THE JOURNEY
THE BRIEF

- To measure and track audiences across all reading platforms to enable the buying and selling of advertising
- High AMPS RPCs need to be addressed
- Link to PRC Mobile Reader Panel
- To enable the linking of these audiences to the Establishment Survey and IAB Effective Measure data

Source: PAMS 2017
OUR PURPOSE

To provide an innovative “Gold Standard” Reader Audience Measurement founded on global and local best-in-class practice, expertise and resources

Source: PAMS 2017
THE OUTCOME

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

Source: PAMS 2017
FIELDWORK, SAMPLE AND SCOPE

- Fieldwork: 11 July – 16 November 2017

- Total sample of 17,386:

- Weighted to the mid-2017 IHS population of 40,073,000 (Adults 15+)

- 53 Newspapers; 92 Magazines and 10 Online News Sites were measured – 155 Total

Source: PAMS 2017
Significant cost efficiency generated through flooding methodology

Households | Average Flooded Rate | Total Respondents
--- | --- | ---
10,000 | 1,74 | 17,386

PAMS INTERVIEWS
Cost us **34%** of what we paid in 2015 per AMPS interview

Source: PAMS 2017
FLOODING – REDUCES READERSHIP BY 4%

<table>
<thead>
<tr>
<th>Primary</th>
<th>Total</th>
<th>Newspapers</th>
<th>Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>60.4</td>
<td>44.4</td>
<td>44.3</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Sample</th>
<th>Total</th>
<th>Newspapers</th>
<th>Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>56.6</td>
<td>40.6</td>
<td>41.4</td>
<td></td>
</tr>
</tbody>
</table>

Source: PAMS 2017
QUESTIONNAIRE FLOW

1. PLATFORM FILTER
   - On Paper
   - On a Cellphone
   - On a Computer
   - On a Tablet
   - On another device
   - None of these

2. CASI SELF-SELECTION
   - Paper
     - Weekly Magazine
     - Huisgenoot
     - GLAMOUR
   - Online
     - YOU
     - Huisgenoot.com
     - people
     - GLAMOUR
   - None on this screen

3. ROUTING PAPER / ONLINE QUESTIONS
   - Frequency
   - When last for AIR
   - Pick ups
   - Origin of Copy
   - Time Spent Reading
   - Device/Platform

4. PRODUCT / BRAND / RETAIL / BEHAVIOUR
   - Cell Phones / Online behaviour
   - Motoring / Financial
   - Retail: Food and groceries / Furniture and Appliances / Clothing

Source: PAMS 2017
READ OUT:
I am now going to ask you a few questions about your reading of Magazines, Online Magazine, Newspapers, Online News Sites content.
HAND THE RESPONDENT THE DEFINITION CARD OF WHAT IS MEANT BY READING AND READ OUT THE DEFINITION
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.

Source: PAMS 2017
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

Source: PAMS 2017
EASIER FREQUENCY SELECTION THROUGH VISUAL PUBLISHING INTERVAL SCALE

• Thinking of **DAILY SUN** there are FIVE issues published from MONDAY to FRIDAY. How many different issues do you normally read or page through?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>Tuesday</td>
<td>Wednesday</td>
<td>Thursday</td>
<td>Friday</td>
</tr>
</tbody>
</table>

• Thinking of **CITY PRESS**, there are normally FOUR issues published in a ONE MONTH. How many different issues do you normally read or page through?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1 (Mon-Sun)</td>
<td>Week 2 (Mon-Sun)</td>
<td>Week 3 (Mon-Sun)</td>
<td>Week 4 (Mon-Sun)</td>
</tr>
</tbody>
</table>

• Thinking of **BONA**, there are TWELVE issues published in a YEAR. How many different issues do you normally read or page through?

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>February</td>
<td>March</td>
<td>April</td>
<td>May</td>
<td>June</td>
<td>July</td>
<td>August</td>
<td>September</td>
<td>October</td>
<td>November</td>
<td>December</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
## Two Placebo Titles Included

### Total Respondents 56

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAMS Paper</td>
<td>0.0</td>
</tr>
<tr>
<td>PAMS Online</td>
<td>0.1</td>
</tr>
<tr>
<td>PAMS Total</td>
<td>0.1</td>
</tr>
</tbody>
</table>

Source: PAMS 2017

### Total Respondents 6

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>0.0</td>
</tr>
<tr>
<td>PAMS Online</td>
<td>0.0</td>
</tr>
<tr>
<td>PAMS Total</td>
<td>0.0</td>
</tr>
</tbody>
</table>
AIR BASED ON “WHEN LAST” RECENTY

**PAPER**
Not counting today, when last did you personally read or page through a paper copy of

![Cosmopolitan Magazine]

- 2 Days ago
- 3 Days ago
- 4 Days ago
- 5 Days ago
- 6 Days ago
- 7 Days ago
- 8 Days – 2 Weeks ago
- 3 – 4 Weeks ago
- 5 – 6 Weeks ago
- 7 – 8 Weeks ago
- 9 – 12 Weeks ago
- 4 – 6 Months ago
- 7 – 12 Months ago

**ONLINE**
You mentioned that you have read or viewed online content for IOL. When last did you read or view this?

![IOL Online]

- Yesterday
- 2 Days ago
- 3 Days ago
- 4 Days ago
- 5 Days ago
- 6 Days ago
- 7 Days ago
- 8 Days – 2 Weeks ago
- 3 – 4 Weeks ago
- Longer ago

Source: PAMS 2017
AIRs BASED ON RECENTY

**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)

Source: PAMS 2017
NEW: MULTIPLE PICK-UPS (OTS)

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

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

Source: PAMS 2017
### NUMBER OF PICK-UPS

- **Average number of Pick-ups**
  - Daily Newspaper: 45
  - Weekly Newspaper: 39
  - Weekly Magazine: 29
  - Monthly Magazine: 29

#### Data Distribution:
- **Once only**
  - Daily Newspaper: 41
  - Weekly Newspaper: 39
  - Weekly Magazine: 29
  - Monthly Magazine: 29
- **2-3 times**
  - Daily Newspaper: 14
  - Weekly Newspaper: 19
  - Weekly Magazine: 25
  - Monthly Magazine: 41
- **4 or more times**
  - Daily Newspaper: 14
  - Weekly Newspaper: 19
  - Weekly Magazine: 25
  - Monthly Magazine: 30

Based on 12 month Readers

Source: PAMS 2017
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

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

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

Source: PAMS 2017
TIME SPENT READING

Average time minutes

<table>
<thead>
<tr>
<th></th>
<th>DAILY NEWSPAPER</th>
<th>WEEKLY NEWSPAPER</th>
<th>WEEKLY MAGAZINE</th>
<th>MONTHLY MAGAZINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 30 mins</td>
<td>34</td>
<td>29</td>
<td>25</td>
<td>27</td>
</tr>
<tr>
<td>30 mins - 1 hour</td>
<td>45</td>
<td>43</td>
<td>43</td>
<td>38</td>
</tr>
<tr>
<td>1 hour +</td>
<td>21</td>
<td>28</td>
<td>32</td>
<td>35</td>
</tr>
</tbody>
</table>

Based on 12 month Readers
Source: PAMS 2017
NEW: USAGE OF ADVERTISING INSERTS/LEAFLETS

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

- Use them to compare *prices* 57%
- Use them to *plan* your shopping 45%
- *Buy* products as a result of seeing them 29%
- Glance or page through to see if anything *interests* you 26%
- *Don’t* look at them 16%

Source: PAMS 2017
## TOPICS/INTEREST QUESTION – NEWSPAPERS

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sport</td>
<td>38%</td>
</tr>
<tr>
<td>Community News/Local...</td>
<td>38%</td>
</tr>
<tr>
<td>Jobs/Careers</td>
<td>35%</td>
</tr>
<tr>
<td>SA News/Current Affairs</td>
<td>35%</td>
</tr>
<tr>
<td>Celebrity News</td>
<td>33%</td>
</tr>
<tr>
<td>Politics</td>
<td>32%</td>
</tr>
<tr>
<td>Education</td>
<td>27%</td>
</tr>
<tr>
<td>Health/Fitness</td>
<td>25%</td>
</tr>
<tr>
<td>International news</td>
<td>23%</td>
</tr>
<tr>
<td>Food/Recipes</td>
<td>23%</td>
</tr>
<tr>
<td>Beauty &amp; Fashion</td>
<td>22%</td>
</tr>
<tr>
<td>Advertising</td>
<td>21%</td>
</tr>
<tr>
<td>Business/Economic/Company</td>
<td>18%</td>
</tr>
<tr>
<td>Comics/Cartoons/Crosswords</td>
<td>17%</td>
</tr>
<tr>
<td>Entertainment/Movies/TV</td>
<td>16%</td>
</tr>
<tr>
<td>Motoring</td>
<td>16%</td>
</tr>
<tr>
<td>Technology</td>
<td>16%</td>
</tr>
<tr>
<td>Property</td>
<td>14%</td>
</tr>
<tr>
<td>Personal Finance</td>
<td>13%</td>
</tr>
<tr>
<td>Travel</td>
<td>13%</td>
</tr>
<tr>
<td>Home/Gardening/Do It Yourself</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
## Topics/Interest Question – Magazines

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real Life Stories</td>
<td>33%</td>
</tr>
<tr>
<td>Celebrities</td>
<td>30%</td>
</tr>
<tr>
<td>Sports</td>
<td>27%</td>
</tr>
<tr>
<td>Food, Cooking and Baking</td>
<td>26%</td>
</tr>
<tr>
<td>Fashion and Beauty</td>
<td>25%</td>
</tr>
<tr>
<td>Health, Fitness and Weight loss</td>
<td>24%</td>
</tr>
<tr>
<td>Careers, Jobs and Appointments</td>
<td>23%</td>
</tr>
<tr>
<td>Wellness and Relationships</td>
<td>21%</td>
</tr>
<tr>
<td>TV Guides</td>
<td>21%</td>
</tr>
<tr>
<td>International News</td>
<td>19%</td>
</tr>
<tr>
<td>Home Décor and Gardening</td>
<td>14%</td>
</tr>
<tr>
<td>Holidays and Travel</td>
<td>14%</td>
</tr>
<tr>
<td>Motoring</td>
<td>14%</td>
</tr>
<tr>
<td>Technology, Gadgets and Hobbies</td>
<td>14%</td>
</tr>
<tr>
<td>Financial and Business</td>
<td>12%</td>
</tr>
<tr>
<td>Pregnancy, Baby and Parenting</td>
<td>11%</td>
</tr>
<tr>
<td>Personal Finance and Investment</td>
<td>11%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
SAMPLING AND WEIGHTING

Designed by Prof. Ariane Neethling

National Sample based on SAL’s

Verified by Andrew Whitney
99% OF MUNICIPALITIES SAMPLED

232 out of 233 municipalities

Source: PAMS 2017
SAMPLE POINTS STRETCHED TO MAXIMISE DIVERSITY

Limited to Points of 2 per SAL to maximise national coverage

No substitution outside sampled SAL
SOUTH AFRICA – MOST INEQUITABLE SOCIETY ON EARTH

The current top and bottom ranked countries according to the Palma ratio

<table>
<thead>
<tr>
<th>Country</th>
<th>Top five countries</th>
<th>Bottom five countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ukraine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slovenia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slovakia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kazakhstan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central African Republic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Namibia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Botswana</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Haiti</td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DISPROPORTIONAL DESIGN IN LINE WITH INCOME SHARE

Source: PAMS 2017
HYBRID OF CELL AND RIM WEIGHTING

CELL WEIGHTING

- Applies a weight per Cell combination
- Enables interlaced demographic control
- Ensures in-depth analysis reliability

Source: PAMS 2017

RIM WEIGHTING

- Iterative process of recalculation of weights
- Repeated until results converge to the target population
- Enabled PAMS to weight Afrikaans speakers

Source: PAMS 2017
WEIGHTING EFFICIENCY

83% 70%

International Standard

Source: PAMS 2017

Measure of how well PAMS sample is aligned to the population
CREATE A SINGLE DATABASE - IMPUTATION

- PRIMARY SAMPLE 10,000
  - Reading Demographics
    - Products + Services
      - Best match Donor
        - Single PAMS 2017 Datafile 17,386

- FLOODED SAMPLE 7,386
  - Reading Demographics
    - Imputed Products + Services

Source: PAMS 2017
KEY DEMOGRAPHICS
SEM’s

ES (July 2016-June 2017 12M)  PAMS

%  

12  17  13  13  11  10  9  9  7  7
11  13  13  11  11  8  9  7  7  7

Source: PAMS 2017
LSM’s

Source: PAMS 2017
EMPLOYMENT LEVELS HIGHER AMONGST READERS

Source: PAMS 2017
PAMS IS NOT COMPARABLE TO AMPS – 
EVEN THE PAPER MEASURE

Designed for **Readership**

Sample:  
SAL the HH addressed based, Flooded different disproportionality

Questionnaire:  
Multi-platform reading

Masthead: TABLET  
AIR: Recency based

---

**≠**

AMPS

Designed for **All Media and Products**

Sample  
Magisterial Based  
HH address based

Questionnaire:  
“Paper”

Masthead: DSCAPI  
AIR: FRIPI  
(First Reading within in Issue Period)

Source: PAMS 2017
TOTAL READING – LIMITED OVERLAP

- **Paper Only**: 86%
  - 29,129k
  - R10,220
  - 37 years

- **Paper & Online**: 11%
  - 3,739k
  - R19,480
  - 32 years

- **Online Only**: 3%
  - 907k
  - R21,460
  - 33 years

*Source: PAMS 2017*
## TOTAL READERS AIR

<table>
<thead>
<tr>
<th>Total Audience</th>
<th>PAMS Total (AIR)</th>
<th>AMPS 2015 (AIR)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22 664</td>
<td>23 341</td>
</tr>
<tr>
<td>%</td>
<td>57</td>
<td>61</td>
</tr>
</tbody>
</table>

Source: 2017
## Online Repertoires Are Higher

### AMPS 2015

<table>
<thead>
<tr>
<th>Category</th>
<th>AMPS 2015</th>
<th>PAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>1.9</td>
<td>2.0</td>
</tr>
<tr>
<td>Online</td>
<td>2.7</td>
<td>2.6</td>
</tr>
<tr>
<td>Total</td>
<td>3.5</td>
<td>2.2</td>
</tr>
</tbody>
</table>

### PAMS

<table>
<thead>
<tr>
<th>Category</th>
<th>PAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>2.6</td>
</tr>
<tr>
<td>Online</td>
<td>3.1</td>
</tr>
<tr>
<td>Total</td>
<td>2.8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>PAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>3.3</td>
</tr>
<tr>
<td>Online</td>
<td>4.1</td>
</tr>
<tr>
<td>Total</td>
<td>3.6</td>
</tr>
</tbody>
</table>

Source: PAMS 2017

---

nielsen

Publisher Research Council

---

39
## TOTAL NEWSPAPERS AIR

<table>
<thead>
<tr>
<th></th>
<th>AMPS 2015 ’000</th>
<th>PAMS Total ’000</th>
<th>Total Audience ’000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Daily</td>
<td>9 742</td>
<td>10 945</td>
<td>16 664</td>
</tr>
<tr>
<td>Any Weekly</td>
<td>8 756</td>
<td>11 797</td>
<td>16 251</td>
</tr>
<tr>
<td>Any Newspaper</td>
<td>44</td>
<td>41</td>
<td></td>
</tr>
</tbody>
</table>

Source: PAMS 2017
<table>
<thead>
<tr>
<th></th>
<th>AMPS 2015 ‘000</th>
<th>PAMS 2017 Total Audience</th>
<th>AMPS 2015 %</th>
<th>PAMS Paper %</th>
<th>PAMS Online %</th>
<th>PAMS Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMPS 2015</td>
<td>9,742</td>
<td>8,756</td>
<td>26</td>
<td>18</td>
<td>5</td>
<td>22</td>
</tr>
<tr>
<td>PAMS 2017</td>
<td>10,945</td>
<td>11,797</td>
<td>29</td>
<td>27</td>
<td>4</td>
<td>29</td>
</tr>
<tr>
<td>Total Audience</td>
<td>16,664</td>
<td>16,251</td>
<td>44</td>
<td>37</td>
<td>6</td>
<td>41</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
RANKINGS – DAILY NEWSPAPERS

AMPS 2015

- Daily Sun
- Sowetan
- Isolezwe
- Son
- The Star
- Beeld
- The Citizen
- Daily Voice
- Daily News
- The Times
- Daily Dispatch
- Daily Herald

PAMS 2017

- Daily Sun
- Sowetan
- Isolezwe
- Son
- The Star
- The Times
- Daily Voice
- The Citizen
- Business Day
- Daily News
- Beeld
- The Mercury

Source: PAMS 2017
RANKINGS – WEEKLY NEWSPAPERS

<table>
<thead>
<tr>
<th>AMPS 2015</th>
<th>PAMS 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday Times</td>
<td>Soccer Laduma</td>
</tr>
<tr>
<td>Soccer Laduma</td>
<td>Sunday Times</td>
</tr>
<tr>
<td>Sunday Sun</td>
<td>Sunday Sun</td>
</tr>
<tr>
<td>City Press</td>
<td>City Press</td>
</tr>
<tr>
<td>Sunday World</td>
<td>Sunday World</td>
</tr>
<tr>
<td>Rapport</td>
<td>Ilanga LangeSonto</td>
</tr>
<tr>
<td>Isolezwe ngeSonto</td>
<td>Isolezwe ngeSonto</td>
</tr>
<tr>
<td>Ilanga LangeSonto</td>
<td>Rapport</td>
</tr>
<tr>
<td>Isolozwe...</td>
<td>Isolezwe ngoMgqibelo</td>
</tr>
<tr>
<td>Son op Sondag</td>
<td>Ilanga</td>
</tr>
<tr>
<td>Sunday Tribune</td>
<td>Son op Sondag</td>
</tr>
<tr>
<td>Post</td>
<td>Sunday Tribune</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
## TOTAL MAGAZINES AIR

<table>
<thead>
<tr>
<th></th>
<th>AMPS 2015</th>
<th>PAMS 2017</th>
<th>PAMS Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMPS 2015 '000</td>
<td>8 946</td>
<td>12 866</td>
<td>17 360</td>
</tr>
<tr>
<td>PAMS 2017 Total Audience</td>
<td>8 063</td>
<td>12 903</td>
<td>16 599</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>AMPS 2015</th>
<th>PAMS Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Weekly</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Any Monthly</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Any Magazine</td>
<td>45%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
# TOTAL MAGAZINES AIR

<table>
<thead>
<tr>
<th></th>
<th>AMPS 2015</th>
<th>PAMS 2017</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>’000</td>
<td>8 946</td>
<td>12 866</td>
<td>17 360</td>
</tr>
<tr>
<td>Total Audience</td>
<td>8 063</td>
<td>12 903</td>
<td>16 599</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>AMPS 2015</th>
<th>PAMS Paper</th>
<th>PAMS Online</th>
<th>PAMS Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Weekly</td>
<td>23</td>
<td>19</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Any Monthly</td>
<td>34</td>
<td>30</td>
<td>4</td>
<td>32</td>
</tr>
<tr>
<td>Any Magazine</td>
<td>45</td>
<td>39</td>
<td>5</td>
<td>41</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
RANKINGS - MAGAZINES

AMPS 2015
KickOff
Drum
Bona
Move!
You
True Love
Huisgenoot
People
Men's Health
Kuier
Speed & Sound
Cosmopolitan

PAMS 2017
KickOff
Drum
Bona
You
Move!
Huisgenoot
True Love
Car
People
Men's Health
Kuier
Food & Home

Source: PAMS 2017
INTERNET AND CELLPHONE
INTERNET ACCESS

Source: PAMS 2017
INTERNET DEVICE OVERLAP

Cellphone Only 81%

17,873k
R11,890 32 years

Cellphone & Computer/Tablet 12%

2,738k
R27,540 37 years

Computer/Tablet Only 7%

1,525k
R17,100 37 years

Source: PAMS 2017
CELLPHONES

Smartphone 50 %
Ordinary Cell 30 %
Feature Cell 10 %

TOTAL ACCESS 90 %

Source: PAMS 2017
RETAIL AND BRANDS
33% OF HOUSEHOLDS HAVE A MOTOR VEHICLE

NUMBER IN HOUSEHOLD

- None: 67%
- One: 20%
- Two: 9%
- Three+: 4%

Source: PAMS 2017
TOP CAR MANUFACTURERS

<table>
<thead>
<tr>
<th>%</th>
<th>Toyota</th>
<th>22</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>VW</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Ford</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Nissan</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Hyundai</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>BMW</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Opel</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Mazda</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Mercedes</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Isuzu</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Audi</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Chevrolet</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Kia</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
### MAIN BANK

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Bank</th>
</tr>
</thead>
</table>
|            | Capitec Bank              | 23%
|            | ABSA                      | 13%
|            | First National Bank (FNB)| 13%
|            | Standard Bank             | 10%
|            | Nedbank                   | 8%
|            | Postbank/Posbank          | 1%
|            | Don’t have a bank account | 32%

Source: PAMS 2017
RESPONSIBILITY FOR HOUSEHOLD PURCHASES

WHOLLY/PARTLY RESPONSIBLE – DAY TO DAY PURCHASES

Source: PAMS 2017
<table>
<thead>
<tr>
<th></th>
<th>SEM 1-4 %</th>
<th>SEM 5-7 %</th>
<th>SEM 8-10 %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shoprite</strong></td>
<td>47</td>
<td>50</td>
<td>33</td>
</tr>
<tr>
<td><strong>Boxer Superstores</strong></td>
<td>14</td>
<td>16</td>
<td>22</td>
</tr>
<tr>
<td><strong>Spar/Superspar</strong></td>
<td>14</td>
<td>12</td>
<td>17</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
FURNITURE AND APPLIANCES

BOUGHT IN PAST 12 MONTHS

Yes 24%
No 76%

Source: PAMS 2017

<table>
<thead>
<tr>
<th>Store</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shoprite</td>
<td>17</td>
</tr>
<tr>
<td>Game</td>
<td>15</td>
</tr>
<tr>
<td>OK Furniture</td>
<td>12</td>
</tr>
<tr>
<td>Lewis</td>
<td>10</td>
</tr>
<tr>
<td>Makro</td>
<td>6</td>
</tr>
<tr>
<td>Checkers/Checkers...</td>
<td>5</td>
</tr>
<tr>
<td>Clicks</td>
<td>5</td>
</tr>
<tr>
<td>Pick 'n Pay/Pick 'n...</td>
<td>5</td>
</tr>
<tr>
<td>Hi-Fi Corporation</td>
<td>4</td>
</tr>
<tr>
<td>Jet Mart</td>
<td>4</td>
</tr>
<tr>
<td>Mr Price Home</td>
<td>4</td>
</tr>
<tr>
<td>Russells</td>
<td>4</td>
</tr>
<tr>
<td>Ackermans</td>
<td>3</td>
</tr>
<tr>
<td>House &amp; Home</td>
<td>3</td>
</tr>
<tr>
<td>Morkels</td>
<td>3</td>
</tr>
<tr>
<td>At Home</td>
<td>2</td>
</tr>
<tr>
<td>Barnettts</td>
<td>2</td>
</tr>
<tr>
<td>Boardmans</td>
<td>2</td>
</tr>
<tr>
<td>Joshua Doore</td>
<td>2</td>
</tr>
<tr>
<td>Pep Stores</td>
<td>2</td>
</tr>
<tr>
<td>Geen &amp; Richards</td>
<td>1</td>
</tr>
<tr>
<td>Hirsch's</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: PAMS 2017
## CLOTHING

### BOUGHT IN PAST 6 MONTHS

<table>
<thead>
<tr>
<th>Store</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr Price/Mr Price Sport</td>
<td>33</td>
</tr>
<tr>
<td>Jet</td>
<td>25</td>
</tr>
<tr>
<td>Ackermans</td>
<td>23</td>
</tr>
<tr>
<td>Pep Stores</td>
<td>20</td>
</tr>
<tr>
<td>Edgars/Edgars Active</td>
<td>19</td>
</tr>
<tr>
<td>Truworths</td>
<td>14</td>
</tr>
<tr>
<td>Woolworths</td>
<td>12</td>
</tr>
<tr>
<td>Markham</td>
<td>9</td>
</tr>
<tr>
<td>Sportscene</td>
<td>8</td>
</tr>
<tr>
<td>Identity</td>
<td>7</td>
</tr>
<tr>
<td>Foschini</td>
<td>6</td>
</tr>
<tr>
<td>Total Sports</td>
<td>6</td>
</tr>
<tr>
<td>Studio 88</td>
<td>5</td>
</tr>
<tr>
<td>Legit</td>
<td>4</td>
</tr>
<tr>
<td>Fashion Express</td>
<td>3</td>
</tr>
<tr>
<td>Pick 'n Pay/Pick 'n Pay Hyper</td>
<td>3</td>
</tr>
<tr>
<td>Milady's</td>
<td>2</td>
</tr>
<tr>
<td>Jay Jay's</td>
<td>1</td>
</tr>
<tr>
<td>Sportman's Warehouse</td>
<td>1</td>
</tr>
<tr>
<td>Stuttafords</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: PAMS 2017

- **Yes**: 62%
- **No**: 38%
Fusion Hooks Incorporated, Including behavioural and brand data

TV and Radio topline data also included

L1. During an average week, on how many days do you personally watch TV?
   ○ 7 days (every day)
   ○ 6 days
   ○ 5 days
   ○ 4 days
   ○ 3 days
   ○ 2 days
   ○ 1 day
   ○ Don’t watch TV in an average week

Source: PAMS 2017
OUR CURRENCY SURVEYS

PAMS

BALANCE
FUSE

= TOTAL AUDIENCE

PANEL

Source: PAMS 2017
HUB & DONOR = SINGLE SOURCE
HUB & DONOR = SINGLE SOURCE
THE THING ABOUT SINGLE SOURCE

All markets fragment as the world becomes more complex

1. **Fewer** respondents per question
2. **More** questions to understand complexity and brands
3. **Longer** questionnaires
4. **Poorer** quality of responses

Inevitably single source will no longer do the **trick**!
MEDIA FUSION IS NO LONGER THE VISION, IT’S THE PREFERRED SOLUTION

Brings previously separate media assets together

1. for the most **granular** view of consumers
2. **cross platform** behavior
3. which supports **analytics**, 
4. **flexible** media & target creation and
5. un-duplicated **reach & frequency** planning

Source: PAMS 2017
WHAT IS DATA FUSION?

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

Data Set 1 (recipient):
Print Title
Reading
+ Platform

Data Set 2: (donor)
FMCG brand consumption

Data Set 3: (integrated)
Print Title FMCG consumption profile by platform

Source: PAMS 2017
DATA FUSION APPROACH

Linking Variables
Like-variables within both Data Sets

Importance Weights
Using statistical analysis to understand how each of these variables correlates to behavior, we establish importance weights for each variable

Fusion
A fusion algorithm is created that uses the linking variables and importance weights to assign donor data from Data Set 2 to Data Set 1

Calibration and testing
Individual respondents in the fused data set are re-weighted, calibrated. Fusion yields behaviors consistent with the original data sets.
BUT WE HAVE A LOT TO WORK WITH

**Currency data**

- Newspaper
- Magazine
- Digital
- TV
- Radio
- OOH
- PAMS
- EM / DAR
- TAMS
- RAMS
- ROAD

**Insight data**

- Brands + Categories
- Attitudes + Lifestyle
- Products + Brands
- Homepanel (CPS)
- Profile + Segments
- GCIS
- Attitudes + Lifestyle
- FutureFact
- Financial Services (OMNI)
- Products + Brands
- AMPS 2016
INTRODUCING Nielsen consumer PANEL (CPS)
Urban HH’s are audited **twice** a month, Rural HH’s **once** a month

- **Household Sample**
  - 4000, representative of 15 million HH (AMPS 2014)

- **Full National**
  - Demographically and Geographically representative of South African Households (LSM, PDM age, Region, HH size, Race)

- **Pantry Audit**
  - Record household purchases in a Nielsen diary. Auditor* cross checks with pantry and dustbin

- **All Retail Outlets**
  - HH’s continuously report their domestic purchases from all retail outlets and are rewarded if compliant
Apart from all the Reader data, what do we get?

**PAMS**
- Retail outlet:
  - Furniture + Appliances
  - Clothing
  - Food + Grocery
- Reading
- Cell phone network
- Feature vs. smart phone
- Banks
- Motor vehicle brands
- Demographics
- Weighted to IHS
- SEM / LSM

**Home Scan**
- FMCG retail outlet
- FMCG volumetric consumption
  - 200 categories
  - 2000 brands
  - Full national
  - Longitudinal data
  - Weighted to IHS
- Demographics
- LSM (and SEM later)
QUESTIONS?