TV Establishment Survey 2023
Topline view

29 September 2023

Content

Technical summary

8,000	**Sample size**
5,000	***Face to face***
3,000	***CAWI / Online***
Nov 22 - Feb 23	**Fieldwork**

Difference from PAMS 2019:
15,000 face-to-face sample

Hybrid face-to-face on and online methodology

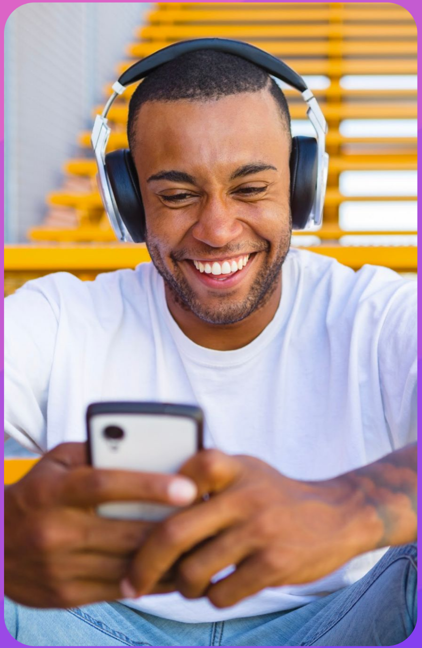
Mixed methodology, F2F and online, is essential to obtain a representative national SA sample.

- **Face-to-face** was seen as the Gold Standard of Media Research, but it has become **increasingly unrepresentative** of the universe since around 2015.
- It under reads the top end of the market considerably, this was proved in the PRC PAMS audit using 3 different GIS and demographic suppliers, namely Fernridge, GTI and IHS.
- The primarily cause of this is security infrastructure and concerns, which were exacerbated during and now post Covid. This applies not only to gated communities, but also flats, townhouses and high walled houses with intercoms.
- Time Constraints and the post covid “work from home” movement have further decreased representivity.
- **Online CAWI** was used to **provide greater access to the top end** of the market and those household types that are unreachable via face-to-face interviews.

Hybrid face-to-face on and online methodology

- **Ariane Neethling**, used GTI data to design the sample of the **face-to-face** survey to ensure representivity
- **CAWI** based on a panel with a profile representing the **online universe,** calibrated afterwards
- Nielsen has considerable experience, both internationally and locally, in the process of **combining data sets**, which ensures that the final ES is the best possible representation of the **total market**
- When using these two different methodologies we are faced with both **underreads** and **overreads** inherent in each, we are developing models to account for these variances

The video viewing landscape



The video viewing landscape

The lay of the land

This is a topline view of the **TV/video content landscape**

This survey has been conducted after a **long hiatus** and in the aftermath of Covid 19 and other changes, we find ourselves in a completely **new video viewing world**

The TAMS panel

An overview of the panel and the **new ES**

Streaming services

The **devices** used to view **streaming** services

TV household viewing

Note: this is an apple with pears comparison as the questionnaire has changed significantly.

	Current	New
The **TOTAL** number of households in SA has **increased** by 5%	17.3m	18.2m
Total household viewing (TV and streaming):	**15.9m (92%)**	**16.5 (90%)**
Viewing on a TV set only		*66%*
Viewing both on a TV set and streaming		*25%*
Streaming only		*9%*

People are watching as much video as they always were but it is happening very differently now. **This reflects international trends.**

The **TAMS household universe** (**linear only**) has reduced in this environment	15.9m	13.9m

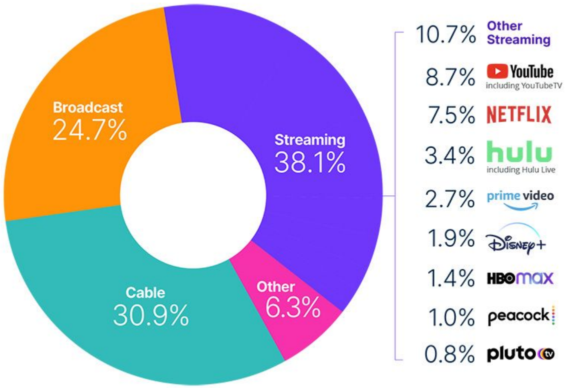
Some contributing factors to the changes

1. **Lockdown** and the significant behavioural changes that accompanied it
2. General changes in **global** viewing behaviour
3. **Load shedding** has changed people's viewing habits
4. Greater and cheaper **streaming options**
5. High levels of internet access: **2.7m or 15%** of households have access to **permanent/fixed internet**
6. **69%** have access to **smartphones** (with reduced data costs)
7. Only **23%** DO NOT have some type of access to the internet
8. At the lower end of the spectrum, the **loss of income** caused by the lockdown and other economic factors resulted in a greater inability to purchase and/or fix TV sets. This is evident on the TAMS panel from 2020
9. **Young people** living alone skew towards fewer or no TVs in home
10. Across the market there is greater incidence of **streaming only** homes
11. **Analogue Switch Off** has reduced viewing

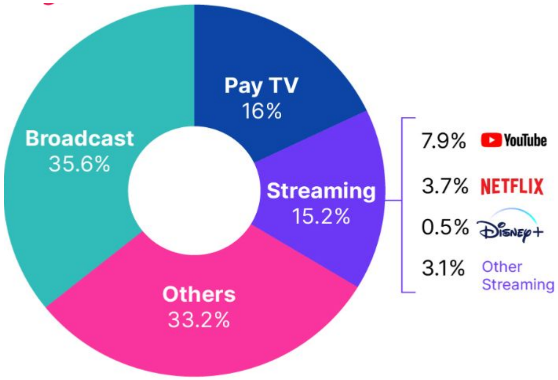
Global streaming

The Gauge: December 2022

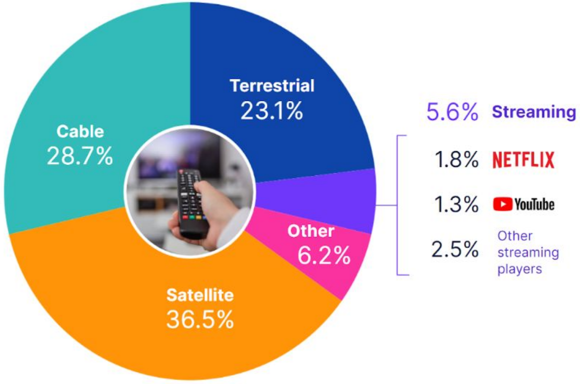
USA



Mexico



Poland



Where are the changes coming from?

Compared to the population.....

Those NOT in the TAMS universe

All ages with a skew to young

SEM L

Single

Unemployed or student

OR

Those who are streaming

Who is streaming?

Young up to 34

SEM H

Working or student

Streaming on device only (not watching TV)

Young up to 24

SEM H

Single

Student or working

But also, in this group 25% are unemployed and streaming mostly on a smartphone

No working TV in home

Young up to 24

Also, older 50+

SEM L

Single

Unemployed or student

Live in a single person household

DStv/Pay TV, OpenView, DTT sizing of the TAMS Universe

Due to the complexities of the world of content viewing, the goal of this questionnaire was to try understand this world and to attempt to mitigate against over/underclaims, misunderstandings, lack of knowledge of equipment, and so on. This is a reality for all surveys in this arena.

Considering this, below are the universes we believe best represent these particular platforms.

Pay TV/DStv

Claimed viewing/device

DStv decoder only 7.63m (55%)

Both DStv decoder & streaming 1.9m (13%)

Total DStv decoder: *9.5m (68%)*

Average DStv audited subscriber numbers for periods Sept '22 /Mar '23: 7.7m **(55%)**

TAMS panel HH composition 58.5%

OpenView

Claimed viewing

Total TV population: watch OpenView 10.9%

When converted to households **12.8%**

TAMS panel HH composition 13%

DTT

HH experienced ASO 18%

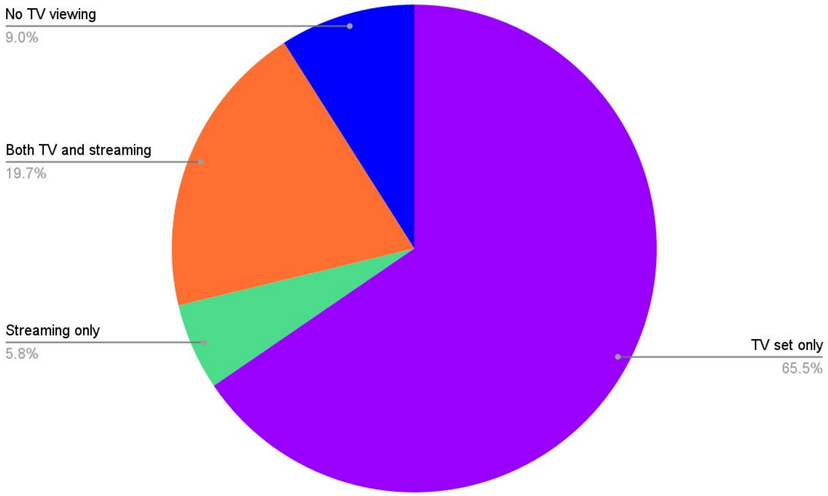
HH bought/received an STB 12%

STB is connected in the home **10%**

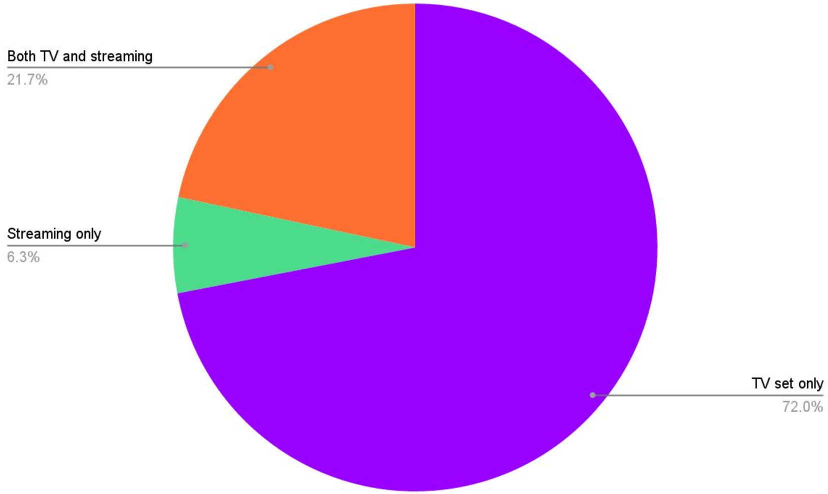
TAMS panel HH composition 8%

Video content viewing

Total population **43.6m**



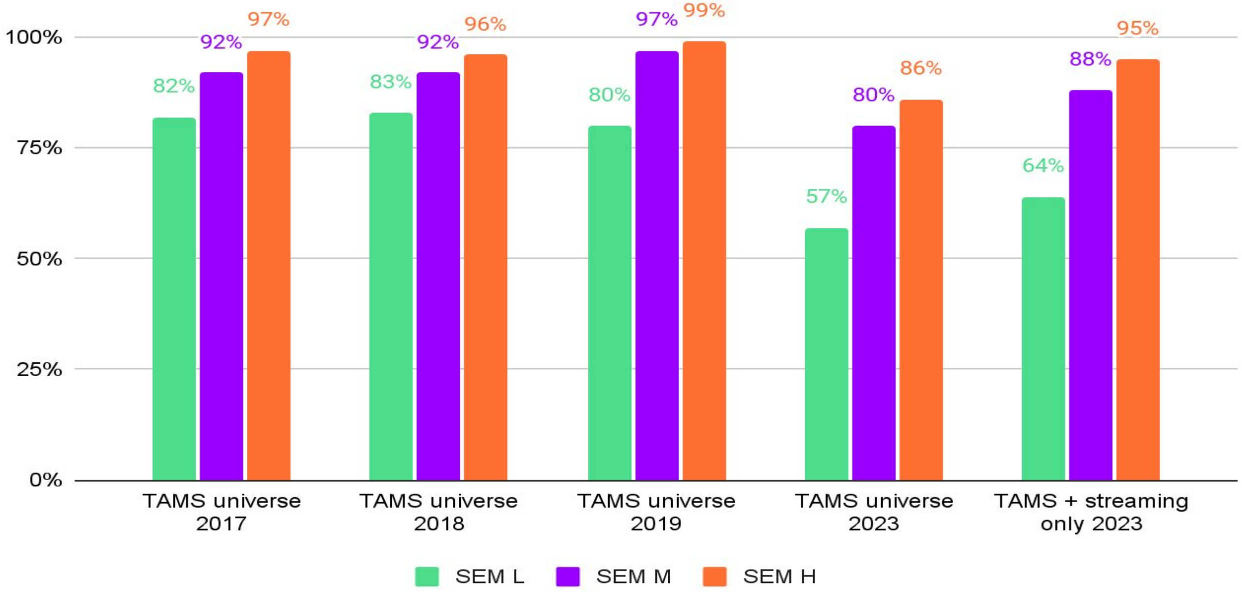
Any video viewing **39.7m (91%)**



Any streaming devices used:

Smartphone	86%
Computer/laptop	40%
Tablet	20%

Changes in SEM penetration



This change in penetration naturally leads to a change in the SEM profile of the TV Universe.

TAMS HH Universe: SEM Profile

	PAMS 2019	ES 2023
SEM L	26%	19%
SEM M	39%	37%
SEM H	35%	43%

The TAMS panel

Comparing the 2019 and 2023 TV universes and ratings

It has been **4 years** since we last implemented a universe update

When assessing ratings, the following must be considered:

1. The differences in ratings are reflective of a panel that has **not been adjusted over a 4 year period**. Not just any 4 years, a period where we experienced Covid, viewing behaviour changes, greater fragmentation, analogue switch off, load shedding and so on.
2. In this time we have not been able to adjust the panel according to changes in the environment and universes as **we did not know what these changes would look like.**
3. There are changes in the **TV Universe size** and this will have an **impact on ratings and audiences.**
4. **Adjustments to the panel according to the new universes will commence**, however, we need to make changes at a pace that will not disrupt the panel too severely.

Considering all these factors, we are still **maintaining** healthy weighting efficiencies when assessing the new TV universe - **82% household and 68% individual (which is very close to the statistically accepted level of 70%)**.
This indicates that the structure of the panel at this stage is **not noticeably out of balance** according to the accepted levels. The weighting efficiencies will improve as we recruit new households according to the required universe changes.

RIM Weighting Structure

RIM Household: Categories (20)

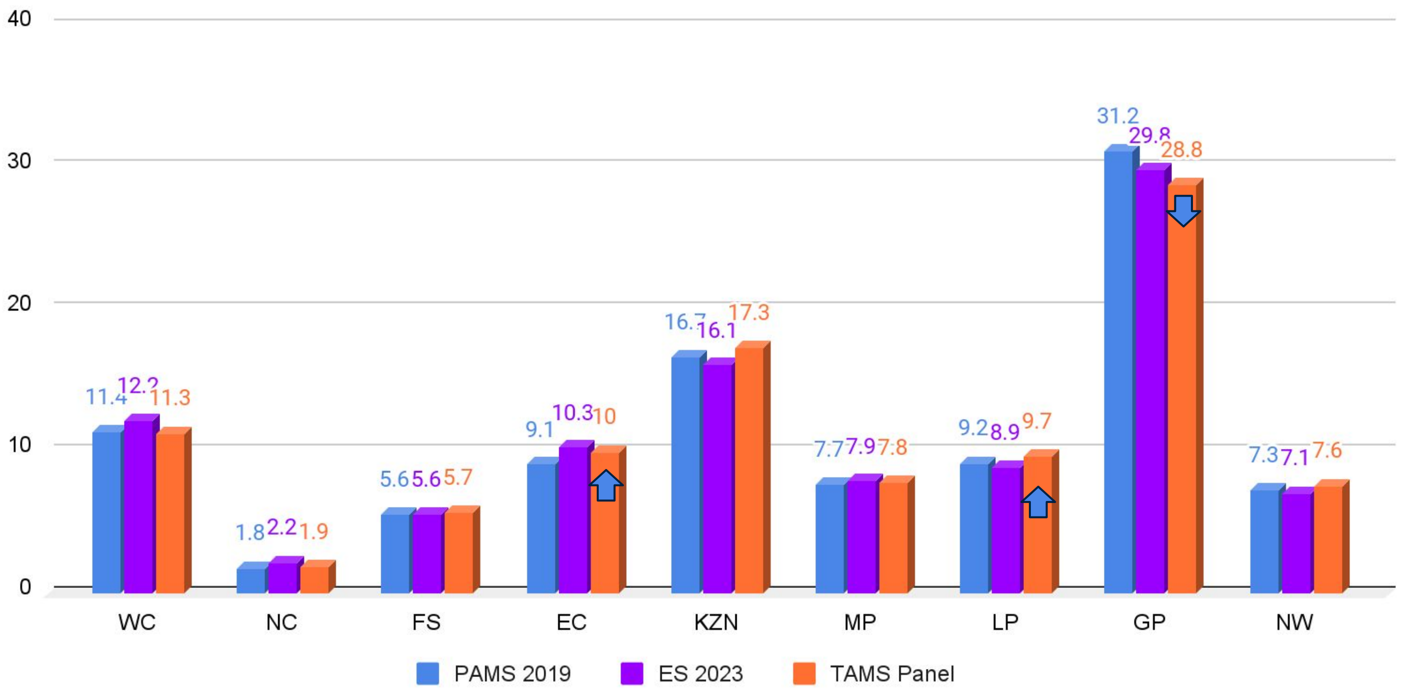
Provinces	Race	Area type	Pay TV vs Non-pay TV	HH size
9	4	3	2	2

RIM Individuals: Categories (54)

Age groups	Kids/Adults Pay/No pay	Kids/Adults Gender	Kid/Adults Province	Kids/Adults Race	Kid/Adults Area type	Kids/Adults 3 SEM SGs
8	4	8	18	8	6	6

Profile of the TV population and TV panel

Province



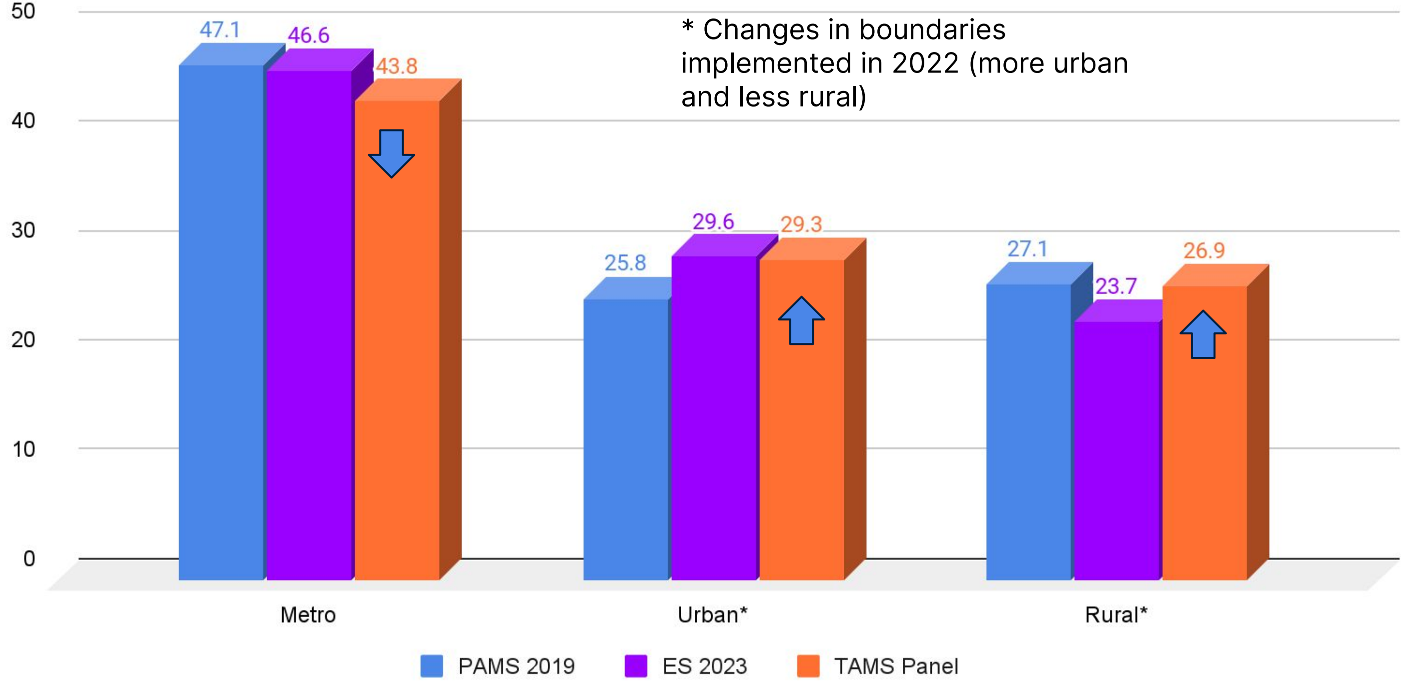
%

Indicates panel balance based on current ES (PAMS 19)

Nielsen

Profile of the TV population and TV panel

Area type



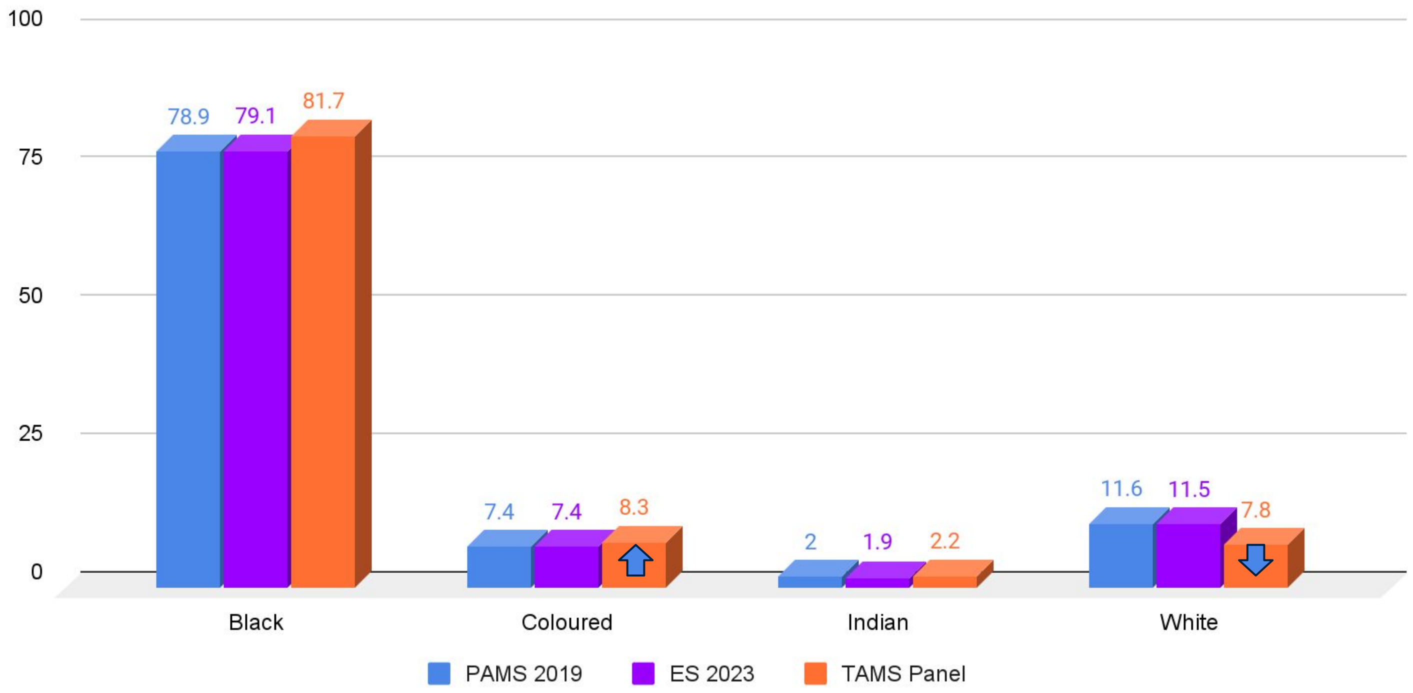
* Changes in boundaries implemented in 2022 (more urban and less rural)

%

Indicates panel balance based on current ES (PAMS 19)

Profile of the TV population and TV panel

Population group



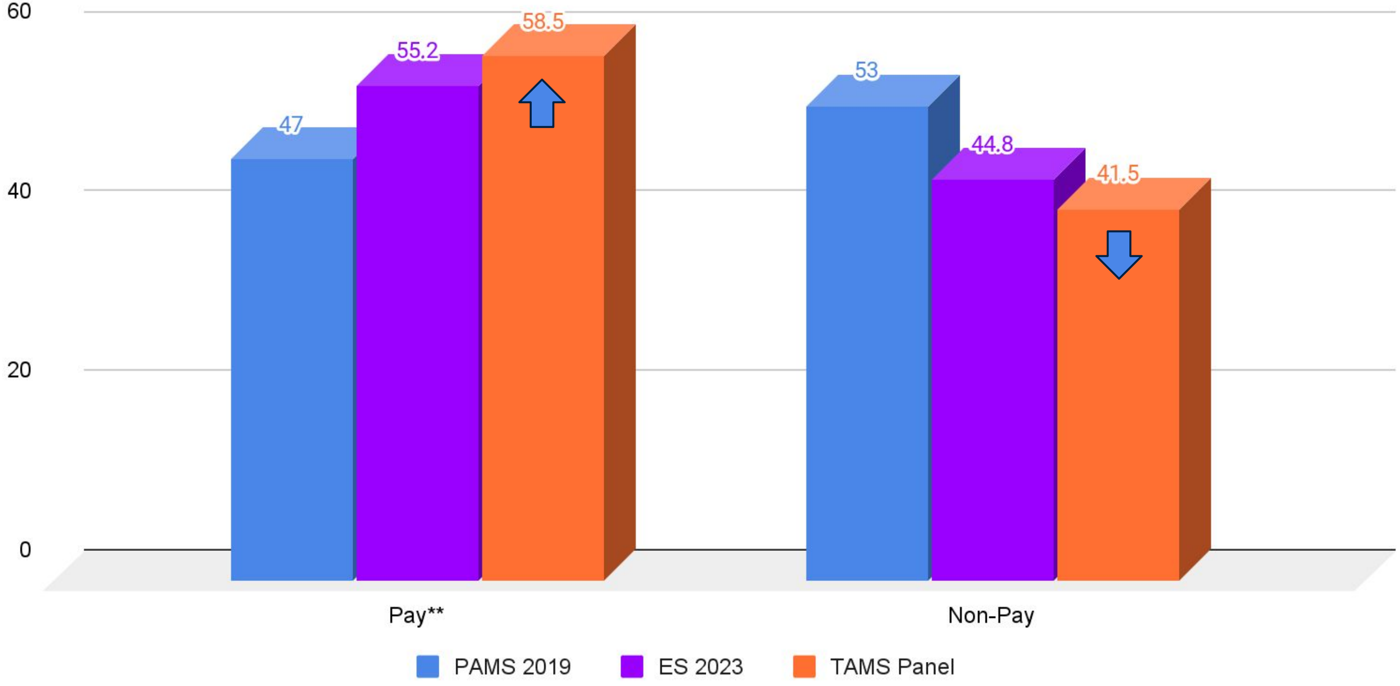
%

Indicates panel balance based on current ES (PAMS 19)

Profile of the TV population and TV panel

Pay / Non-pay TV

** Average DStv audited subs
Sept 22+Mar 23



%

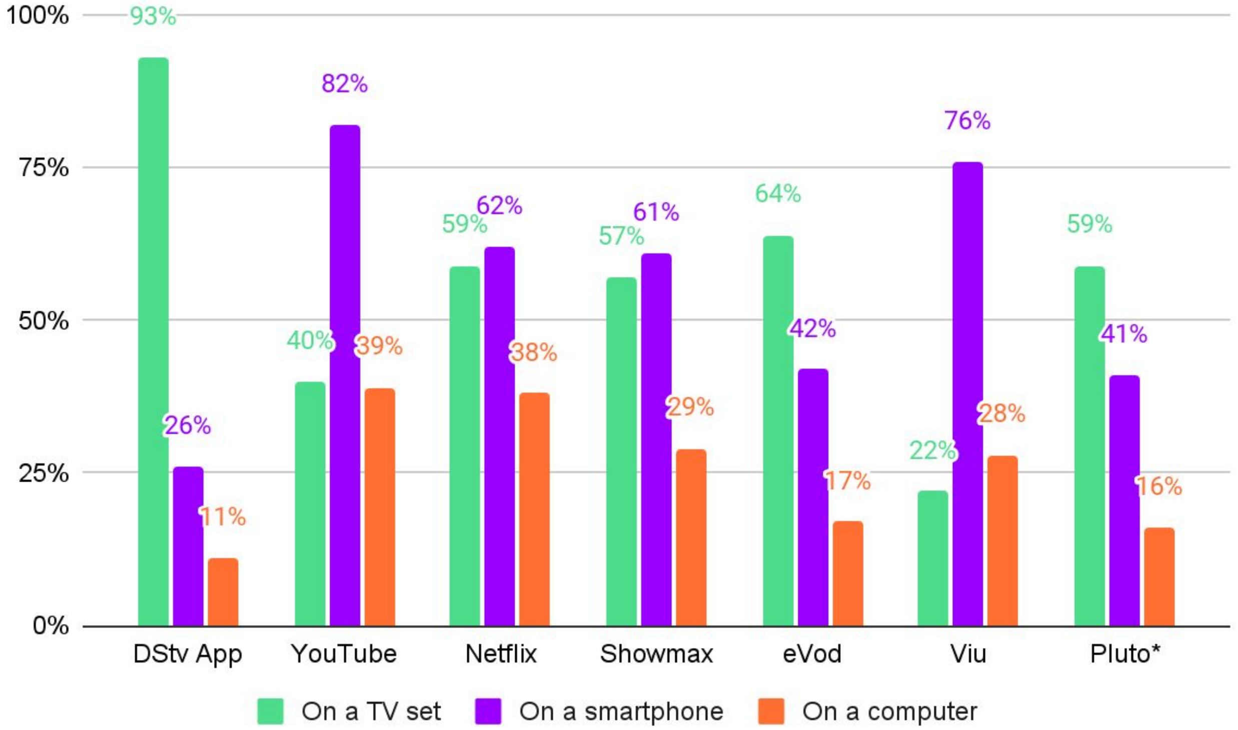
Indicates panel balance based on current ES (PAMS 19)

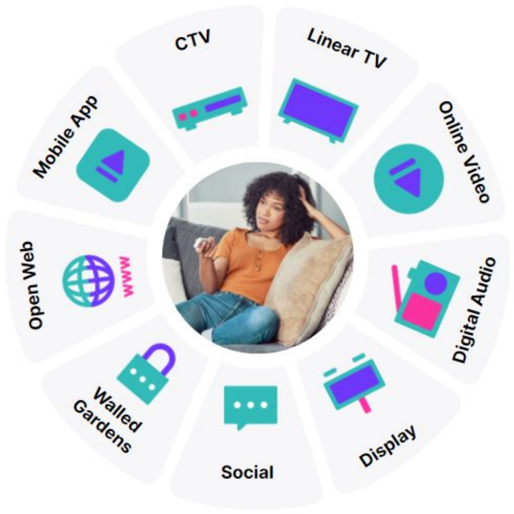
Nielsen

Streaming services

Streaming services device used

Household viewing

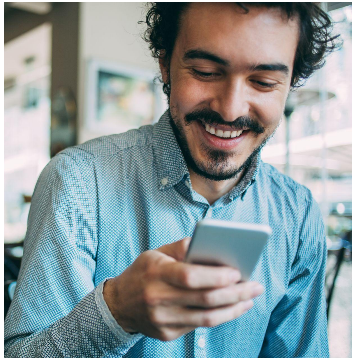
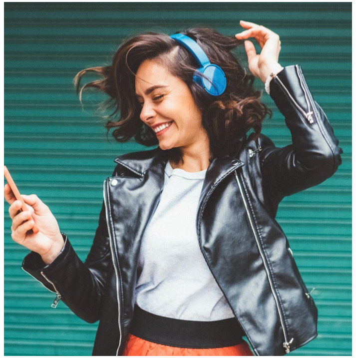


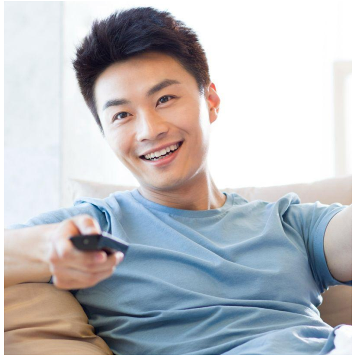


ES 2023 “Other” media topline data

Standard questions for all media types

1. Consumption past 12 months
2. Consumption past 4 weeks
3. Ways of consuming
4. Frequency of consumption
5. Last time consumed
6. Time spent consuming



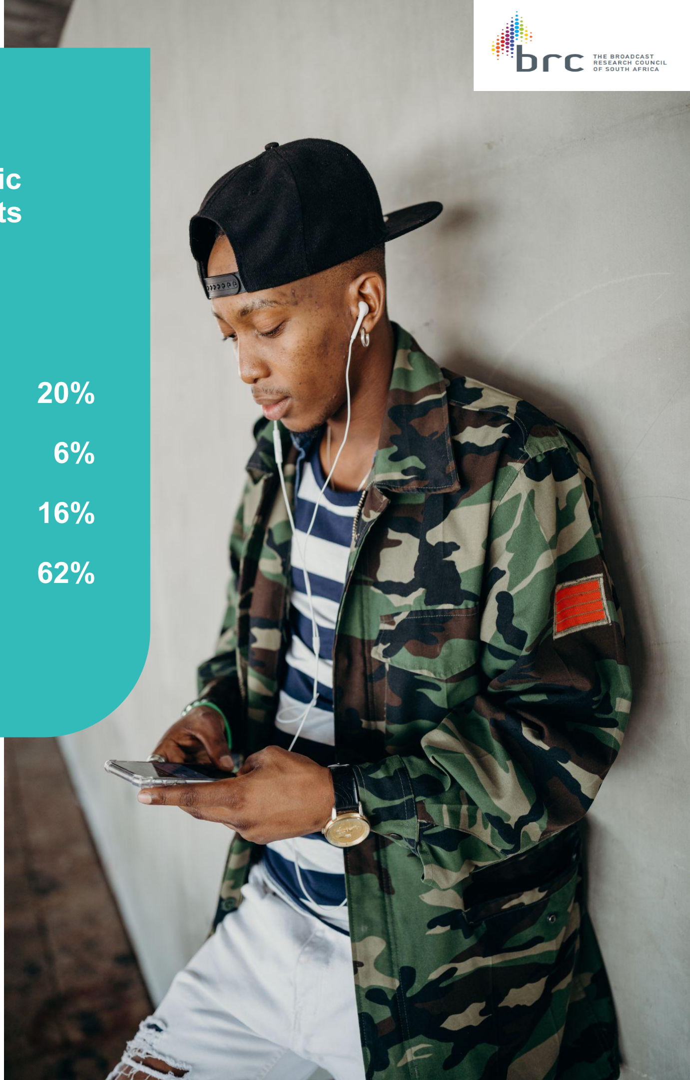
Radio topline

Base: adults 15+

Listened past 4 week	71%
Listening to a radio set	62%
Listening to a radio in car/bus/taxi	33%
Listening to FM radio APP on cell	22%
Listening via audio channels on TV	20%
Streaming online	8%

Ever used Spotify or Apple Music APPS to listen to music/podcasts

Spotify	20%
Apple Music	6%
Use other Apps	16%
Don’t use any of these Apps	62%

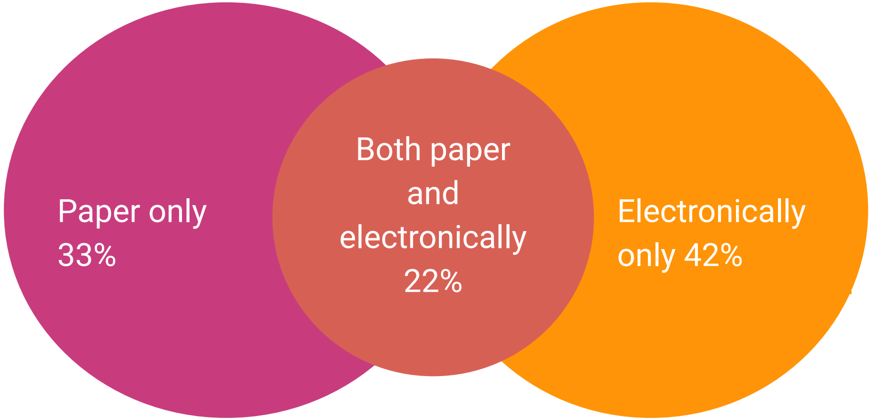


Print topline

Base: adults 15+

Read newspaper, news, magazine, in the past 4 week **71%**

On paper	55%
Electronically	65%



Internet usage topline

Base: adults 15+

Accessed the internet in the past 4 week **74%**

On a smartphone	90%
On a computer/laptop	27%
On another devices	22%

Type of access

Mobile data	89%
Permanent/fixed internet at home	20%
Public access	8%

Top 10 online activities
(base: accessed the internet P4W)

Use WhatsApp or instant messaging	74%
Use FaceBook	64%
Email	53%
Banking	53%
Make/receive calls using Skype, Facetime, WhatsApp, etc	41%
Use TikTok	39%
Watch videos, e.g. YouTube	38%
Check the weather	38%
Searching/browsing for information	33%
Eskom Se Push	32%
Download music (excl. radio)	30%

Out of home topline

Base: adults 15+

88% of all adults left home in the past 7 days

86% of all adults have seen some OOH advertising in the past 4 weeks

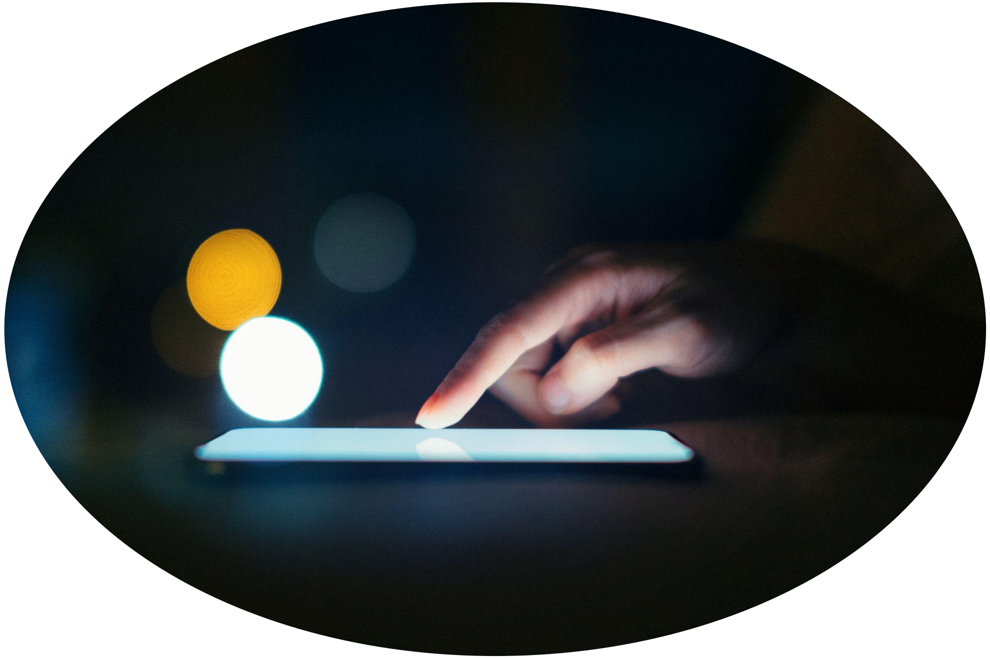
Billboards on the side of the road	69%
Advertising inside a mall or store	56%
Branding on buses or taxis	35%
Advertising inside or outside of taxi ranks	31%
Bus shelters	23%
Dustbins	22%
Trailers	21%
Advertising inside or outside of airports	20%
Wraps	17%

Consumer information

Consumer information

1. Cell phone information
2. Motor vehicles in home
3. Banking by institution
4. Grocery stores - spend most
5. Pets in home
6. Purchase of sport equipment, clothing, shoes
7. Types of insurance policies
8. Alcohol consumption by types of alcohol

Personally own a cell phone



94%

Have a cell phone

… and

69%

Have a smartphone

Source: Nielsen Annual Marketing Report, 2020

11.4m

own/use a motor vehicle

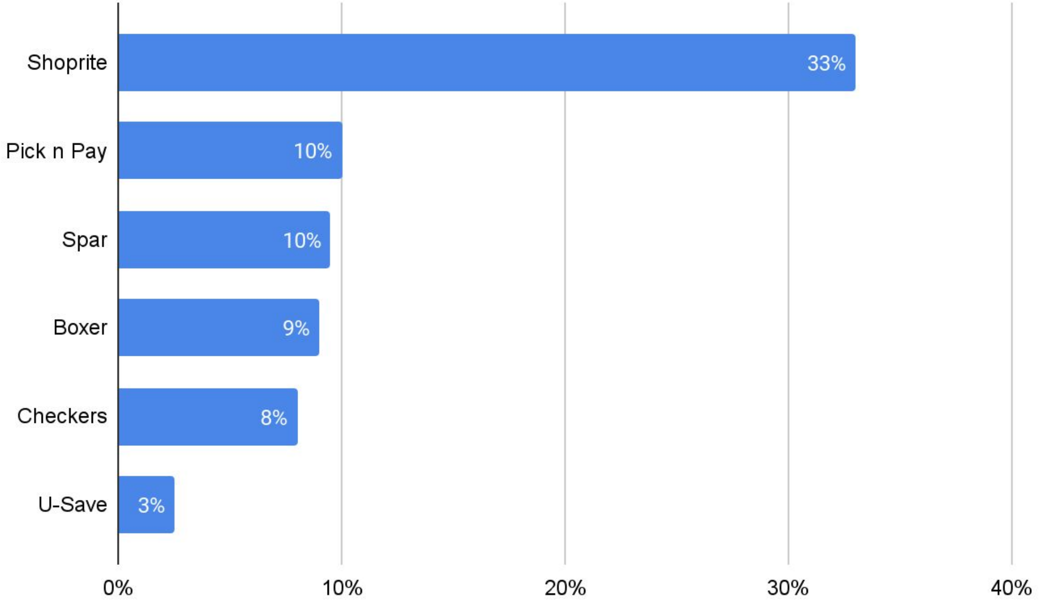
Top 5 banks

CAPITEC	FNB First National Bank	absa	Standard Bank	NEDBANK
50%	16%	13%	10%	10%

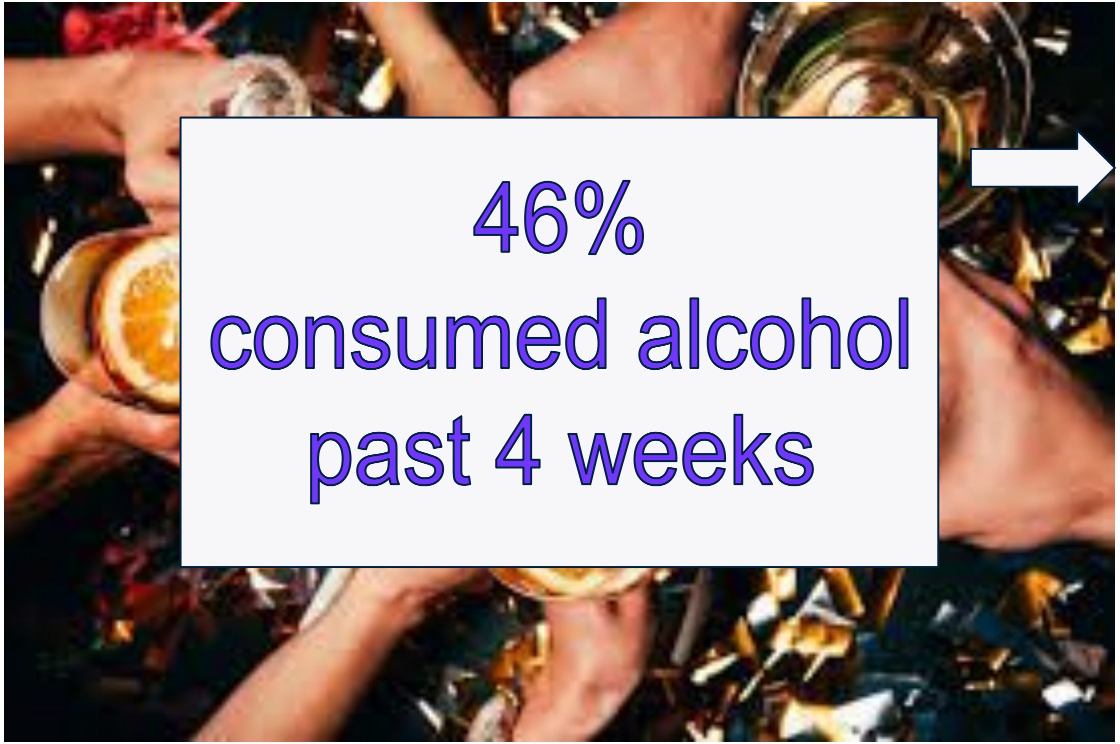
"With 20.1 million clients at the end of February 2023 (up 11% from the previous period), Capitec has financial data on approximately one-third of the South African population"

Capitec Annual Financial Results Feb 2023

Grocery stores: spend most



Alcohol consumption



46% consumed alcohol past 4 weeks

Beer	56%
Flavoured alcohol	43%
Wine	27%
Whisky	21%
Vodka	20%
Gin	19%
Brandy	13%

Pets in the home

33%

7%

3%

60%

ES Bureau Data Release:

Fri Oct 6th

Thank you