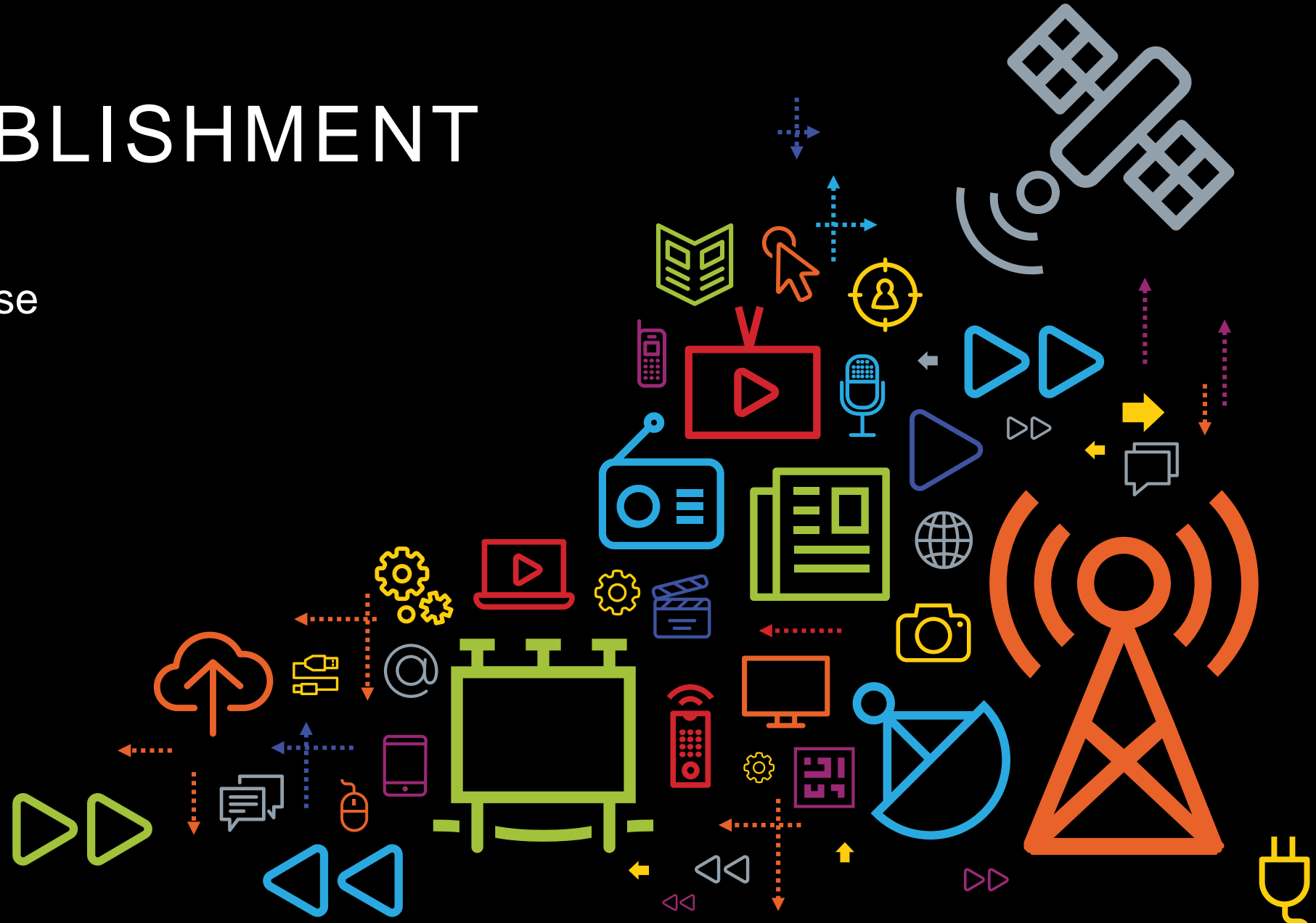


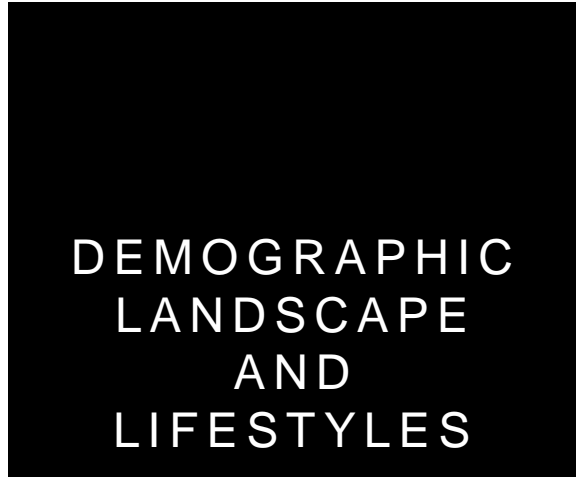
KANTAR TNS

THE ESTABLISHMENT SURVEY

September 2019 release



Contents



25,000 annual sample

**Representative of the SA
population**

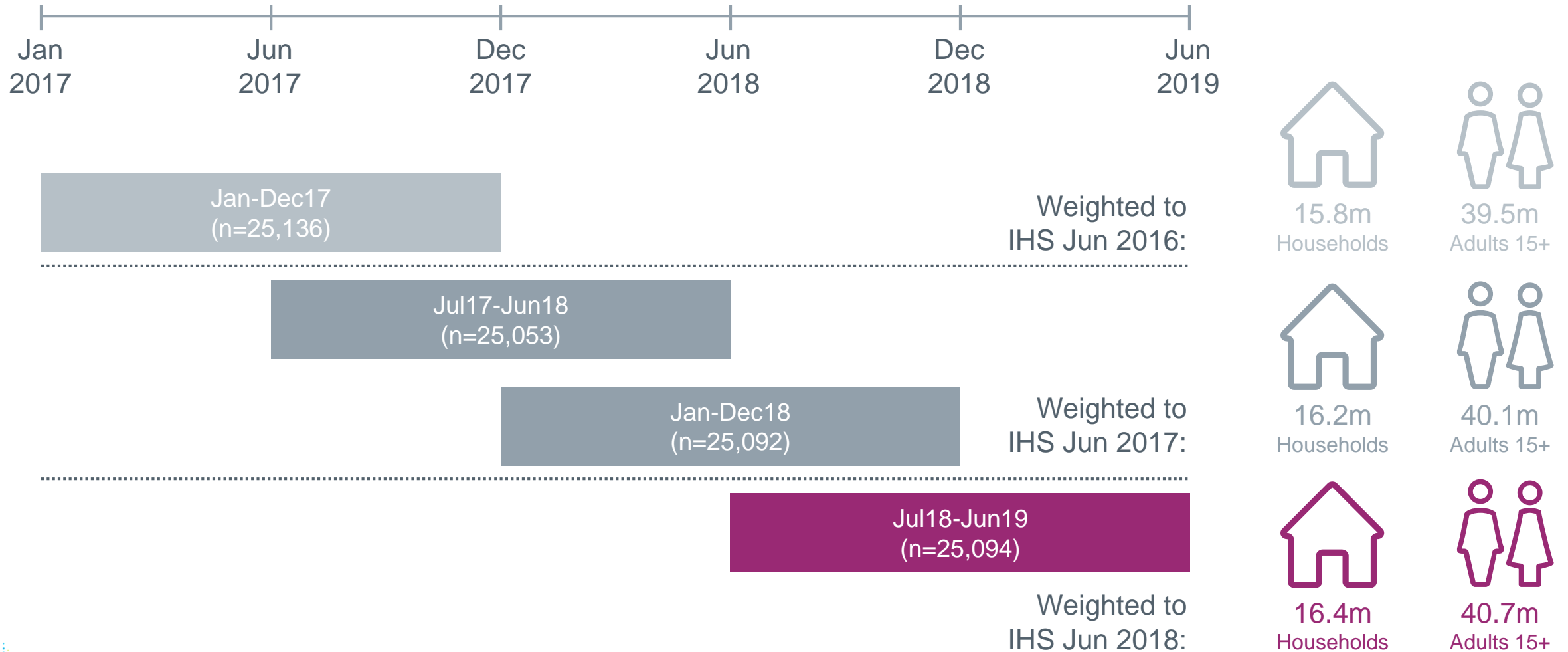
**Demographic / geographic /
lifestyle / products & multi-
media landscape**

**Cross platform / cross device
media consumption**

**Single source
(IHS population data)**

SEM (segmentation model)

Trended ES data (rolling 12 month data) – 4 most recent time periods shown in this deck



ES sample closely reflects the SA population

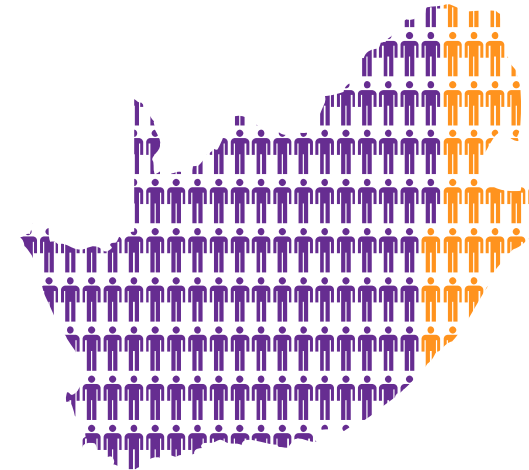
ES (unweighted)



Black	82%
Coloured	10%
Indian / Asian	2%
White	7%

Source: ES Jul18-Jun19 (n=25,094)

IHS Population



Black	79%
Coloured	9%
Indian / Asian	3%
White	9%

Source: IHS Individual Population estimates Jun 2018

High weighting efficiency



Household

Individual

Jan-Dec17

95.7%

84.2%

Jul17-Jun18

96.1%

83.3%

Jan-Dec18

95.3%

83.2%

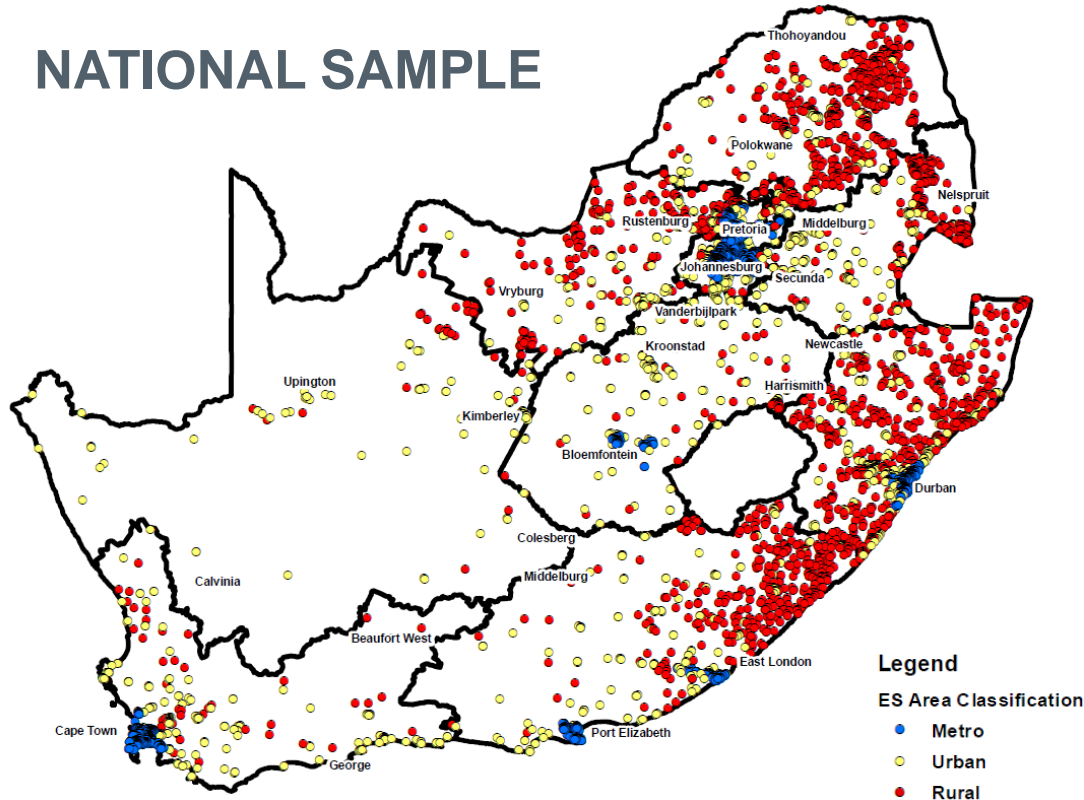
Jul18-Jun19

95.0%

84.8%

Establishment Survey – vital signs

NATIONAL SAMPLE



Universe: Population aged 15+
40.7 million

25,094 sample

JUL 2018-JUN 2019

41% Metro






28% Urban



31% Rural



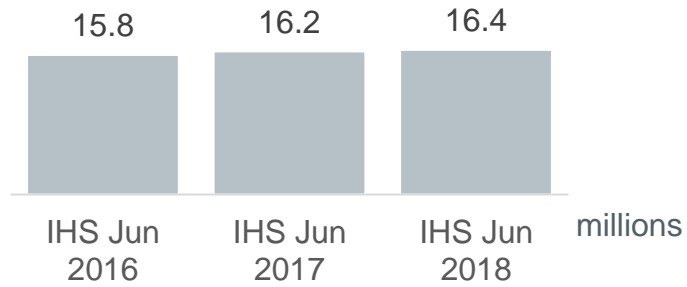
Currency – vital signs

	ES	BRC RAM™	BRC TAMS	PAMS
	41% Metro	60% Metro	44% Metro	50% Metro
	28% Urban	20% Urban	29% Urban	30% Urban
	31% Rural	20% Rural	27% Rural	20% Rural

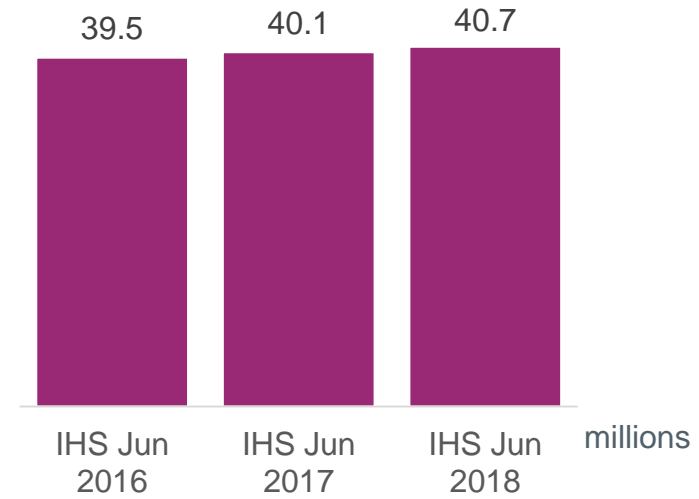
SA's growing population



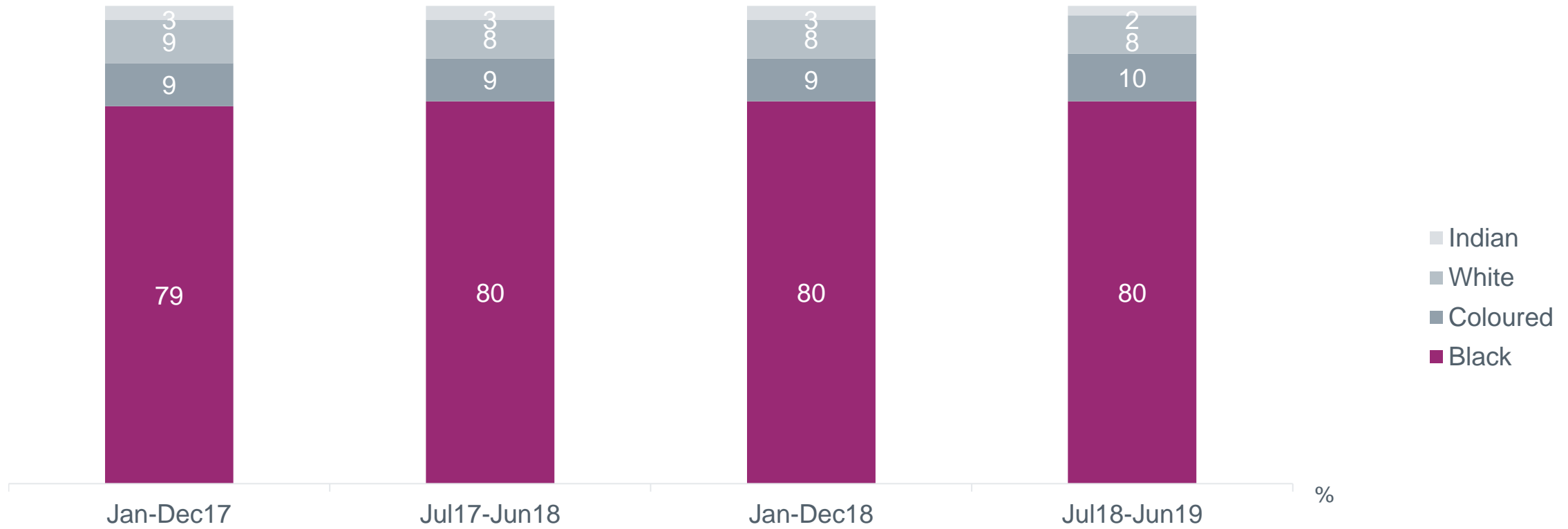
Households



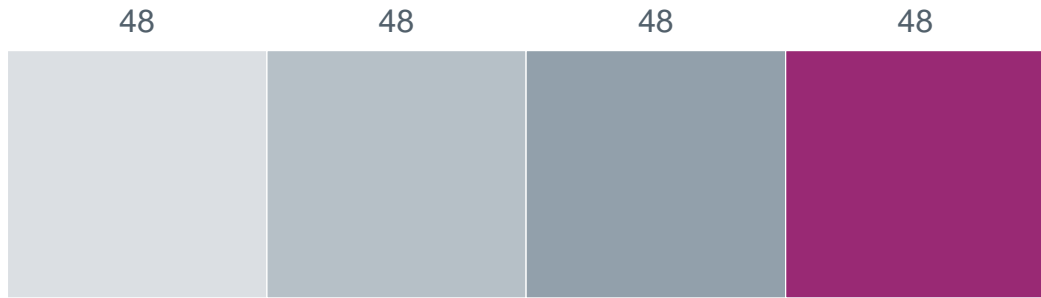
Adults 15+



Race profile



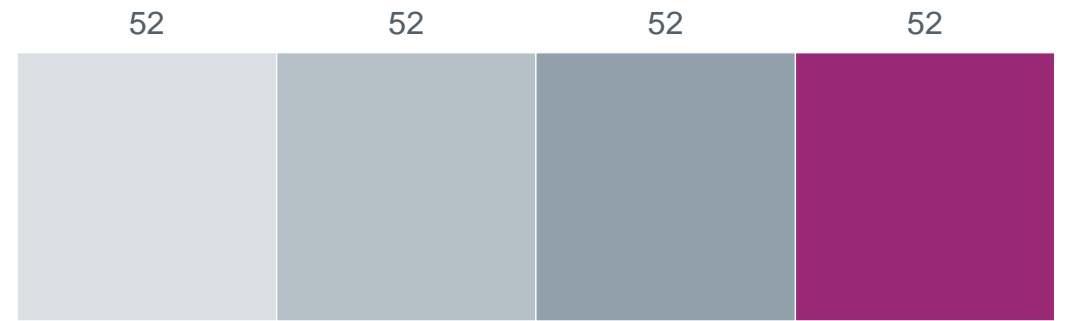
Gender profile



Male

■ Jan-Dec17

■ Jul17-Jun18



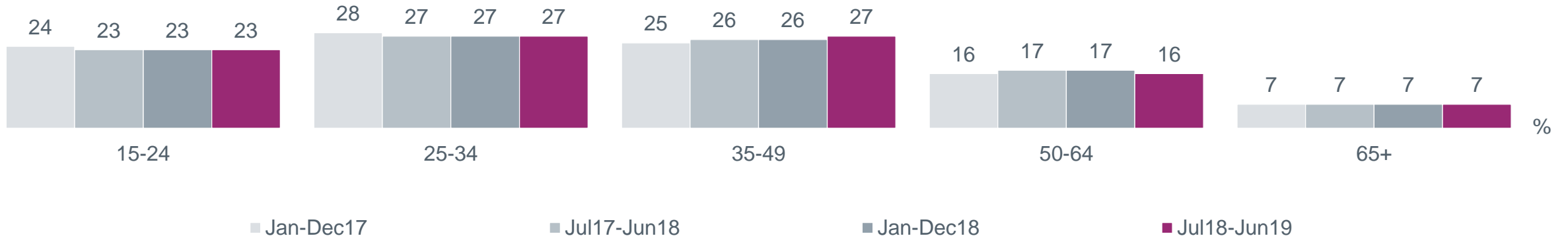
%

Female

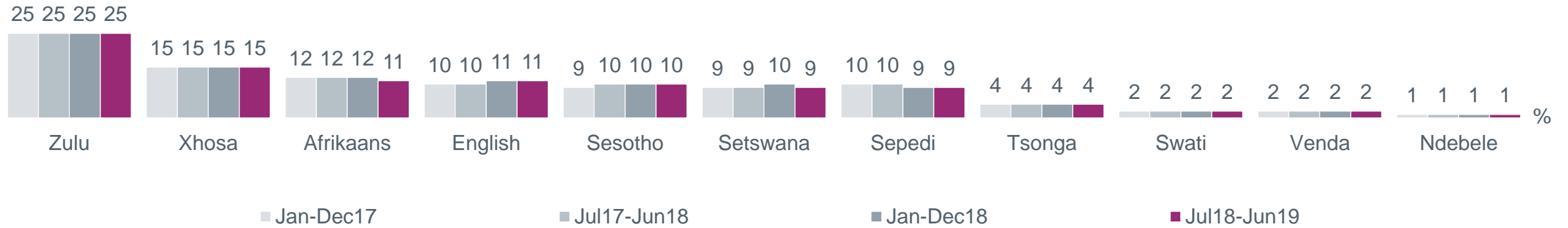
■ Jan-Dec18

■ Jul18-Jun19

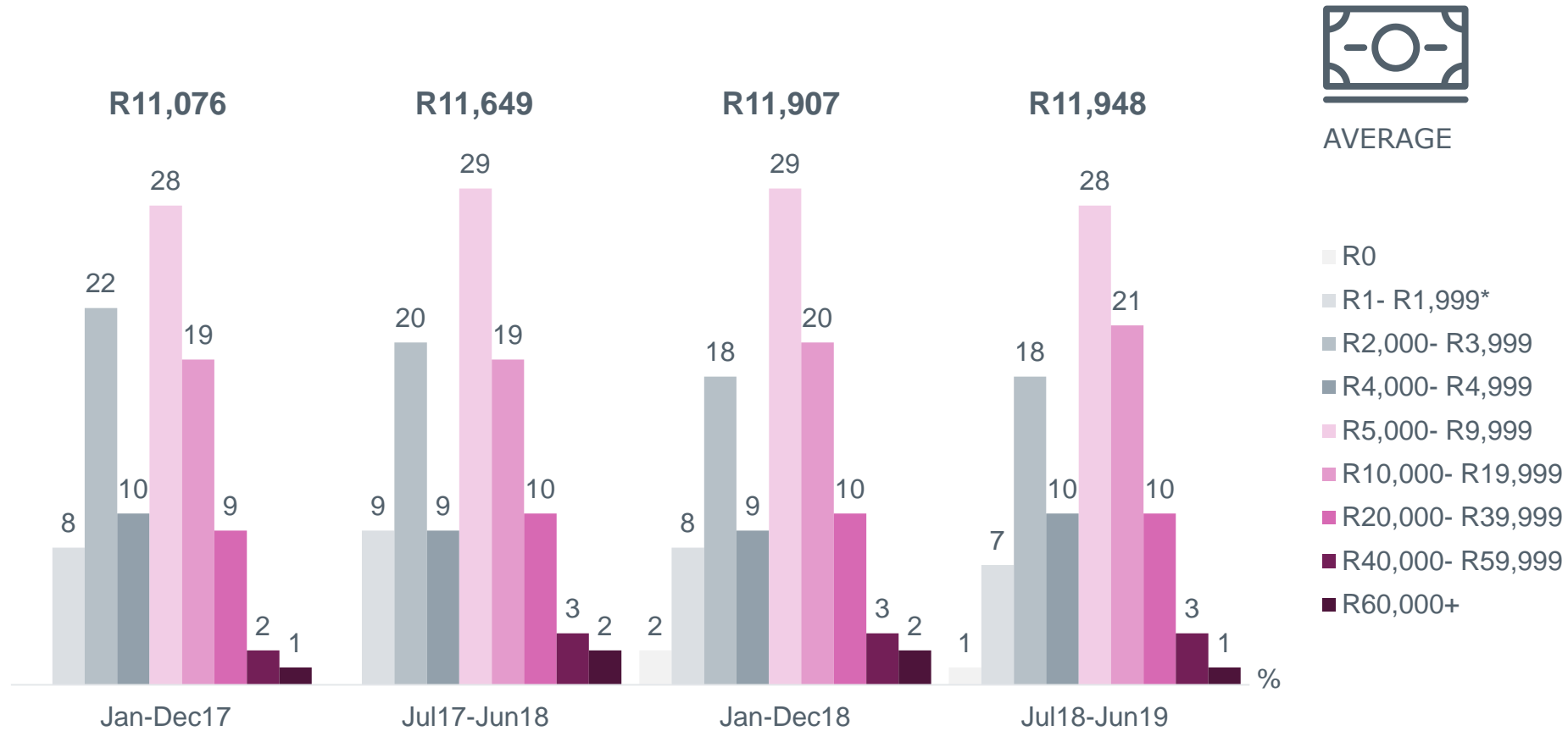
Age profile



Languages spoken most often in SA homes



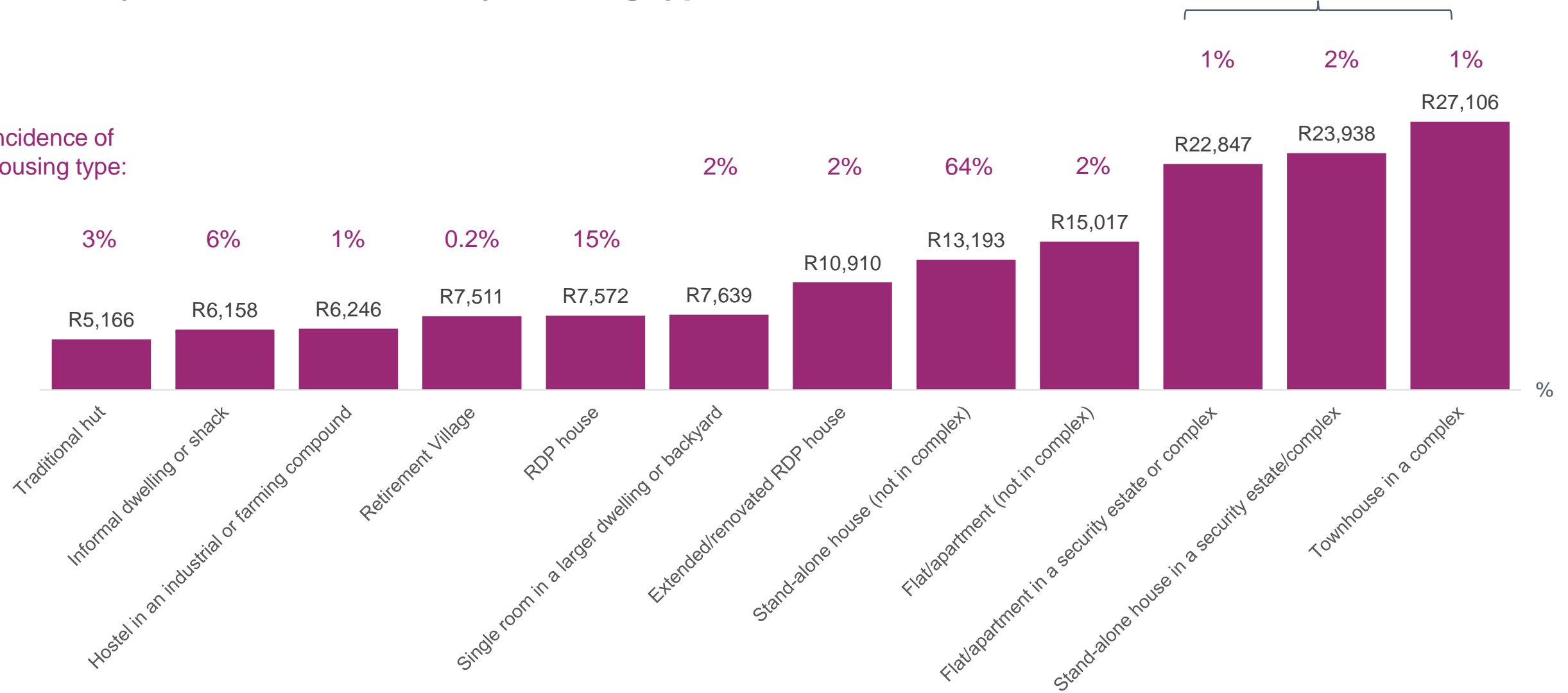
Monthly household income



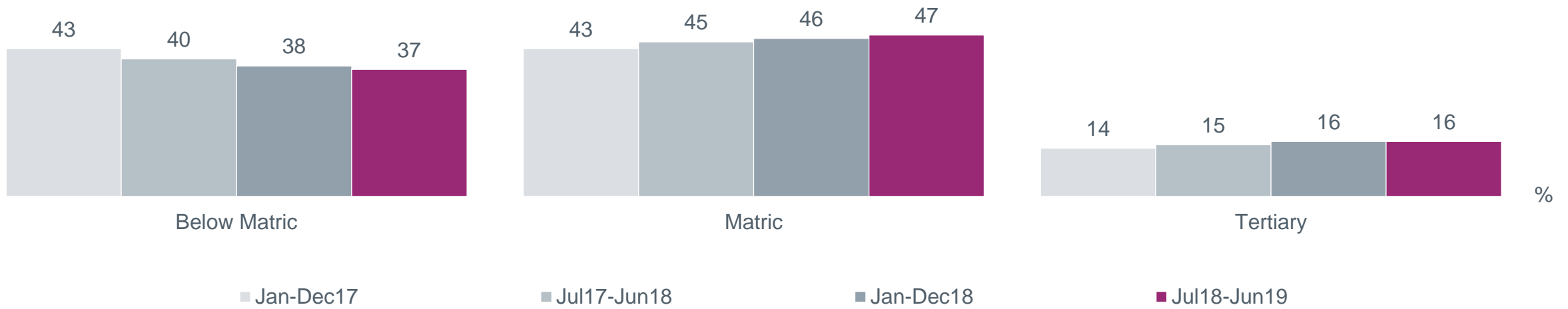
Monthly household income by housing type

Average MHI amongst those living in complexes: R24,237

Incidence of housing type:



Improvement in education levels

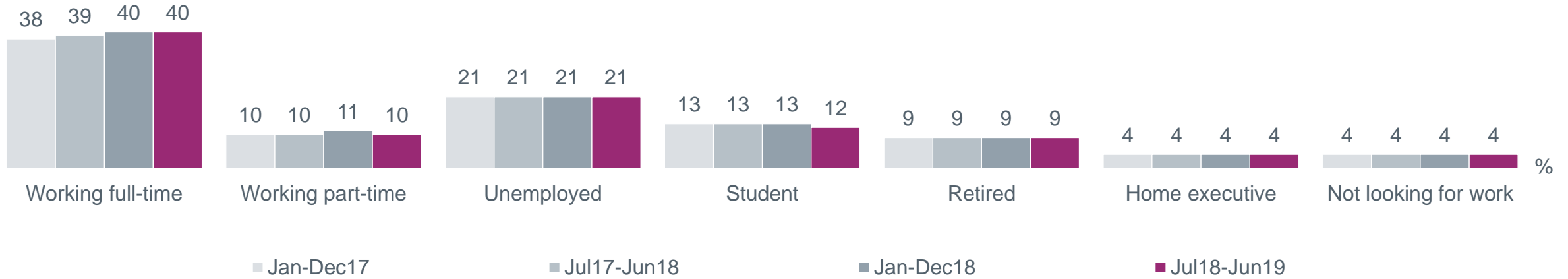


Increased working population

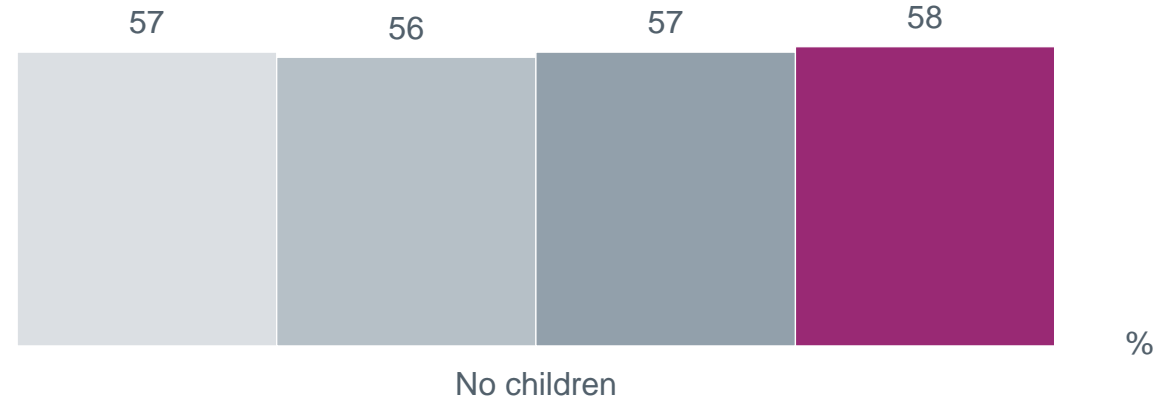
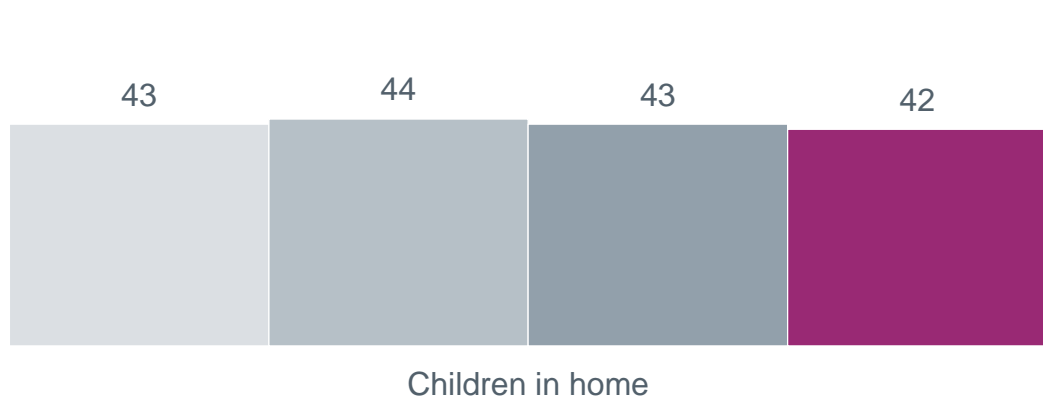


WORKING

Jan-Dec17	49%
Jul17-Jun18	50%
Jan-Dec18	50%
Jul18-Jun19	51%



Children under 15 years living at home



■ Jan-Dec17

■ Jul17-Jun18

■ Jan-Dec18

■ Jul18-Jun19

Area classification

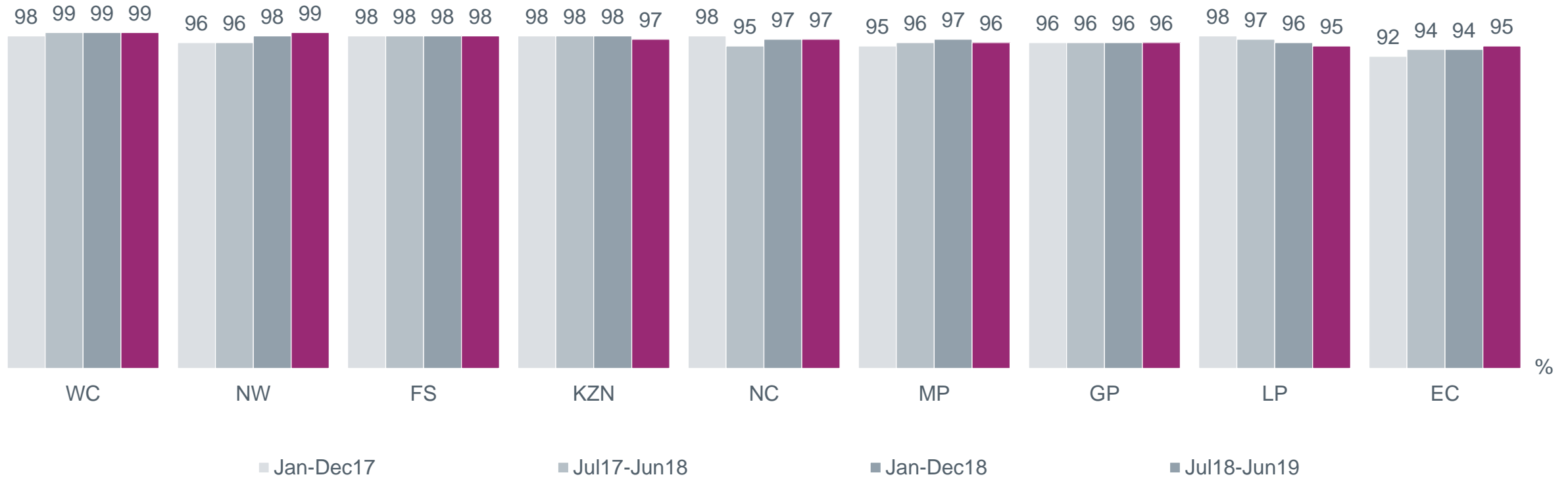


	Jan - Dec17		Jul17 - Jun18		Jan - Dec18		Jul18 - Jun19	
Metro	41%	16.1m	41%	16.4m	41%	16.4m	41%	16.7m
Urban	28%	11.2m	28%	11.4m	28%	11.4m	28%	11.5m
Rural	31%	12.1m	31%	12.3m	31%	12.3m	31%	12.5m

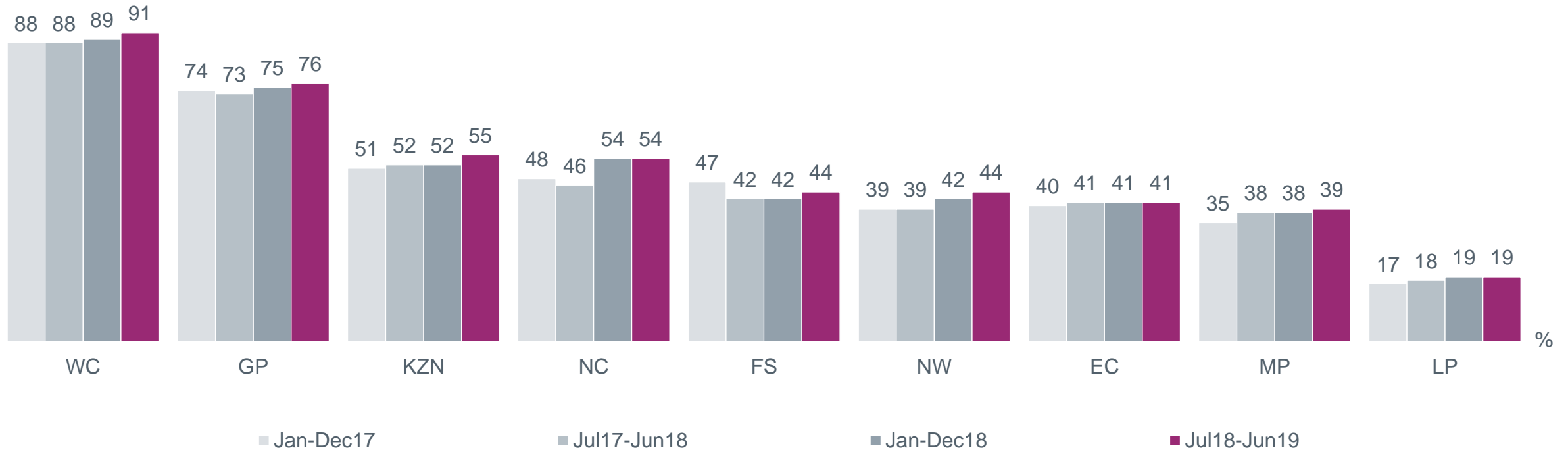
Shifts in population by province

	Jan - Dec17		Jul17 - Jun18		Jan - Dec18		Jul18 - Jun19	
Gauteng	25%	10.0m	25%	10.2m	25%	10.2m	26%	10.4m
KwaZulu-Natal	19%	7.6m	19%	7.7m	19%	7.7m	19%	7.8m
Western Cape	12%	4.8m	12%	4.9m	12%	4.9m	12%	5.0m
Eastern Cape	12%	4.8m	12%	4.8m	12%	4.8m	12%	4.9m
Limpopo	10%	3.8m	10%	3.9m	10%	3.9m	10%	3.9m
Mpumalanga	7%	2.9m	7%	3.0m	7%	3.0m	7%	3.0m
North West	7%	2.7m	7%	2.7m	7%	2.7m	7%	2.7m
Free State	5%	2.0m	5%	2.0m	5%	2.0m	5%	2.1m
Northern Cape	2%	0.9m	2%	0.9m	2%	0.9m	2%	0.9m

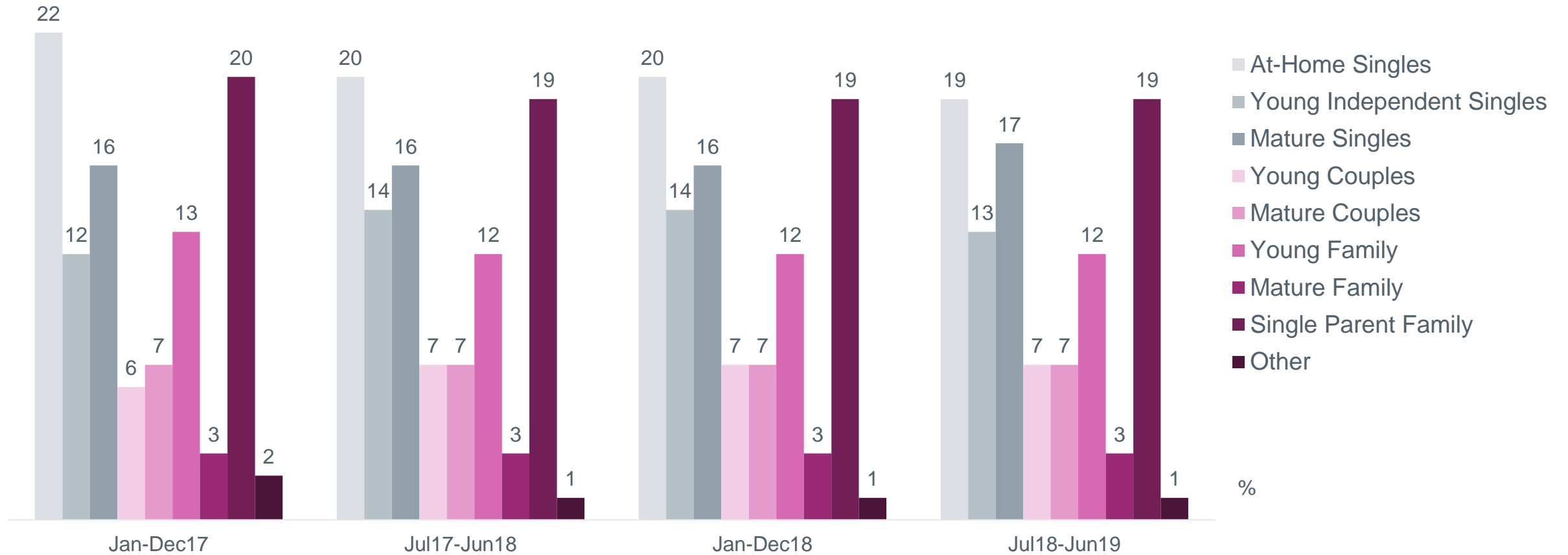
Electrification by province



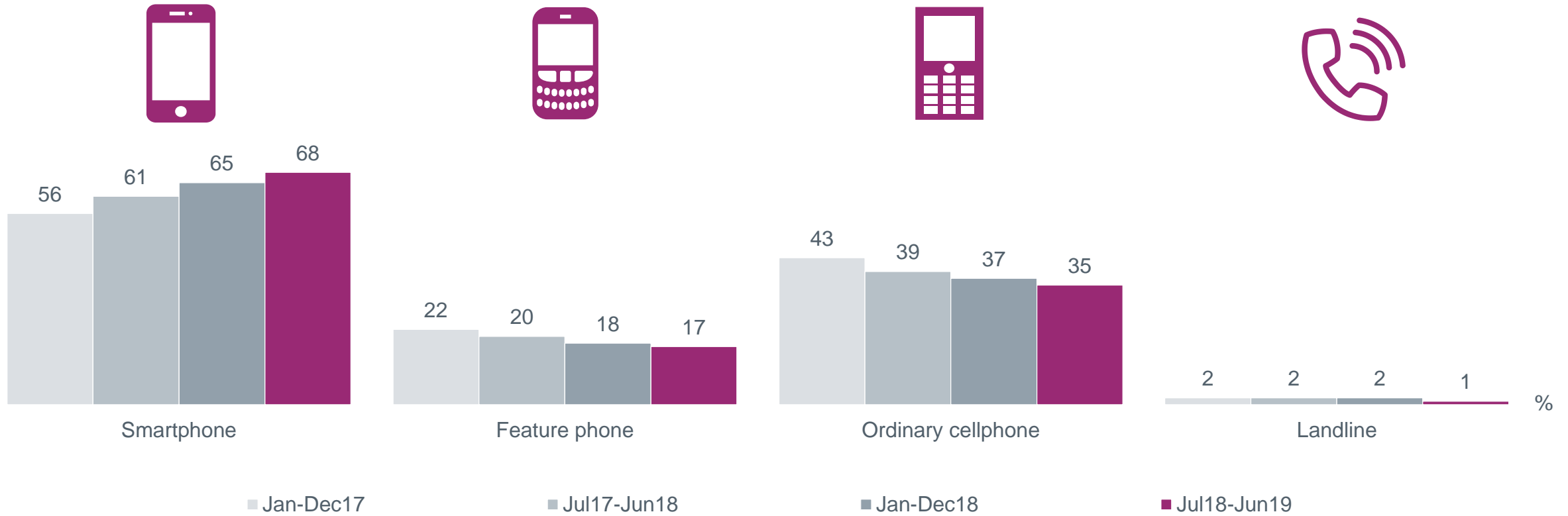
Water access by province



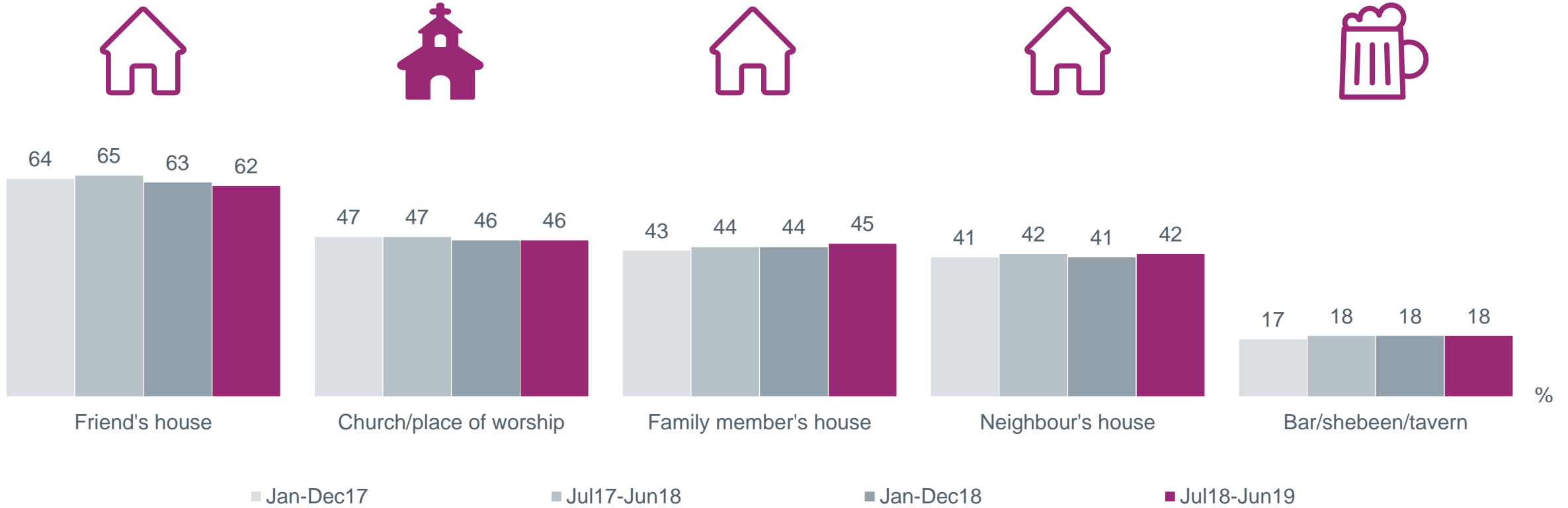
Shifts in life stages



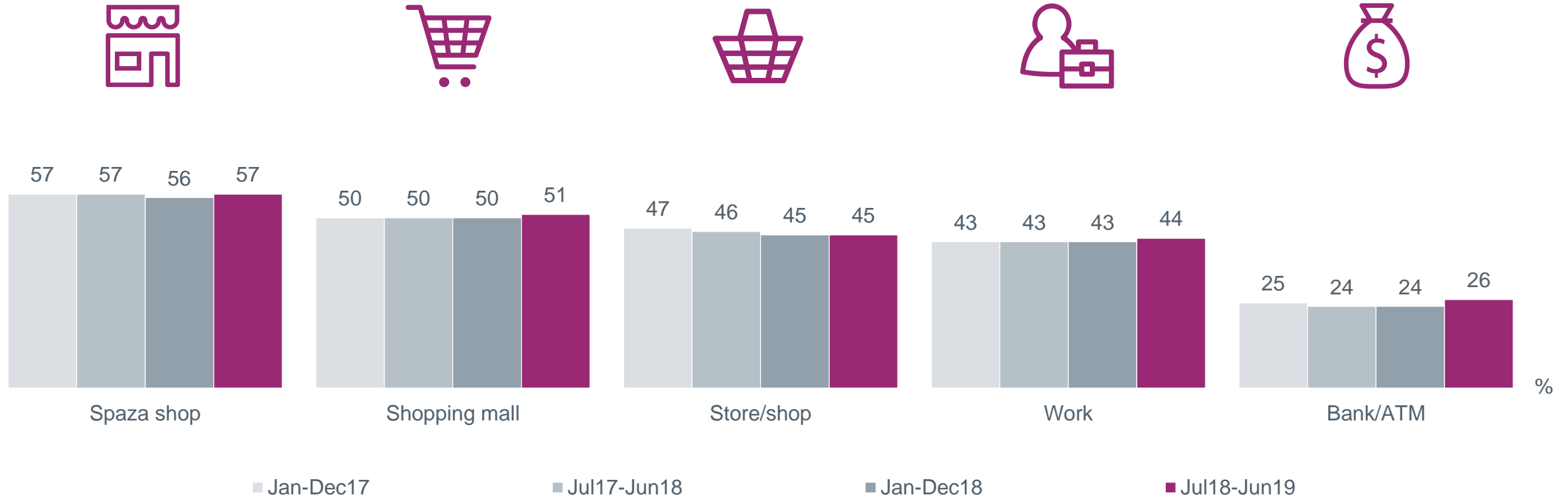
Almost every home has a cellphone, and minimal incidence of landlines



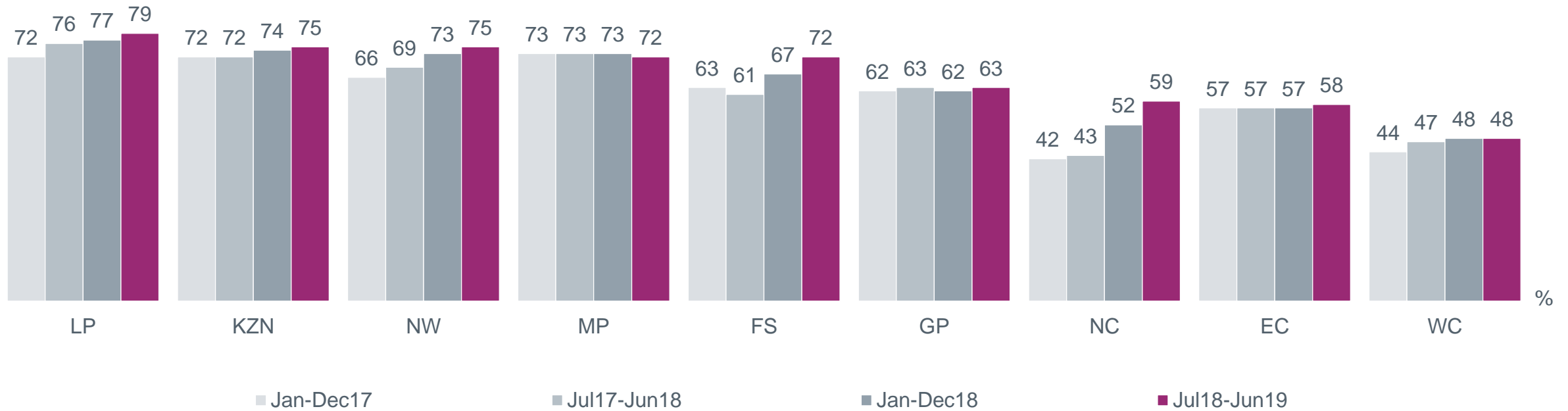
Past week destinations – social



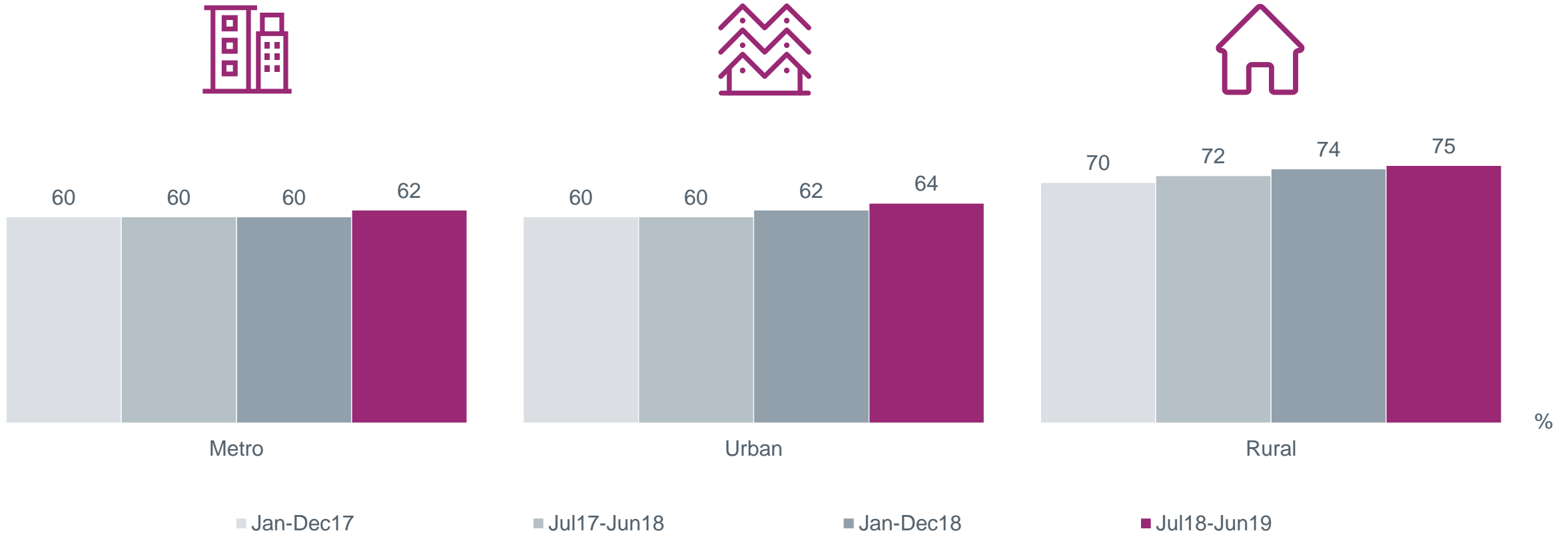
Past week destinations – business



Growth of the taxi/bus industry by province



Growth of the taxi/bus industry by area type

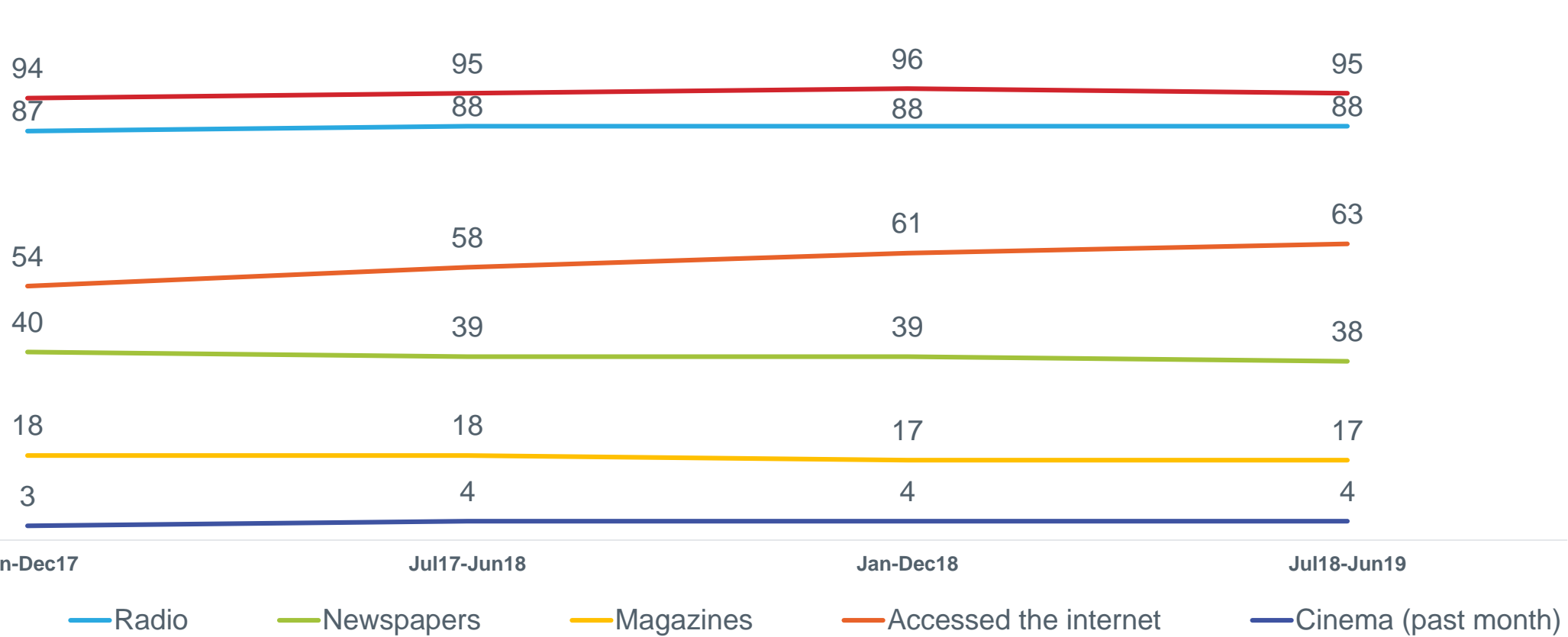


MEDIA LANDSCAPE



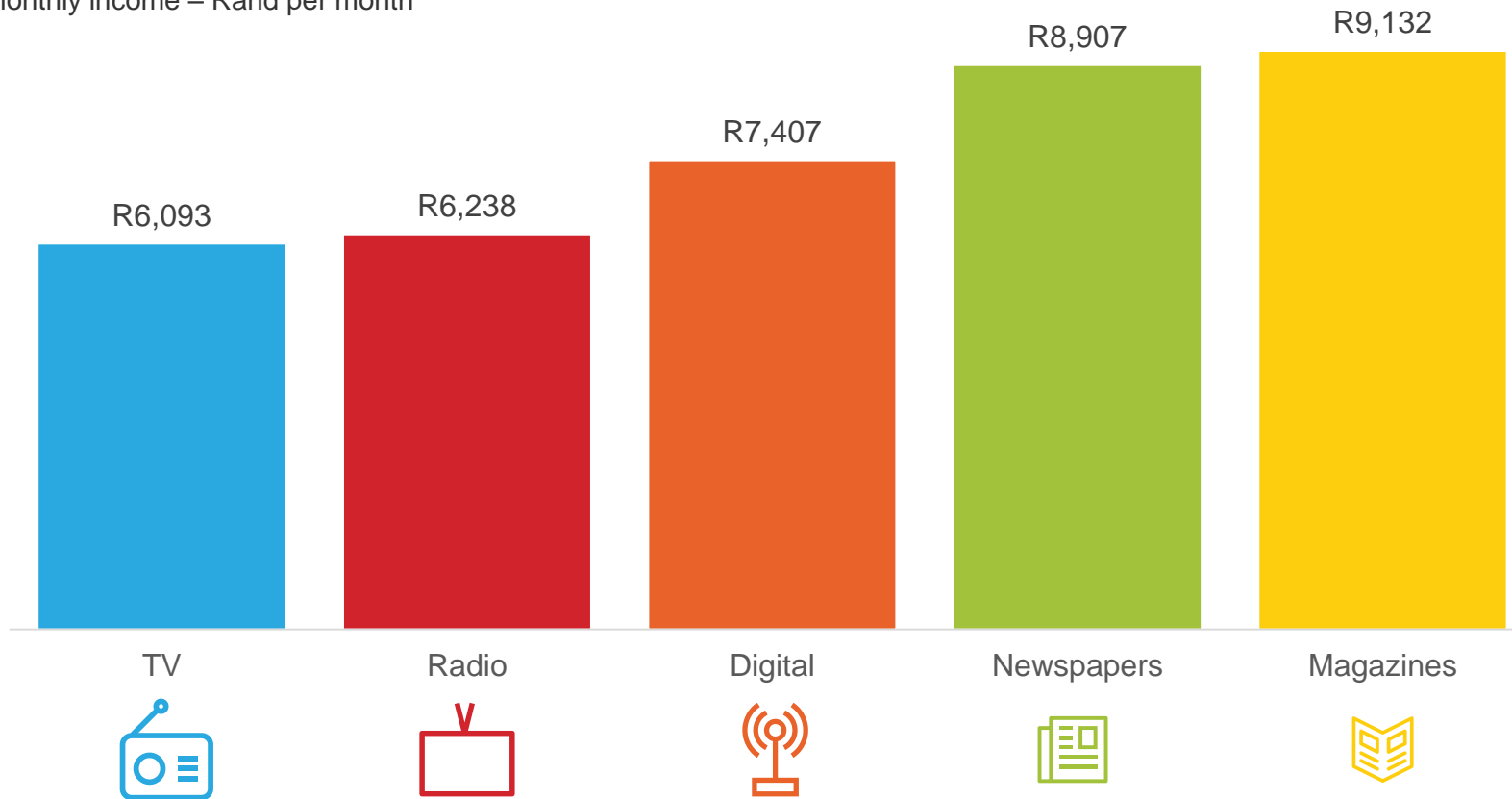
Media landscape

Past 7 day reach trend (%)



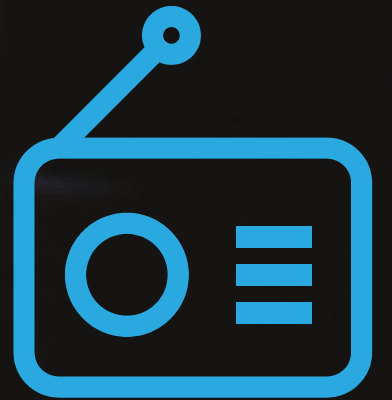
Average personal income by media type

Personal monthly income – Rand per month

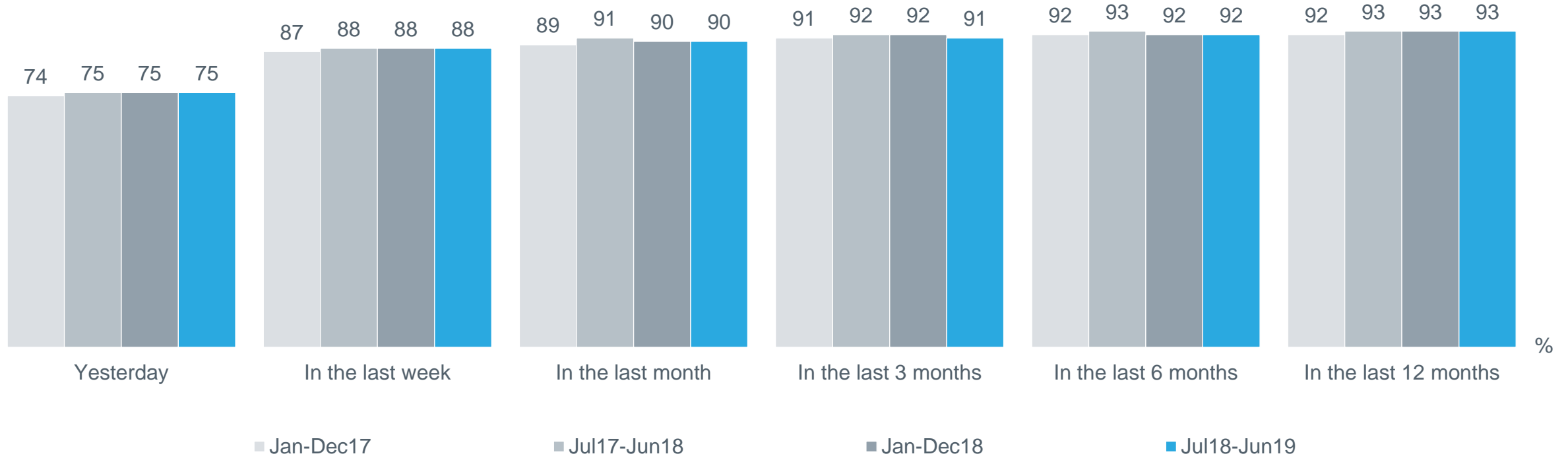


LISTENING

Past 7 days



Listening reach

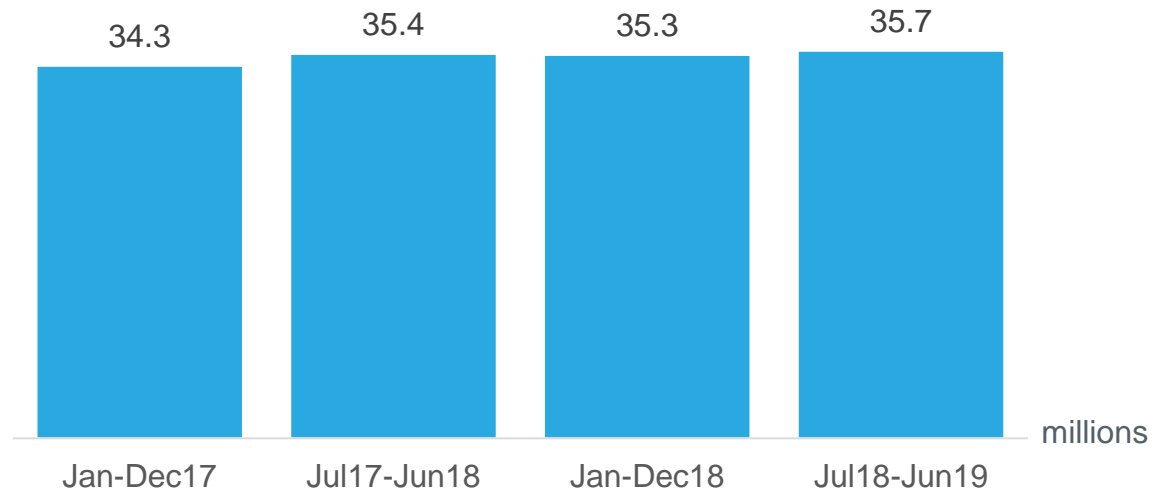


Past 7 day Radio listeners

Population

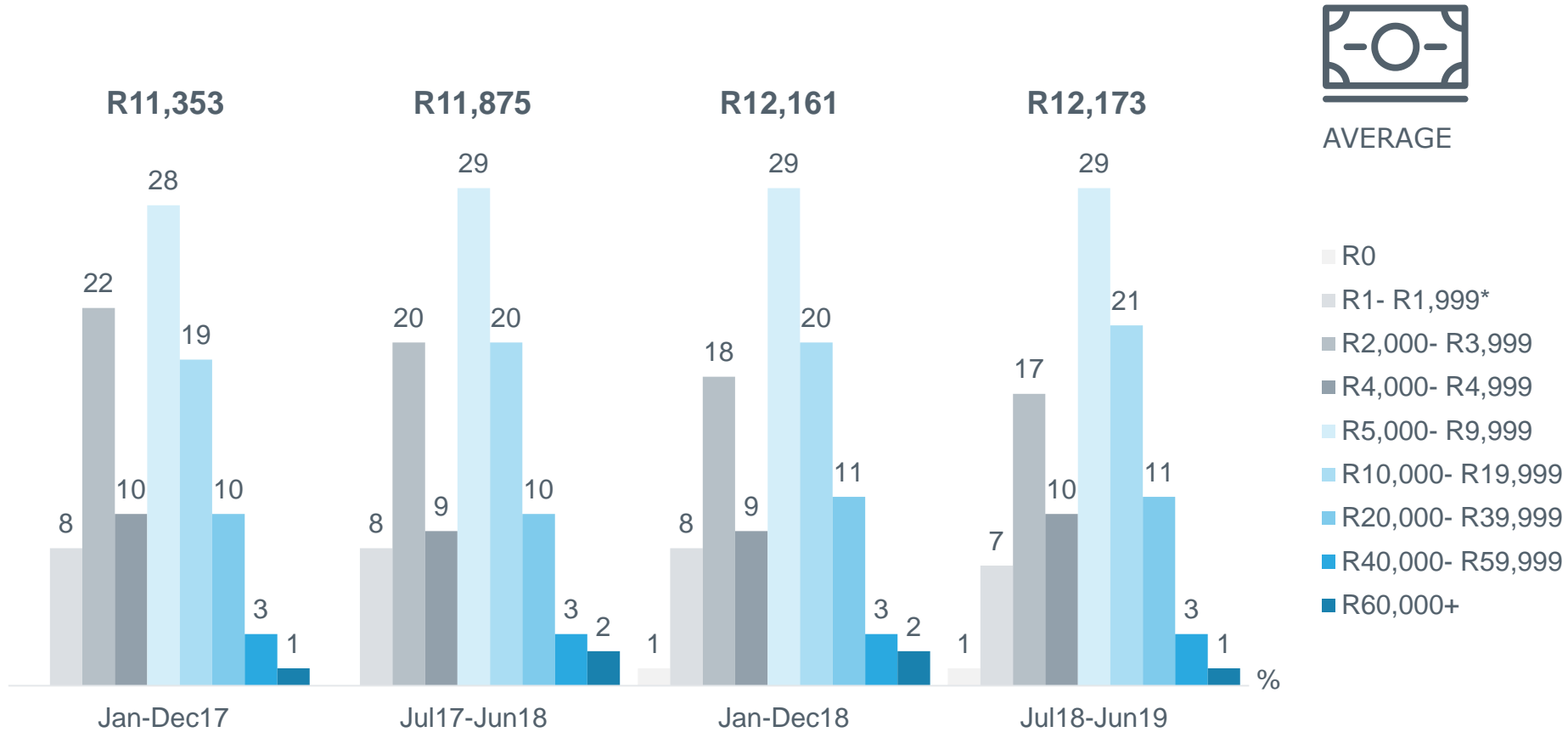


ADULTS 15+



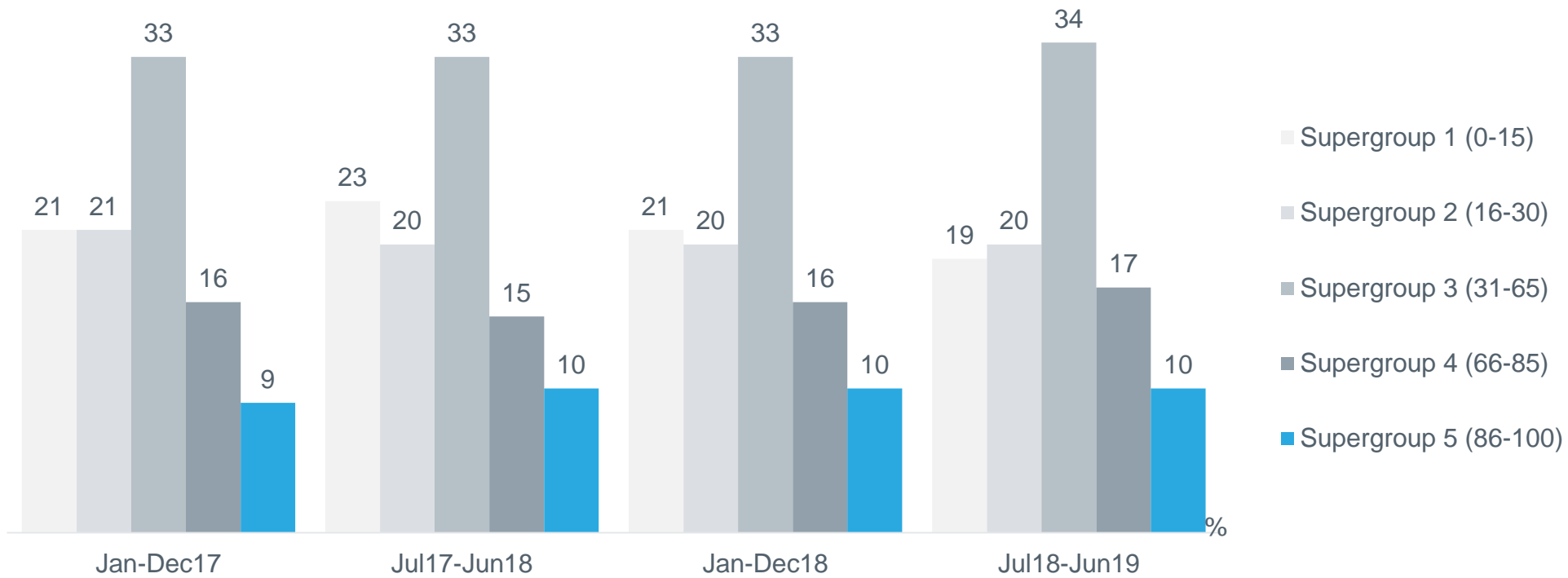
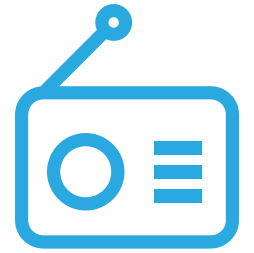
Past 7 day Radio listeners

Monthly household income

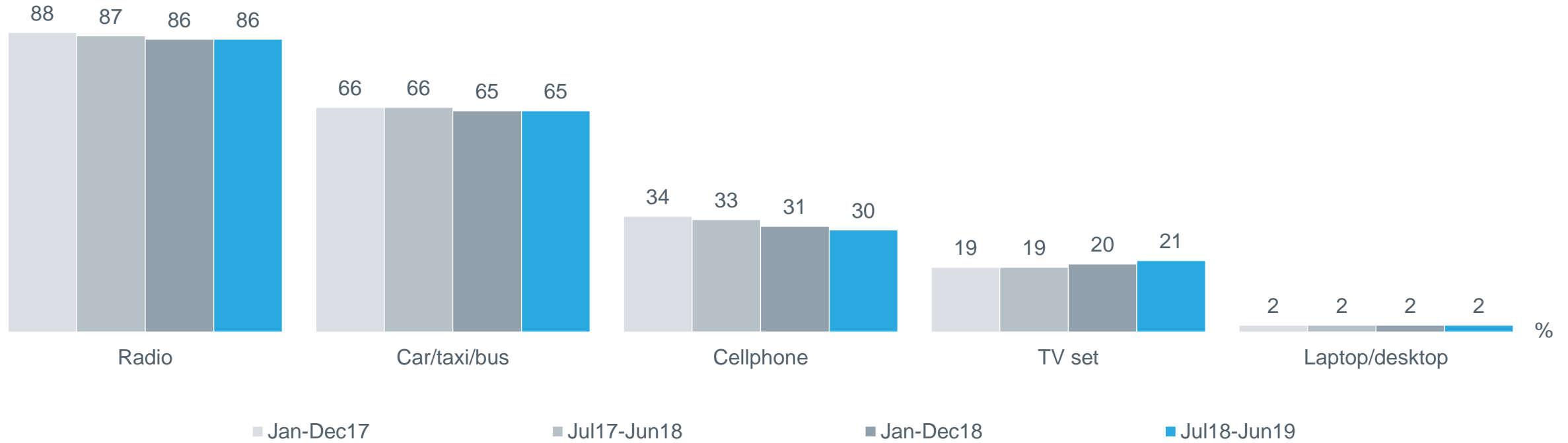
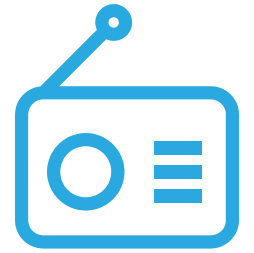


Past 7 day Radio listeners

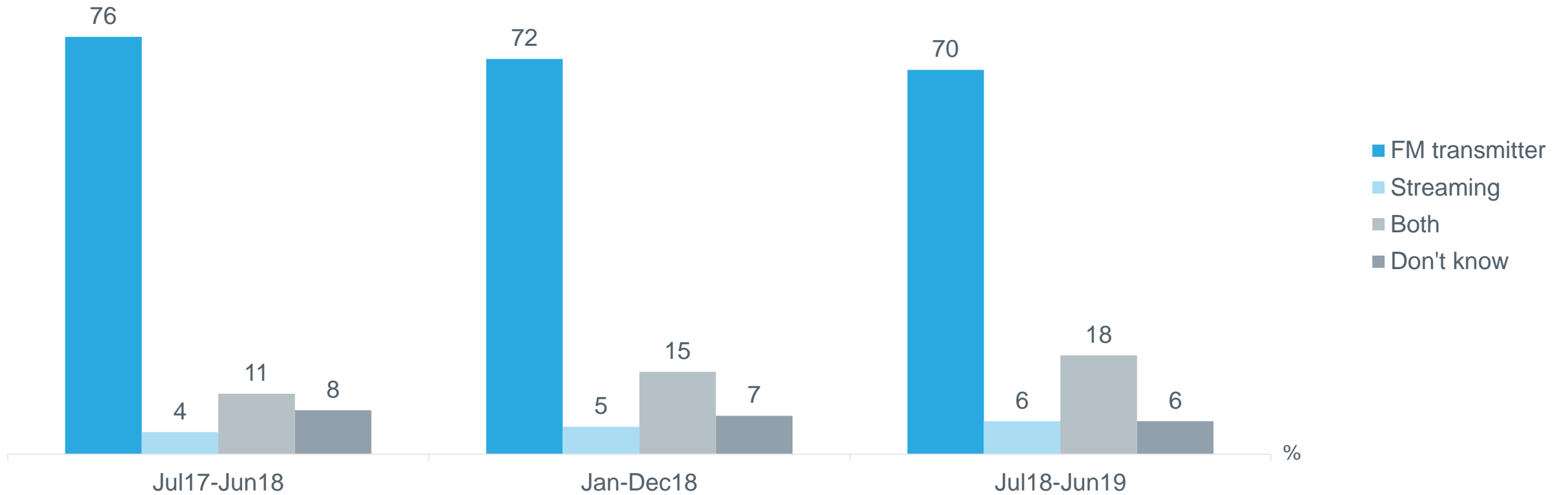
SEM



Listening devices

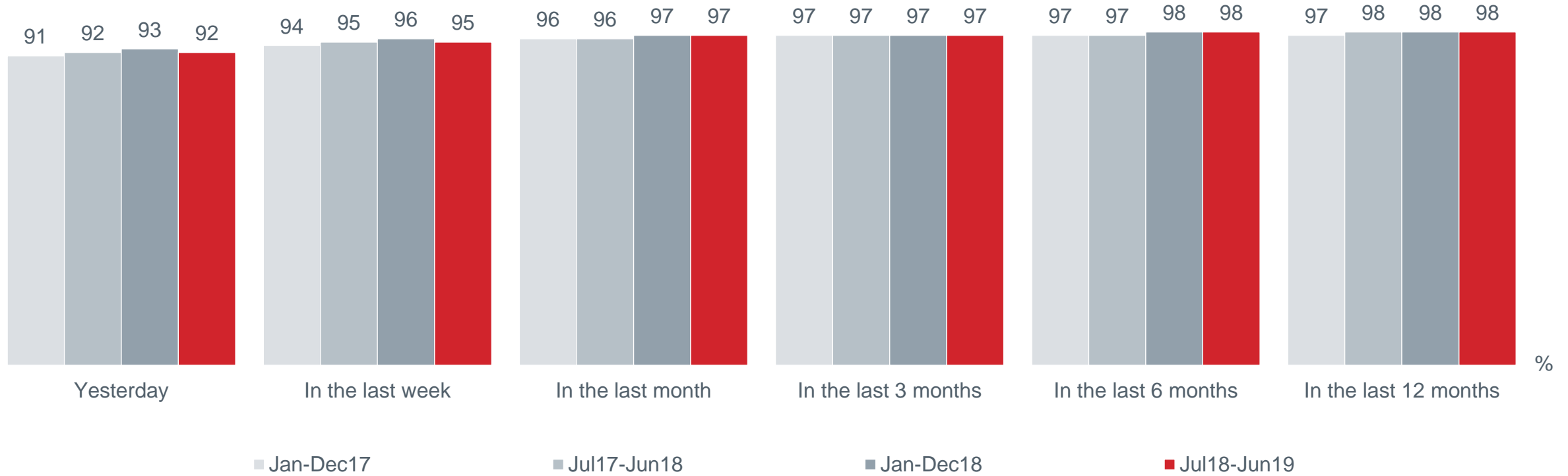
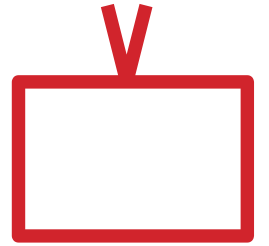


Cellphone listening



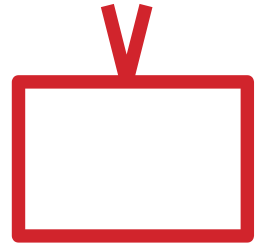
2.
VIEWING
Past 7 days

Viewing reach

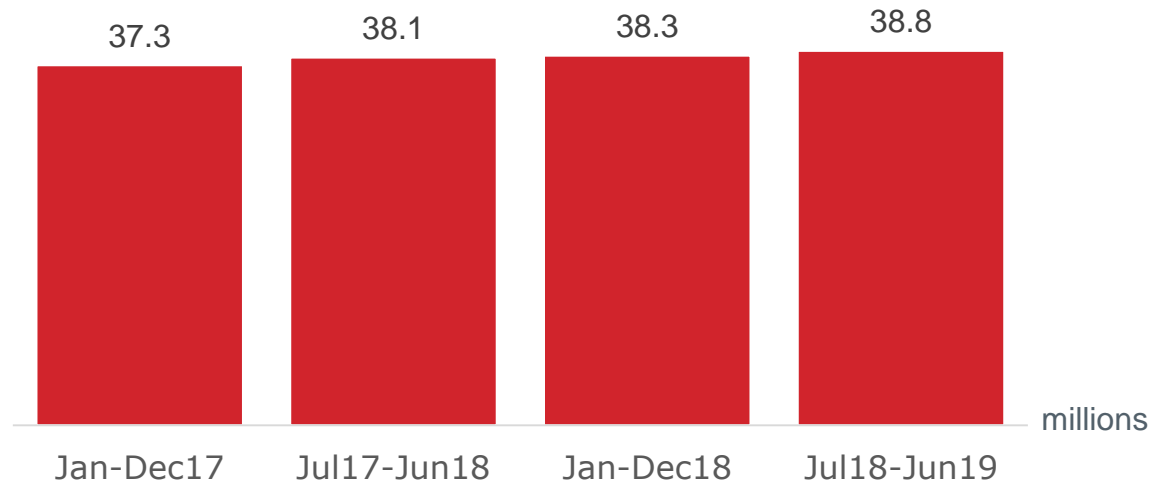


Past 7 day TV viewers

Population

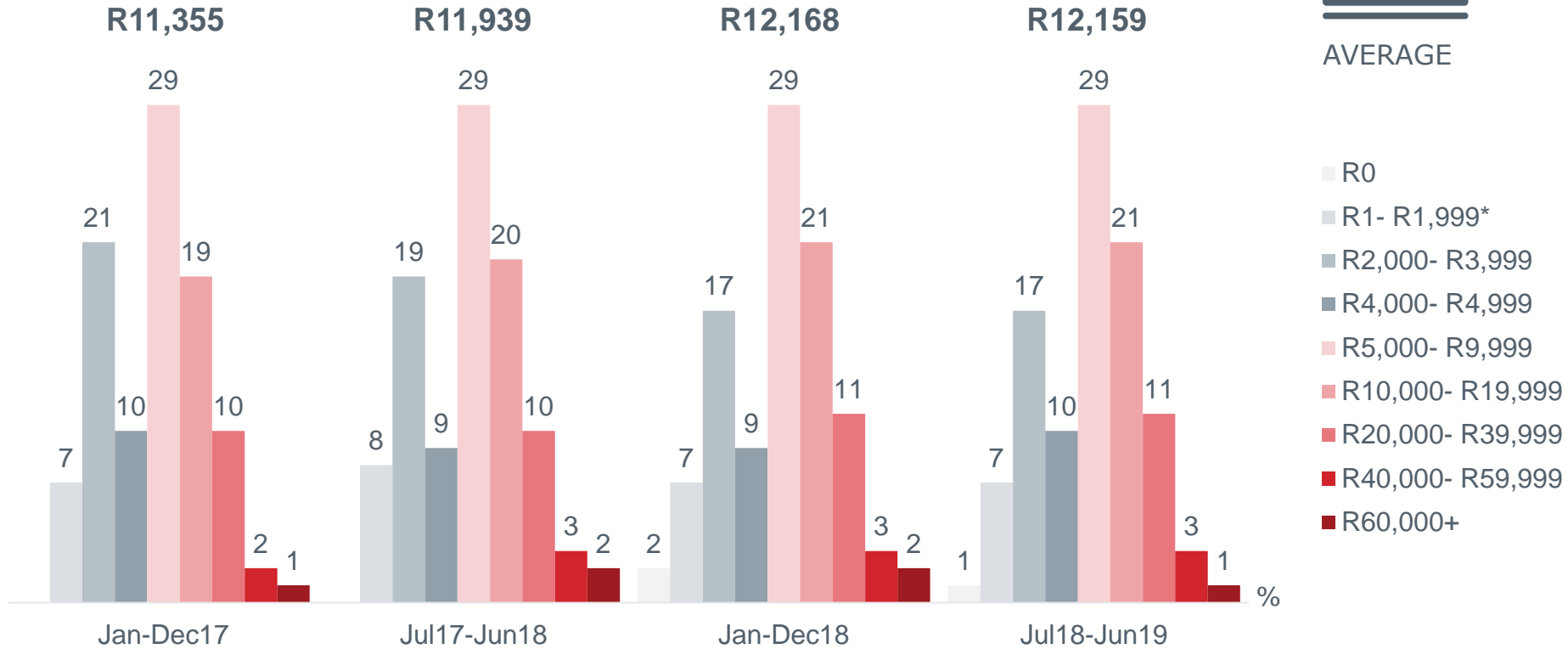
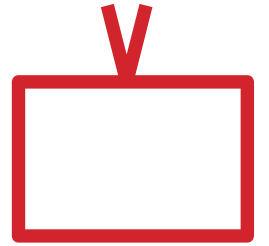


ADULTS 15+



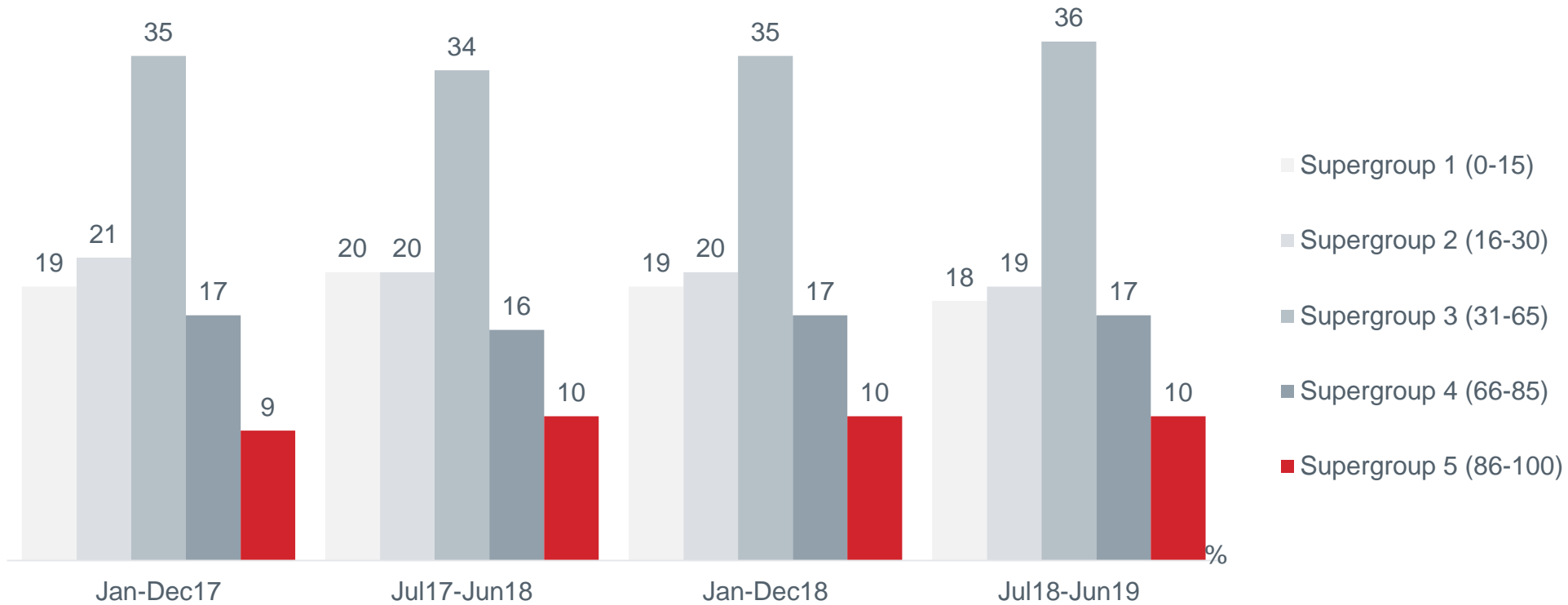
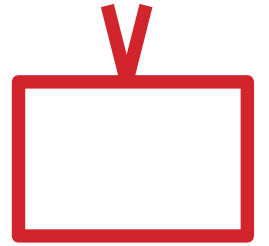
Past 7 day TV viewers

Monthly household income

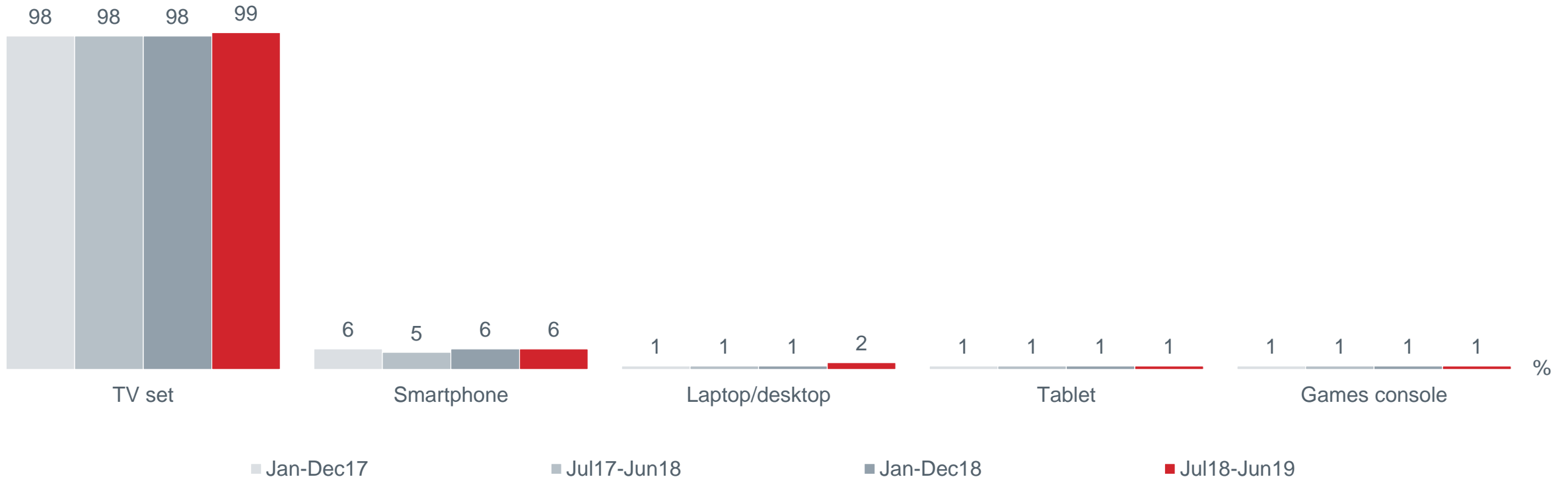
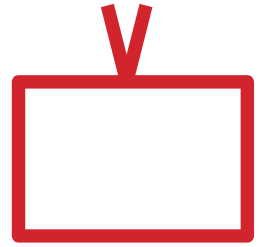


Past 7 day TV viewers

SEM



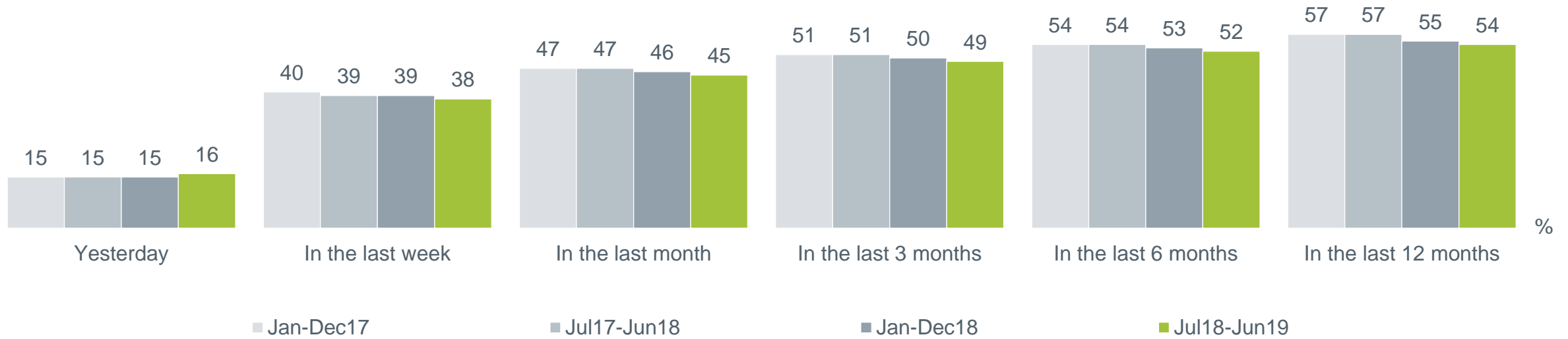
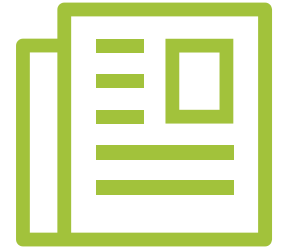
Viewing devices



3.
READING
Past 7 days

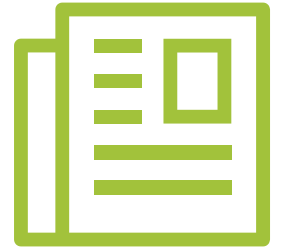


Newspaper reach

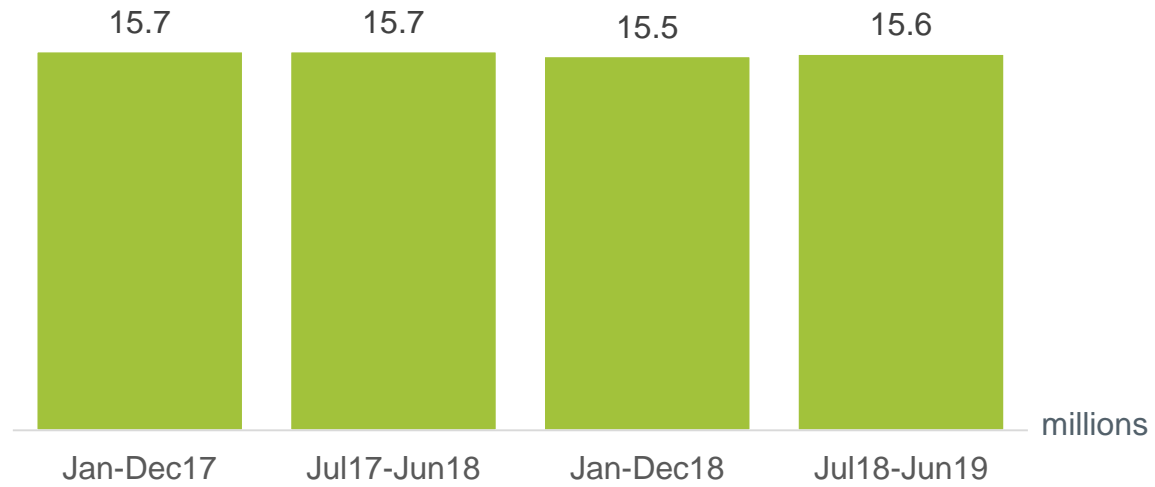


Past 7 day Newspaper readers

Population

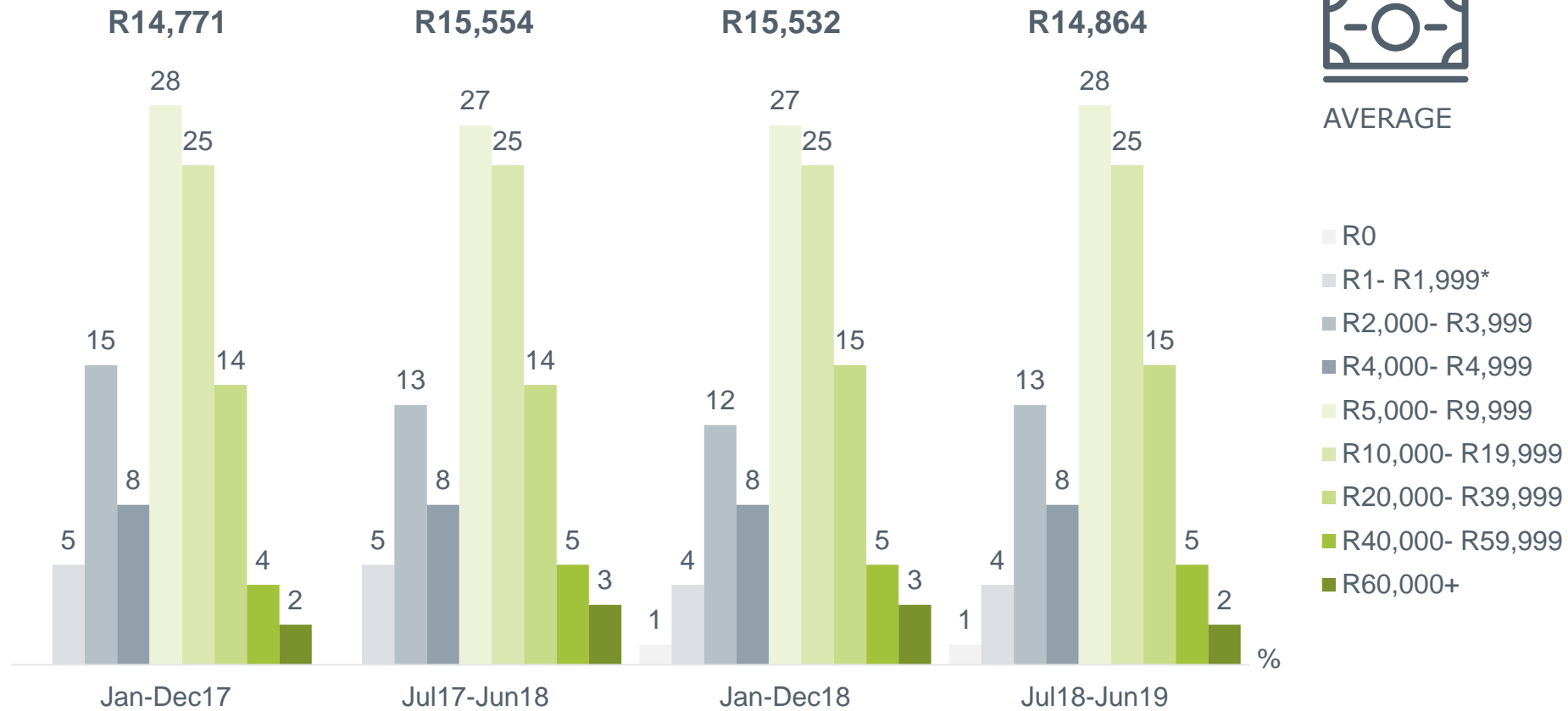
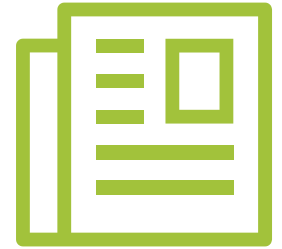


ADULTS 15+



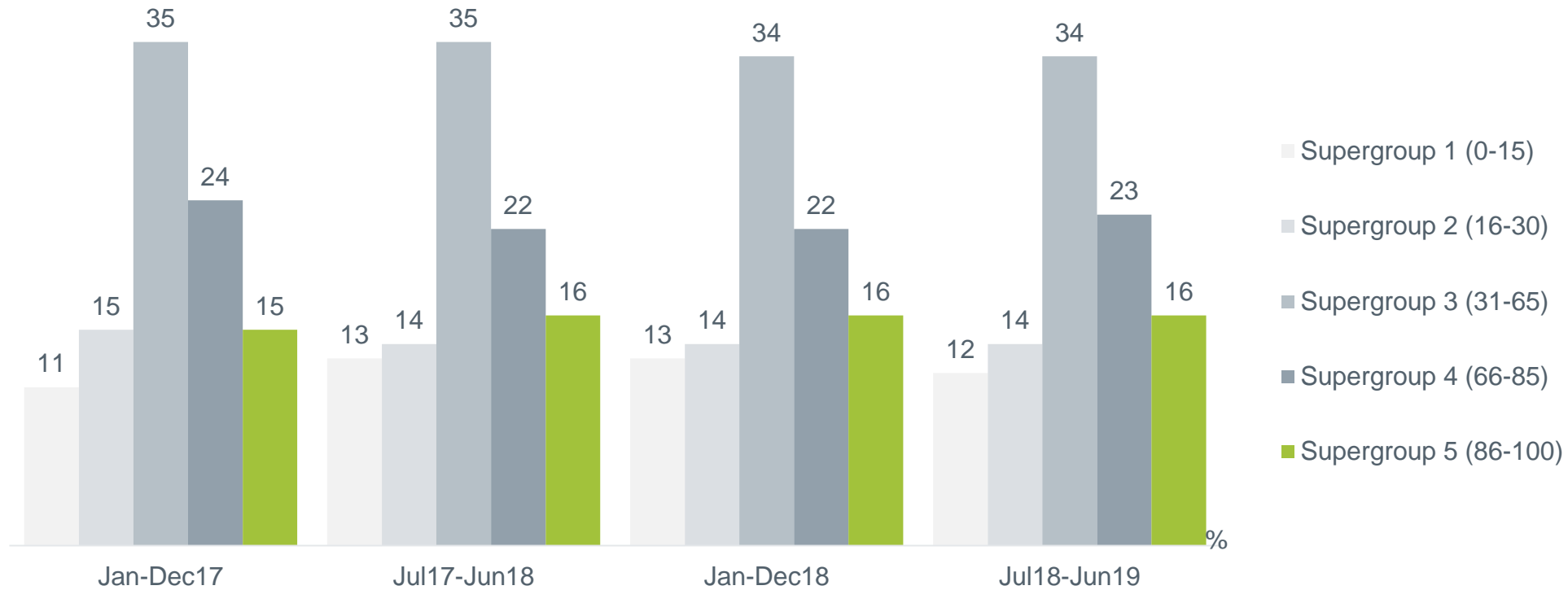
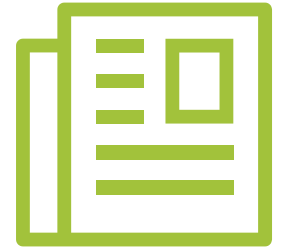
Past 7 day Newspaper readers

Monthly household income

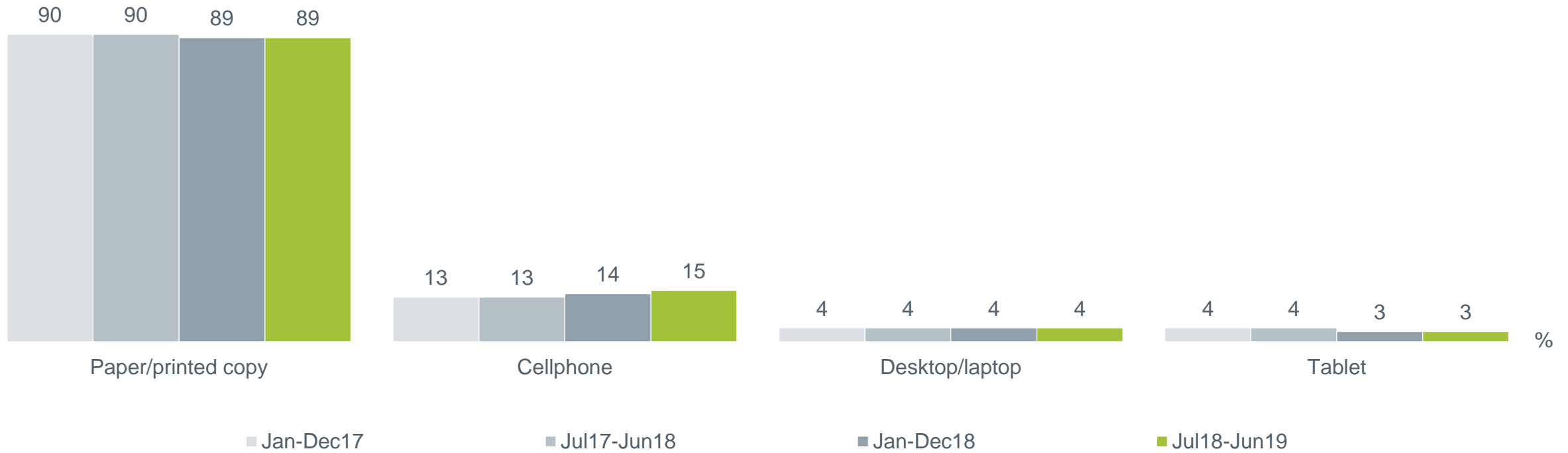
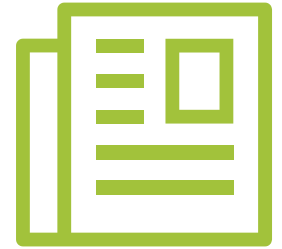


Past 7 day Newspaper readers

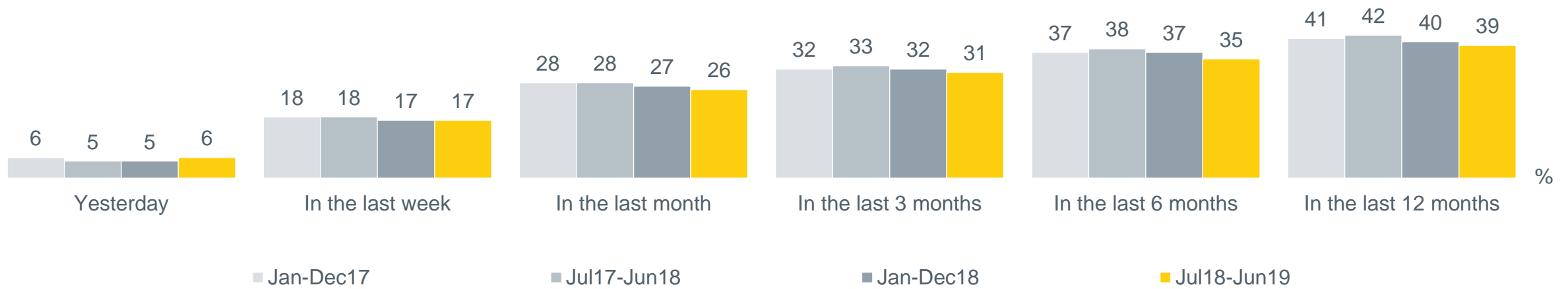
SEM



Newspaper platform usage

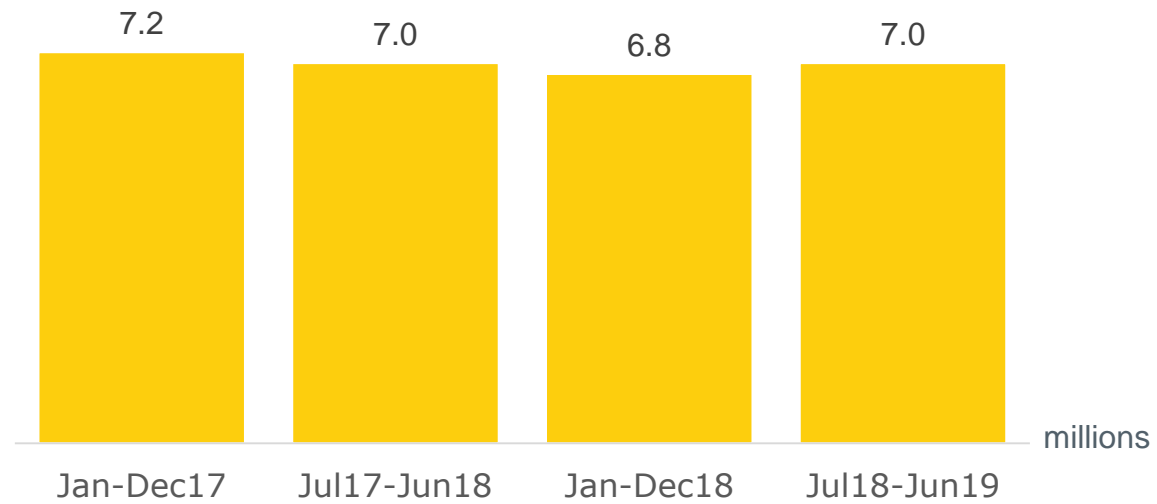


Magazine reach



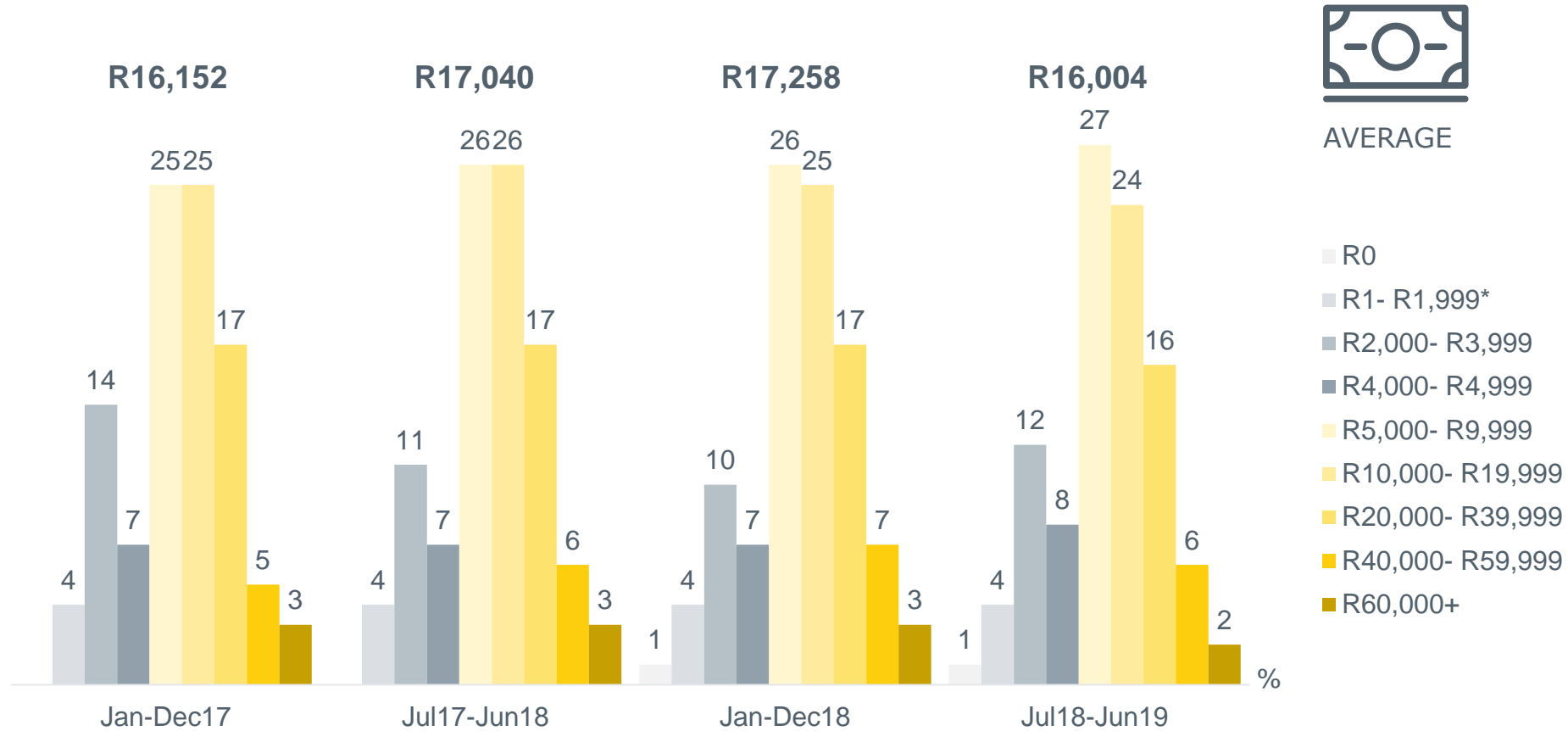
Past 7 day Magazine readers

Population



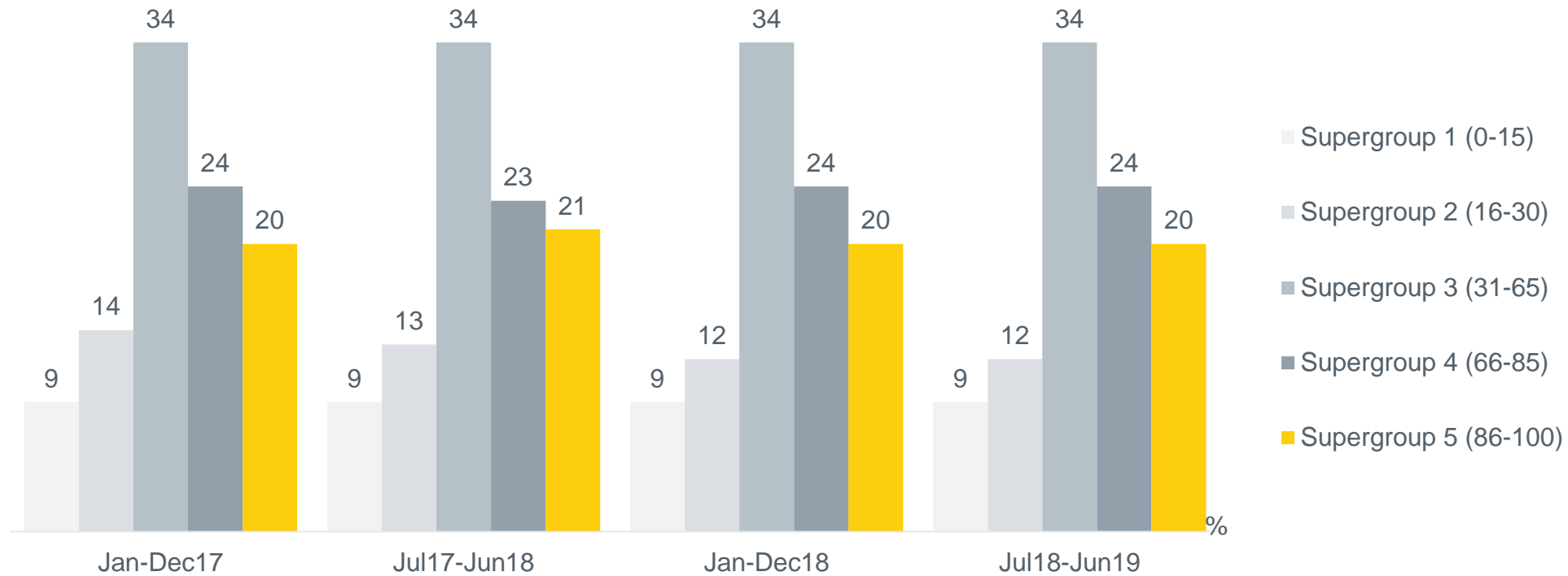
Past 7 day Magazine readers

Monthly household income

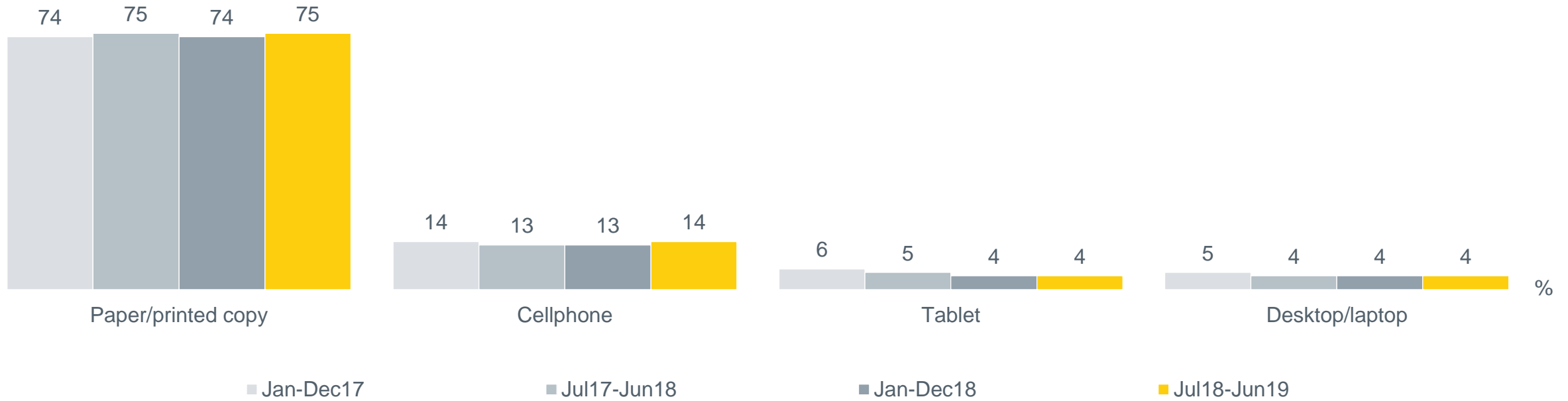


Past 7 day Magazine readers

SEM



Magazine platform usage

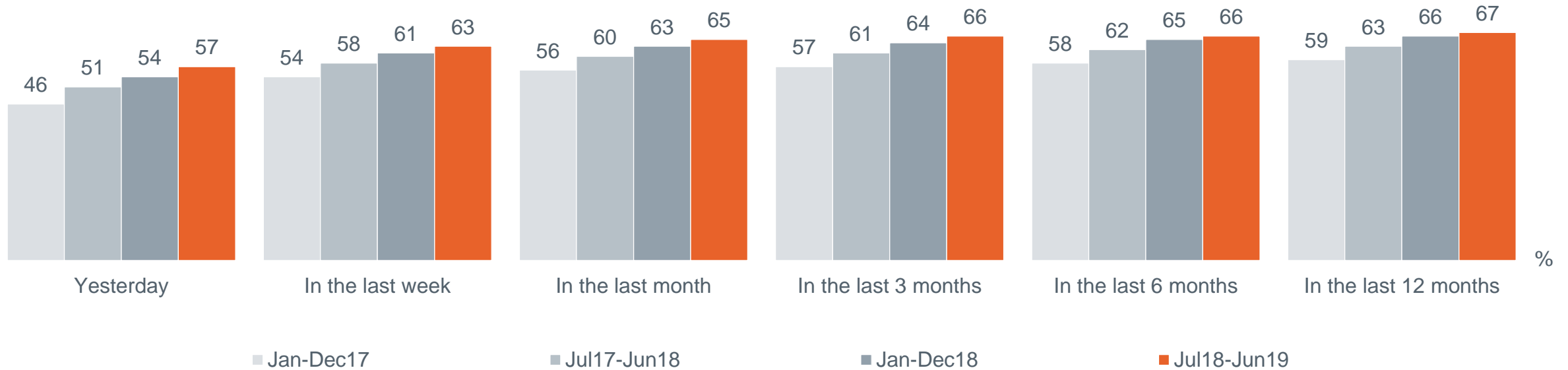


4.

DIGITAL
Past 7 days

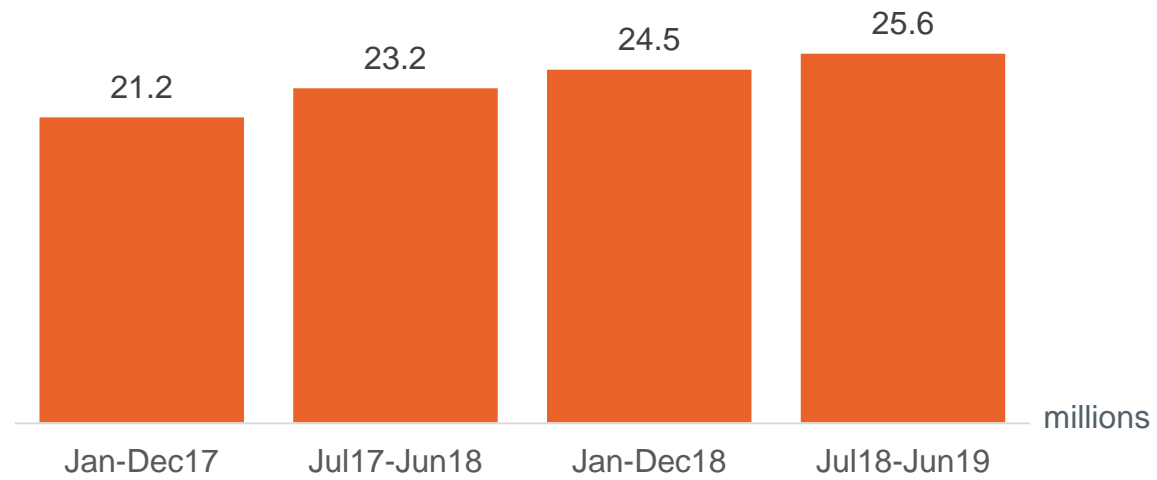


Steady increases in Internet reach



Past 7 day Internet users

Population

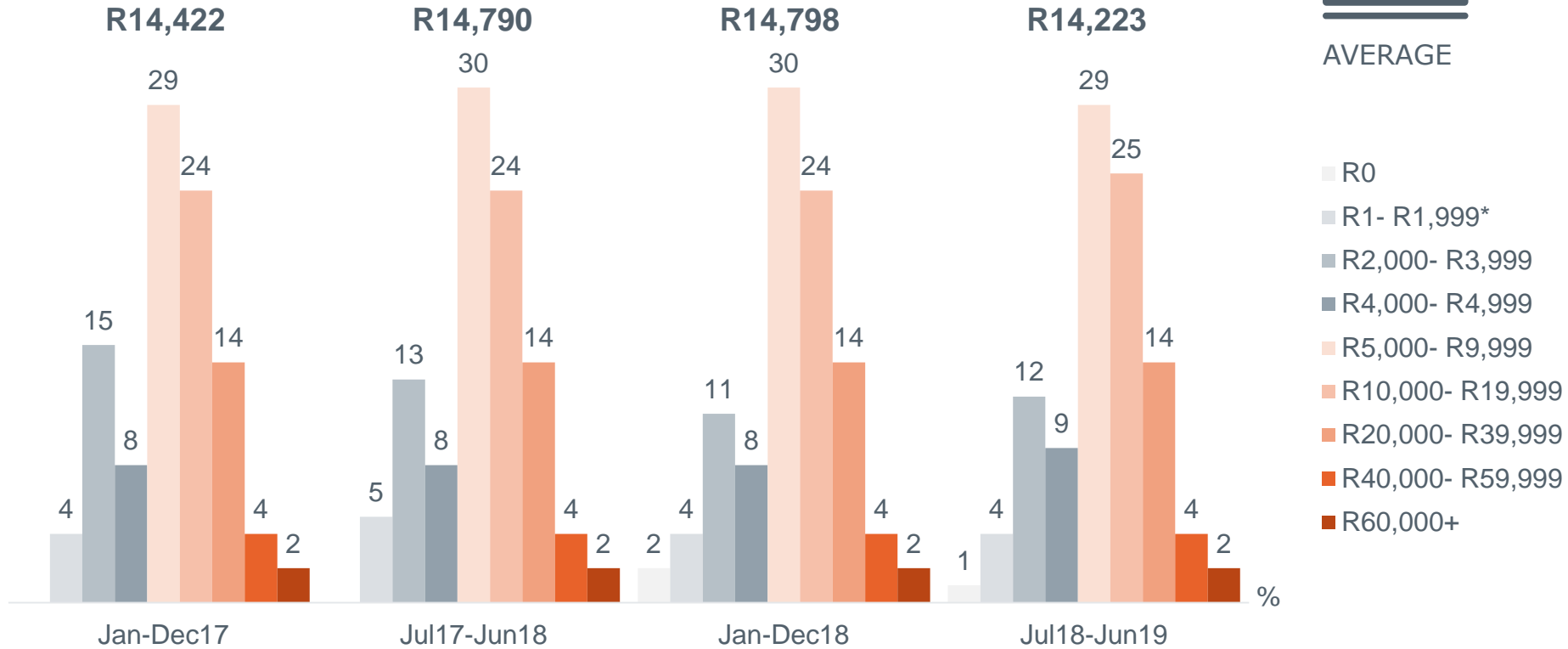


Past 7 day Internet users

Monthly household income

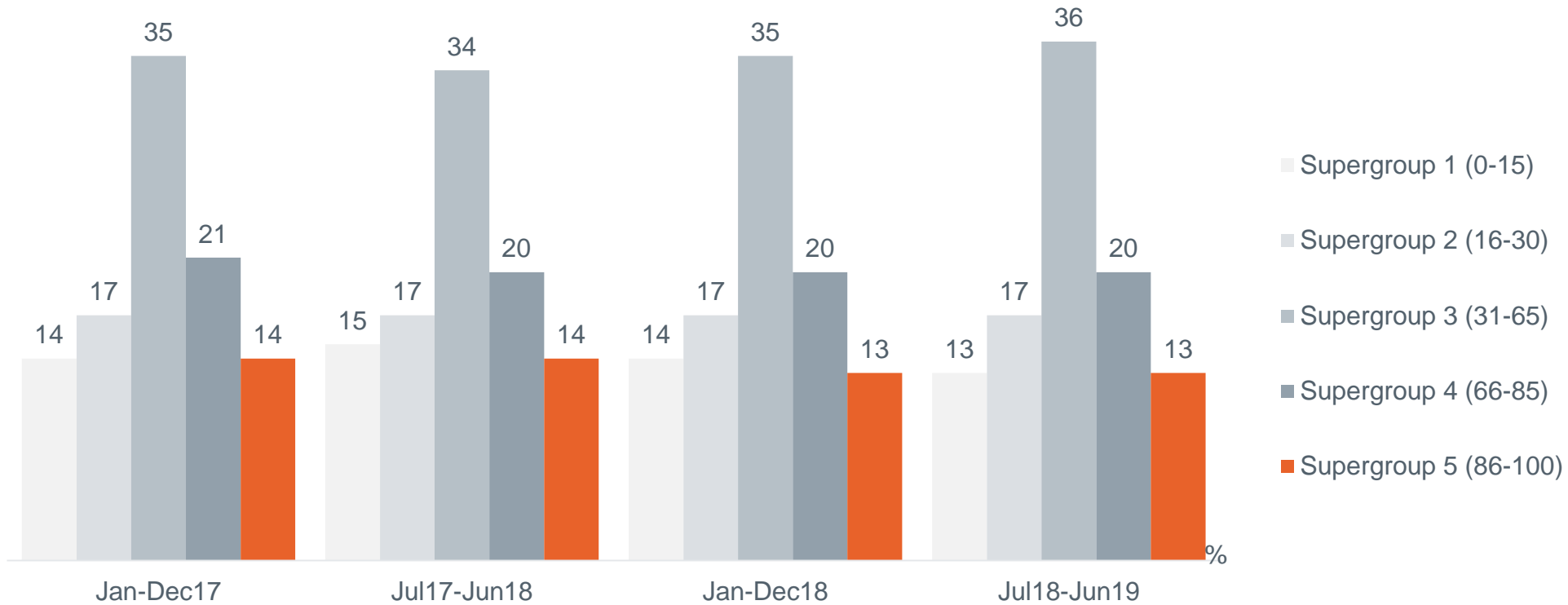


AVERAGE

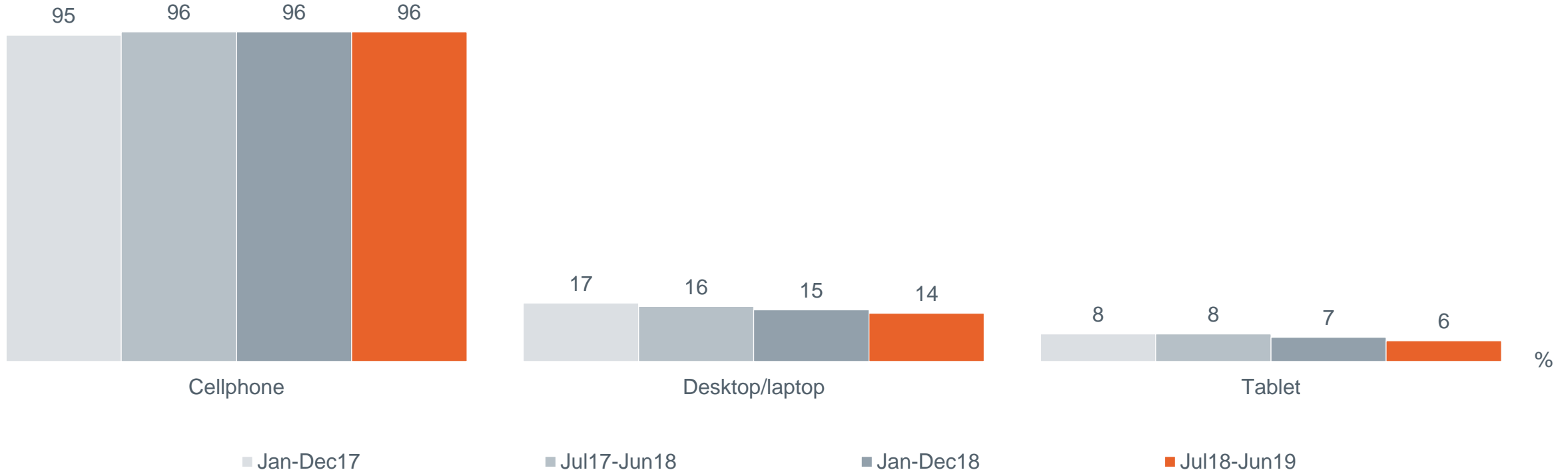


Past 7 day Internet users

SEM

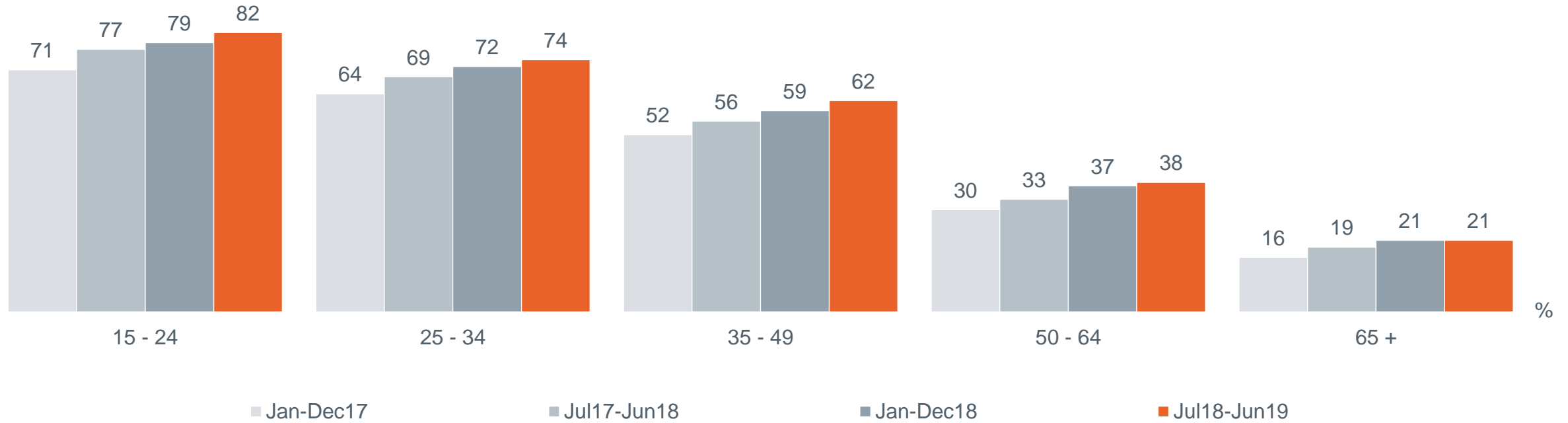


Digital devices

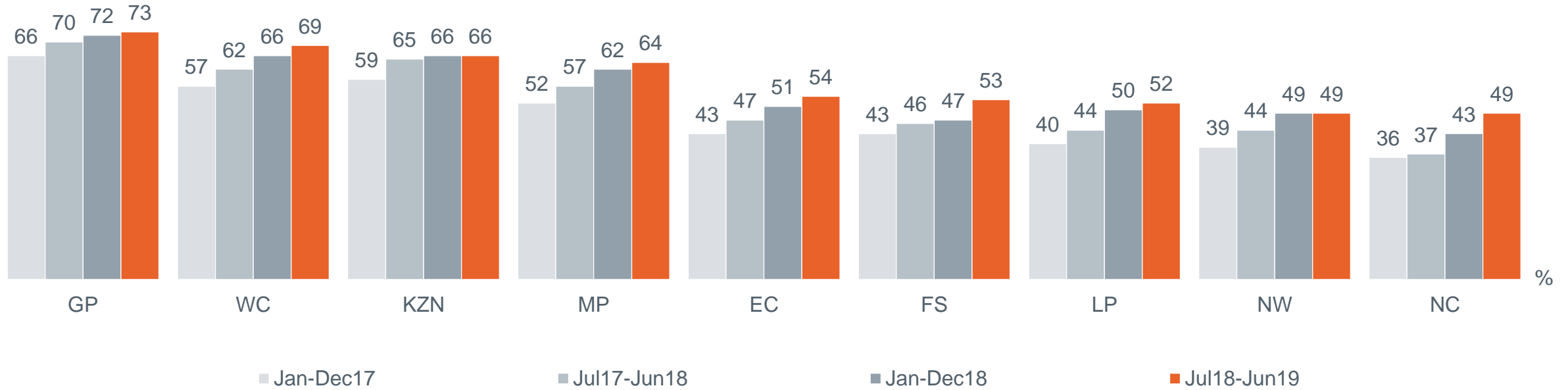


Past 7 day internet usage by age

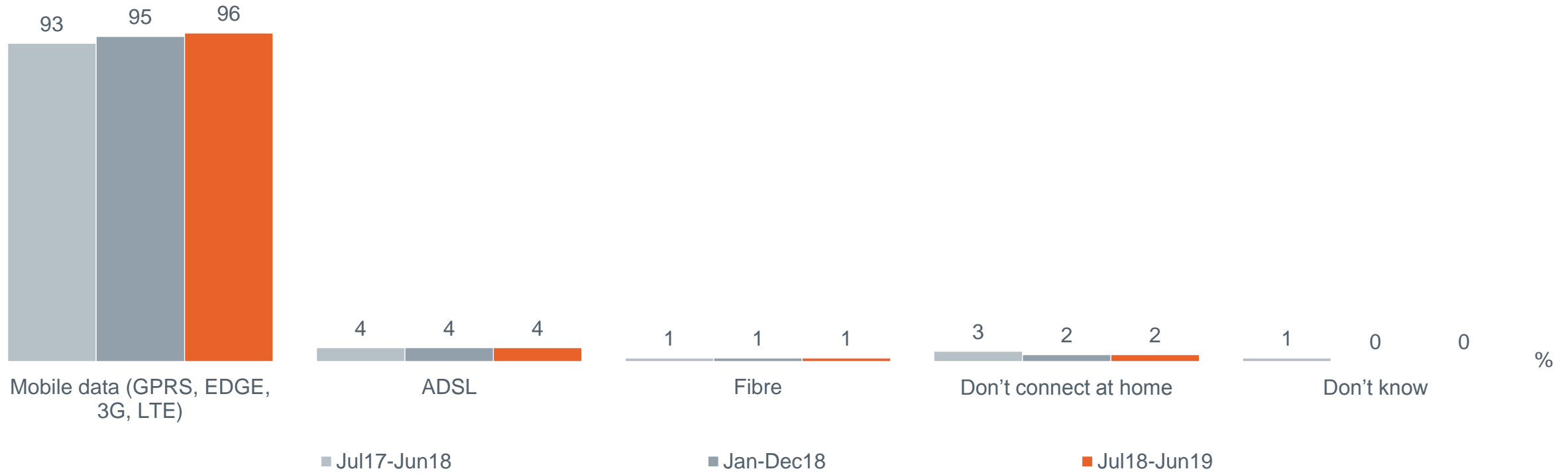
Steady increases across all age groups



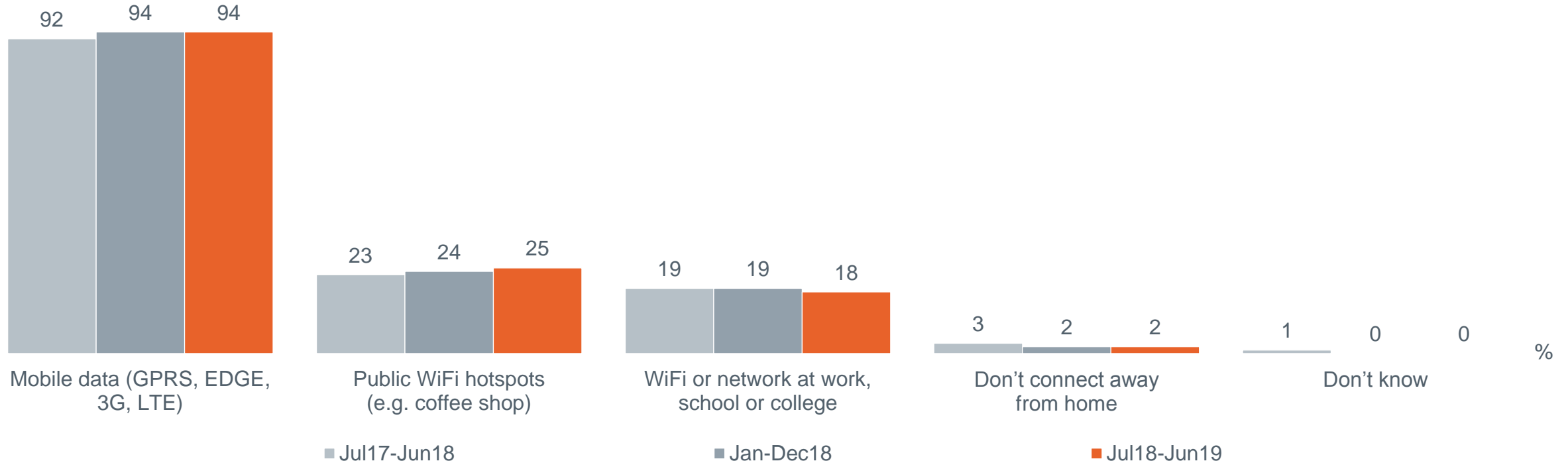
Past 7 day internet usage by province



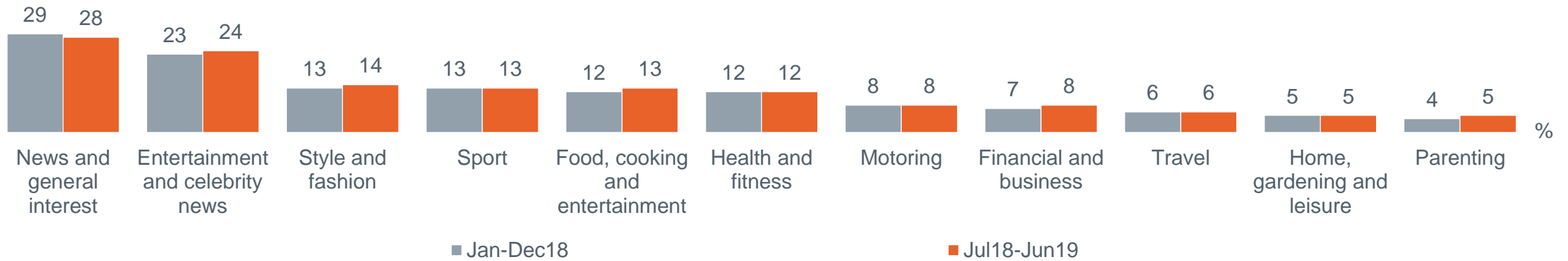
Connection to the internet: At home



Connection to the internet: Away from home



Websites usually visited



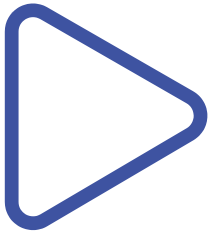
5.
CINEMA
Past month

Cinema reach

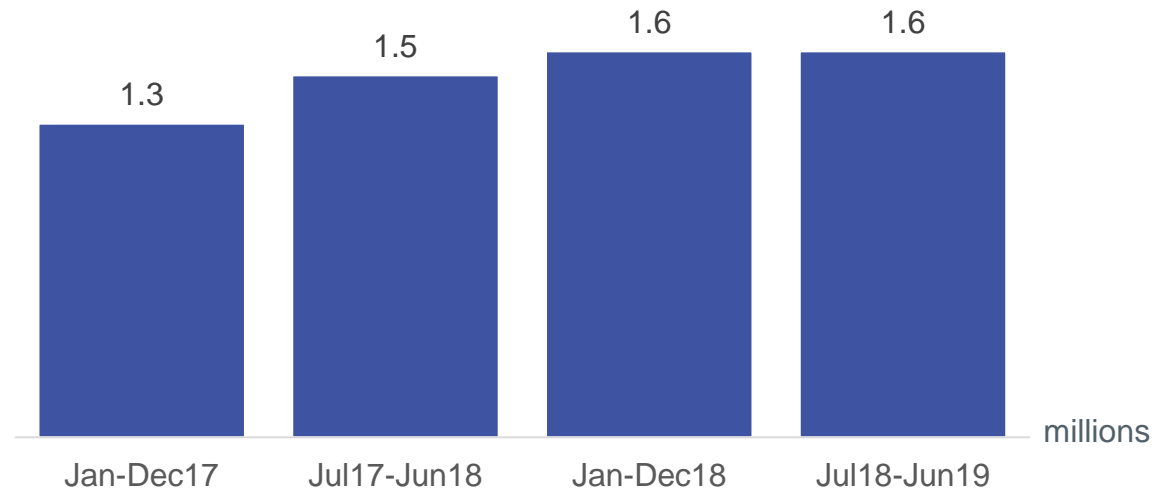


Past month Cinema goers

Population

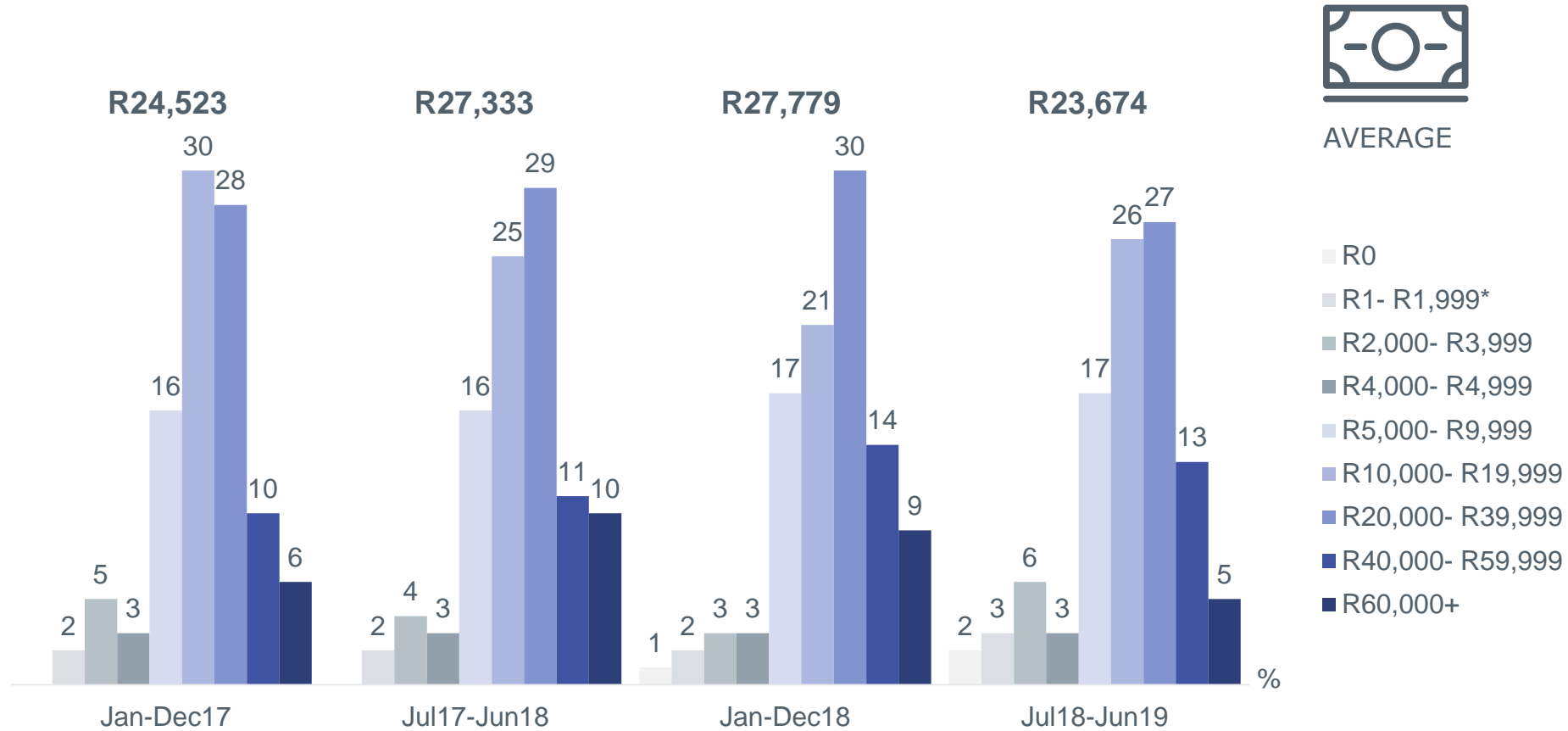
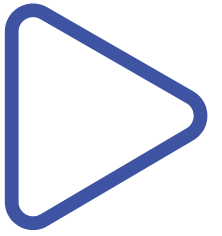


ADULTS 15+



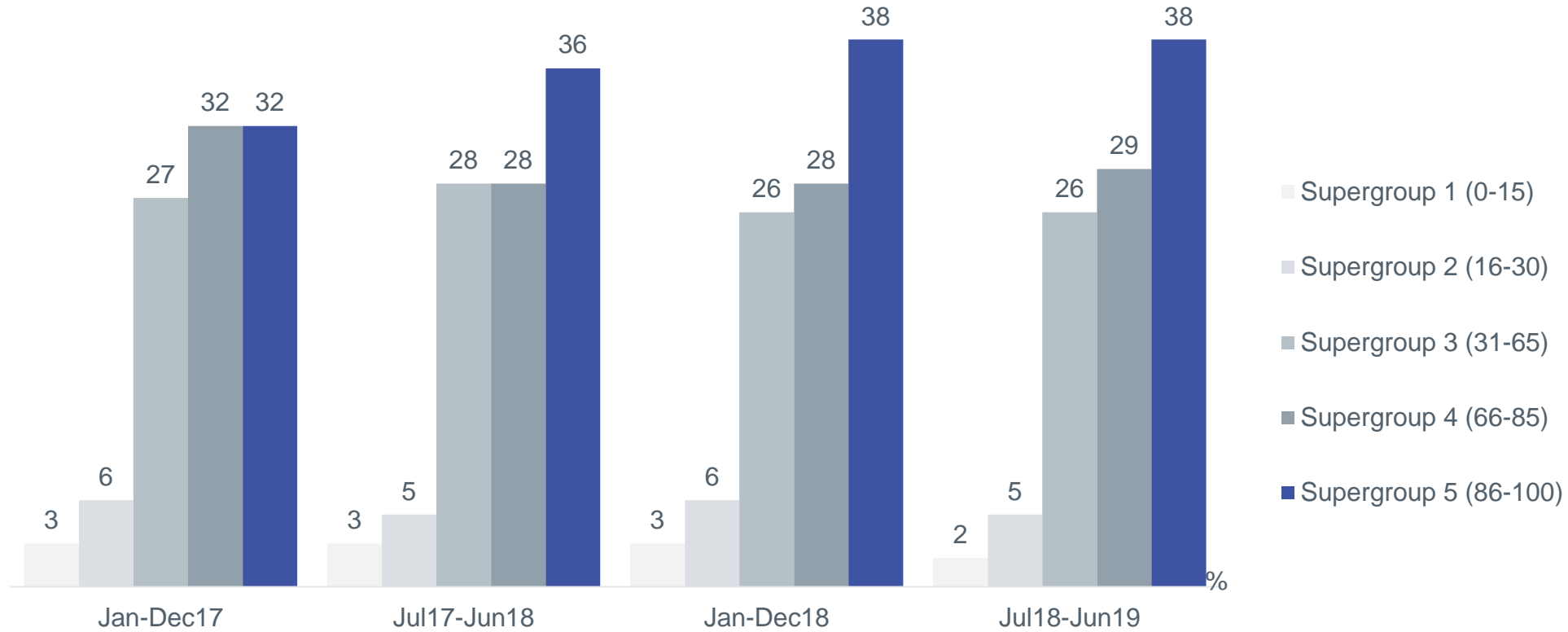
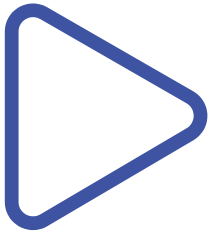
Past month Cinema goers

Monthly household income



Past month Cinema goers

SEM





Establishment Survey
SEMTM 2018

A socio-economic measure that depicts how South Africans live –

based on what they have access to in and near their homes

The power of SEM



Reflective of our unequal society and provides a more realistic picture of SA



Relevant and differentiating
Meaningfully differentiates how people live, along a spectrum from low to high socio-economic living



Stable. A person's score doesn't change quickly over time (focus on structural items and infrastructure elements, low reliance on durables, no reliance on technology items)

















Flexibility of analysis to meet target market requirements – output is a continuum from 0 to 100, therefore can be sliced and diced as required



Good predictor of media and purchasing behaviour, and **highly correlated** to various demographics and attitudes

The 14 SEM inputs

-  Built-in kitchen sink
-  Water source/Hot running water
-  Type of toilet
-  Motor car
-  Microwave oven
-  Washing machine
-  Deep freezer which is free standing/
Side-by-side fridge and freezer
-  Floor polisher or vacuum cleaner
-  Type of roof material
-  Type of floor material
-  Number of sleeping rooms
-  Home security service
-  Post Office near where you live
-  Police station near where you live



Focus on structural items



Low reliance on durables

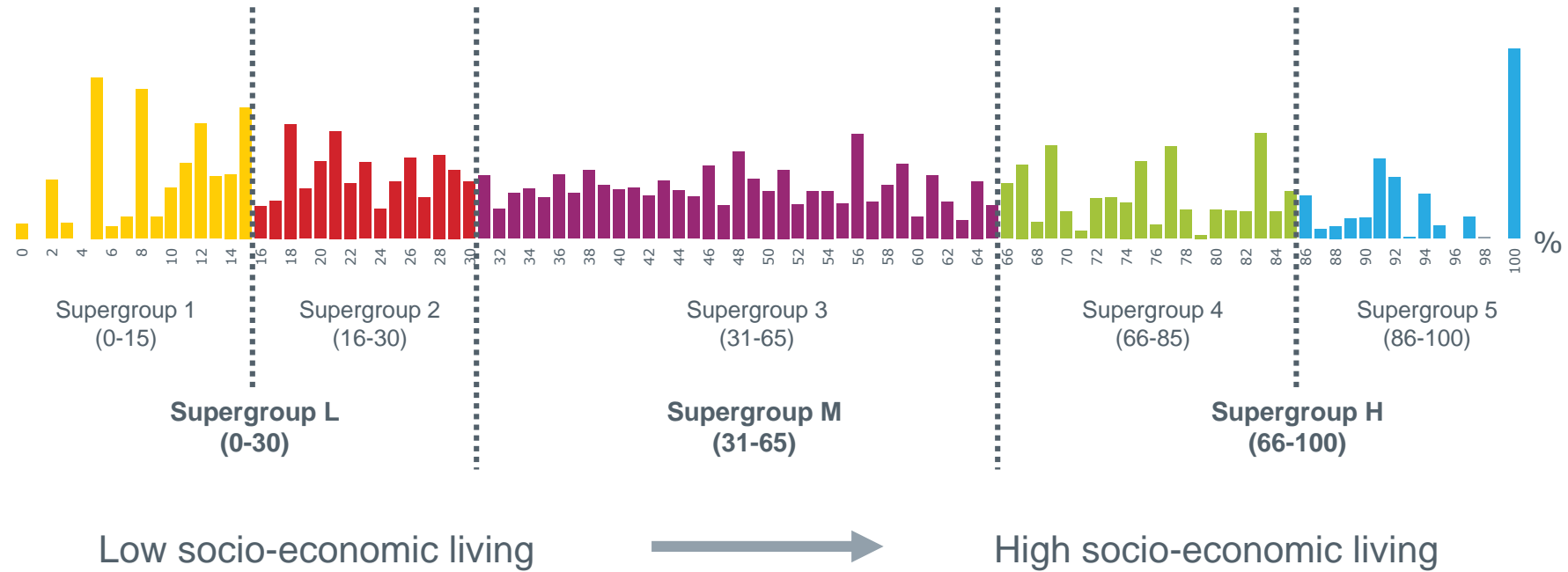


No reliance on
technology items



Short and easy to use

The SEM 2018 continuum

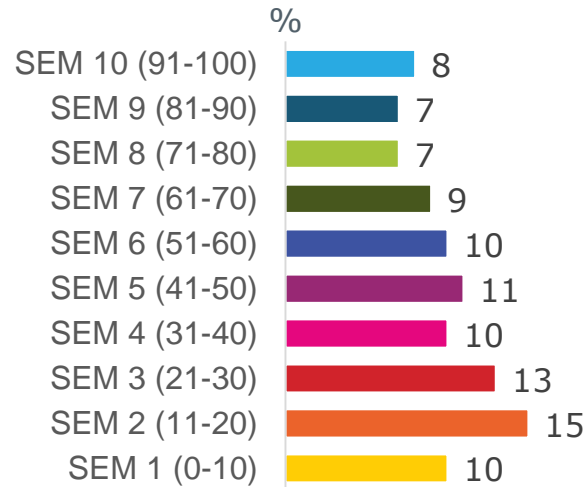


Fully customisable: The SEM continuum allows flexibility to group based on any combination of SEM scores to meet your target market requirements

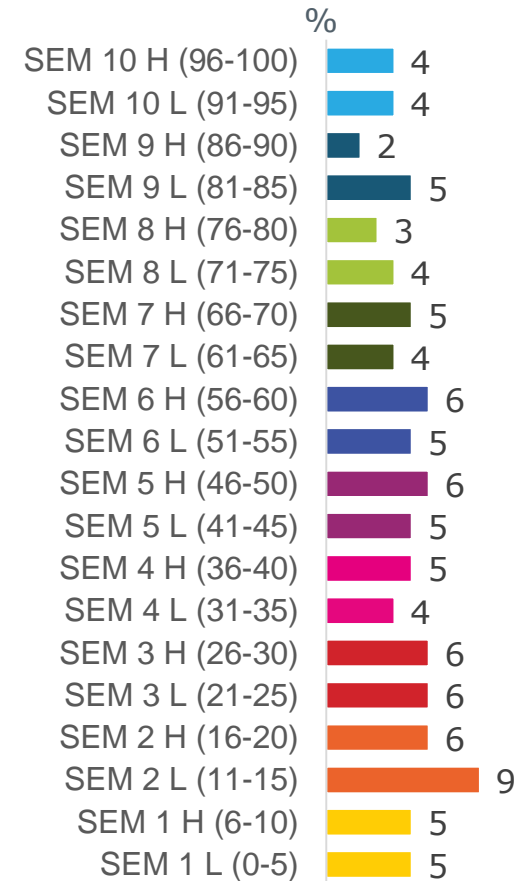
For example: 0-40; 41-95; 96-100

Different standard SEM outputs available

10 groups:
For ease of use



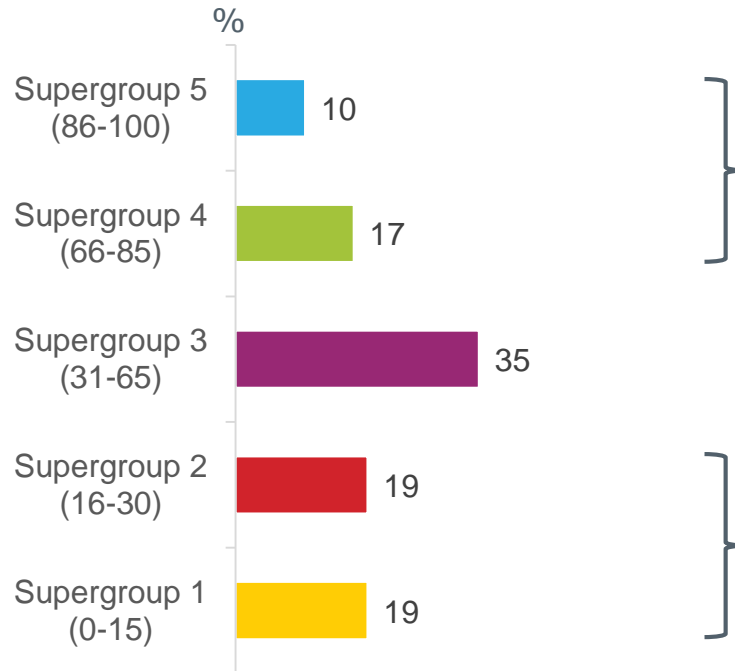
20 groups:
For finer targeting



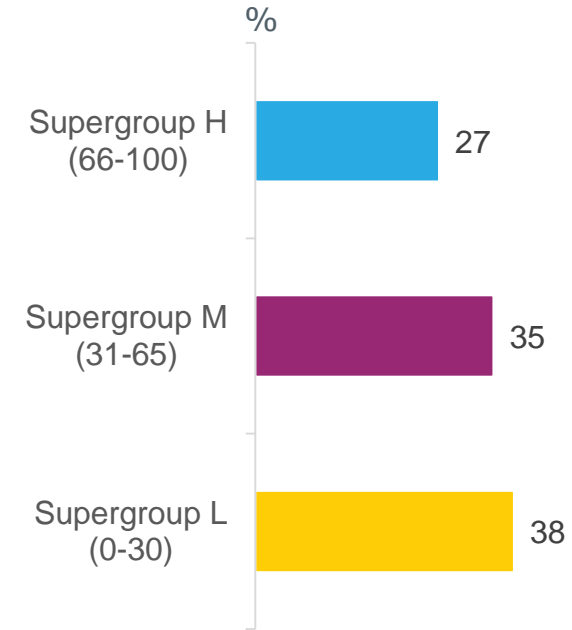
Both of these outputs are based on equal distribution of scores (SEM has been validated as a good continuum)

Different standard SEM outputs available

5 supergroups:
For simpler targeting

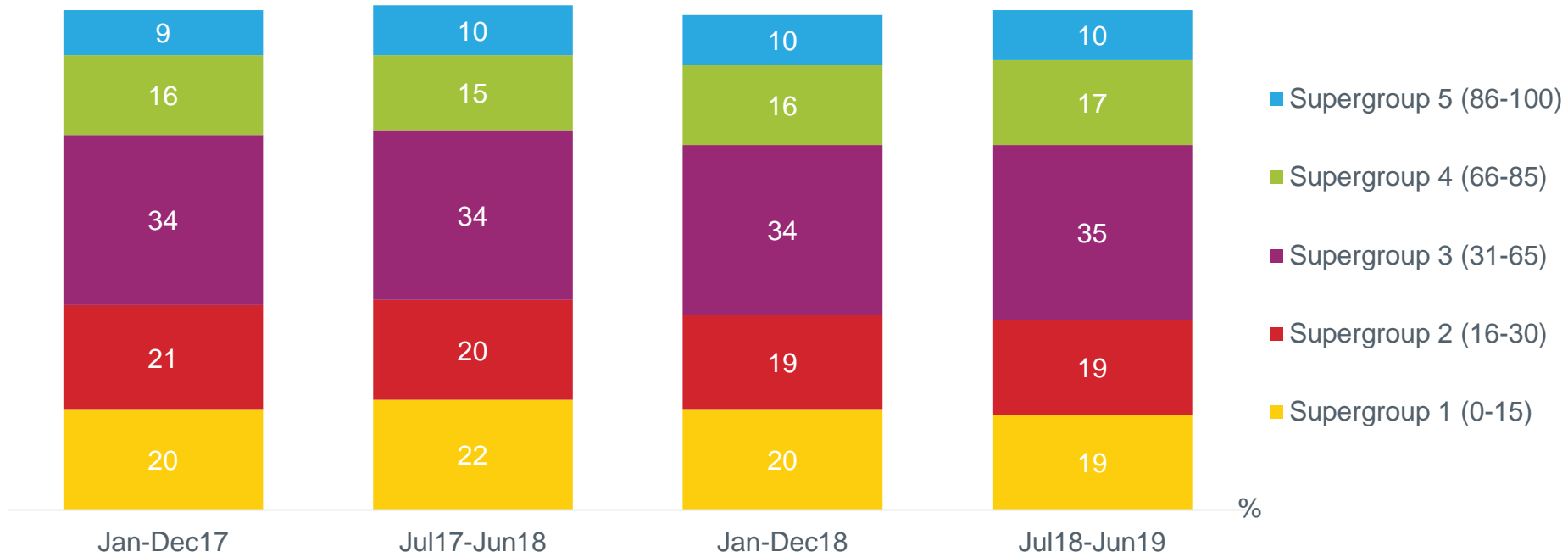


3 supergroups:
For macro targeting and mobile solutions



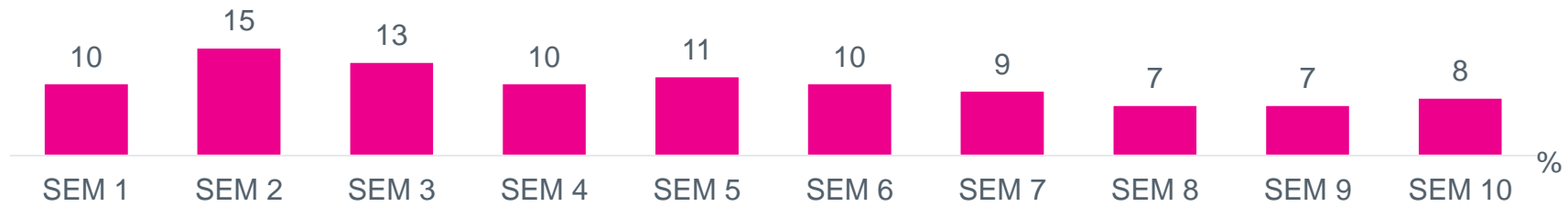
Supergroup cut-points are based on where changes in lifestyle can be noted from segment profiling

SEM supergroups tracked

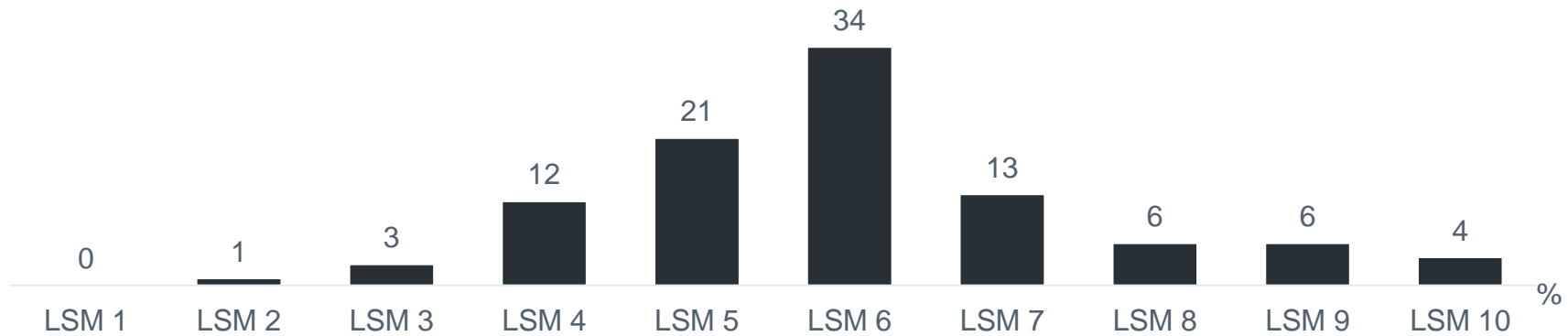


ES SEM vs. ES LSM

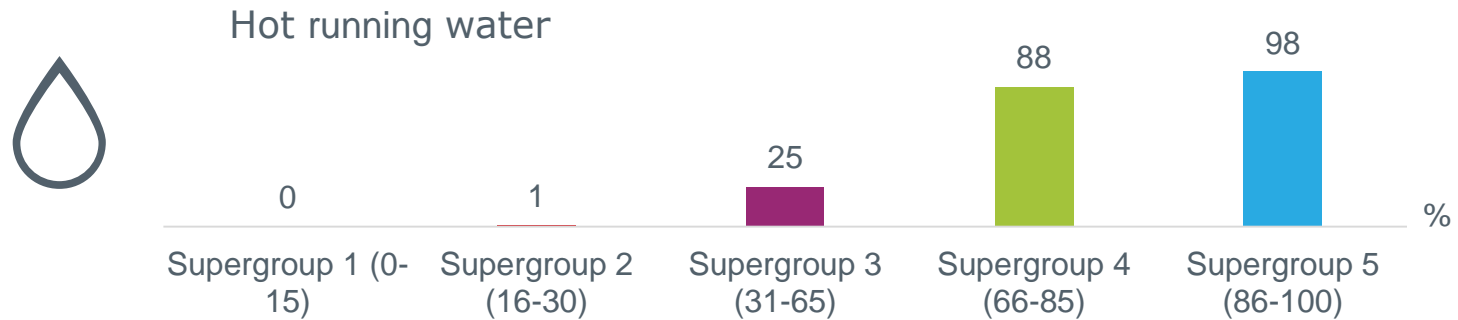
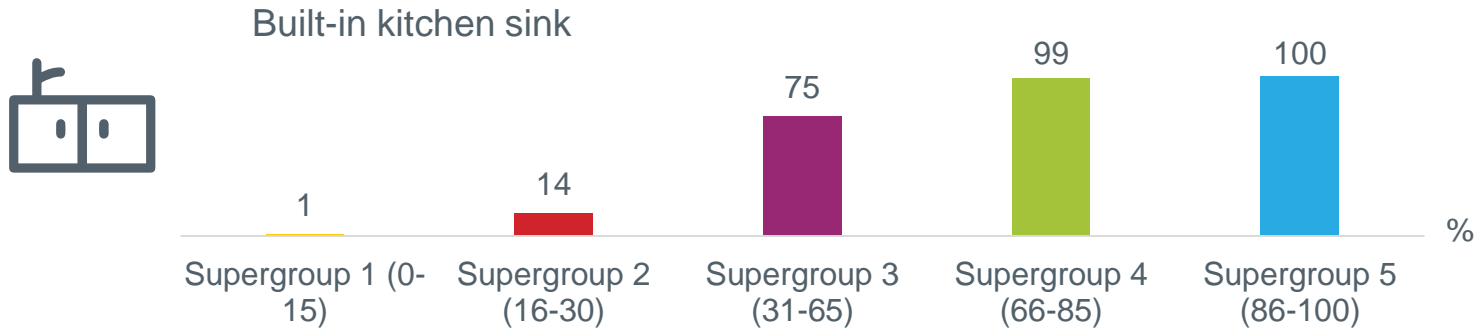
SEM:



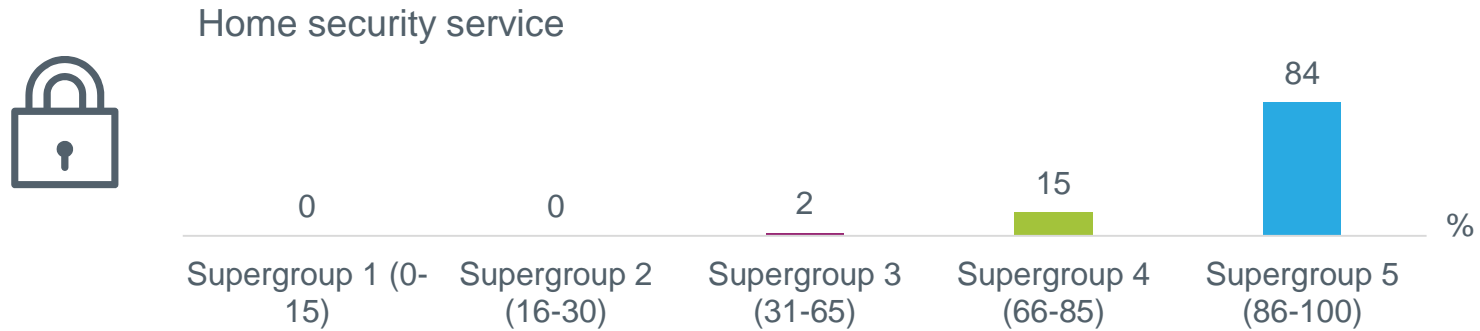
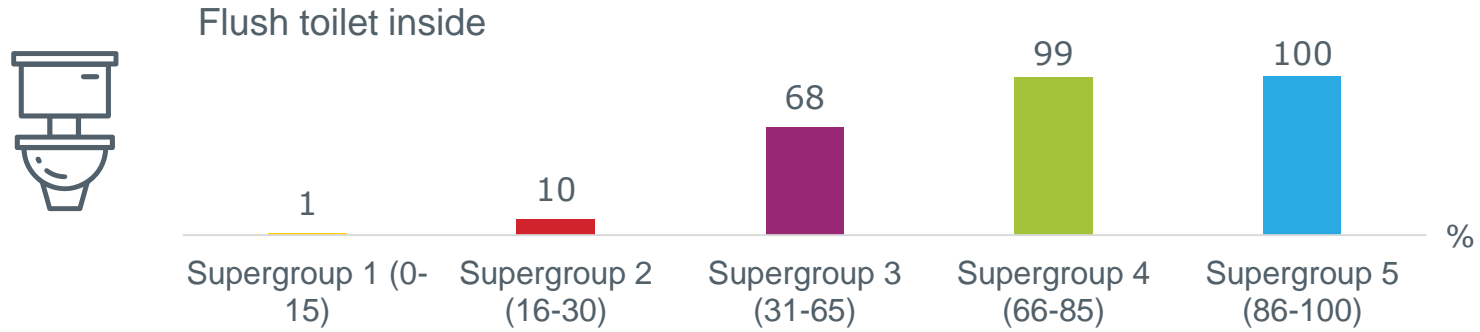
LSM:



SEM 2018 key input variables



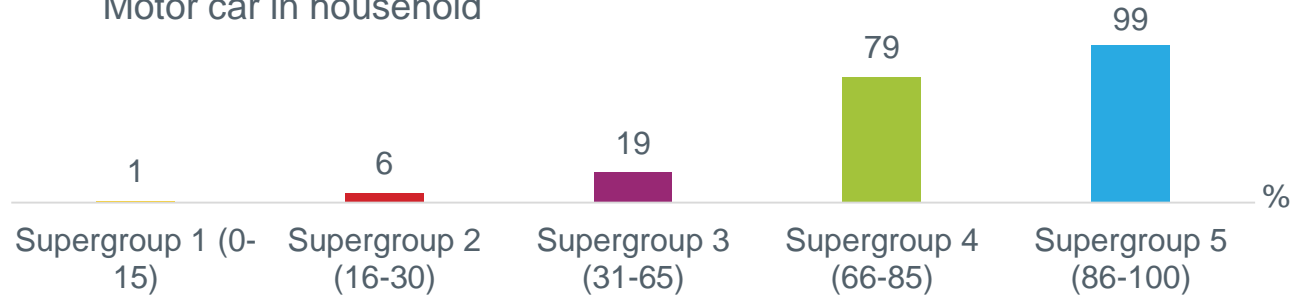
SEM 2018 key input variables



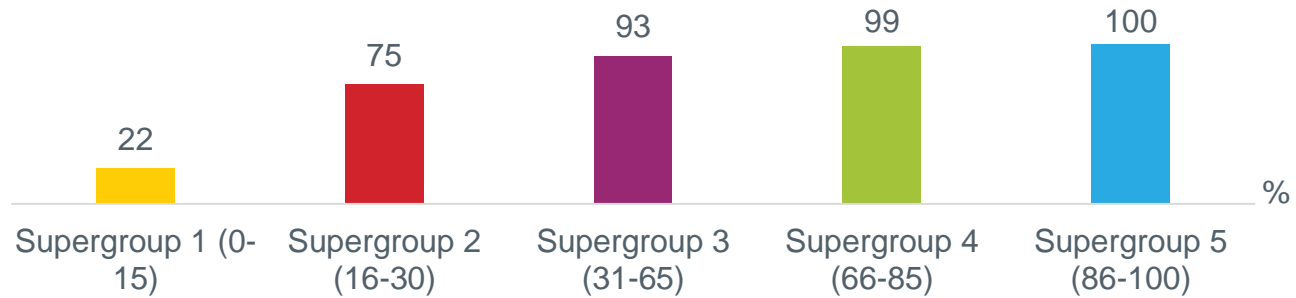
SEM 2018 key input variables



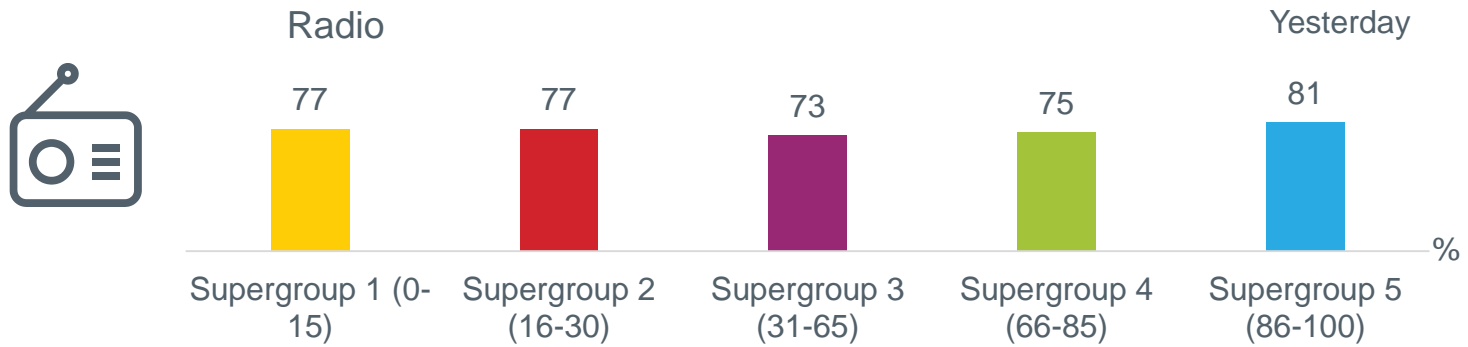
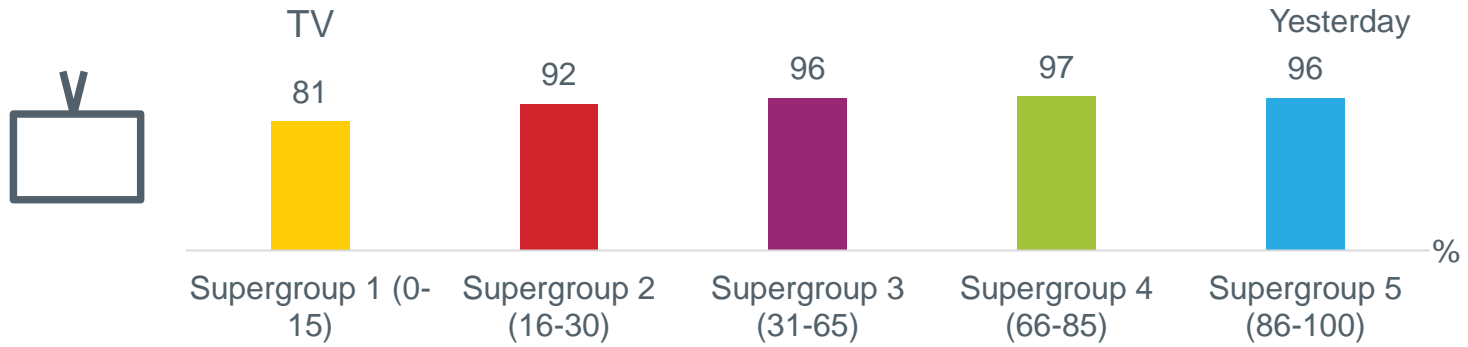
Motor car in household



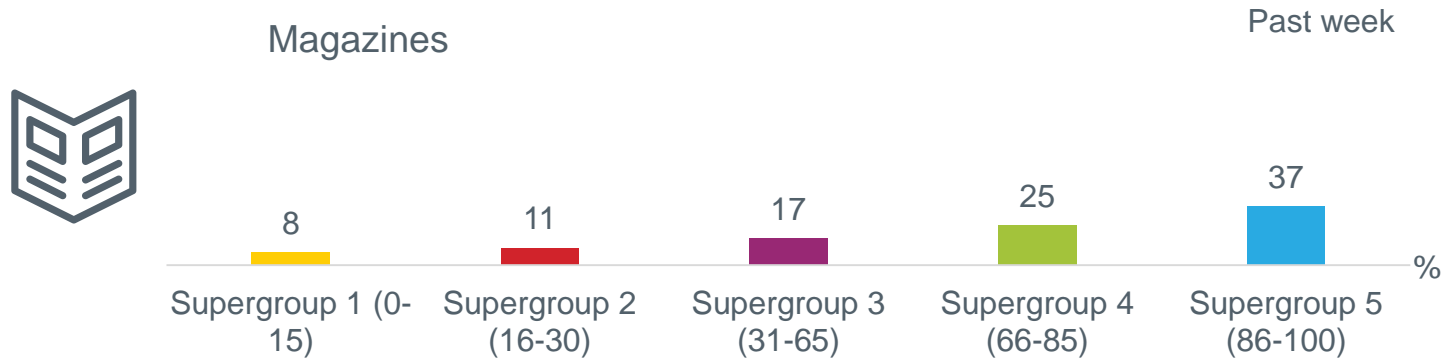
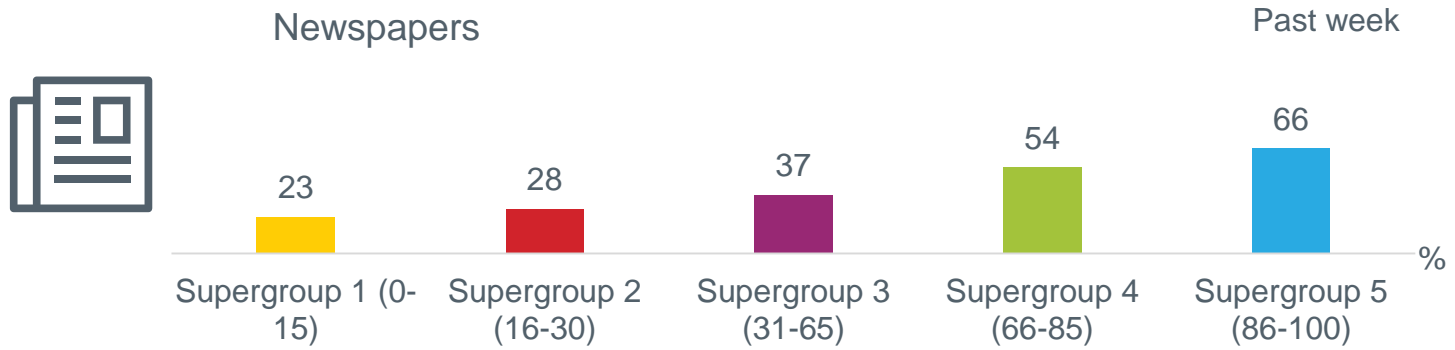
Microwave



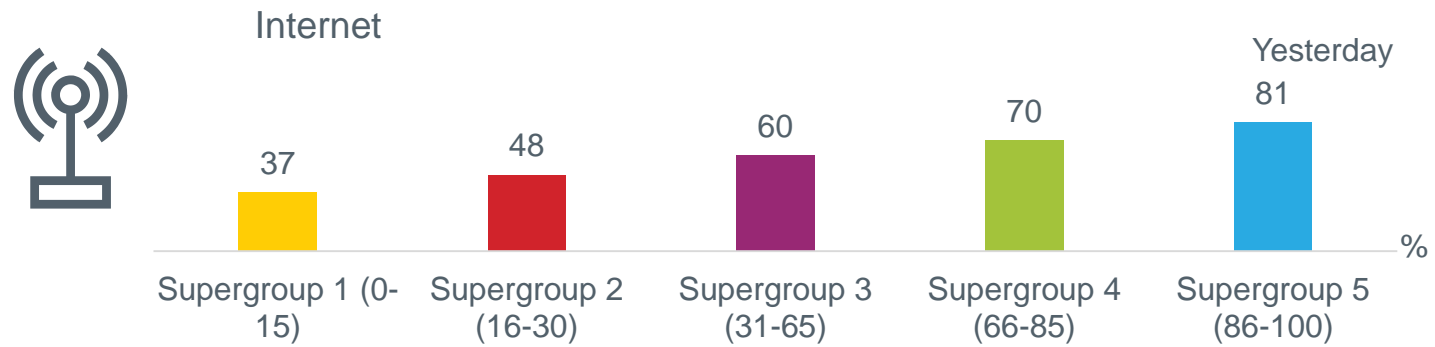
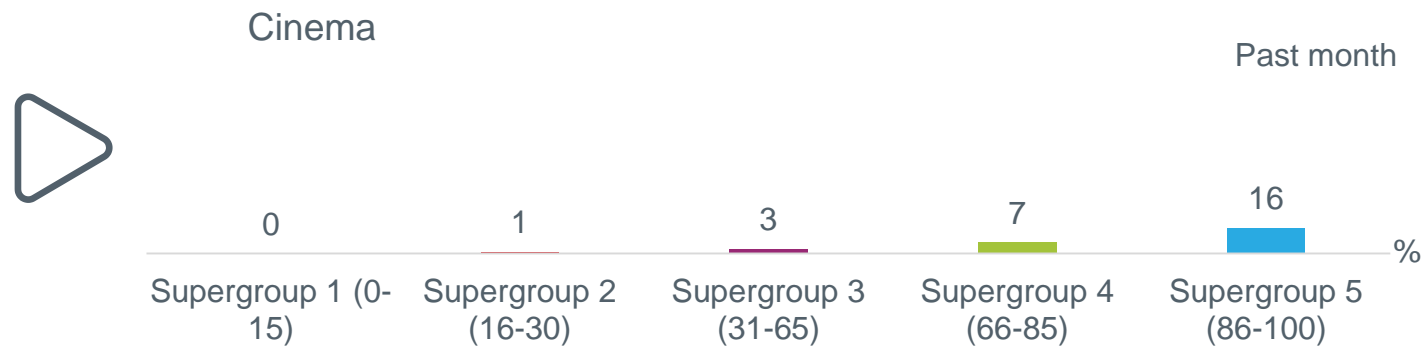
SEM 2018 media profiles



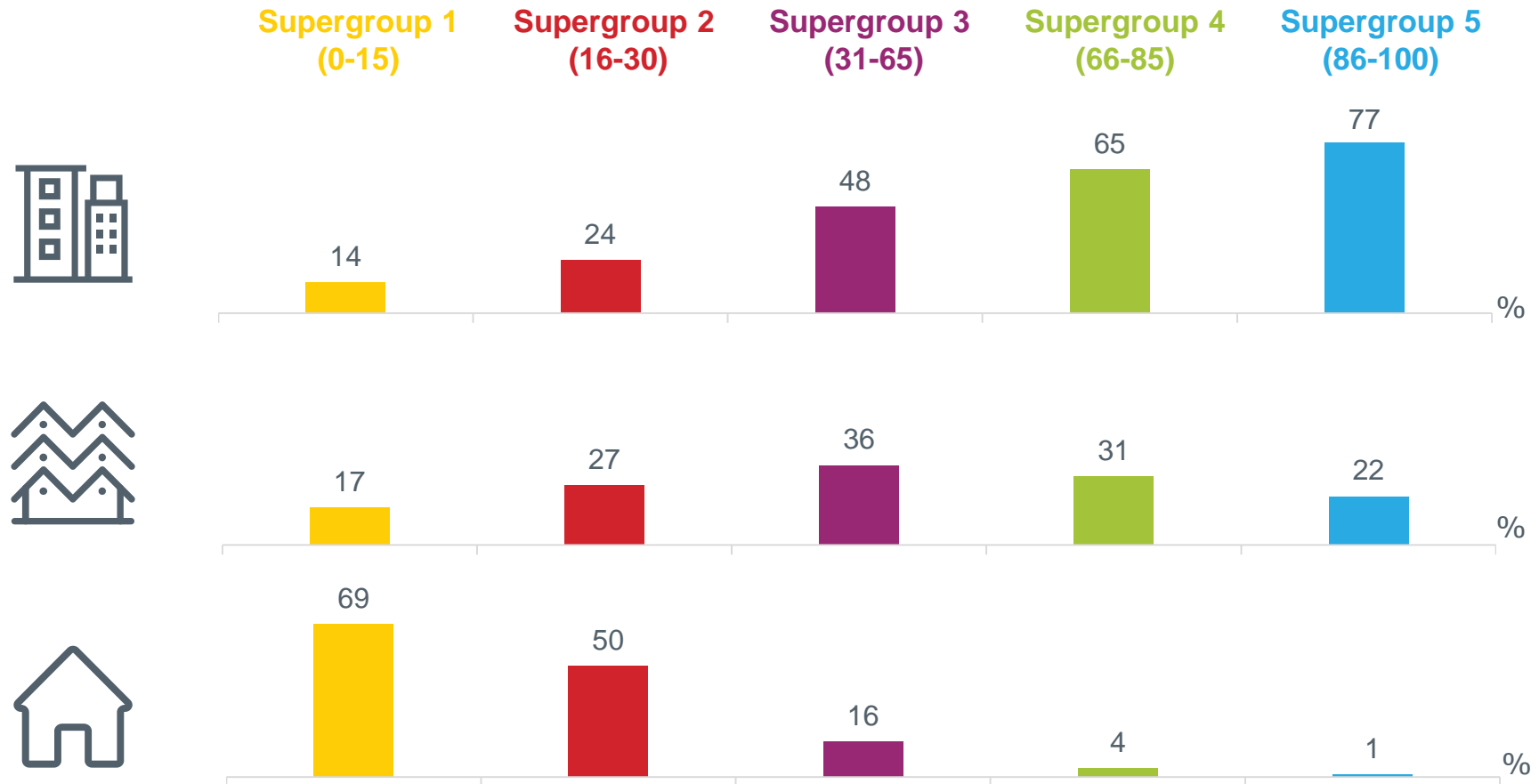
SEM 2018 media profiles



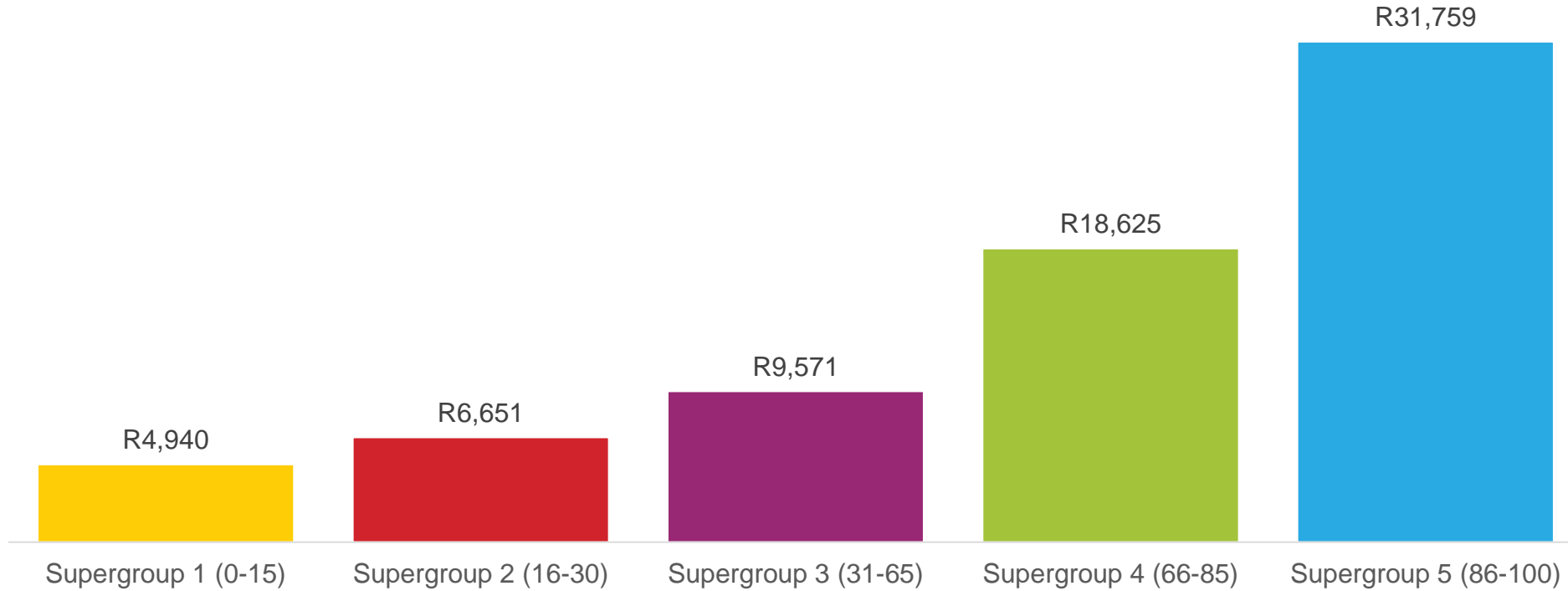
SEM 2018 media profiles



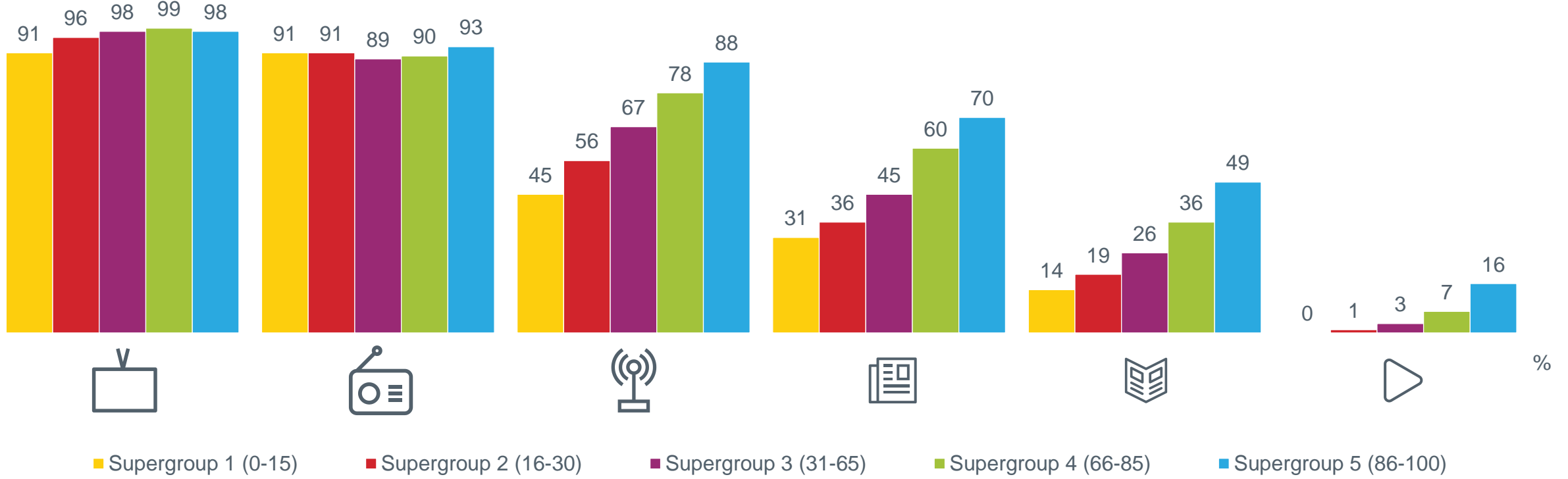
Demographic landscape by SEM



Monthly household income by SEM supergroup



Monthly media reach by SEM supergroup



KANTAR TNS

THE ESTABLISHMENT SURVEY

September 2019 release

