FUSION

INSIGHTS REVEALED

Welcome

Josephine Buys
CEO
Publisher Research Council

Fusion 2020 surveys

HUB

	PAMS	TAMS	CPS	DCS
Sample	15 250 respondents	3 134 households	4 000 households	3 000 respondents
Methodology	Face-to-Face CAPI	Panel of Households	Household Audits	Online Panel
Fieldwork	August - November 2019	February 2020	March 2019 - February 2020	July - August 2020
Survey Owner	PRC Publisher Research Council	BRC Broadcast Research Council	Nielsen Media	Nielsen Media

Publisher Audience Measurement Survey

Josephine Buys
CEO
Publisher Research Council

What is PAMS

Geographically

National Survey
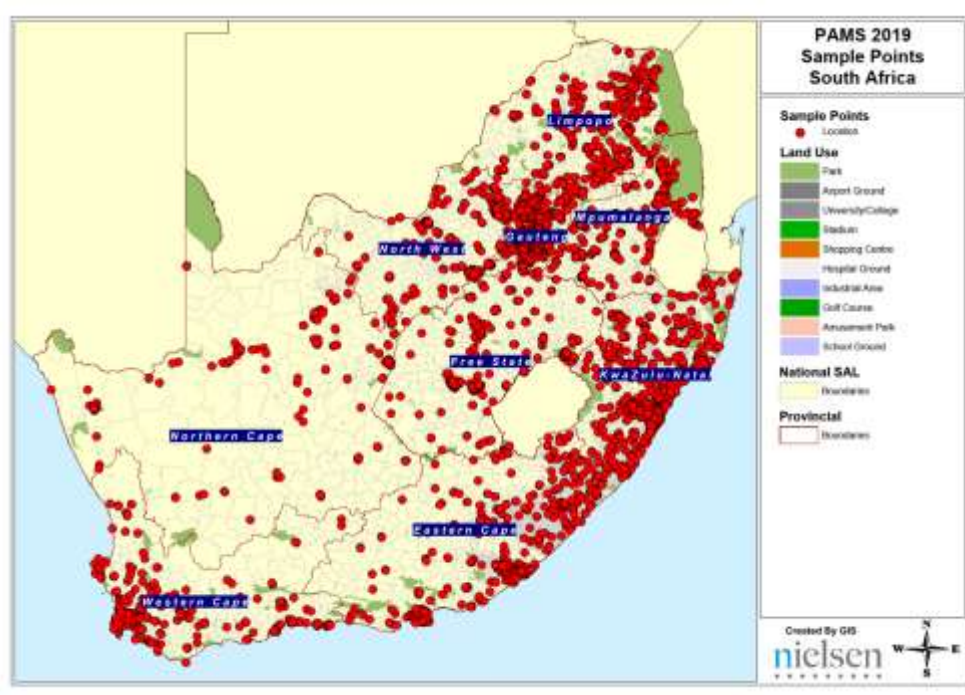Random probability

Face-to-Face CAPI

Household Flooding

Individuals (Adults, 15+)

15 250 Respondents
10 000 Households

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

*July 2018 - June 2019 ES TV Universe estimates

100% of municipalities sampled

PAMS 2019
coverage…

All 233

Municipalities sampled

First survey in SA media history to have income in the sample design

- Using The Neighbourhood Lifestyle Index®© **(NLI™©),** developed by GTI, the PAMS 2019 sample was disproportionately designed by income – upper income areas were disproportionately oversampled, and lower income areas were disproportionately under sampled

- 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	Monthly HH Income	Proportionate %	PAMS 2019 %
1-3	R1 – R11 159	70	50
4-6	R11 160 – R39 941	21	30
7-10	R39 942 +	9	20

Television Audience Measurement Survey

Gary Whitaker
CEO
Broadcast Research Council of South Africa

What is TAMS

Geographically
represents SA TV
viewing Households

Controlled by HH
characteristics

Household Panel
of 3 134

Representing
TV households
15 876 571

Individuals (4+)
of +/-15 500

Representing
TV individuals
49 995 282

"To establish a common currency used by TV stations, media planners and advertisers for their advertising transactions, based on a reliable, independent and transparent audience measurement system"

* PAMS 2019 TV Universe estimates

Consumer Panel Services (Home Panel)

Terry Murphy
Managing Director
Nielsen Media South Africa

What is CPS

A continuous consumer household purchasing tracking tool

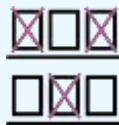**Demographically & Geographically** representative of all SA Households

Household Panel of 4 000

Actual Audited Consumption (not just claimed) of HHs FMCG usage across all retail outlets

CPS GLOBAL FOOTPRINT

- Over 230 000 Households in 24 countries

Finland
5,000

UK*
15,000

Germany
20,000

Canada*
12,300

France*
14,000

Switzerland
3,000

Spain
8,000

Italy
9,000

Greece
2.100

South Korea
3,000

Portugal
3,000

United States*
100,000

Israel
3,000

Hong Kong
1,500

Puerto Rico
830

Philippines
3,600

Mexico*
6,260

Thailand
2,000

Indonesia
10,500

Colombia
4,000

Brazil
8,000

Singapore
1,000

Australia*
10,000

Chile
2,000

South Africa
4,000

New Zealand
2,500

Updated March 2015

● Home Scanner ● Dustbin / Scan ● Diary ● Cash slip

What Nielsen auditors do

(1) Panellists Diary

(2) Till Receipts

(3) Pantry Contents

(4) Nielsen Rubbish Bin

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

New brands are automatically picked up with new incidence

Digital Consumer Survey

Terry Murphy
Managing Director
Nielsen Media South Africa

What is DCS

Demographically & Geographically

National Survey
Adults, 15+

Online Panel

Internet used in
past week

Individuals

3 000 respondents

Measures digital usage across all platforms, and information about online behaviour

Uses PAMS Online Universe as ES

Fusion overview

Jonathon Wells
Senior Vice President Data Science
Nielsen Media International

What is Fusion?

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 separate media assets together for the most granular view of **People's Behaviour** across **Media Platforms**, and **Product** consumption.

A simple data fusion example

Nielsen's TAMS panel tells us how many people watch a game on TV

Nielsen's Consumer Panel Survey tells us how many people buy soft drink

How many people watch the game **_and_** buy soft drinks?

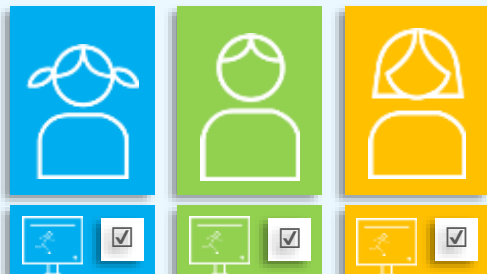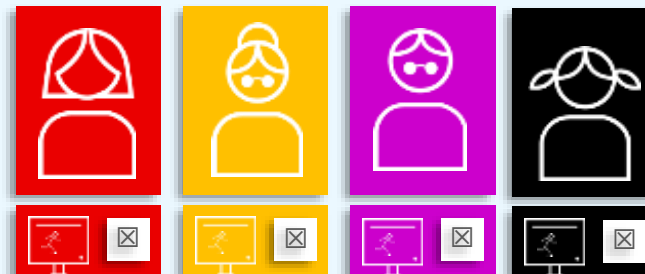Neither panel tells us this… but **data fusion** will!

FUSION

TAMS Panel

THREE PEOPLE METER RESPONDENTS WATCHED THE GAME…
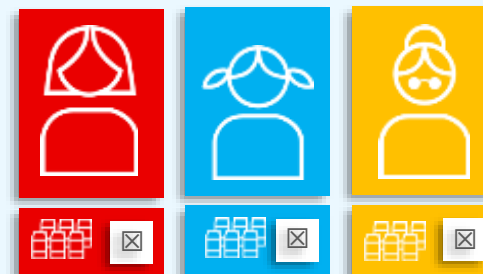
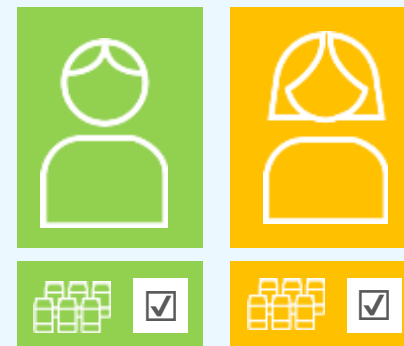FOUR PEOPLE METER RESPONDENTS DIDN'T WATCH THE GAME…

CPS Panel
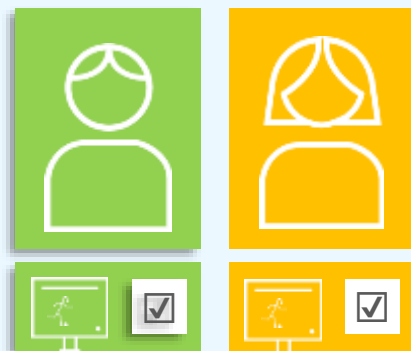
FOUR CPS RESPONDENTS BOUGHT THE SOFT DRINKS…
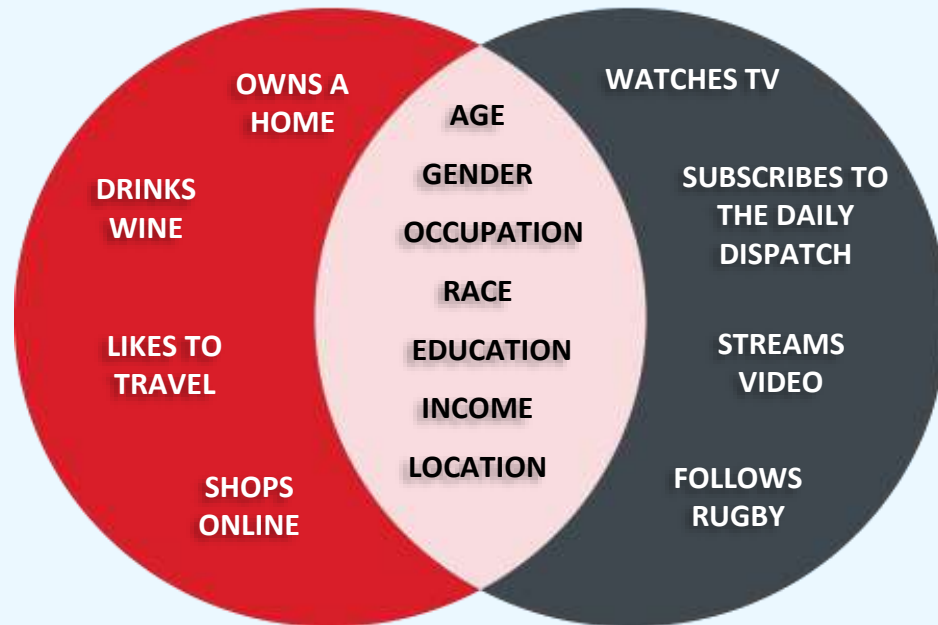
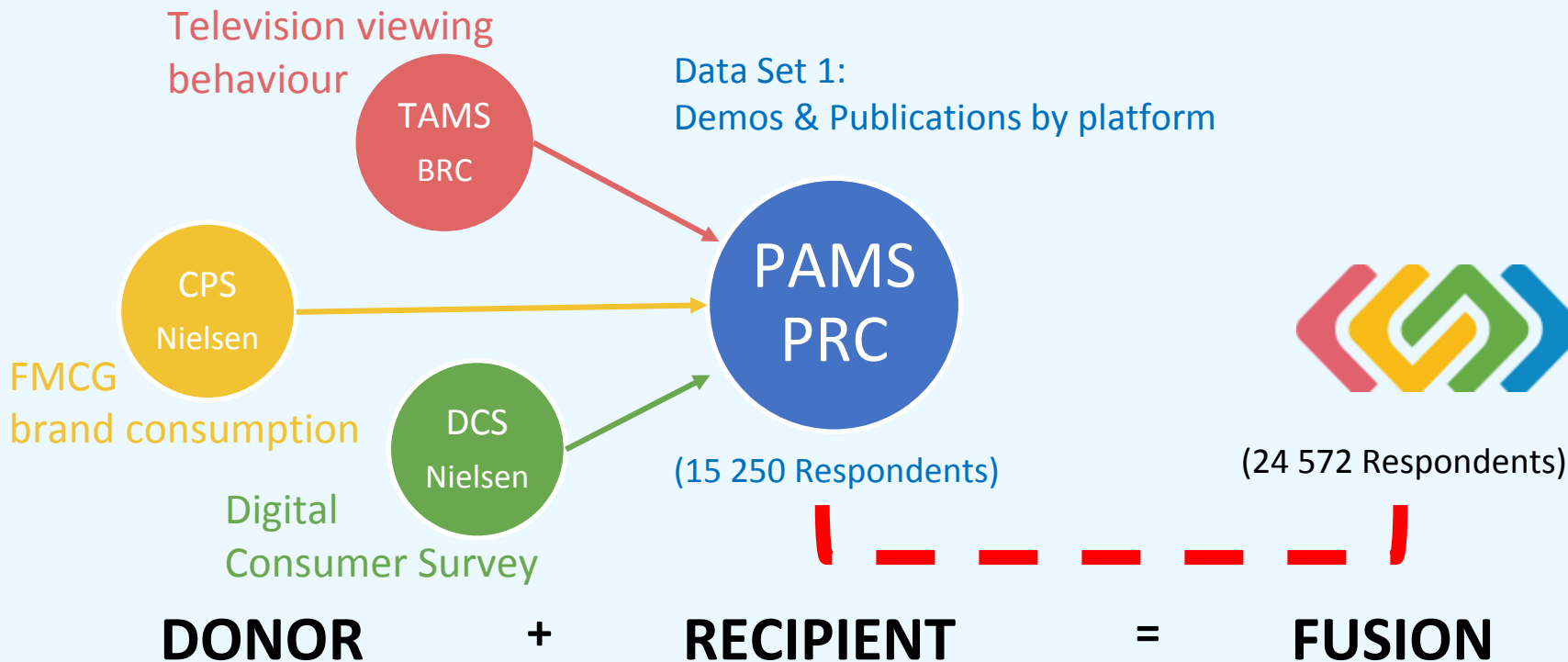THREE CPS RESPONDENTS DIDN'T BUY THE SOFT DRINKS

WITH THE FUSION ...

Some key terms

- Fusion
- Donor
- Recipient
- Hooks
  - Linking Variables
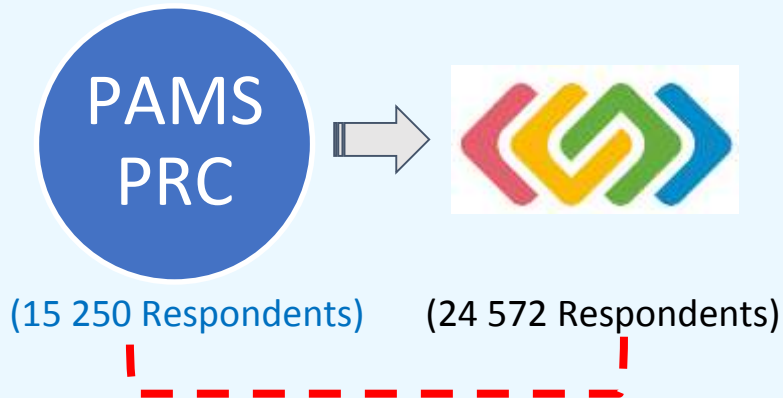 - Matching Variables
- One to Many/Many to One

OWNS A HOME

DRINKS WINE

LIKES TO TRAVEL

SHOPS ONLINE

AGE
GENDER
OCCUPATION
RACE
EDUCATION
INCOME
LOCATION

WATCHES TV

SUBSCRIBES TO THE DAILY DISPATCH

STREAMS VIDEO

FOLLOWS RUGBY

Fusion components

Television viewing behaviour

TAMS
BRC

CPS
Nielsen

FMCG brand consumption

DCS
Nielsen

Digital Consumer Survey

Data Set 1:
Demos & Publications by platform

PAMS
PRC

(15 250 Respondents)

(24 572 Respondents)

DONOR + **RECIPIENT** = **FUSION**

Why does the respondent count increase?

PAMS
PRC

(15 250 Respondents)   (24 572 Respondents)
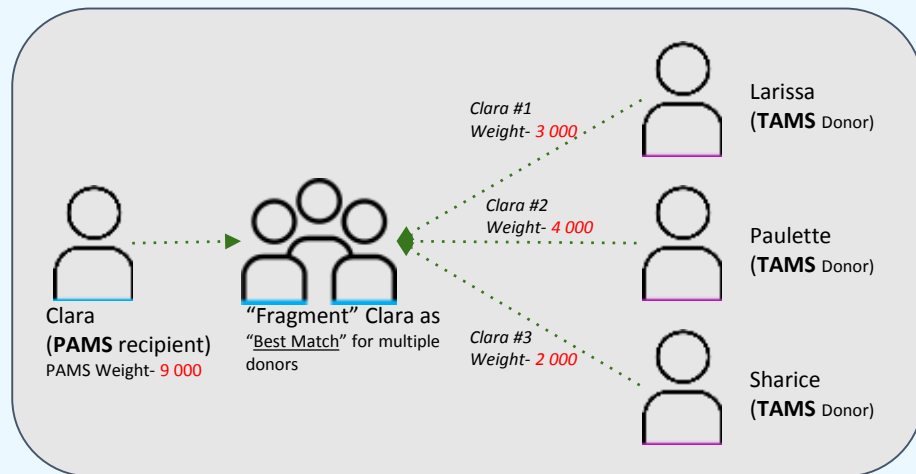
- To preserve currency measurement we must pass the complement of TAMS data on to the fused database
  - We need to match *every* TAMS donor to a PAMS recipient

- We need to "fragment" some recipients in order to make sure we use the *Best Match* for every donor
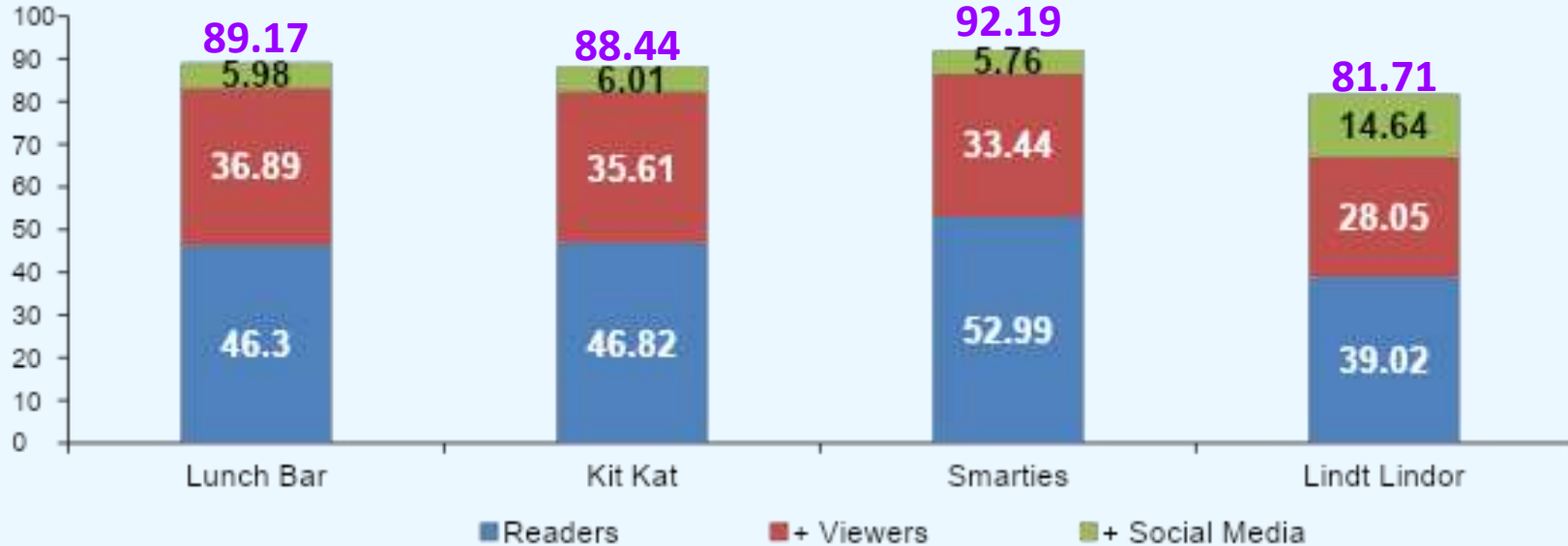

Clara #1
Weight- *3 000*

Larissa
(**TAMS** Donor)

Clara #2
Weight- *4 000*

Paulette
(**TAMS** Donor)

Clara
(**PAMS** recipient)
PAMS Weight- *9 000*

"Fragment" Clara as "Best Match" for multiple donors

Clara #3
Weight- *2 000*

Sharice
(**TAMS** Donor)

Sum of weights are preserved so
PAMS currency does not change

Lunch Bar reach by channel
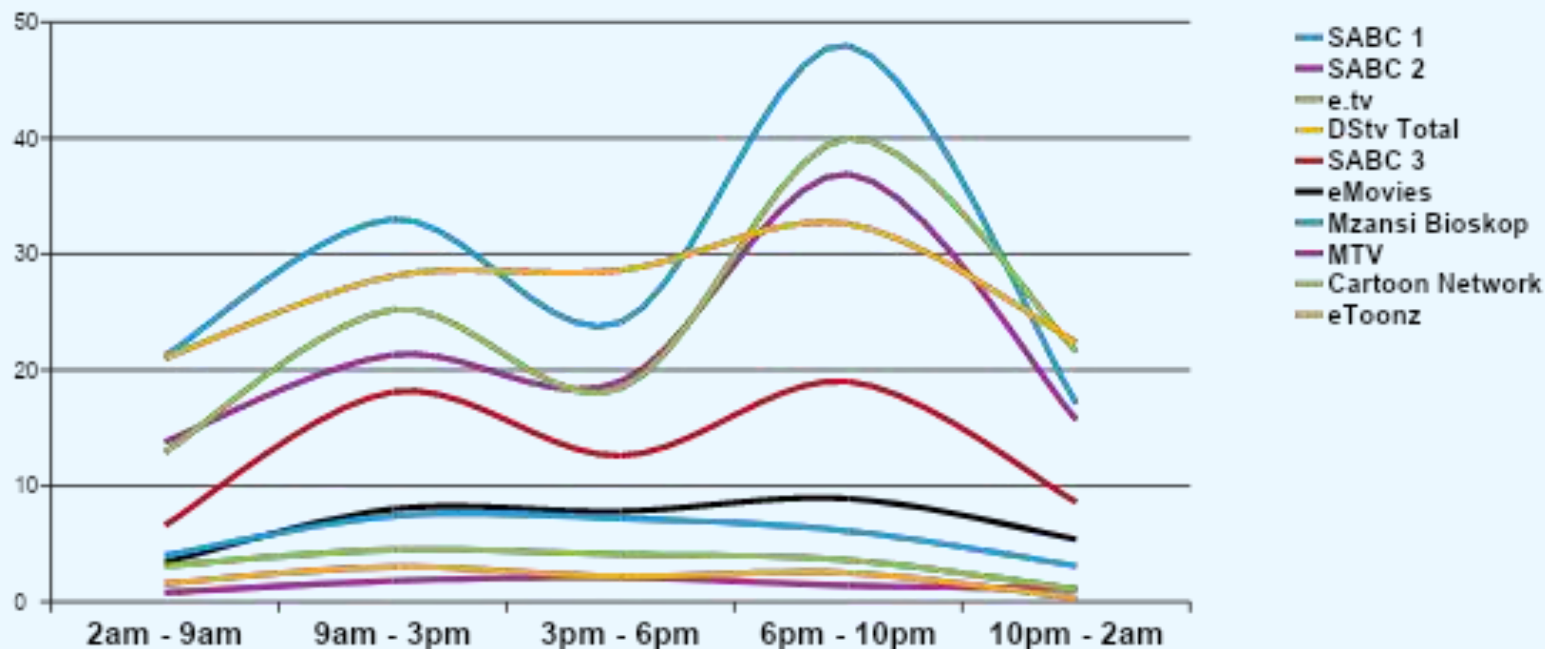
"360" view of an auto purchaser
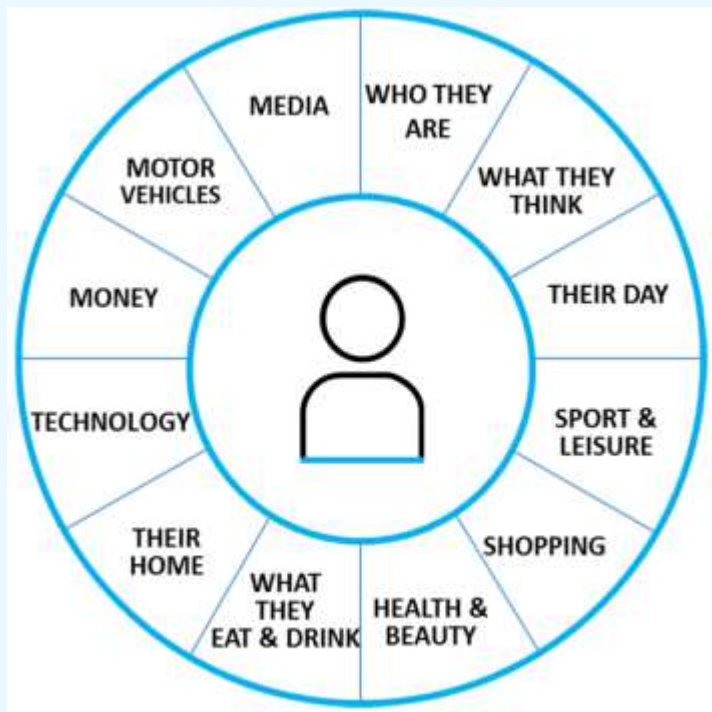
		Vehicle obtained New
Totals	(000s)	3504 354
	Vert%	100
SABC 1	(000s)	1842 651
	Vert%	52,6
e.tv	(000s)	1991 095
	Vert%	56,82
DStv	(000s)	1951 88
	Vert%	55,71
Coffee - Instant	(000s)	3020 259
	Vert%	86,19
Online shopping 9am to 3pm	(000s)	787 573
	Vert%	22,49
Average Number of Magazines Read	Ave	2 041
Average Number of Newspapers Read	Ave	1 883

The future of Fusion

NOW:
- Key for integrating disparate data sets

- A core feature in X-Platform measurement solutions in most of our markets

NEXT:
- Increased use of Machine Learning and Artificial Intelligence algorithms to enhance data integration
  - Automate core Fusion processes
  - Additional consideration of "longitudinal" data
  - Predictive modelling

Summary

Survey-based measurement is still important

Relying solely on single source measurement is fraught with risk in an increasingly fragmented environment

Fusion is well established - both within and outside Nielsen - and continues to evolve

What's in the Fusion?

Peter Langschmidt
Lead Research Consultant
Publisher Research Council
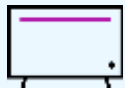
Platforms & Overlap

TV

TAMS Data
Online TV
Time-Shifted TV
OTT/Streaming

Print

Newspaper/Magazines
Paper
Digital

Digital

Internet usage
Social Media
Devices/Apps
Tech in Home

Radio

Live Radio Listening
Online Radio
Streaming

Different Devices and Media Throughout the Day

Automotive

Number of Vehicles

In Household

Person Ownership/Usage

Own or company car

Make of Vehicle

Personally driven

56
Vehicle
Makes

Vehicle Obtained

New or second-hand

Banking

Financial Institution

Where accounts or cards are held

11
Financial Institutions

Main Bank

Which bank

11
Banks

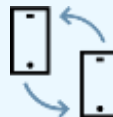### Credit Cards

Personal Usage

Cellular

Number of cell phones

In Household

Personal Ownership

Own or Use

Type Used Most Often

Ordinary
Feature
Smartphone

Network Provider

Vodacom
Cell C
Telkom
MTN

Retail chains

Food and Grocery

Stores where money is spent:
Most, Second most, Third most

12
Stores

Furniture and Appliances

Stores Visited or Purchased from
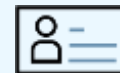(Past 12 Months)

25
Stores

Clothing

Stores Purchased from
(Past 6 Months)

22
Stores

Store Cards

Personally own (for Loyalty points or Discounts)

NLI

Randburg, City of Johannesburg, Gauteng

FUSION BRINGS YOUR CUSTOMERS TO LIFE

Using over 954 Million Data Points in 4 studies

THEIR HOME
Province, Community
NLI, SEM, LSM, Rooms,
running water, toilet,
Floor/roof type, durables

TECHNOLOGY
Mobile Devices, Computers,
TV, Radio, Cell networks

MEDIA AUDIENCES
PAMS, TAMS, Digital,
Radio by Platforms, Dual
usage

MOTOR VEHICLES
Do they have a vehicle?
What make is it?
Did they buy it new
or used?

**WHAT THEIR TYPICAL
DAY LOOKS LIKE (DCS)**
DCS day in the life

**Q2 2021
WHAT THEY THINK? (MAMS)**
Mindsets, Values, Aspirations,
Personality type, Lifestyle, Health,
Exercise, Trust in media, Shopping,
Covid, Alcohol, Smoking, Drugs, Local
Perceptions, Government, Hobbies
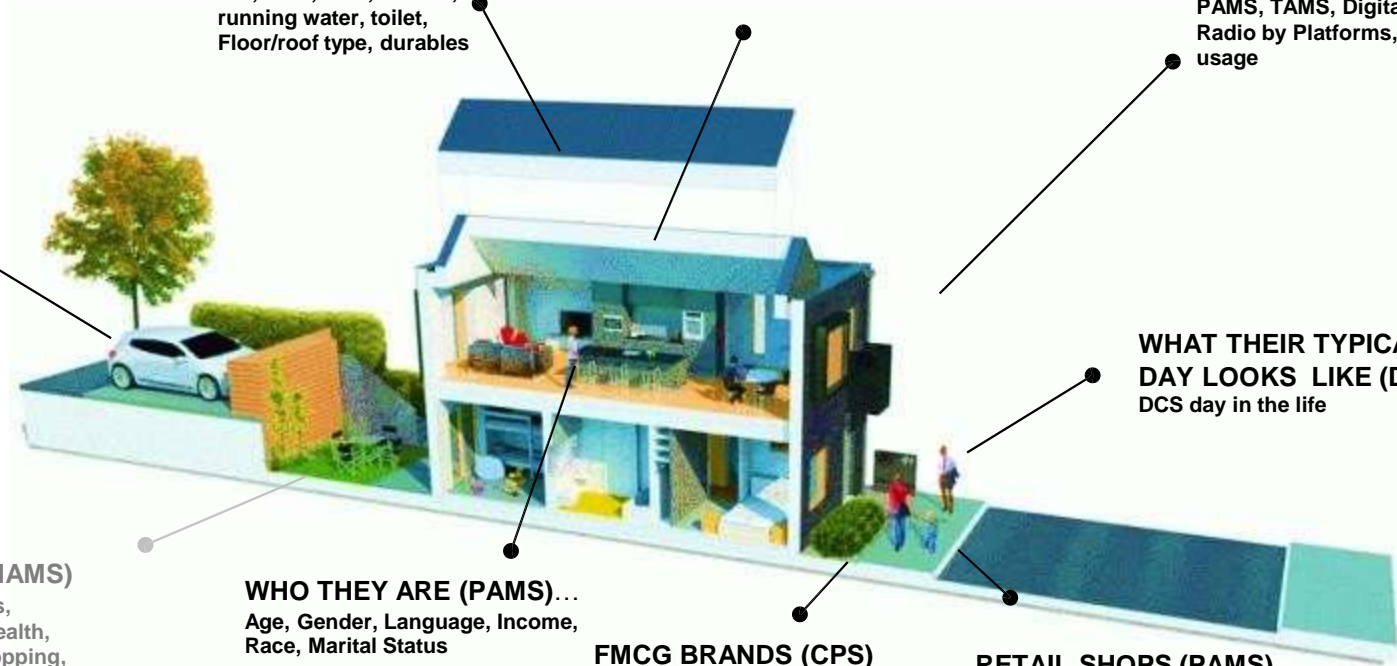
WHO THEY ARE (PAMS)…
Age, Gender, Language, Income,
Race, Marital Status

FMCG BRANDS (CPS)
2200 BRANDS in 191 categories
L,M &H Volume

RETAIL SHOPS (PAMS)
Supermarkets, Clothing, Furniture
Banks

6

RING	SOURCE	CONTENT	EXAMPLE	CAPITEC BANK	FNB
MIND	PAMS	Education	Any Post Matric/ University Complete/Post Grad,	9%	25%
MIND	PAMS	Influencer	I like to keep abreast of the changes in my industry and read quite a bit to stay informed	55%	65%
MIND	PAMS	Influencer	3 or more postive statetments	55%	65%
BODY	PAMS	Age	Average Age	35	40
BODY	PAMS	Marital Status	Single vs. Married	59% Single	52% Married/Liv together
BODY	PAMS	Home Language	Top 3 Languages	Zulu 23%, Xhosa 15%, Sepedi 13%	Zulu 21%, English 20%, Afrikaans 16%

				CAPITEC BANK	FNB
RING	**SOURCE**	**CONTENT**	**EXAMPLE**		
HOME	PAMS	Province/ District Council/ SEM/ NLI		Median SEM 5.2	Median SEM 6.6
TRANSPORT	PAMS	Car ownership make, bought new /second hand. Taxi/ bus		30% have vehicle in HH	54% have vehicle in HH

Fusion 2020 Survey – Automated Planning Tools

- The PRC and BRC fully understand the time pressures that planners and advertisers are now under. This has been exacerbated by Covid with "wait and see" quarterly campaigns now becoming the norm.

- So to save you time and effort we are setting up global cross-tabs, available to all users, in Telmar Survey Time and in Nielsen Clear Decisions.

- These range from target market identification, to ConsumerScopes, to "day in the life" and candidate media.

FUSION

To make life easier for users we have now
put the source survey into the tree.

Please bear in mind the sample, methodology and universe
of each study and use the most appropriate.

TV viewing is asked in PAMS, DCS and TAMS.
Obviously TAMS is far and away the best to use,
and will link to your ratings.

Category Filters ▾

- Own Codes
- Own Media
- GeoGrafix
- Demographics
- Newspaper
- Magazine
- Online News Sites
- AIR
- Core Reader
- Advertising
- Cellphone
- Digital
- Vehicle
- Financial
- Food and groceries
- Household furniture and appliances
- Clothing
- Listening
- Viewing
- Home information
- Local infrastructure
- Equipment
- Influencer

PAMS

- CPS: Brands - Ever
- CPS: Brands - LMH

CPS

- DCS: Internet
- DCS: Media Habits and Preferences
- DCS: Internet TV/Video on Demand
- DCS: Time spend with Different Media
- DCS: Different Devices & Media Usage Throughout The Day
- DCS: Using Different Media At the same Time

DCS

ONLINE

- TAMS: Television Viewing

TAMS

Target Market Identification

Defining the target market is the foundation upon which all advertising and marketing is built.

A product or brand TM definition will give you a 8-15% better return than a demographically defined one.

However, in many cases agencies prefer SEMs, especially in terms of standardised targets and buying performance.

To make your life easier we are setting up a number of TM definition tools in the global own codes of Telmar and Clear Decisions.

Target marketing

Category Filters ▾

- ▸ Own Codes
- ▸ Own Media
- ▸ GeoGrafix
- ▸ Demographics
- ▸ Newspaper
- ▸ Magazine
- ▸ Online News Sites
- ▸ AIR
- ▸ Core Reader
- ▸ Advertising
- ▸ Cellphone
- ▸ Digital
- ▸ Vehicle
- ▸ Financial
- ▸ Food and groceries
- ▸ Household furniture and appliances
- ▸ Clothing
- ▸ Listening
- ▸ Viewing
- ▸ Home Information
- ▸ Local Infrastucture
- ▸ 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
- ▸ Television Viewing

Just click on own codes and you will find
target market definition templates

	TARGET MARKETING		
1	BRAND SEM TARGET MARKET (20 GROUPS)		
2	BRAND SEM TARGET MARKET (10 GROUPS)	See example	
3	BRAND SEM TARGET MARKET (1-5 SUPERGROUPS)		
4	BRAND SEM TARGET MARKET (L,M, H SUPERGROUPS)		
5	MEAN SEM (10 GROUPS)		

Drop your brand and competitors into the rows and
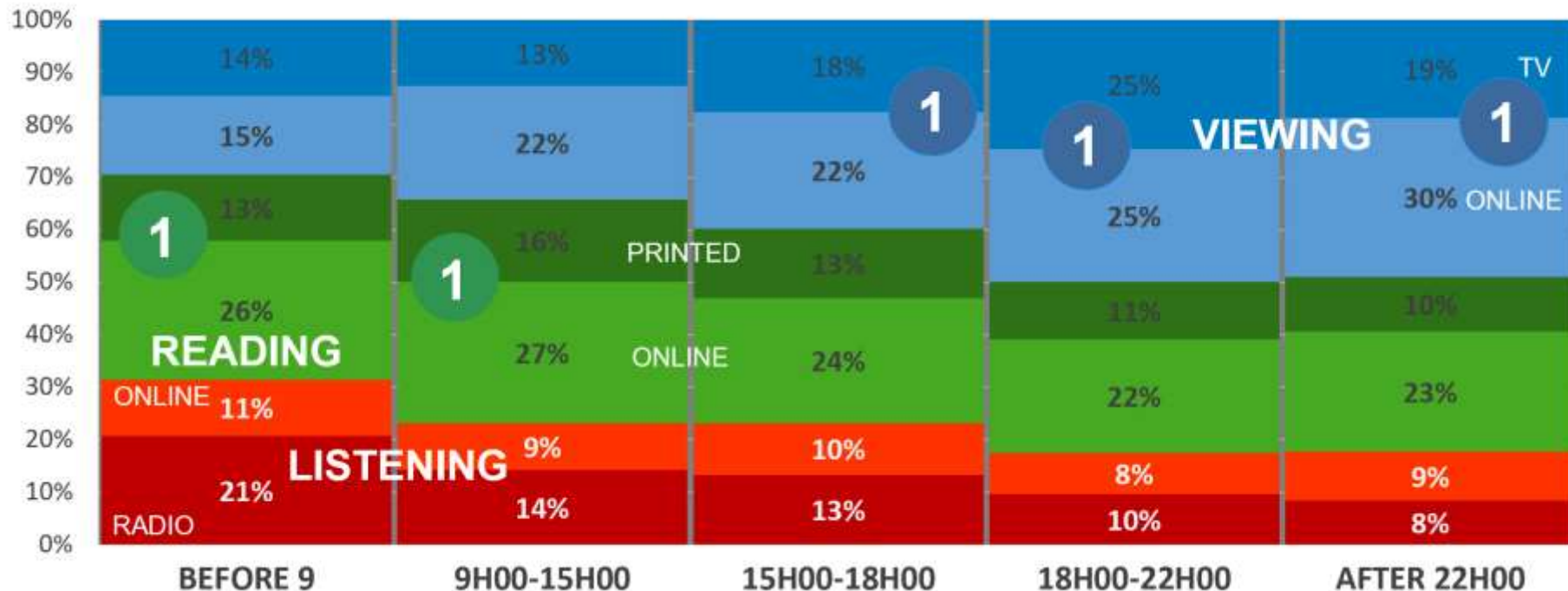you will see your SEM TM definition emerge

Easy TM Identification and Weighting

SEM 10 ID

		Totals	SEM 1	SEM 2	SEM 3	SEM 4	SEM 5	SEM 6	SEM 7	SEM 8	SEM 9	SEM 10
Totals	Audience(000)	40 073	4 858	5 519	4 841	3 886	3 862	3 733	4 206	3 365	2 747	3 055
	Resps	26 666	2 177	2 884	2 802	2 444	2 600	2 622	3 134	2 730	2 369	2 904
Cell C	Audience(000)	5 785	351	509	513	468	700	650	839	674	520	560
	%Row	100.0	6.1	8.8	8.9	8.1	12.1	11.2	14.5	11.6	9.0	9.7
	Index	100	50	64	73	83	126	121	138	139	131	127
MTN	Audience(000)	13 791	1 732	1 737	1 798	1 475	1 417	1 360	1 515	1 121	805	831
	%Row	100.0	12.6	12.6	13.0	10.7	10.3	9.9	11.0	8.1	5.8	6.0
	Index	100	104	91	108	110	107	106	105	97	85	79
Vodacom	Audience(000)	15 873	1 878	2 485	2 019	1 517	1 342	1 333	1 490	1 280	1 158	1 370
	%Row	100.0	11.8	15.7	12.7	9.6	8.5	8.4	9.4	8.1	7.3	8.6
	Index	100	98	114	105	99	88	90	89	96	106	113

PREDICTOR PLUS+

		Totals	SEM 1	SEM 2	SEM 3	SEM 4	SEM 5	SEM 6	SEM 7	SEM 8	SEM 9	SEM 10
Totals	Audience(000)	40 073	4 858	5 519	4 841	3 886	3 862	3 733	4 206	3 365	2 747	3 055
Cell C	Audience(000)	5 785	351	509	513	468	700	650	839	674	520	560
	Score	10 000	305	563	650	672	1 525	1 355	2 001	1 612	1 179	1 232
MTN	Audience(000)	13 791	1 732	1 737	1 798	1 475	1 417	1 360	1 515	1 121	805	831
	Score	10 000	1 310	1 147	1 404	1 177	1 102	1 049	1 155	786	493	474
Vodacom	Audience(000)	15 873	1 878	2 485	2 019	1 517	1 342	1 333	1 490	1 280	1 158	1 370
	Score	10 000	1 156	1 790	1 334	950	748	756	837	778	774	972

Activity by Platform by Daypart **2019**
Total Adults (Online Universe)

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

Activity by Platform by Daypart **2020**
Total Adults (Online Universe)

FUSION PHASE 2. Surveys 5 and 6. Q2 2021

- **DIGITAL - IAB Narratiive Data**
  We have been working with Narratiive and the IAB for the past few months.
  The Nielsen data scientists have evaluated a July pilot extract.
  The project to fuse Narratiive data by daypart is ongoing and should be completed by Q2 2021.

- **MAMS (Mindsets & Attitudes)**
  A 1 000 sample based on the PAMS Online universe was conducted in October.
  The study encompasses over 100 Statements including Values, Motivations, Aspirations, Lifestyle, Health, Personality types, Shopping habits, Religion, Trust in media, Hobbies, Alcohol, Smoking and Drugs, and much more.
  The Insites Consulting report will be released to the industry in late November.

Thank You

Josephine Buys
CEO
Publisher Research Council