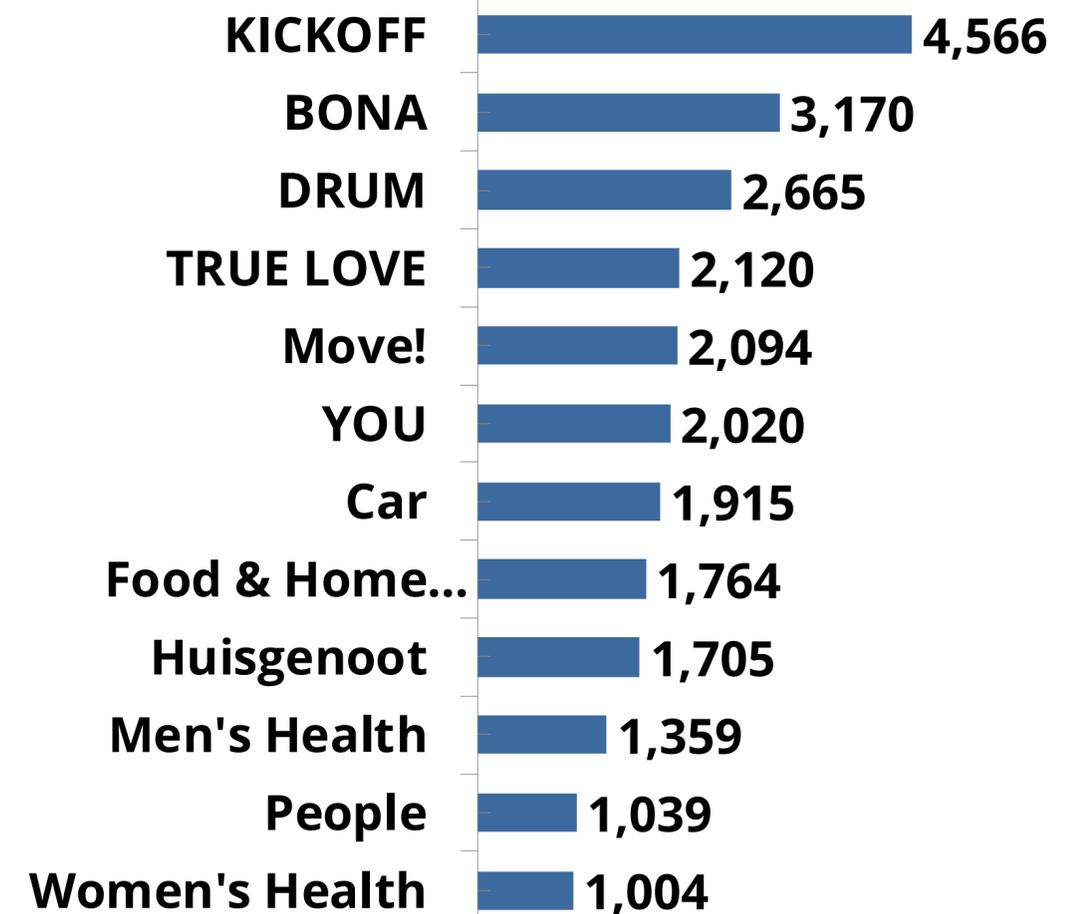
RANKINGS – MAGAZINES



PAMS 2017



PAMS 2019



Thousands

Source: PAMS 2019



INTERNET AND DEVICE

INTERNET ACCESS

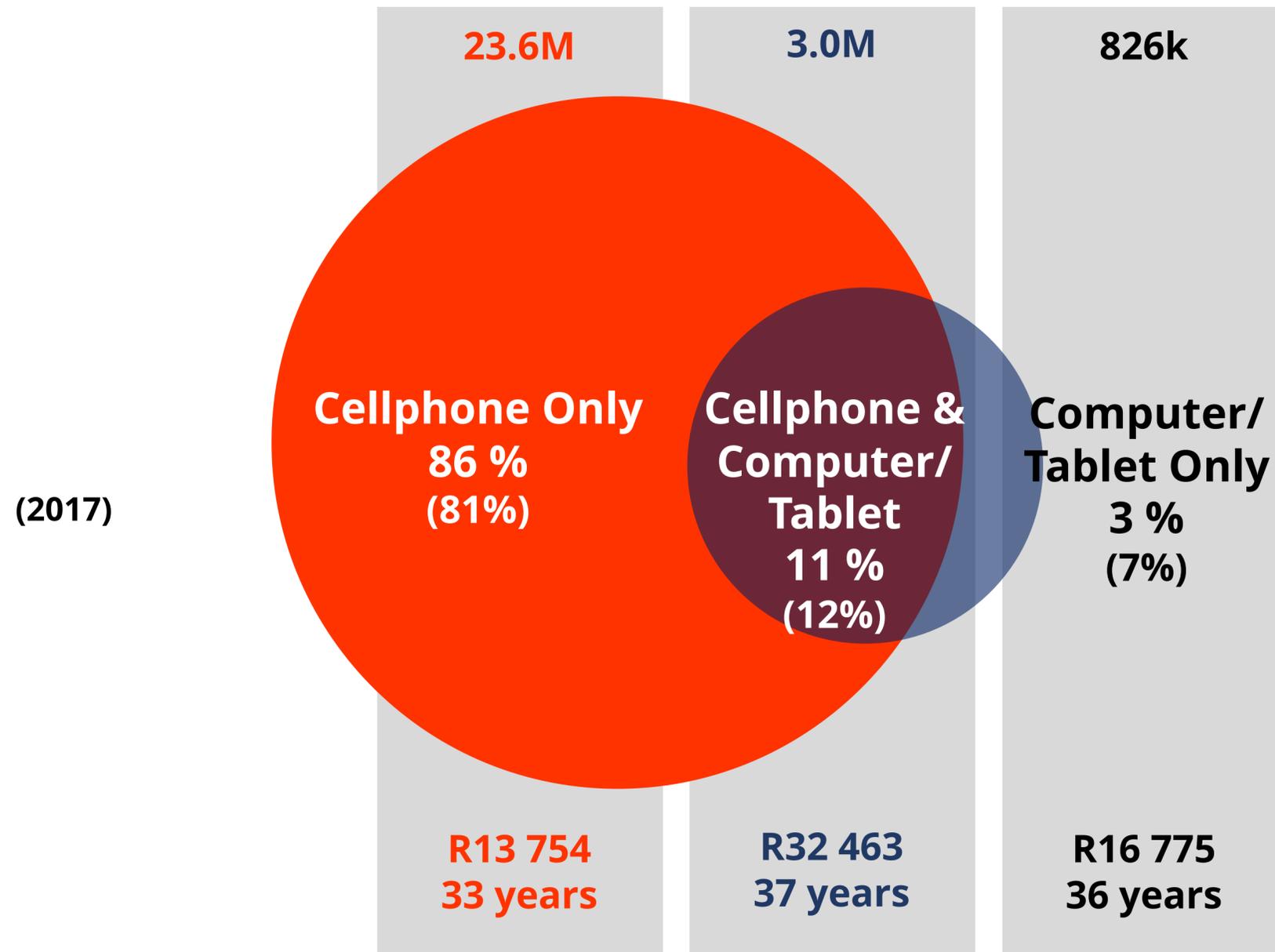


	PAMS 2017	PAMS 2019
 Total Access	55.3%	65.5%↑
 Cellphone	51.4%	63.5%↑
 Computer	8.0%	7.7%
Tablet	3.7%	2.3%↓

64.7%
Source: Stats SA
General
Household Survey
2018

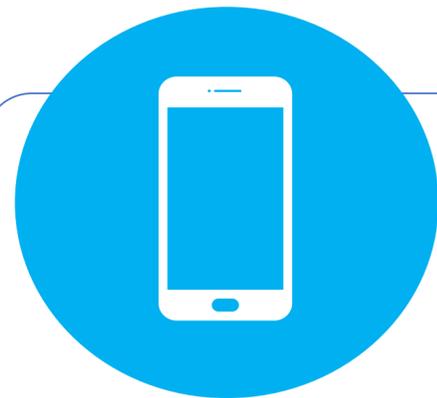
Source: PAMS 2019

INTERNET DEVICE OVERLAP



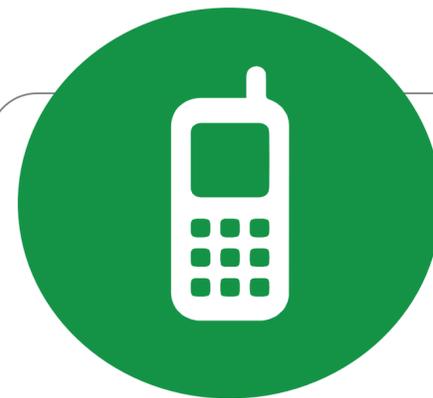
Source: PAMS 2019

CELLPHONES



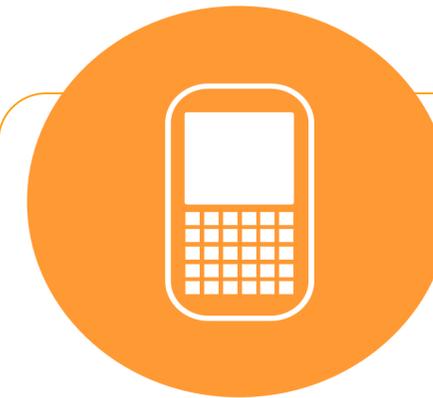
Smartphone

64%



Ordinary Cell

24%



Feature Cell

5%

TOTAL INCIDENCE 93%

Source: PAMS 2019

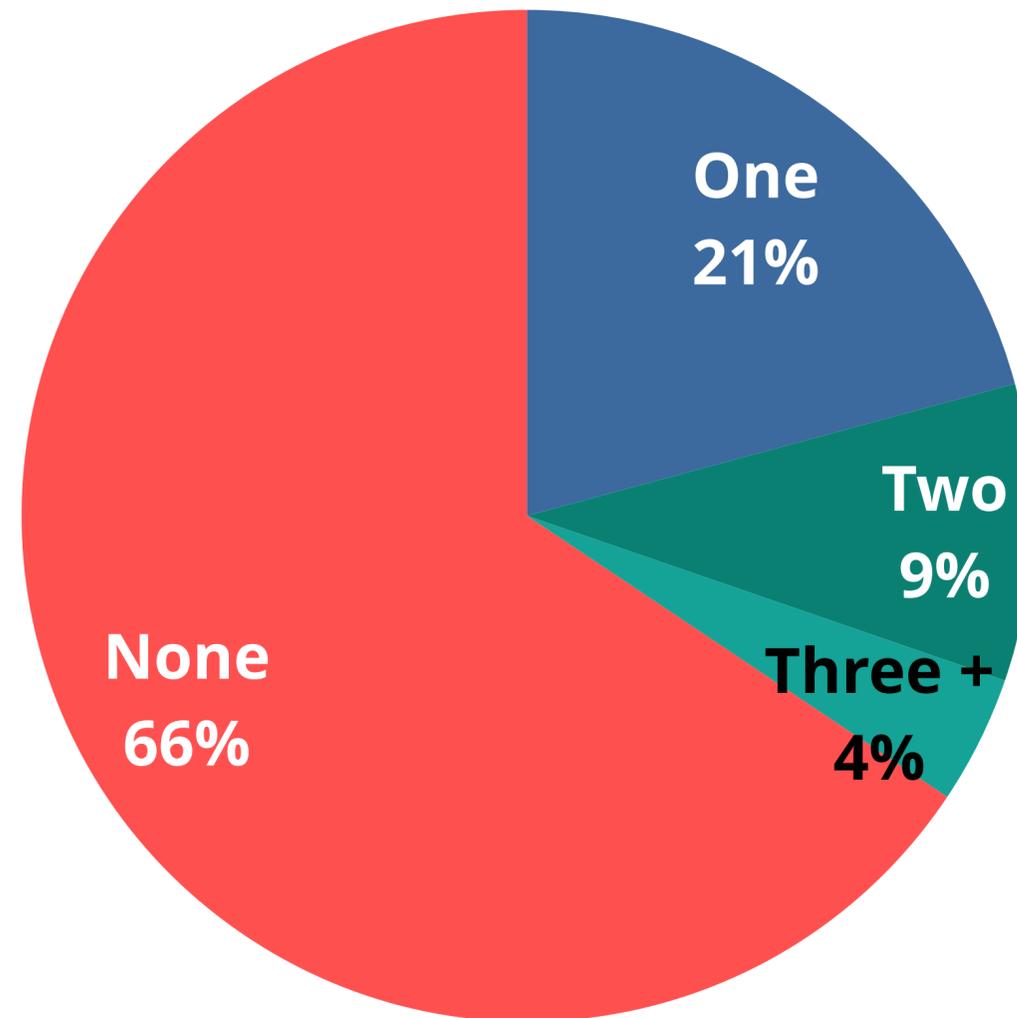


RETAIL AND BRANDS

34% OF HOUSEHOLDS HAVE A MOTOR VEHICLE

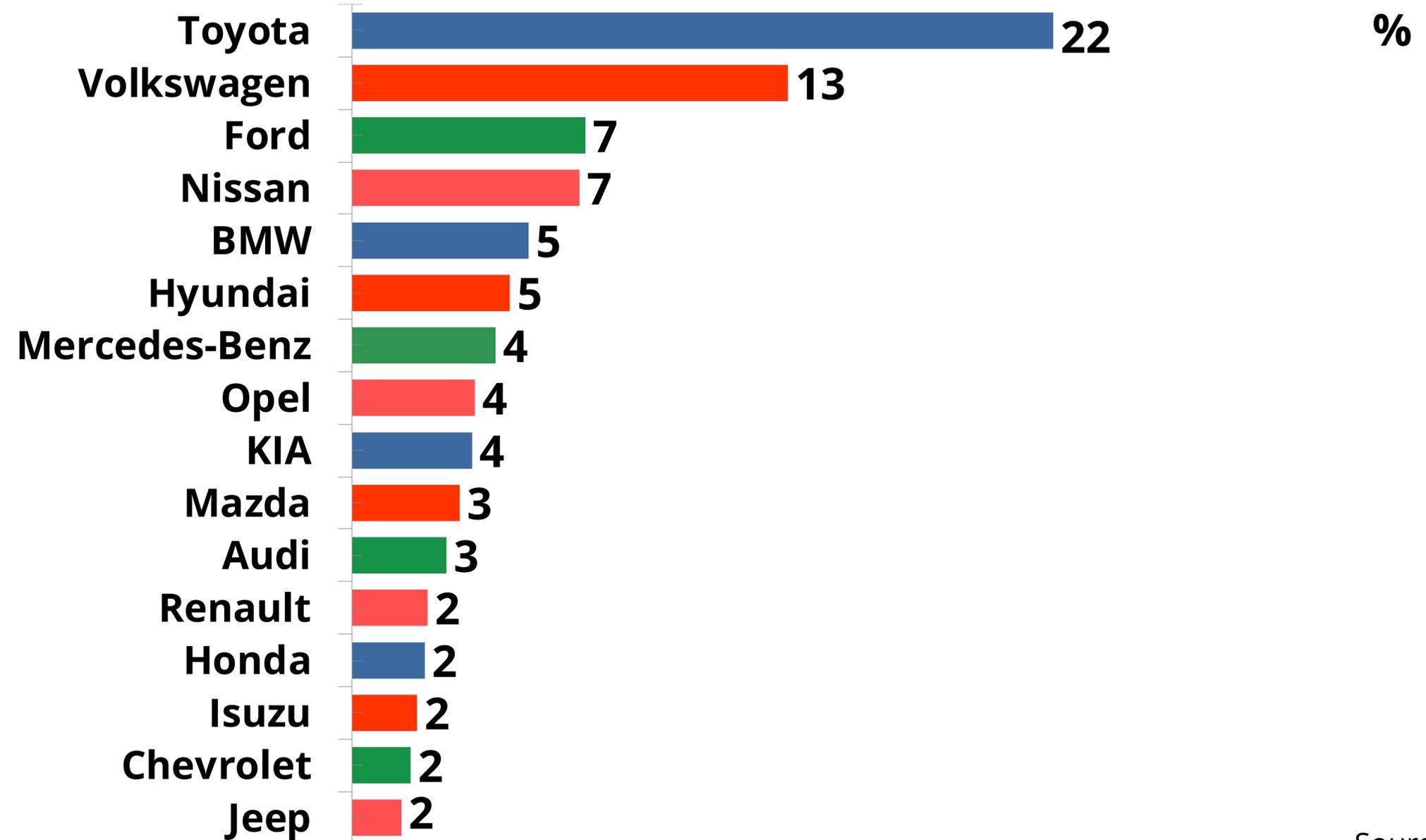


NUMBER VEHICLES IN HOUSEHOLD



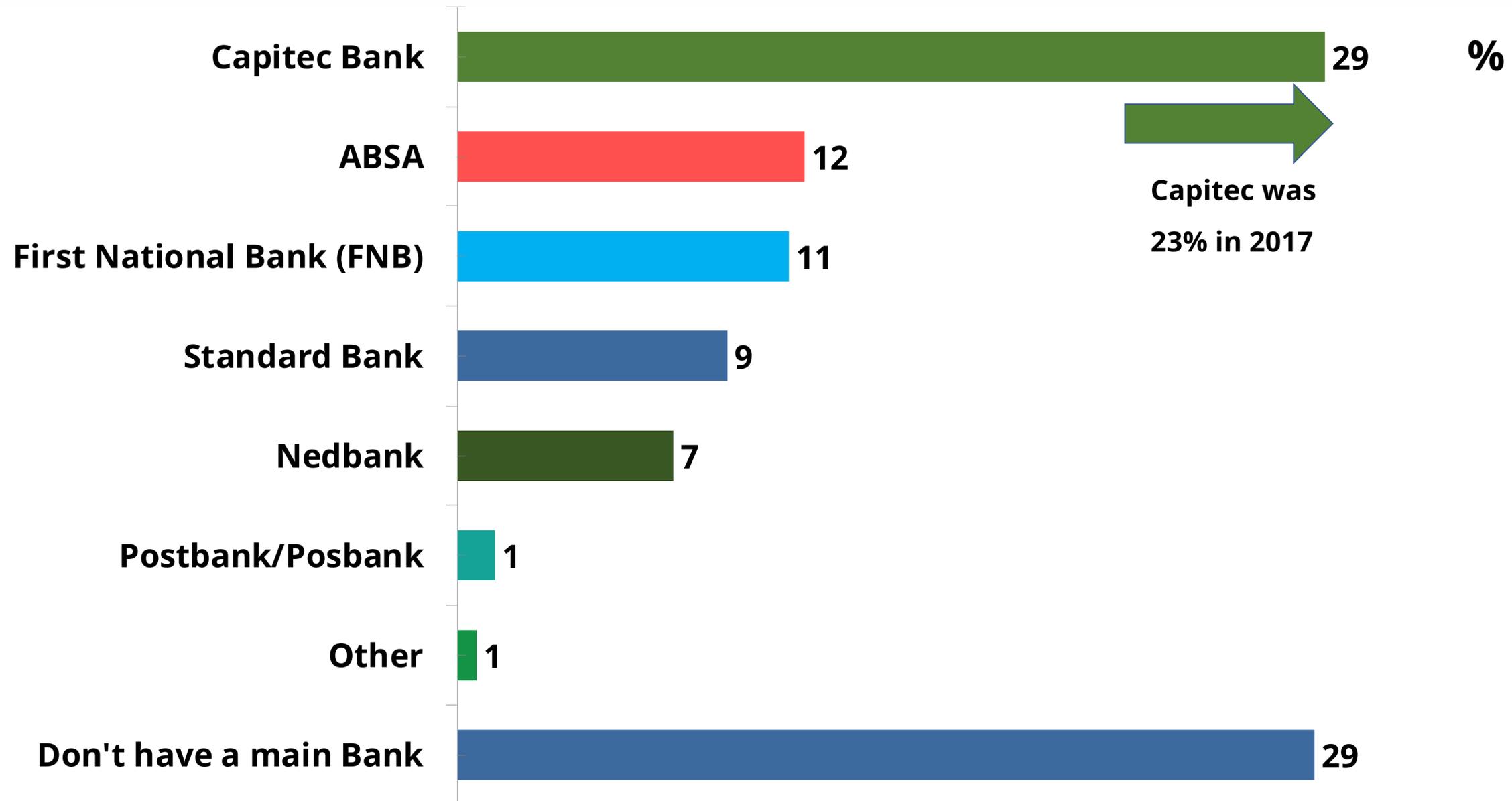
Source: PAMS 2019

TOP CAR MANUFACTURERS



Source: PAMS 2019

MAIN BANK

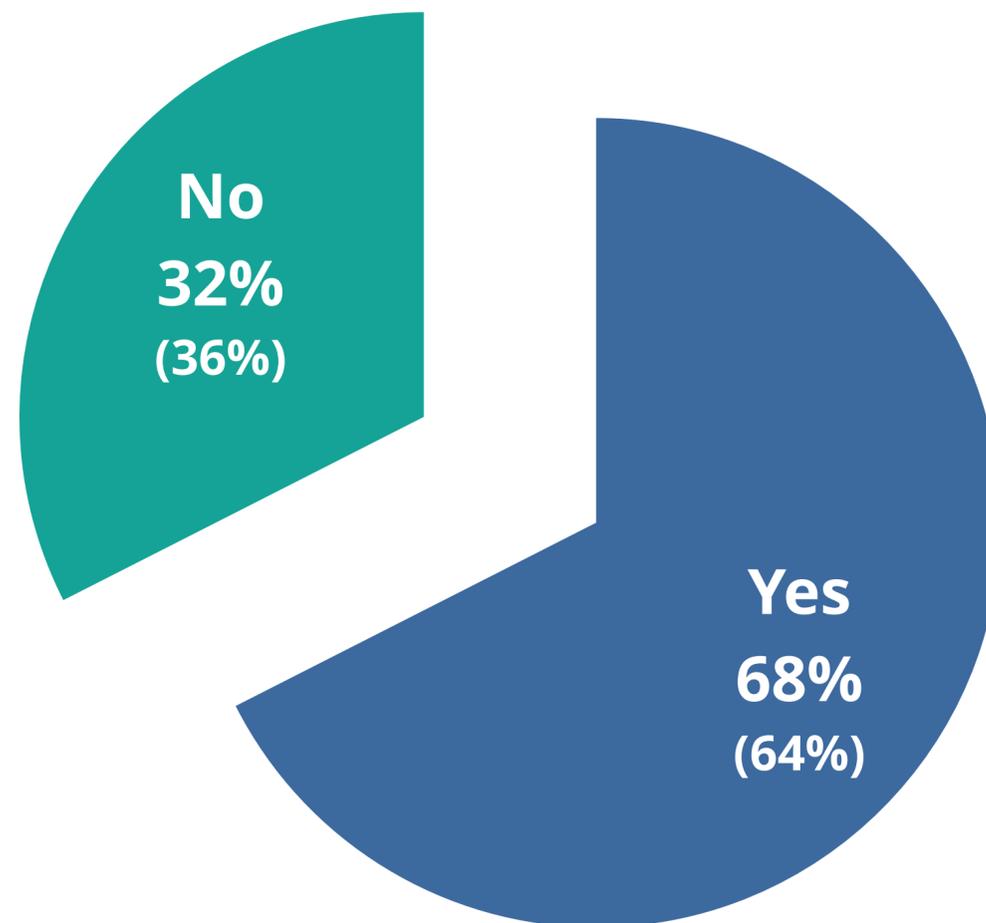


Source: PAMS 2019

HOUSEHOLD PURCHASES



WHOLLY/PARTLY RESPONSIBLE – DAY TO DAY PURCHASES



Source: PAMS 2019

TOP 3 SPEND MOST MONEY



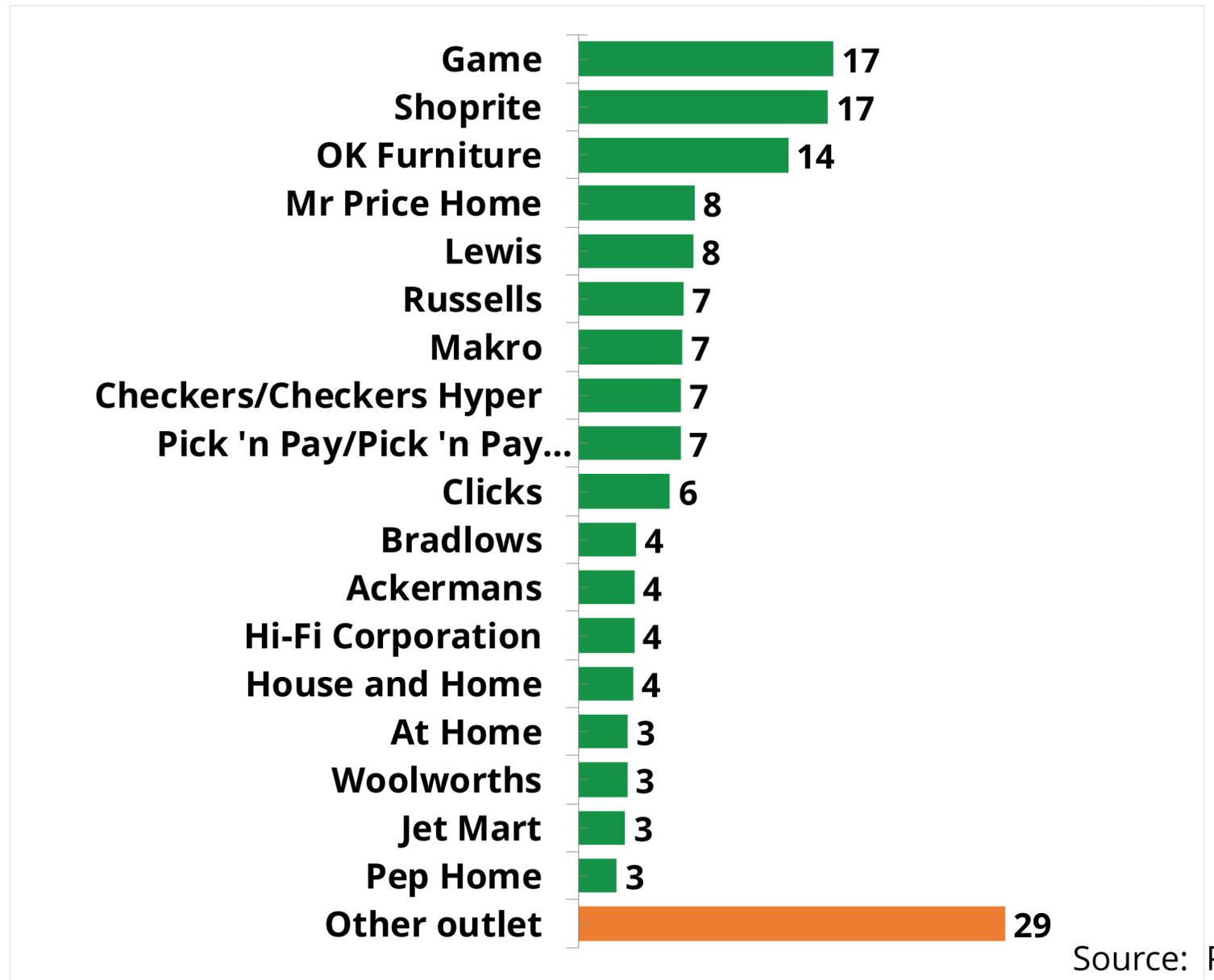
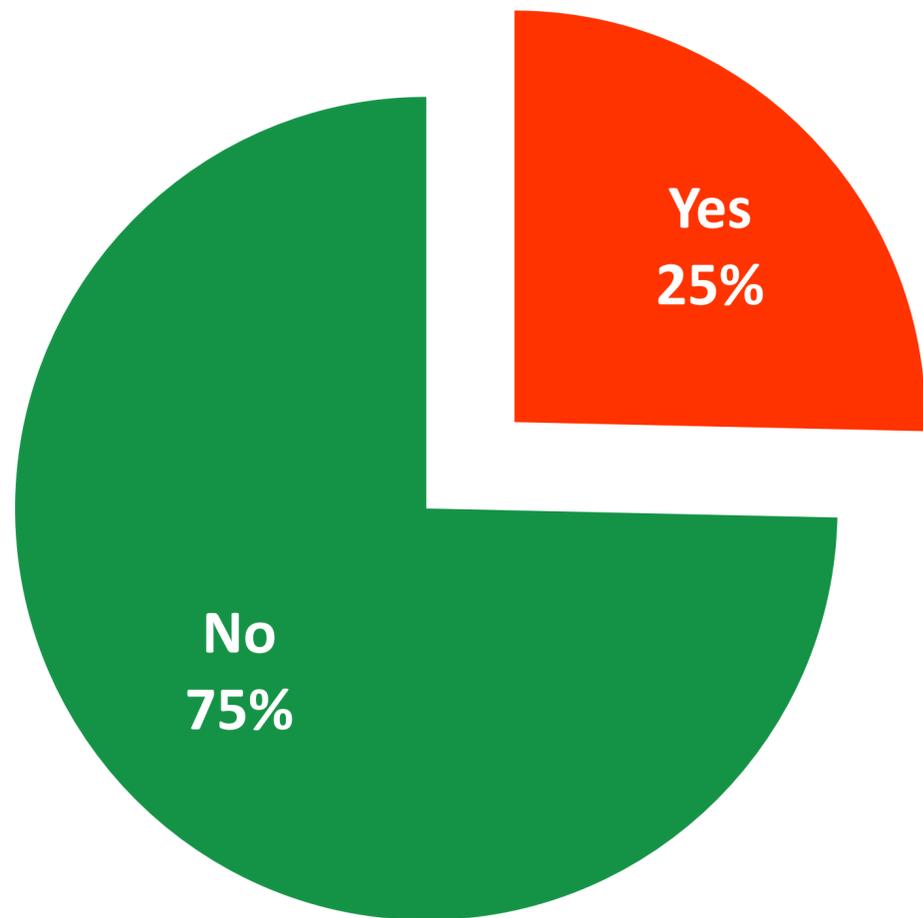
	SEM 1-4 %	SEM 5-7 %	SEM 8-10 %
Shoprite	43	Shoprite 49	Pick n Pay/ Pick n Pay Hypermarket 28
Boxer Superstores	19	Pick n Pay/ Pick n Pay Hypermarket 12	Shoprite 25
Spar/Super Spar	14	Spar/Super Spar 12	Checkers/ Checkers Hyper 19

Source: PAMS 2019



FURNITURE OR APPLIANCES

BOUGHT IN PAST 12 MONTHS



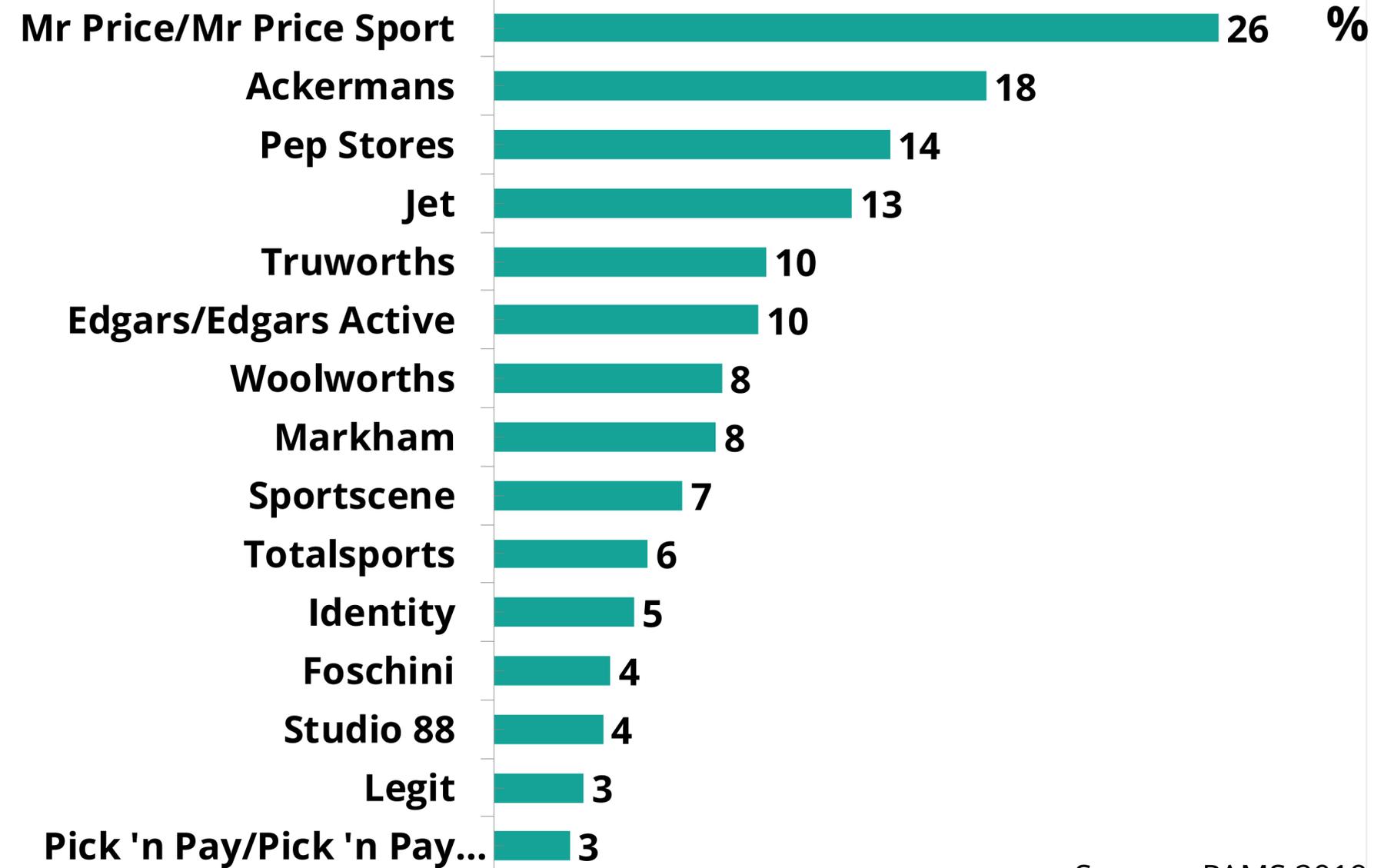
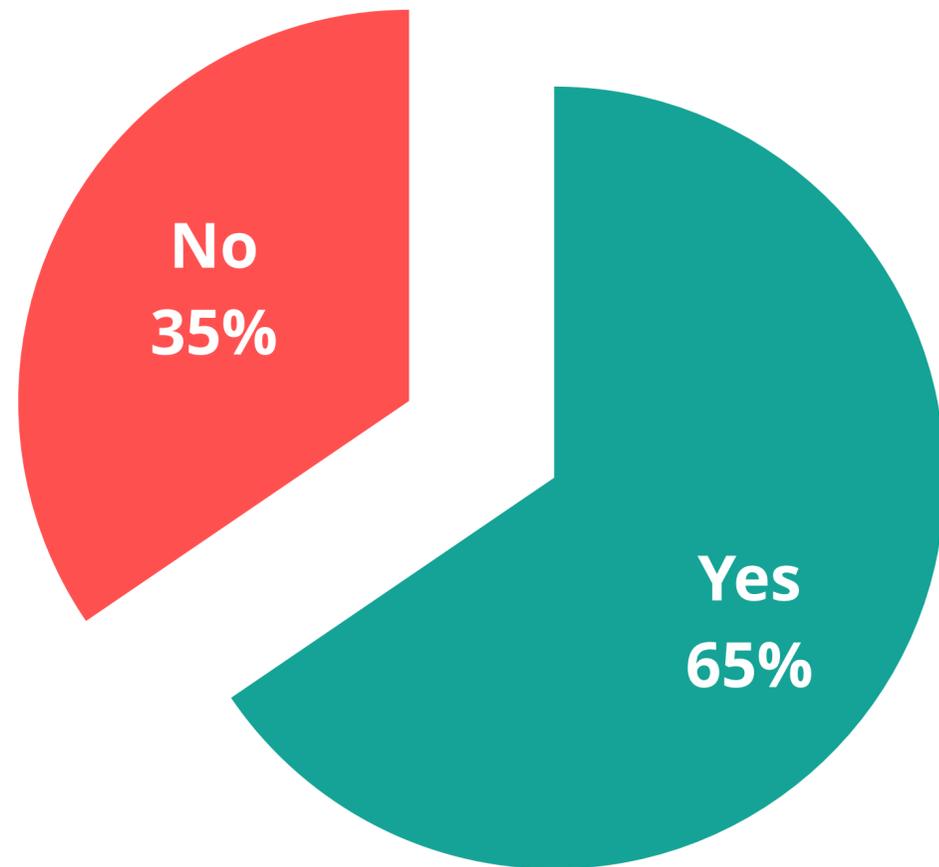
%

Source: PAMS 2019

CLOTHING



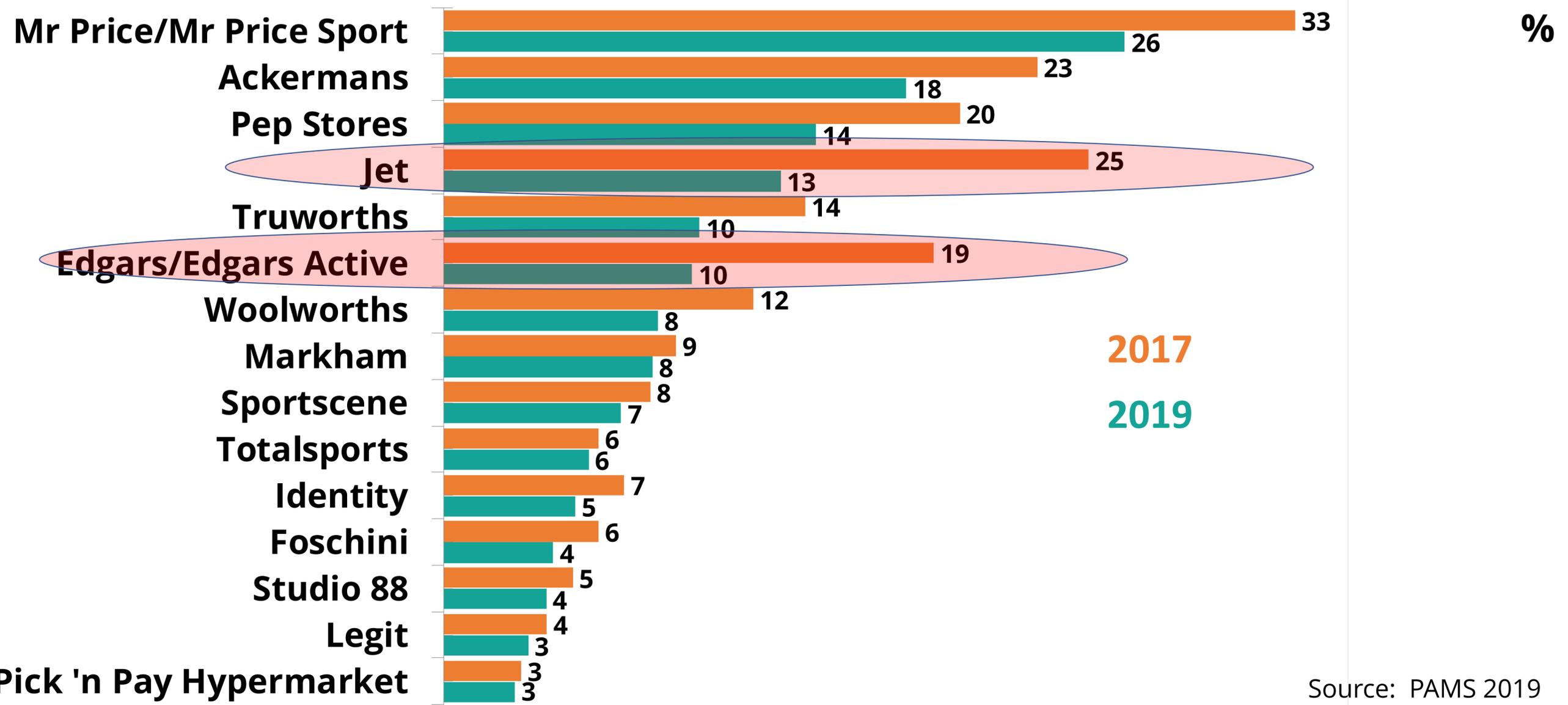
BOUGHT IN PAST 6 MONTHS



Source: PAMS 2019



CLOTHING 2017 VS. 2019



Source: PAMS 2019

THANK YOU

JOSEPHINE BUYS
CEO



PUBLISHER
RESEARCH COUNCIL
READ TO REMEMBER

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