

The Establishment Survey, a foundation for a brave new world

 By [Danette Breitenbach](#)

6 Oct 2017

A brand follows its consumers, knows their purchase journey and decides what media journey to take. It's all about the right message, at the right time, on the right platform. However, in a world of fragmenting audiences across multiple platforms, this has become much more difficult, especially for planners and clients.



Peter Langschmidt, the PRC's lead research consultant.

A multi-purpose, multi-media survey providing context for all media platforms and all media currencies in South Africa, the Establishment Survey (ES) provides granular data, inform planners and clients, and is the foundation for the new model of hub and donor to provide a much better mousetrap.

ES is run by the Broadcast Research Council (BRC) (representing radio and television) in conjunction with the Publishers Research Council (PRC), which represents magazines newspapers and websites. The two entities partnered to conduct the survey.

More accurate reflection of South African profile

The ES's full year results were recently presented by Peter Langschmidt, the PRC's lead research consultant, together with Peter Storrar from Kantar TNS. Langschmidt spoke to Bizcommunity after the results.

"The new segmentation of Social Economic Measures (SEM) used by the ES provide a much more accurate reflection of the profile of South Africans and reflects the massive income inequality that exists in this country," he explains.

South Africa has a higher Gini coefficient (the measure most often used to measure income distribution), demonstrating the big differentiator between rich and poor in the country, with 40% of the population being very poor.

"LSM would have us believe that South Africa has a LSM of 6 middle class, which would give us the same profile as Canada and Australia. But this is not so. We live in Africa and we have the legacy of Apartheid. Half our population earns only 20% of the country's money," says Langschmidt.

The survey is also indicative of the changes the media landscape is going through as it measures listening, reading and viewing, and not radio, televisions, etc. as previously. "It mirrors what consumers are doing on what device. For example, consumers are reading and listening to radio on mobile devices. Forty percent of radio is consumed on the mobile phone."

Everything is mobile

With 98% of all households having a mobile phone, overwhelming everything is mobile.

The PC has been in decline for years and tablet penetration is still small. The cell phone is the fastest growing product in history.

In Africa where people are poor, this device is more important, says Langschmidt. "In South Africa 94% of people access the internet on their cell phone and the country also has the highest penetration of WhatsApp in the world. Unfortunately, the country also has the most expensive data in the world. Models that provide free Wi-Fi in areas such as taxi ranks are

being investigated, and whoever cracks that one will make it big.”

Despite this, television remains the killer app in South Africa. “It is bigger than radio, which previously was the biggest.”

Both the BRC and PRC offer training on the SE. The BRC host weekly workshops, while the PRC will talk clients through the system on site or in their offices. Both entities have underlined their commitment to the industry to train them for this brave new world and exciting times.

SEM will now be on the television and radio panels, as announced yesterday, and on the print currency from February next year.

ABOUT DANETTE BREITENBACH

Danette Breitenbach is a marketing & media editor at Bizcommunity.com. Previously she freelanced in the marketing and media sector, including for Bizcommunity. She was editor and publisher of AdVantage, the publication that served the marketing, media and advertising industry in southern Africa. She has worked extensively in print media, mainly B2B. She has a Masters in Financial Journalism from Wits.

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