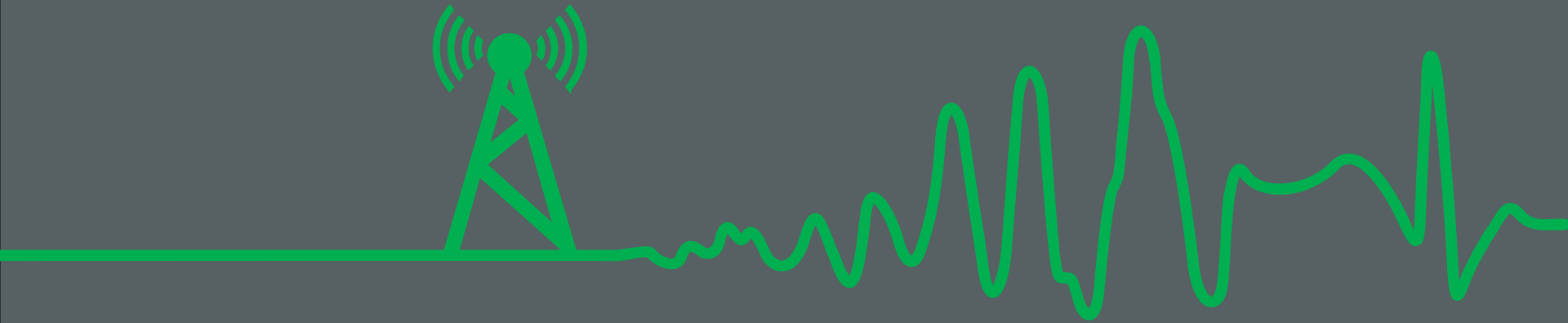


# The BRC brings you a **BRAND NEW** Radio Audience Measurement System

BRC RAM: Jan – Jun 2016



# BRC RAM - VITAL SIGNS



# BRC RAM - Vital Signs

National sample



**Universe:** Population age 15+  
**38,3 million**

Random selection,  
household flooding

**13,436k**  
Households



**36,447k**  
Individuals



Q1&Q2 sample size



# BRC RAM - Vital Signs

## Consistent area split (sample frame)



**60%** Metro



**20%** Small Urban



**20%** Rural

## Stations included

**39** Commercial and PBS stations

**297** Community stations

**85%** Weighting efficiency

## Rolling sample

Stations with a small base size will be able to roll sample for 6 months or 12 months



# BRC RAM - Milestone Chart



**n=7500**

**Q1 (Jan - Mar)  
4 days old**

**new born**



**n=7500**

**Q2 (Apr - Jun)  
7 year old**

**child**



**We are here**



**n=7500**

**Q3 (Jul - Sep)  
14 year old**

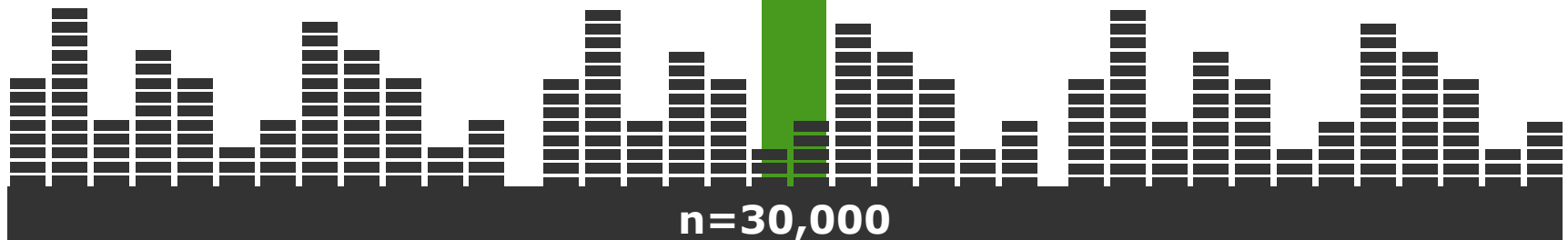
**adolescent**



**n=7500**

**Q4 (Oct - Dec)  
21 year old**

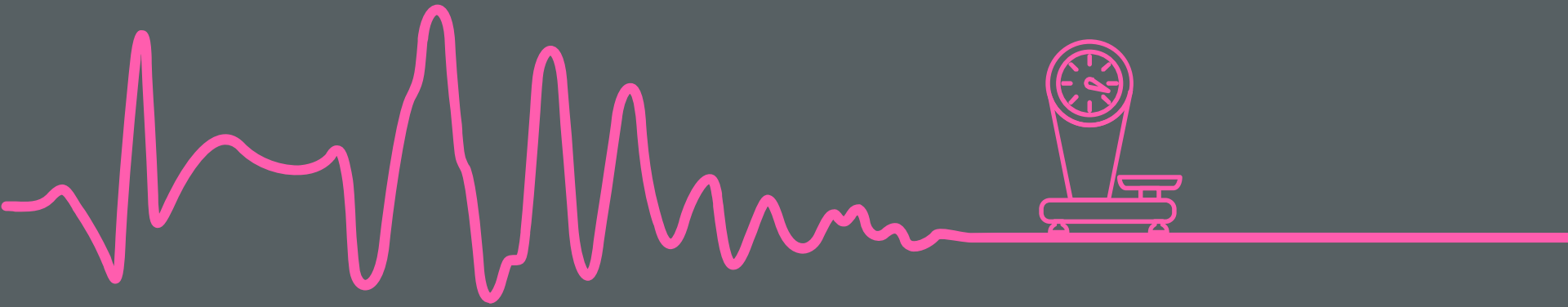
**adult**



**7 Jan**

**22 Dec**





# SAMPLING, WEIGHTING AND THE GIRL IN THE **PINK** DRESS



# BRC RAM sample **closely** reflects the South African population

**SAARF RAMS**  
(Unweighted)



 <b>Black</b>	<b>56%</b>
 <b>Coloured</b>	<b>17%</b>
 <b>Indian / Asian</b>	<b>7%</b>
 <b>White</b>	<b>21%</b>





**BRC RAM**  
(Unweighted)



 <b>Black</b>	<b>76%</b>
 <b>Coloured</b>	<b>12%</b>
 <b>Indian / Asian</b>	<b>4%</b>
 <b>White</b>	<b>8%</b>

**SA Population**  
(IHS)



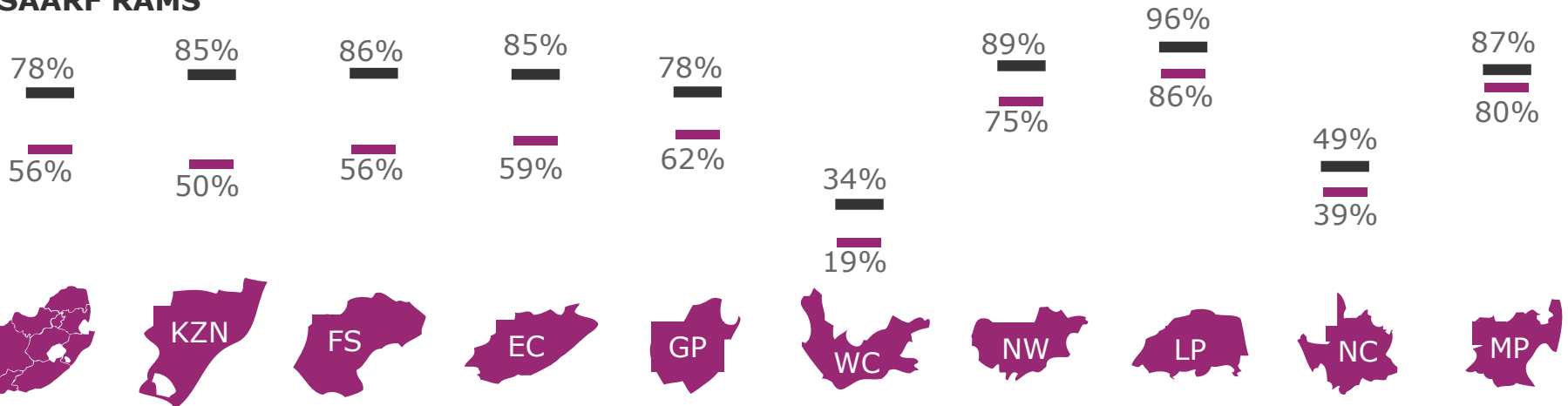
 <b>Black</b>	<b>78%</b>
 <b>Coloured</b>	<b>9%</b>
 <b>Indian / Asian</b>	<b>3%</b>
 <b>White</b>	<b>10%</b>

# ... and therefore requires less weighting

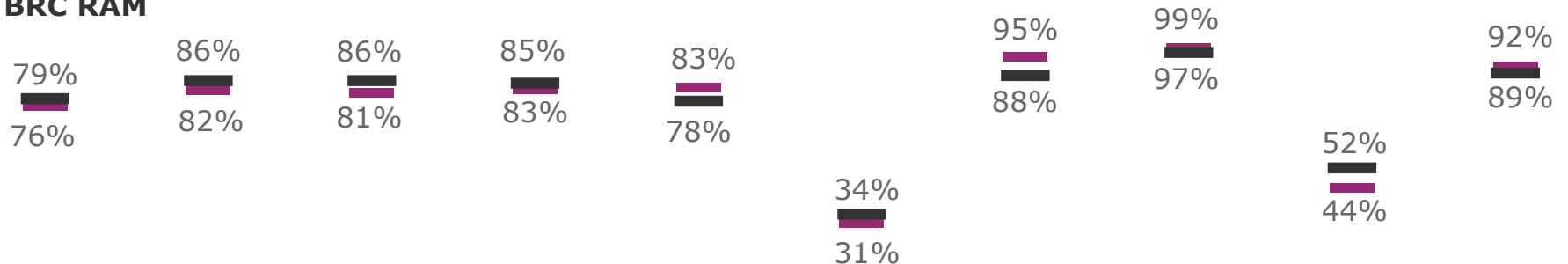
## Black sample

Weighted  
 Unweighted

### SAARF RAMS



### BRC RAM

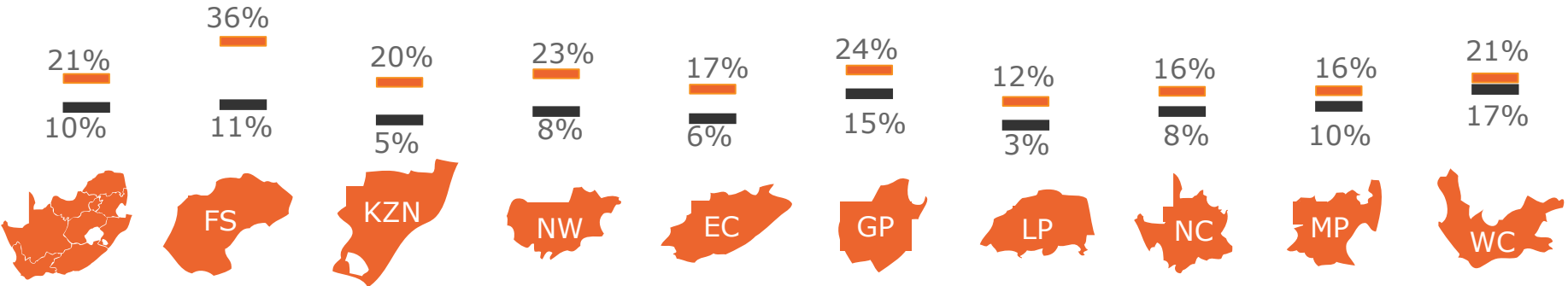




# White sample

Weighted  
 Unweighted

## SAARF RAMS

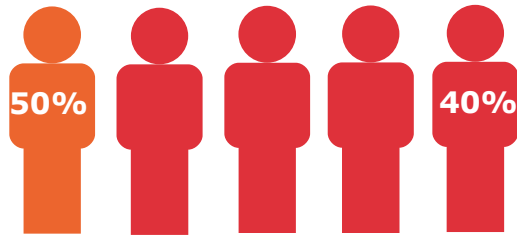
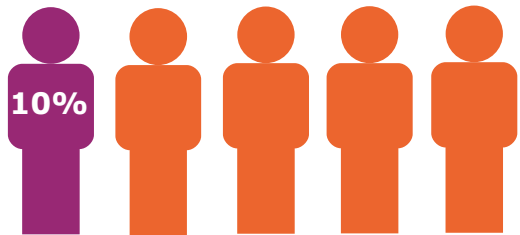


## BRC RAM

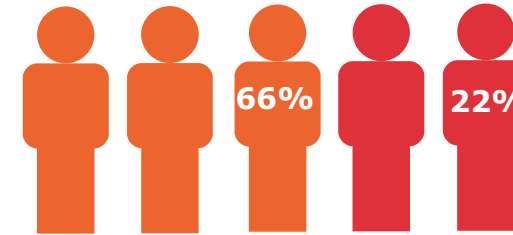


# ... more representative sample provides a different spread across the LSM spectrum

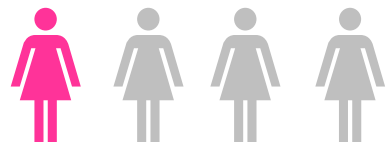
SAARF RAMS



BRC RAM



# As a **skewed** sample can **distort** the **outcome**



1 Girl likes Pink



**WEIGHT DATA**



**Results**

20 girls like pink

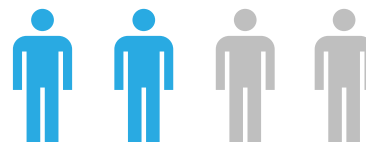


So.....

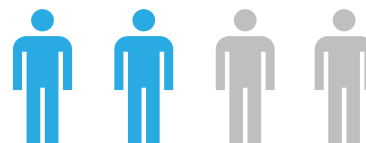
**All girls like Pink**



7 boys likes Blue  
3 boys like green

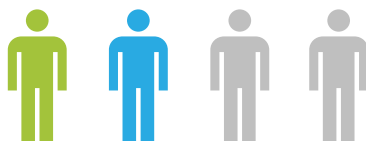
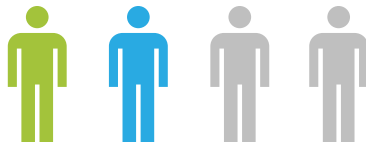


**WEIGHT DATA**



**Results**

12 boys like blue  
8 boys like green



So.....

**60% of boys like blue**

**Weighting is not a 'corrective' factor,  
it is a 'sample balancing' factor**

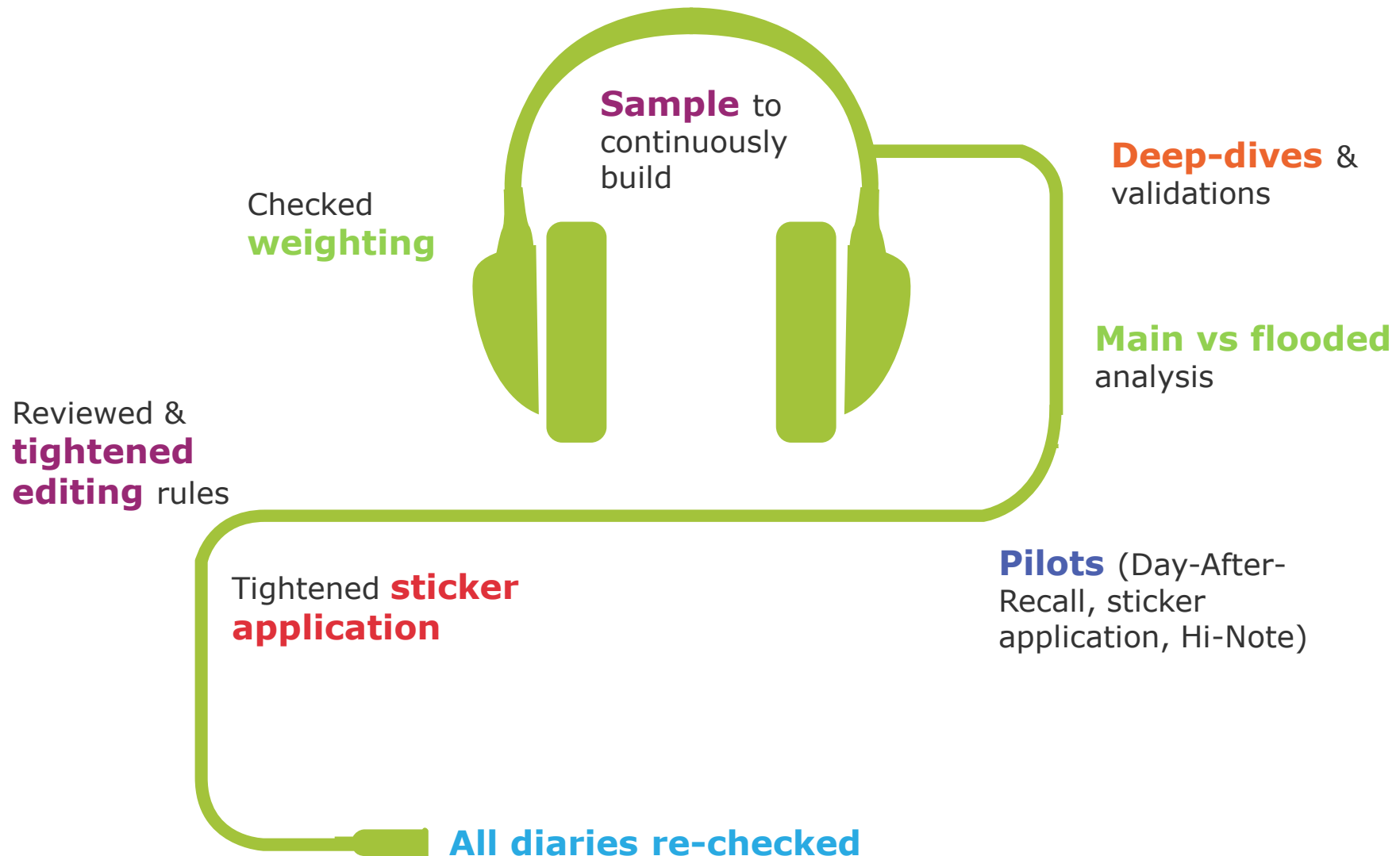
*BRC RAM has better **efficiencies**, **better coverage** and is picking up **more realistic audiences**, reflective of the **SA population***



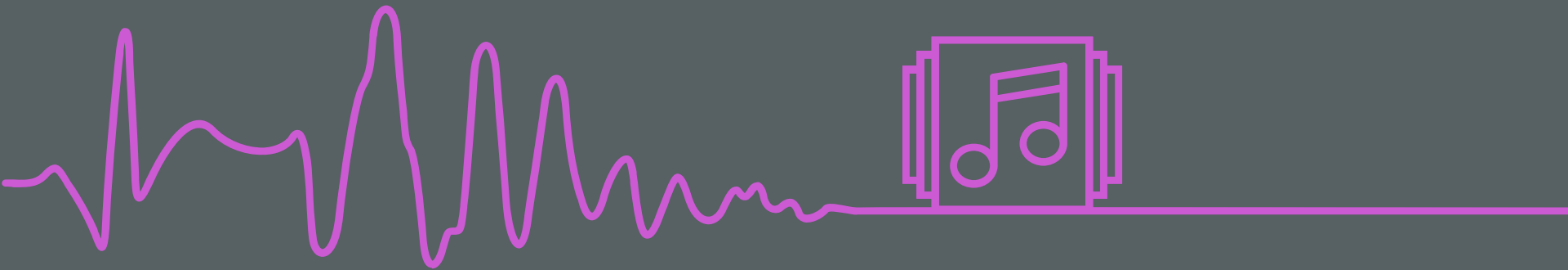
# 10 FINGERS AND 10 TOES



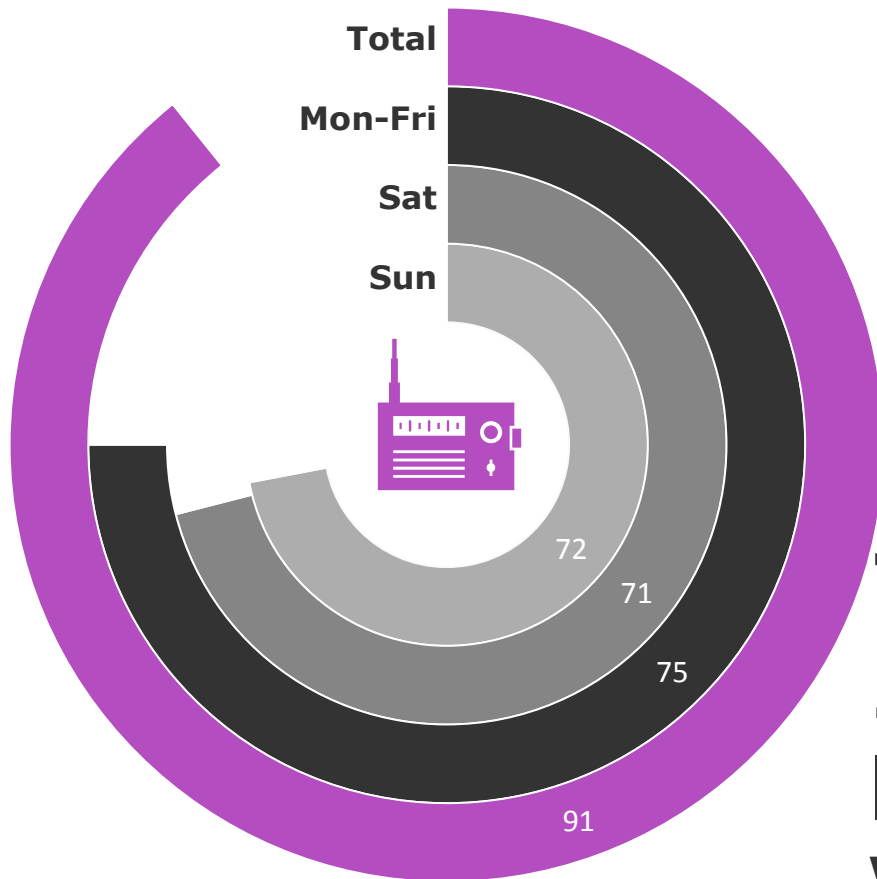
# Checks, Back Checks and Validations



# KEY SOUNDBITES



# Radio reaches most **South Africans** ...

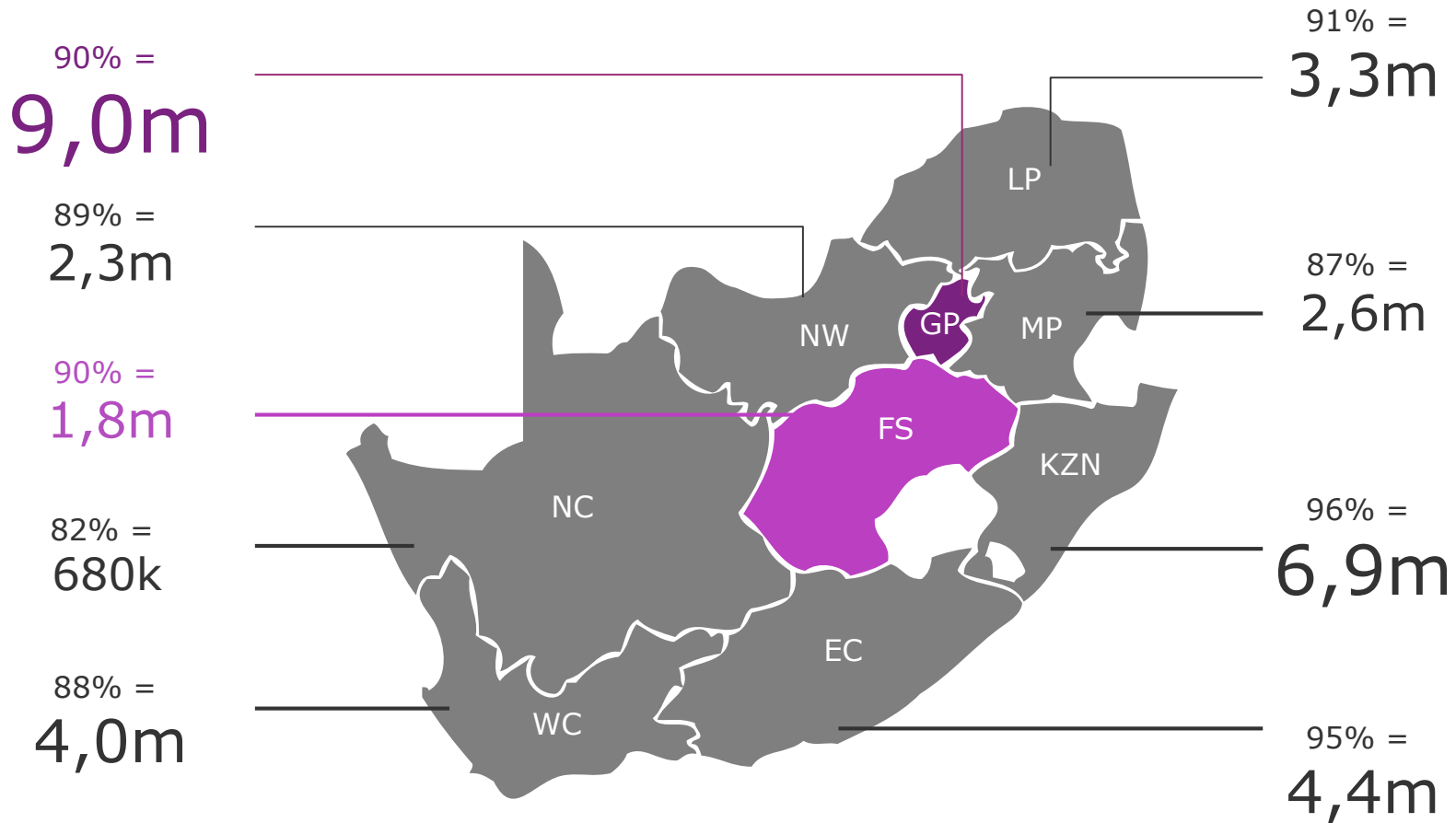


**91% weekly** reach =  
**34,9 million**  
**listeners** listening anytime  
in the week

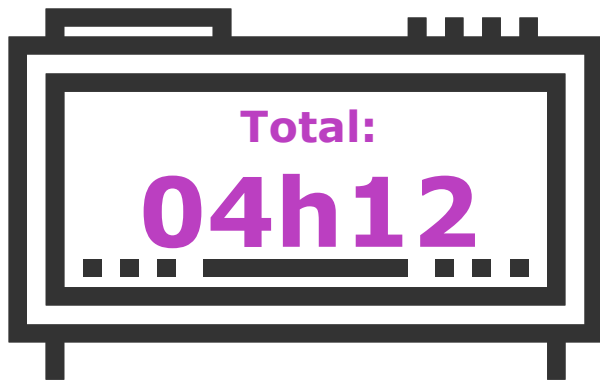
**75% daily** reach (Mon-Fri) =  
**28,5 million**  
**listeners** on an average  
weekday



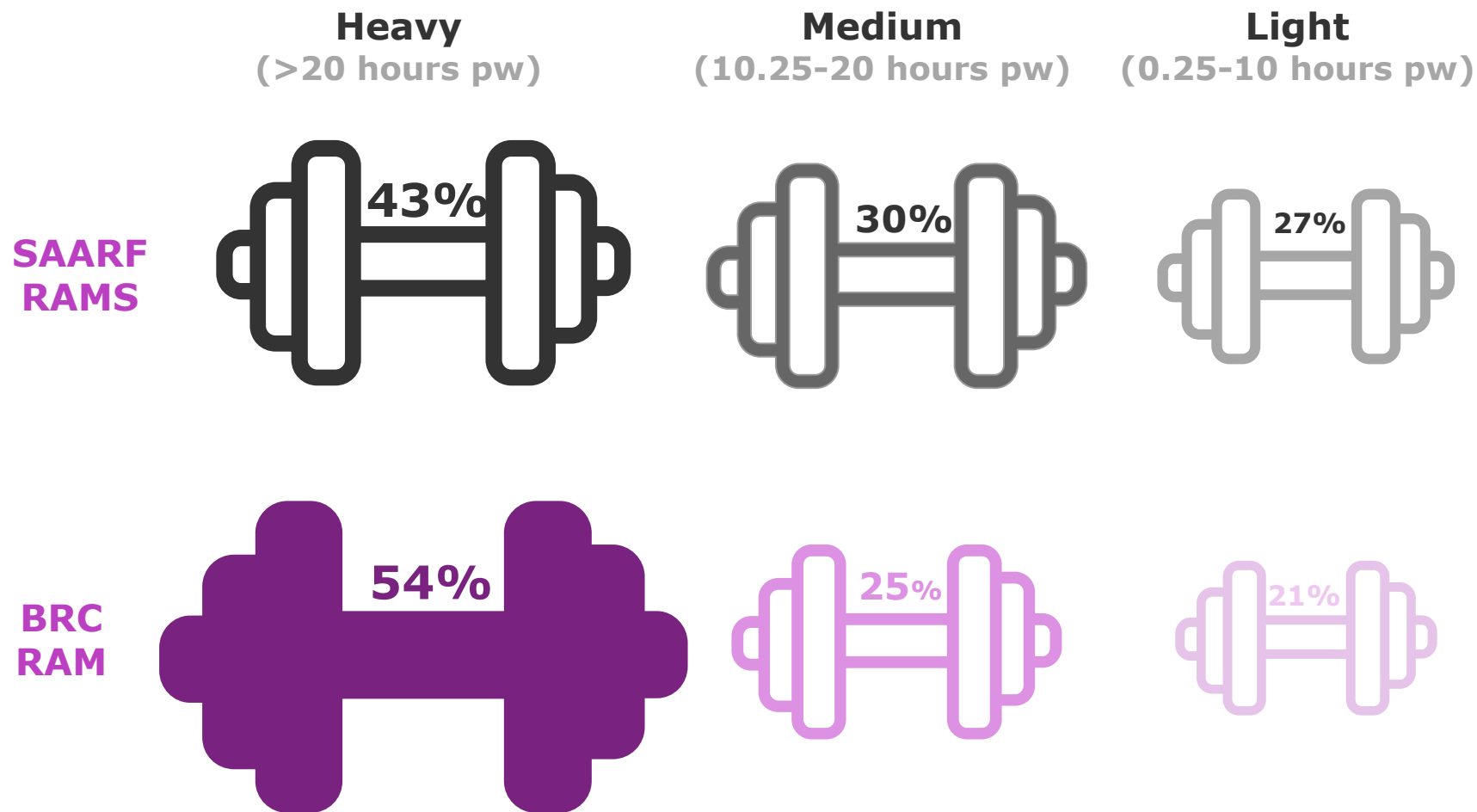
# ... everywhere!



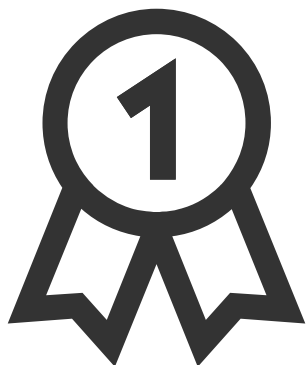
# Longer listening per day



# Heavier listening per week



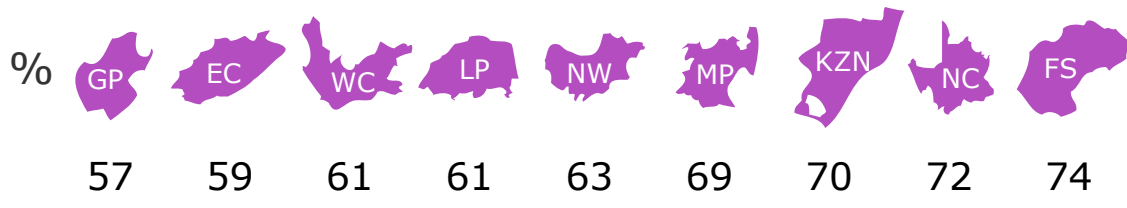
# Loyal listeners



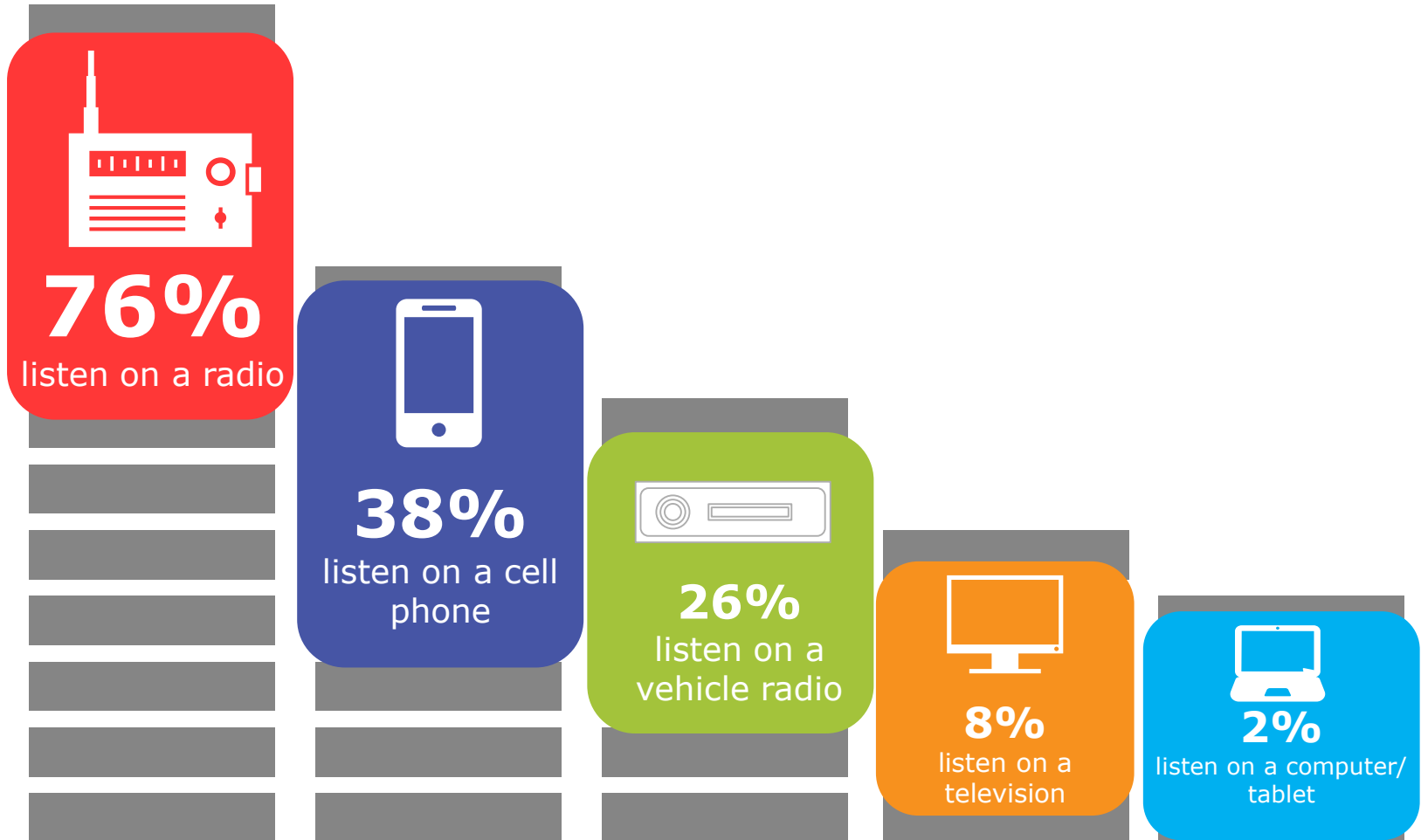
Total:

**63%**

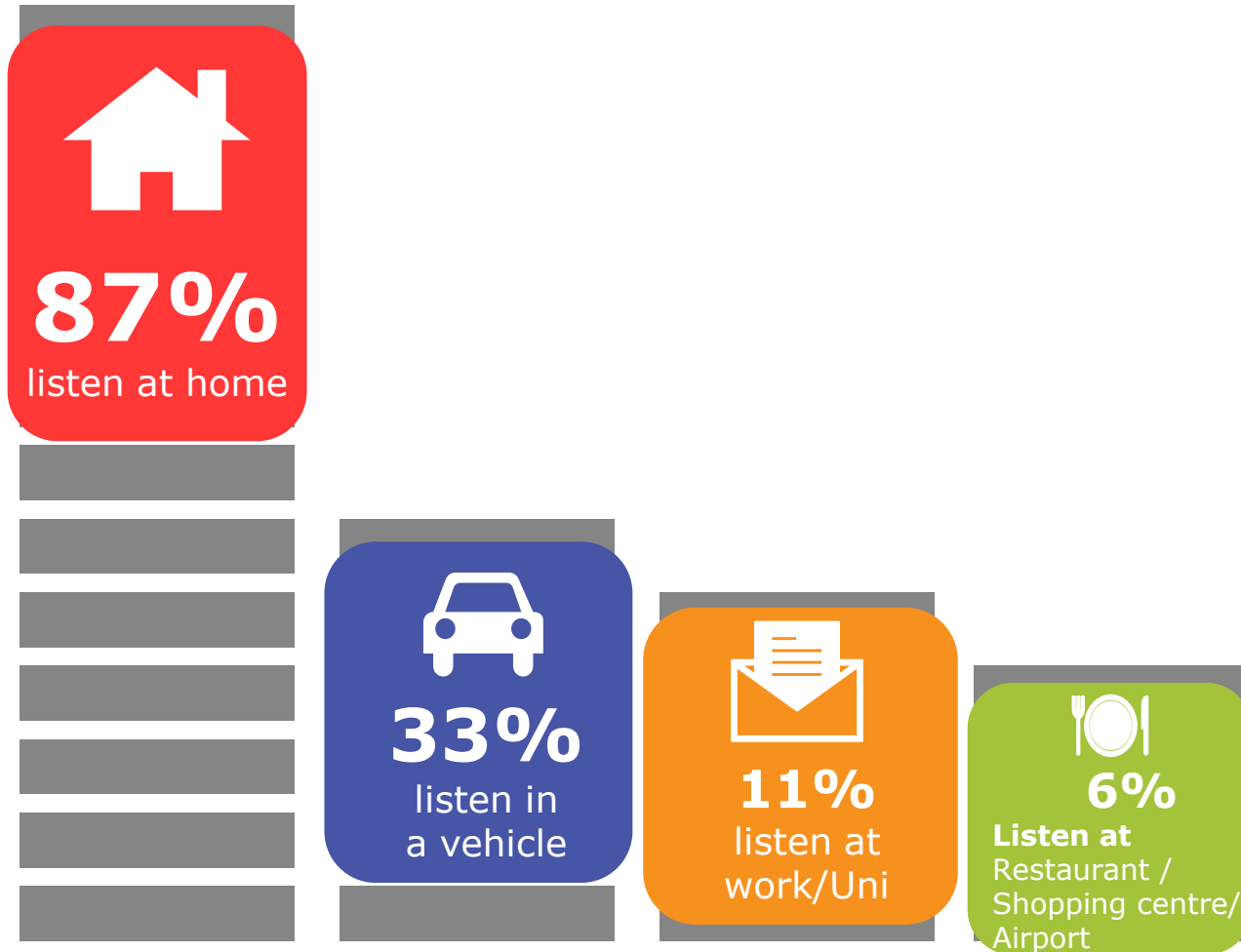
listen to only one station



# DEVICE listening brings a **new dynamic**, capturing **HOW** people listen



# LOCATION listening adds another new dynamic, capturing WHERE people listen



# The **transformation** of a Radio Audience Measurement System ...

**WHY** is it different and **WHAT** has changed?



**Sample Frame**



**Cross device / Cross location**



**Heavy / Loyal listeners**

# BRC RAM – in a **SOUNDBITE**

1

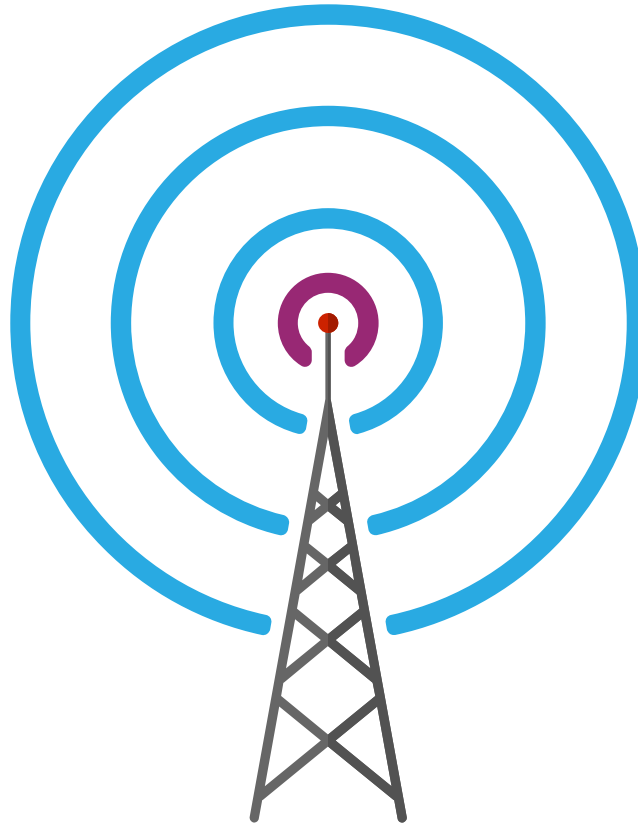
*Validations on the data have been extensive and support the new BRC RAM data*

2

*Less reliance on weighting as a corrective factor as the **sample is a good representation of the SA population***

3

*Dynamic capture of listening across **device & location***



4

*Less light listening which result in lower weekly cumes*

5

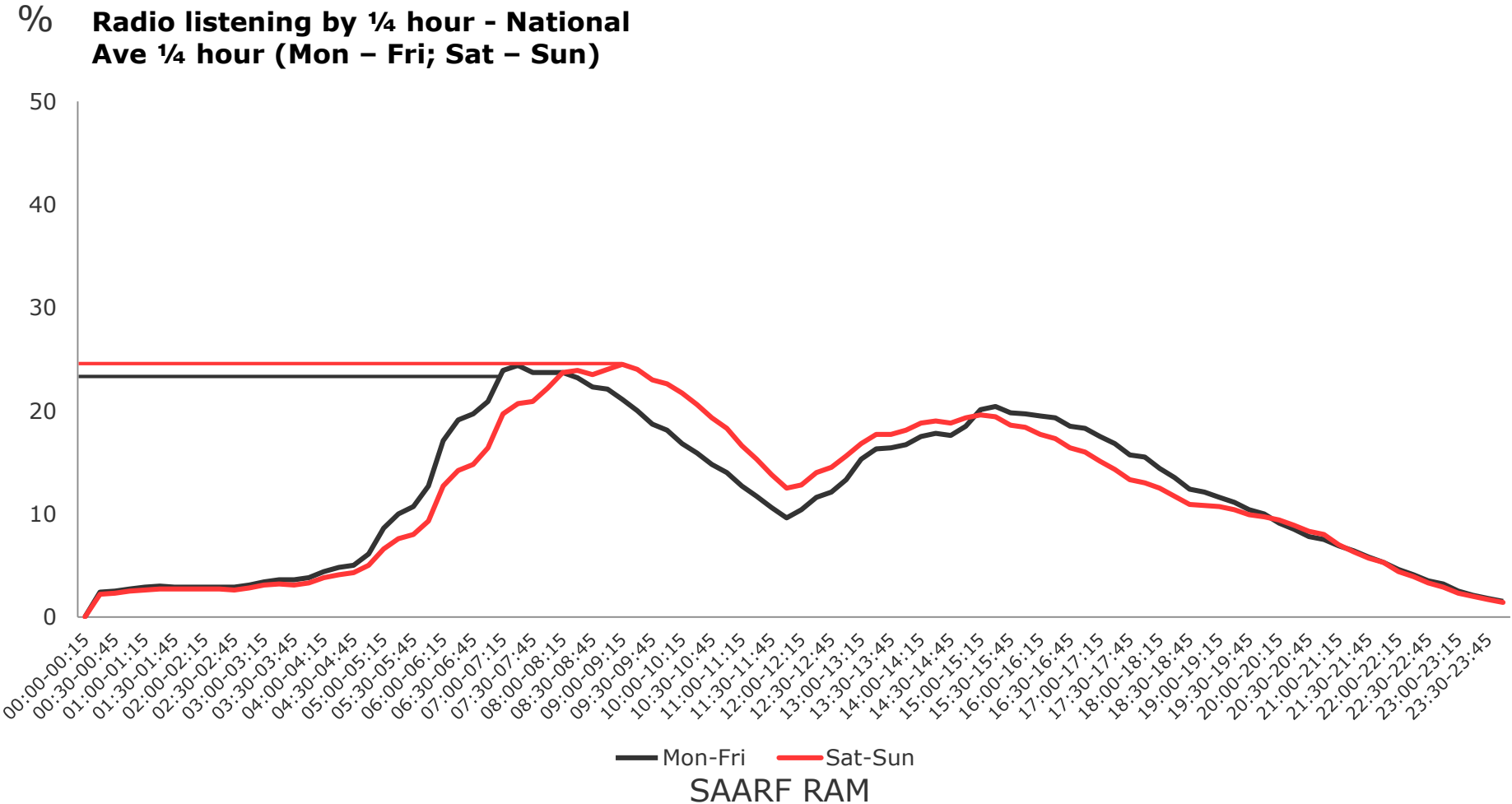
*This is driven by heavy, loyal listeners, listening to stations for longer periods of time*

6

*The instrument has created a paradigm shift, making **Radio relevant throughout the day***

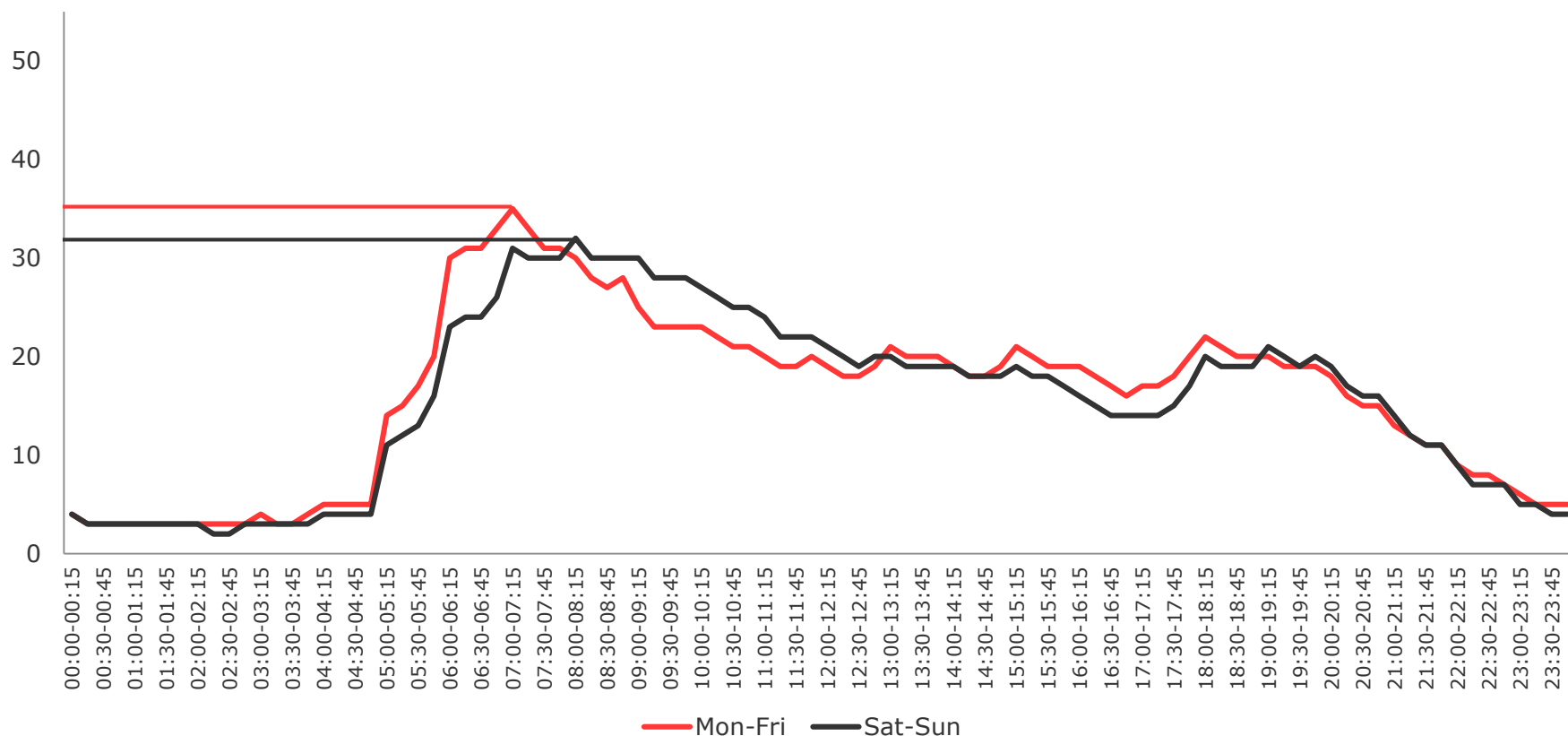


# The curve we were used to...



# A brand new curve (Longer, Heavier and Loyal)

% Radio listening by ¼ hour - National  
Ave ¼ hour (Mon – Fri; Sat – Sun)

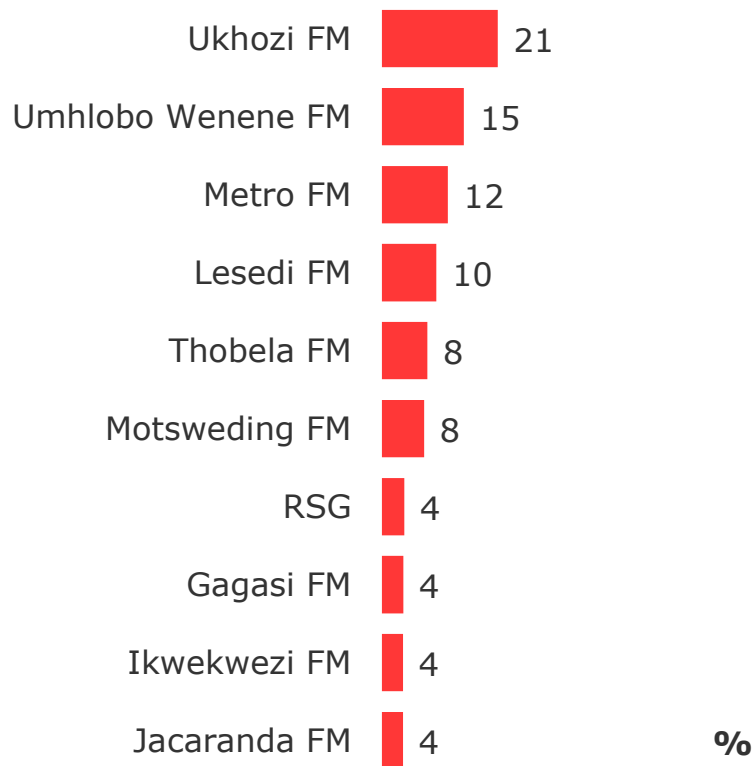


# National – Share of audience & Share of listening

## Share of Audience



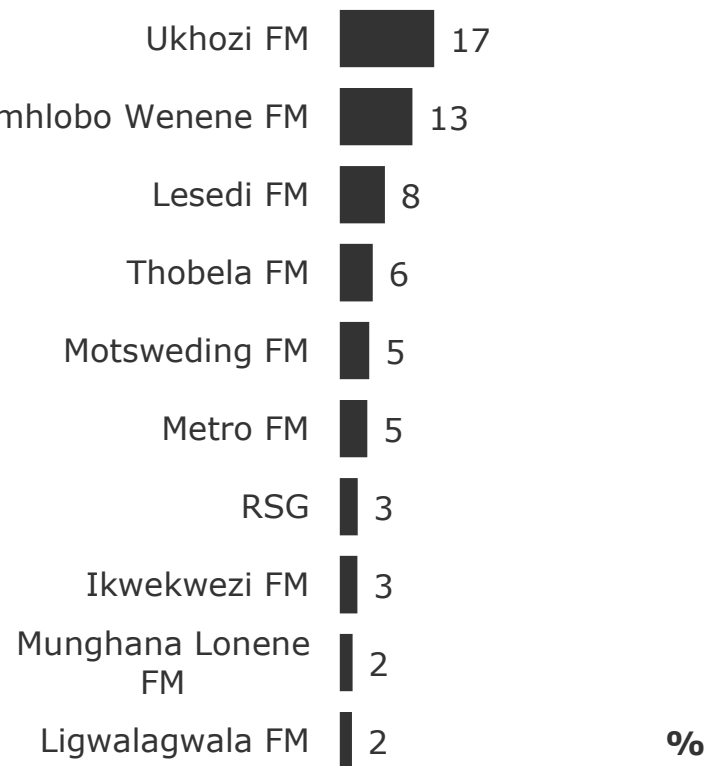
(% of **34.9m** listeners who listen in a week)



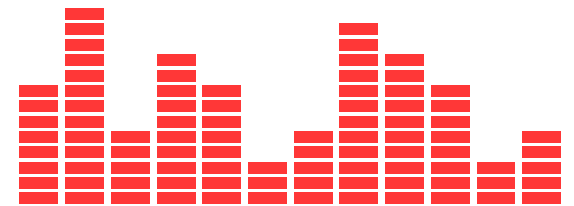
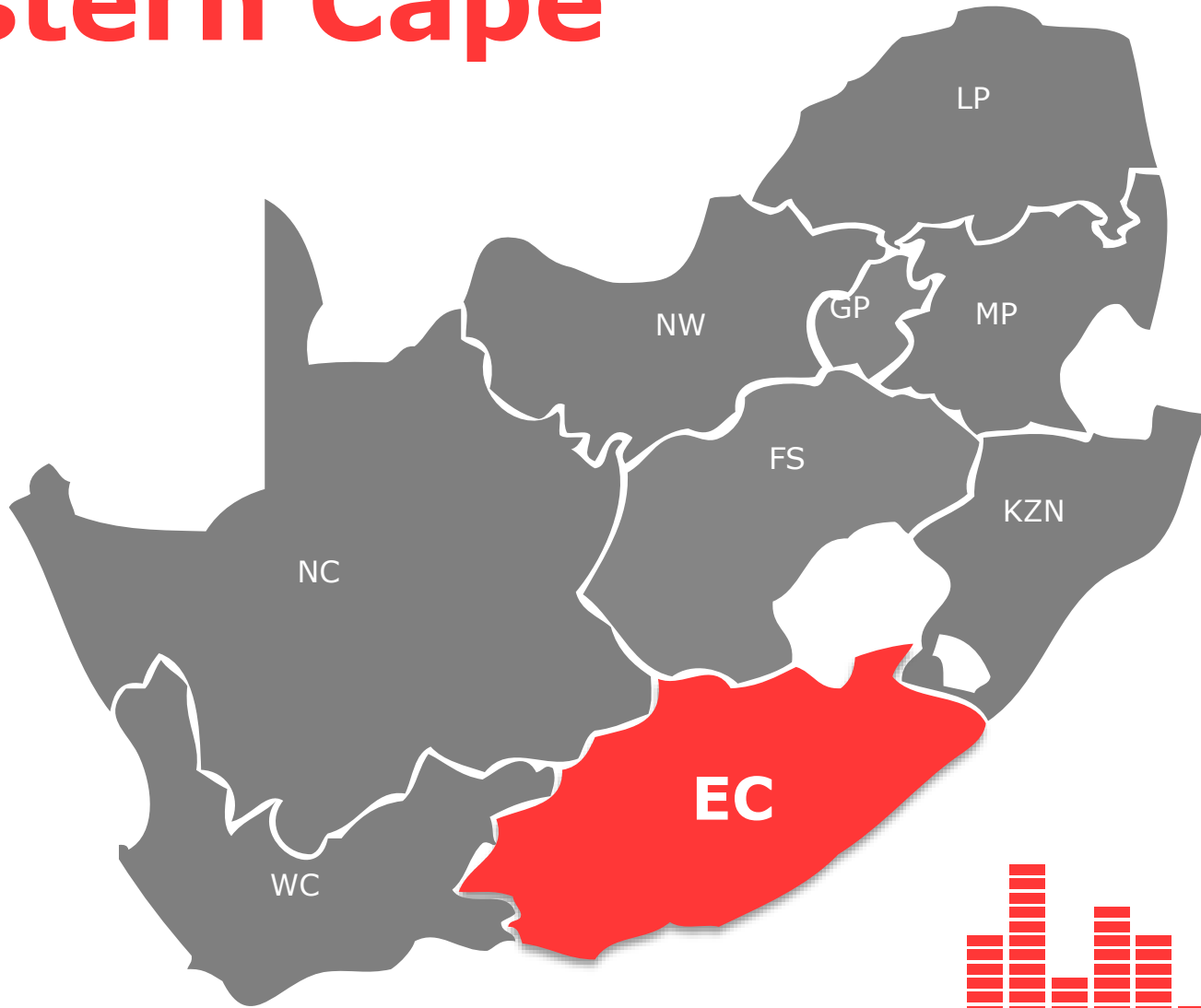
## Share of Listening



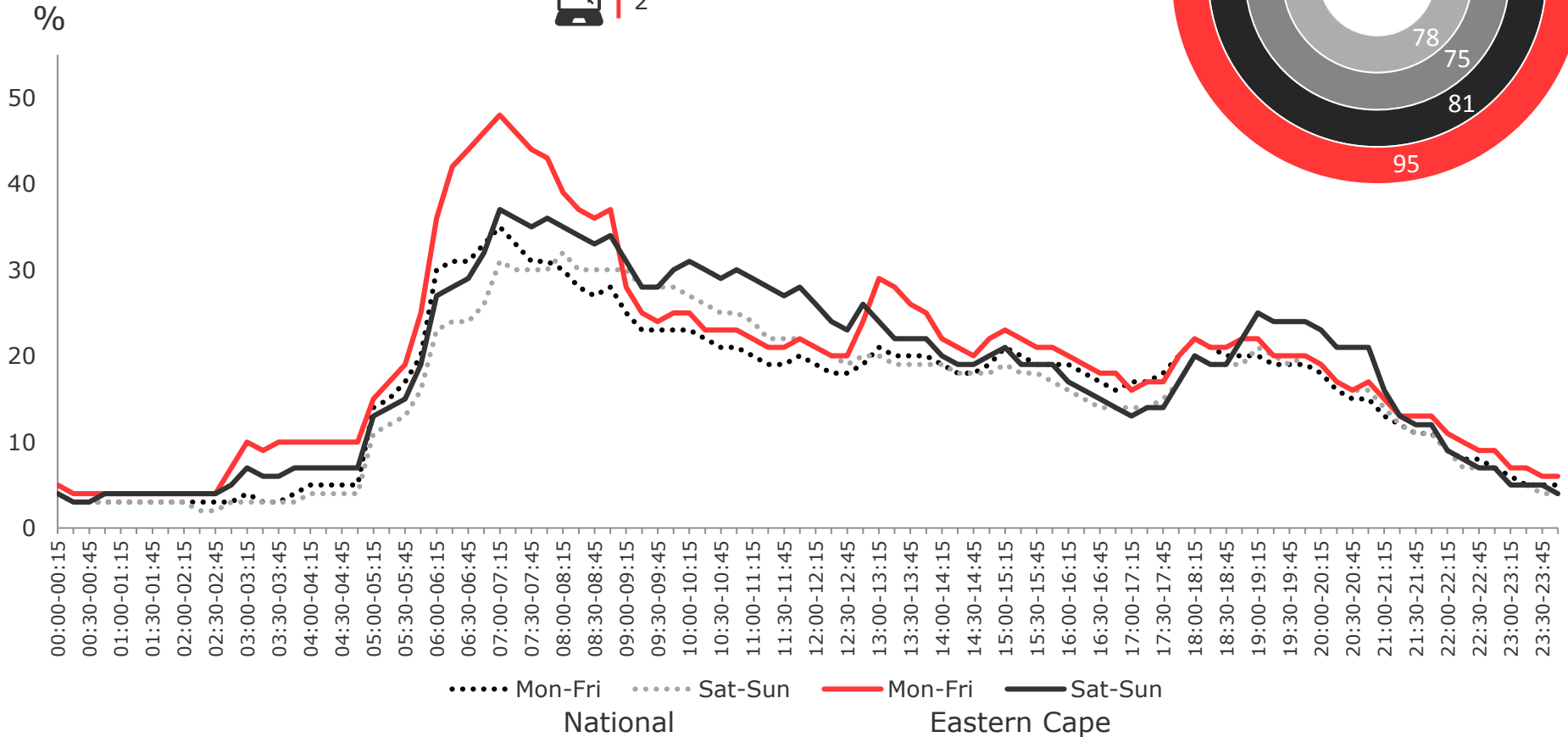
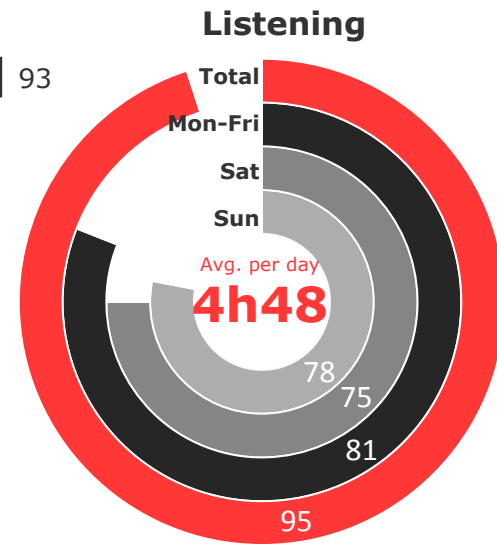
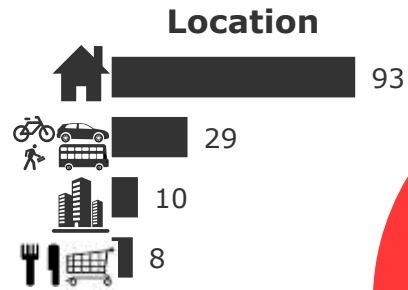
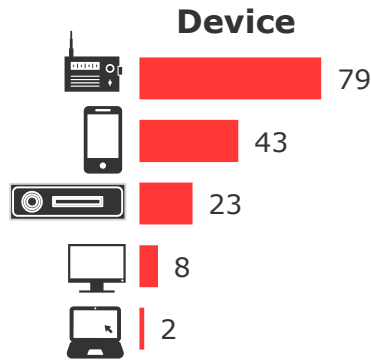
(% of **61.3b** listening minutes a week)



# Eastern Cape



# Eastern Cape

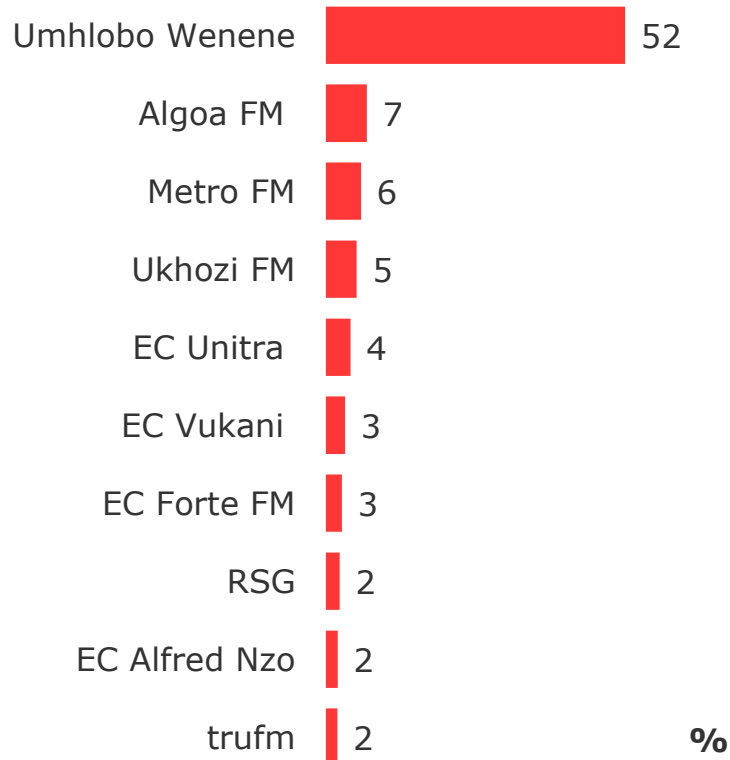


# Eastern Cape – Share of audience & Share of listening

## Share of Audience



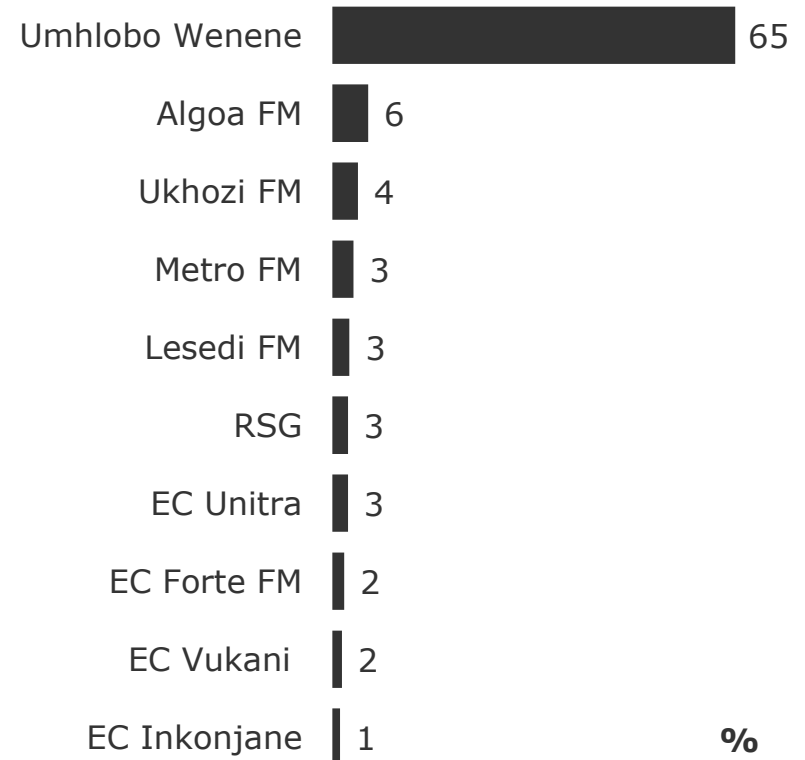
(% of **4.4m** listeners who listen in a week)



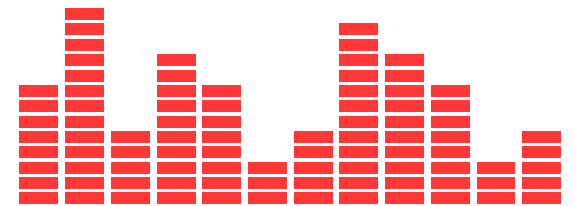
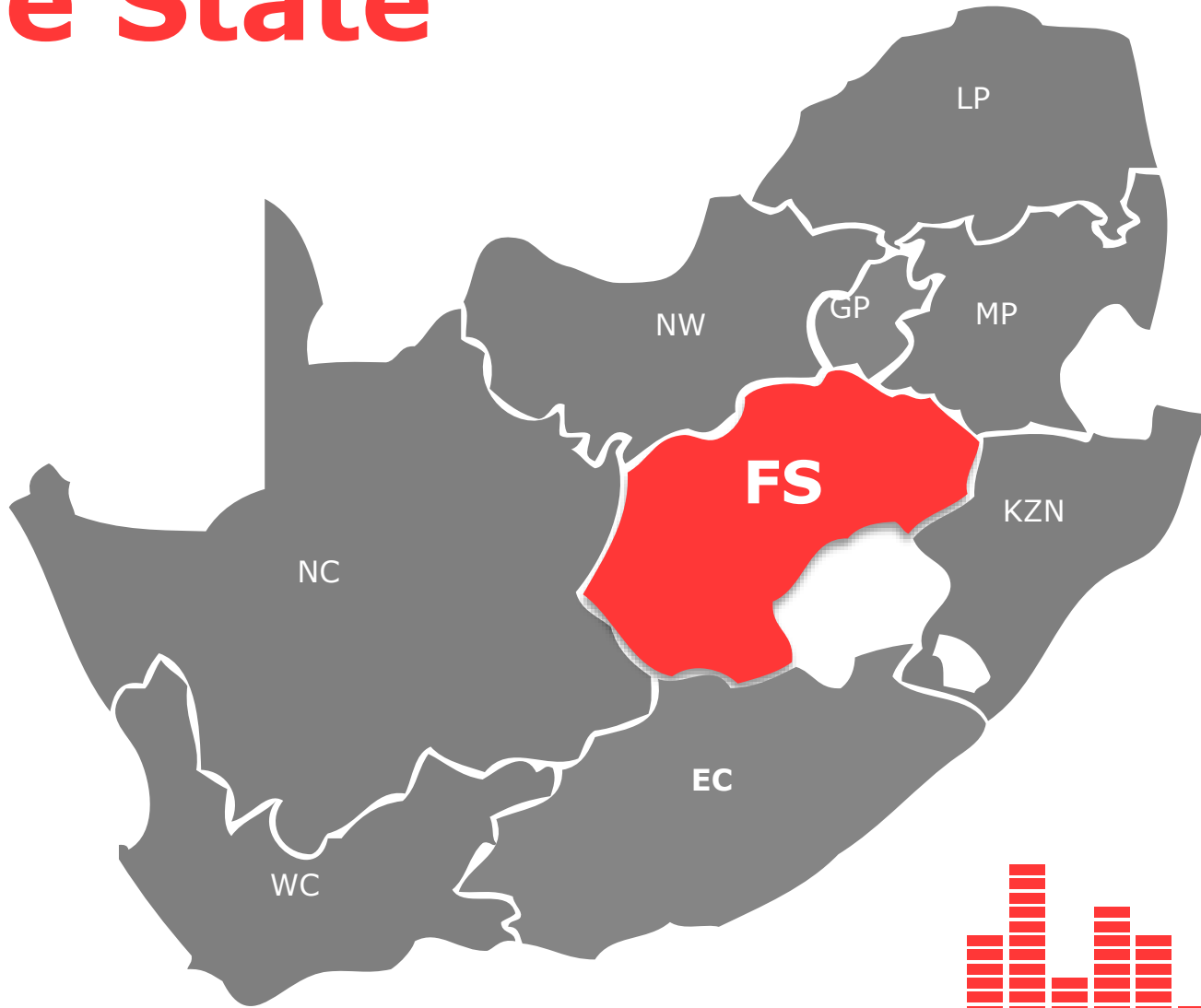
## Share of Listening



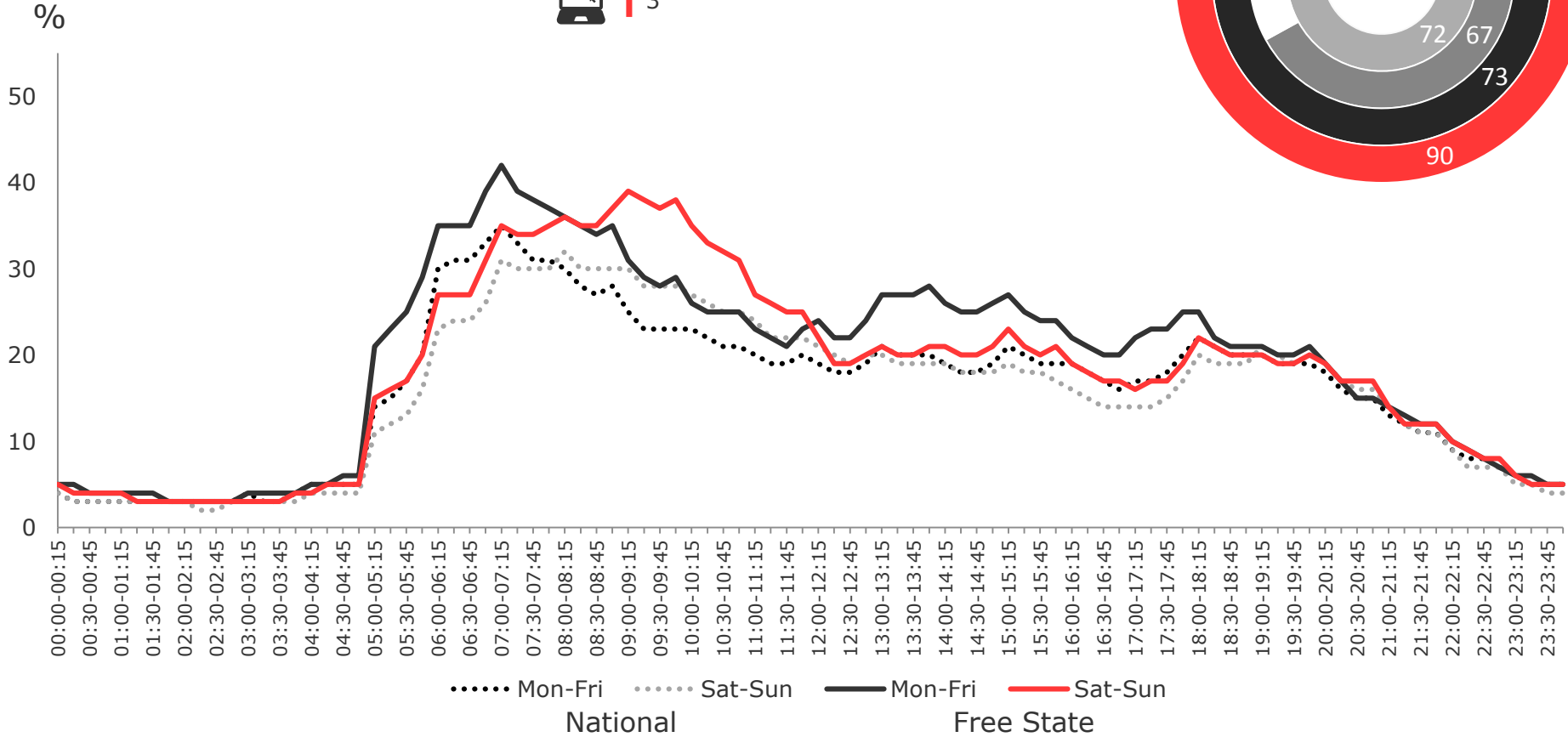
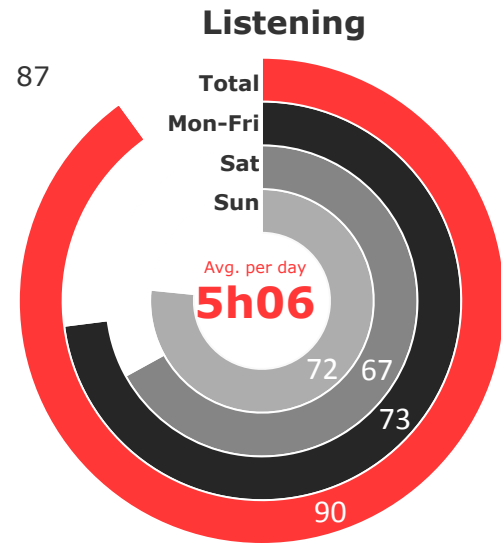
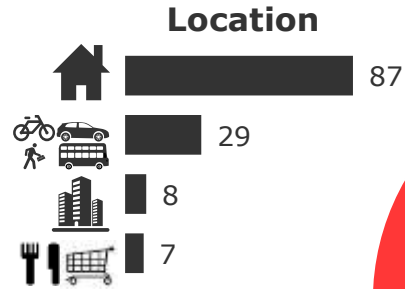
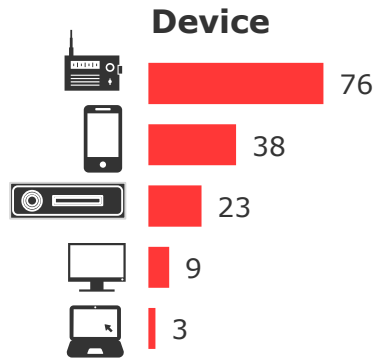
(% of **8.8b** listening minutes a week)



# Free State



# Free State



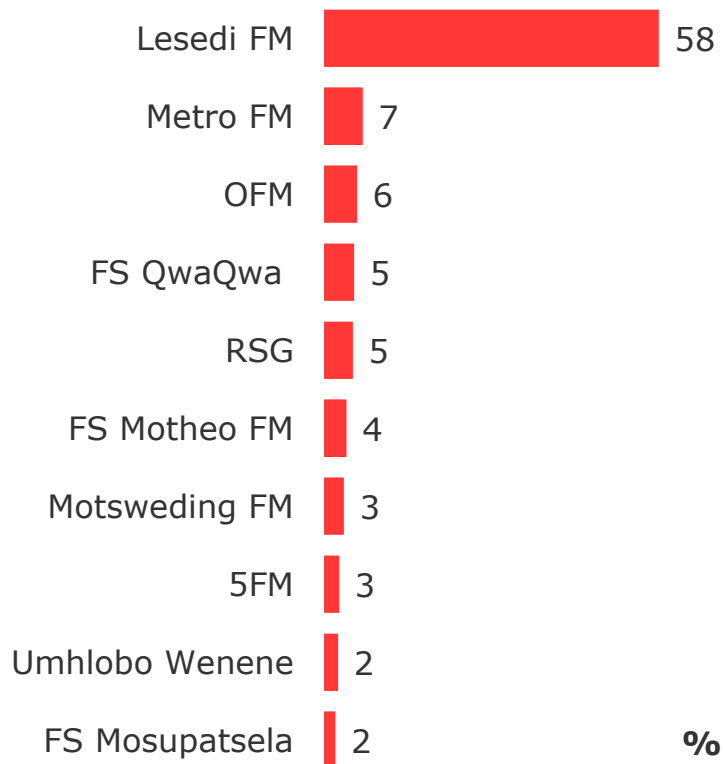


# Free State – Share of audience & Share of listening

## Share of Audience



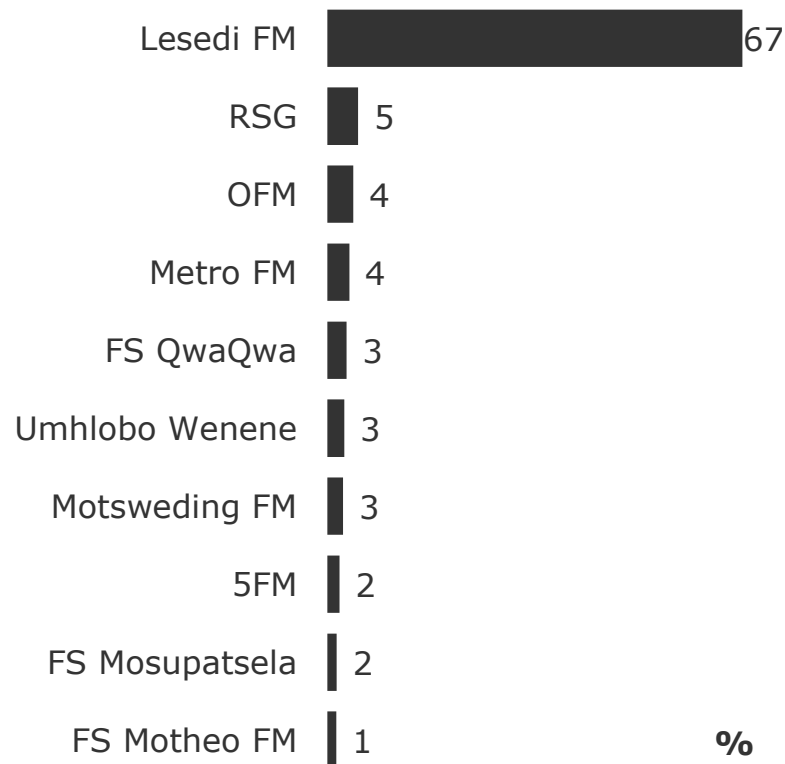
(% of **1.8m** listeners who listen in a week)



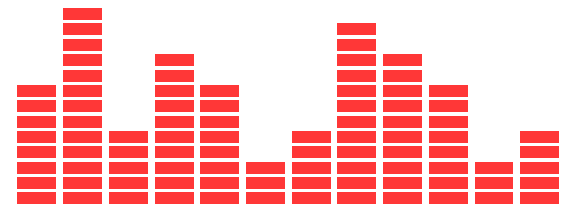
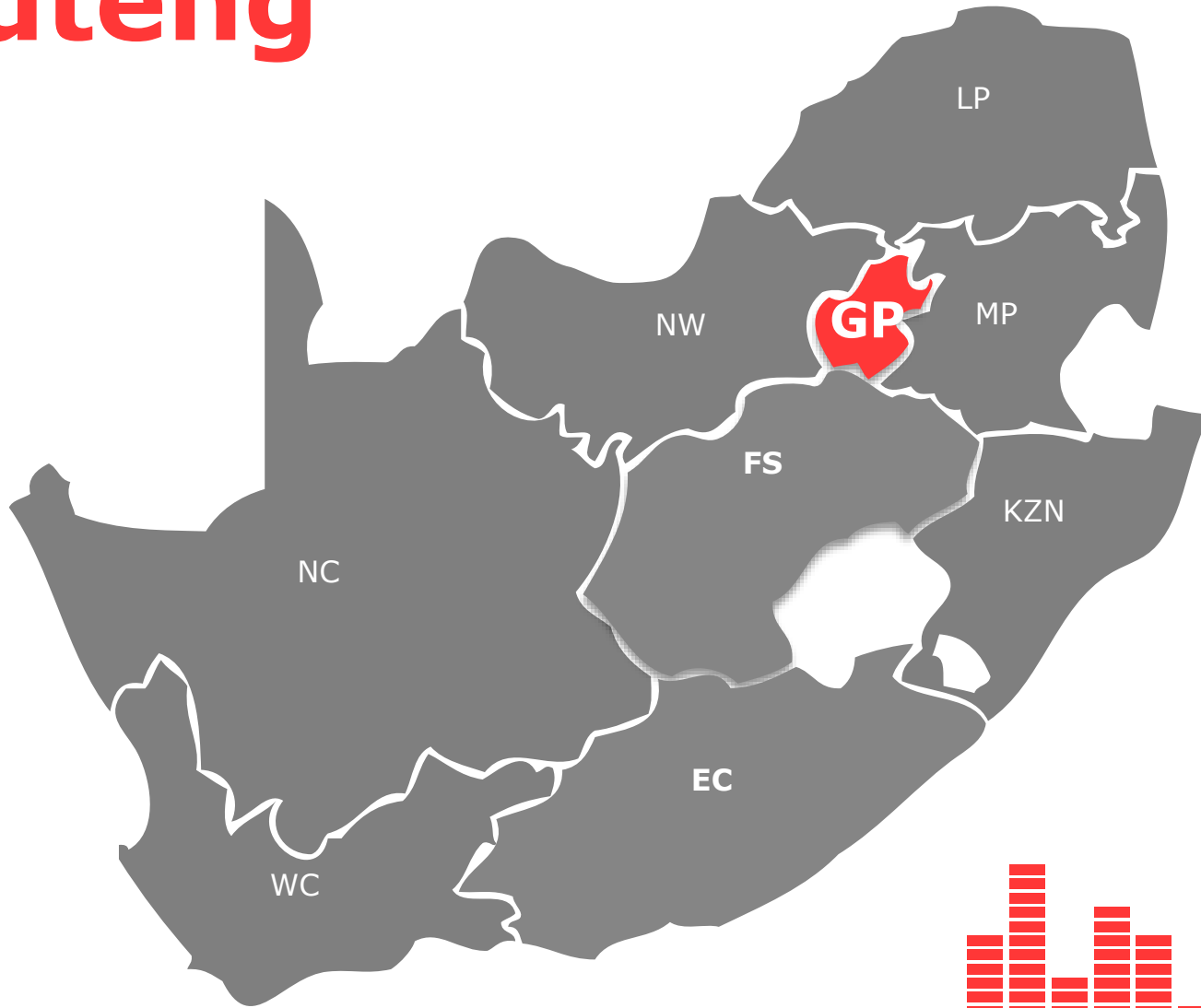
## Share of Listening



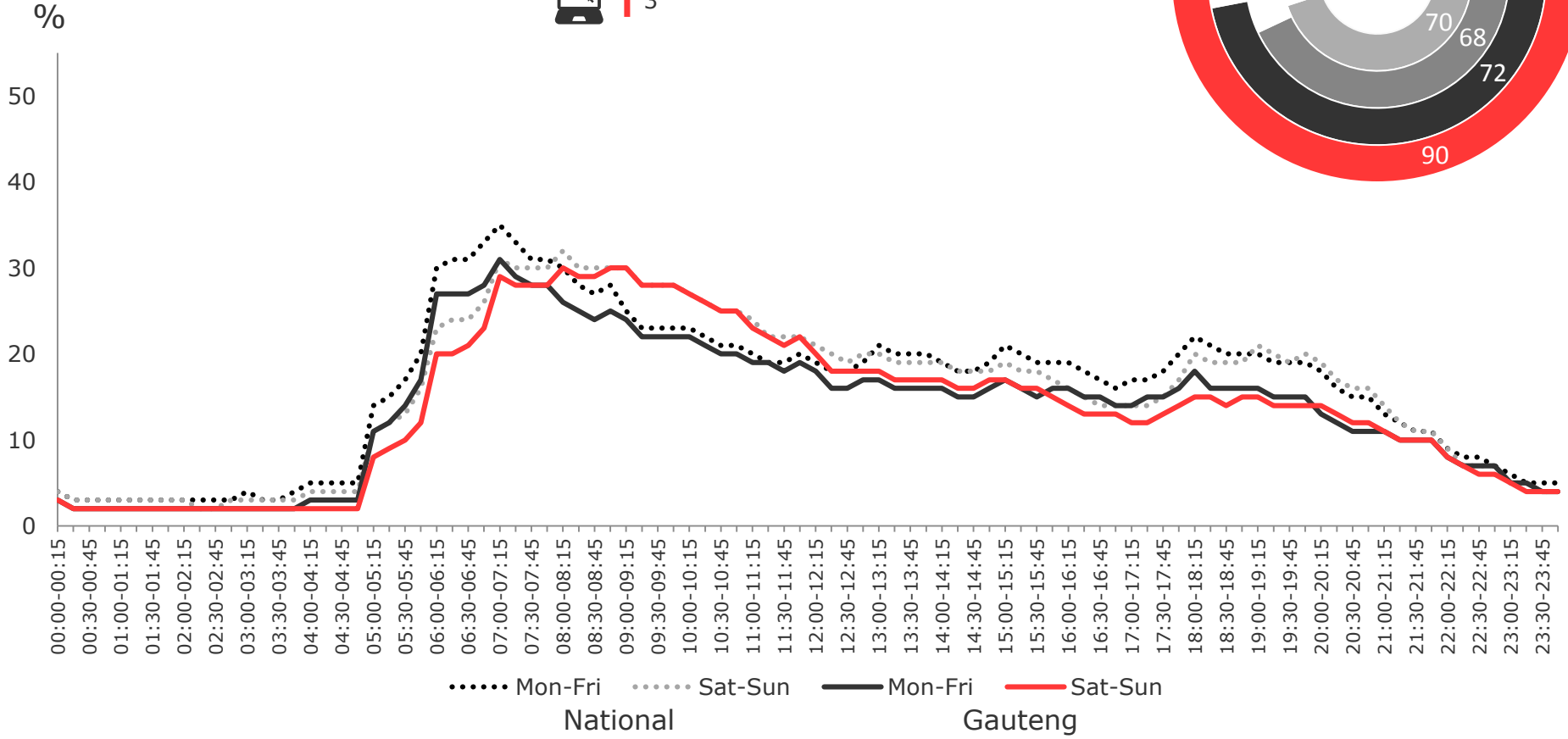
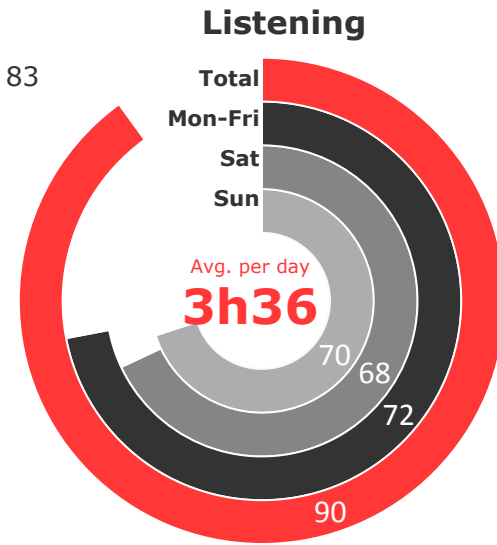
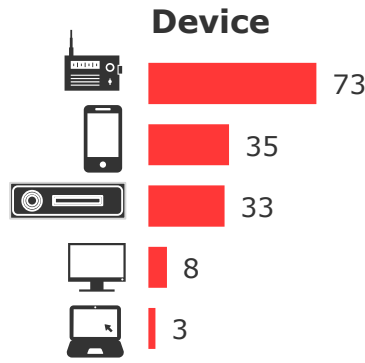
(% of **3.8b** listening minutes a week)



# Gauteng



# Gauteng

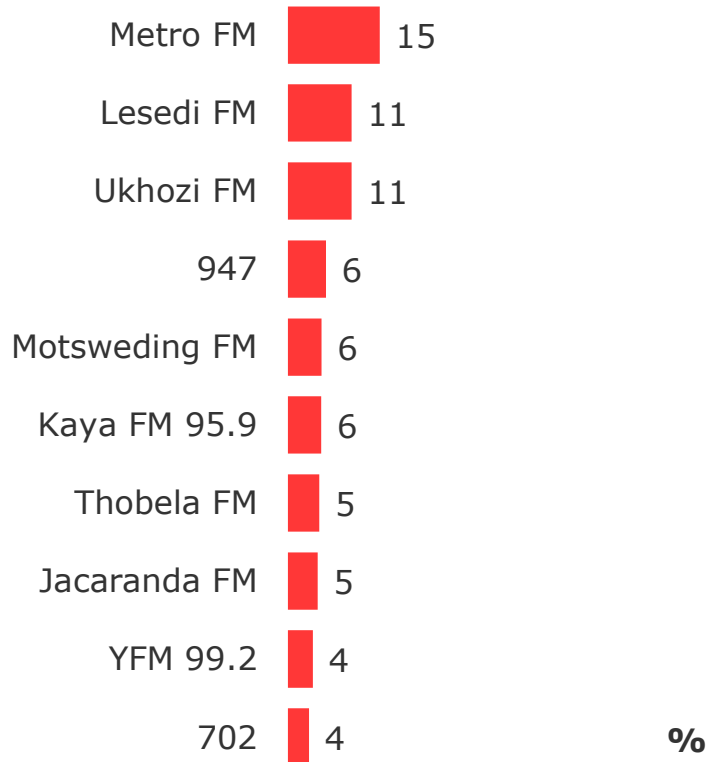


# Gauteng – Share of audience & Share of listening

## Share of Audience



(% of **9.0m** listeners who listen in a week)



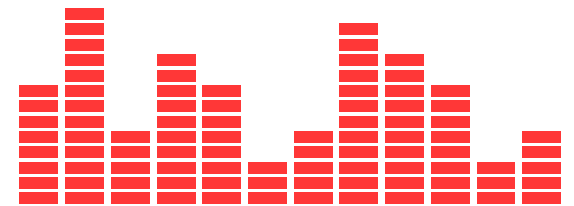
## Share of Listening

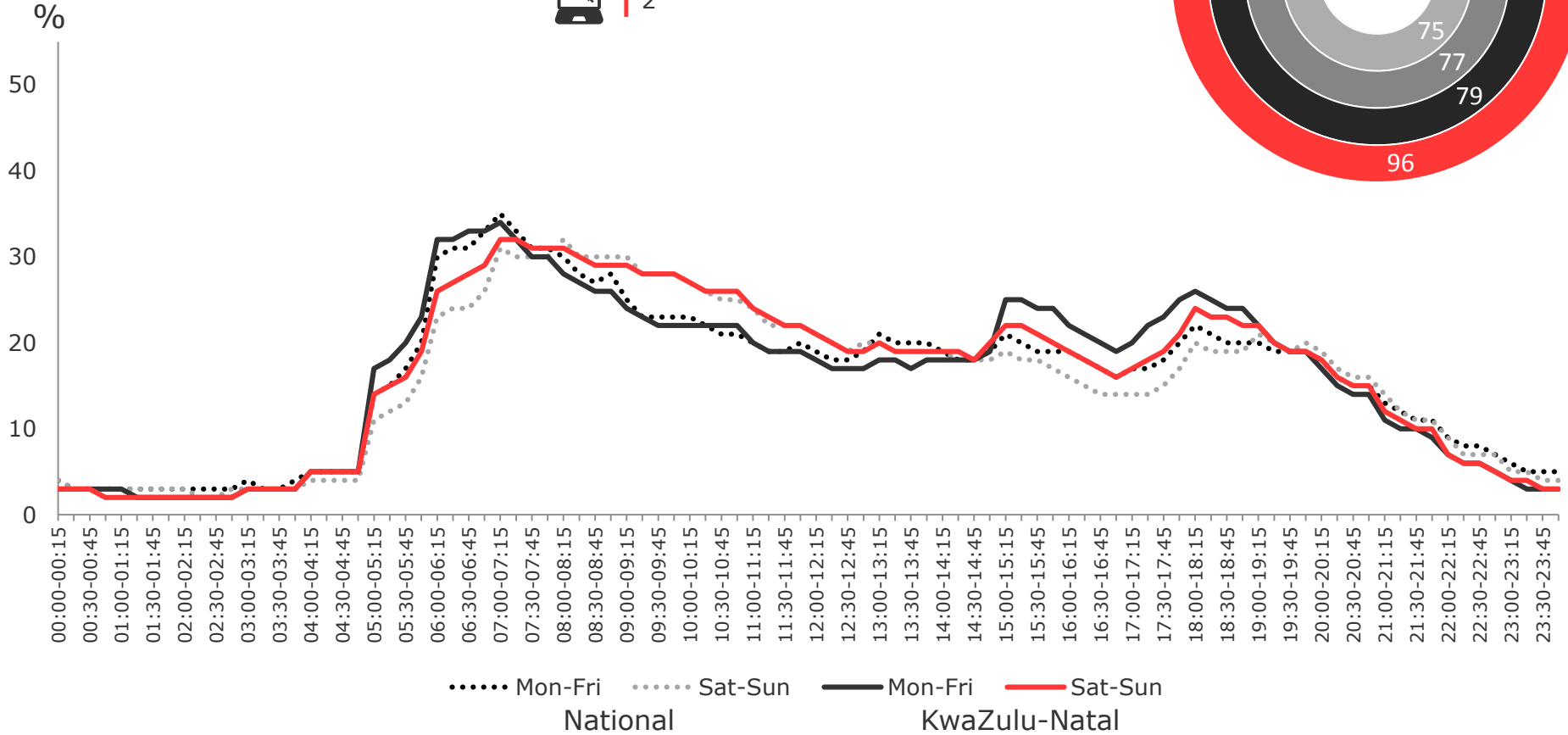
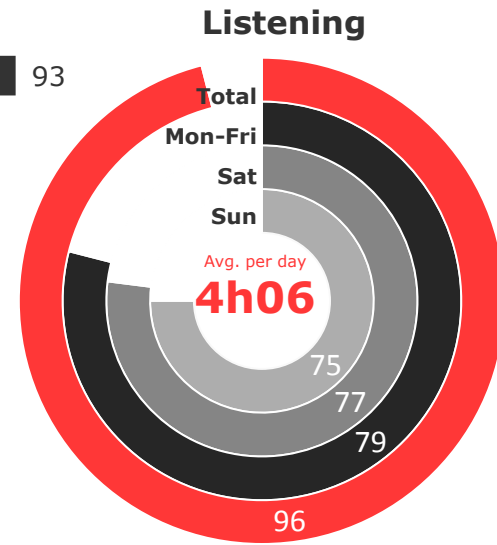
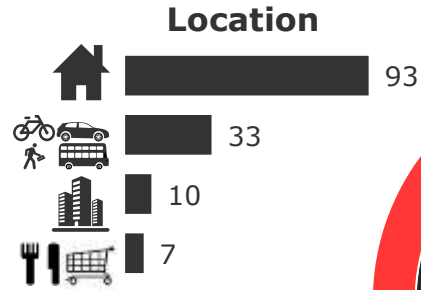
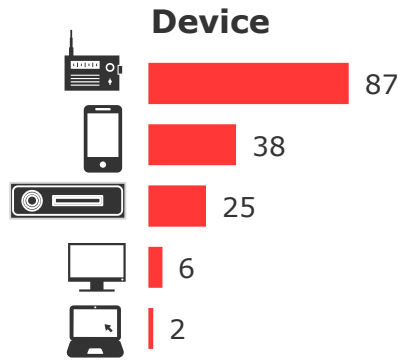


(% of **13.7b** listening minutes a week)



# KwaZulu-Natal



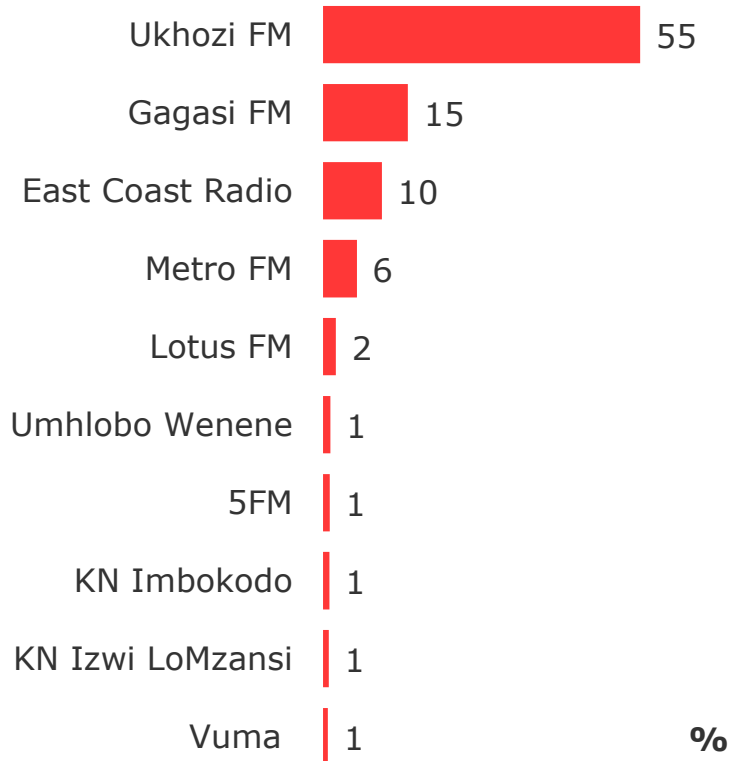


# KZN – Share of audience & Share of listening

## Share of Audience



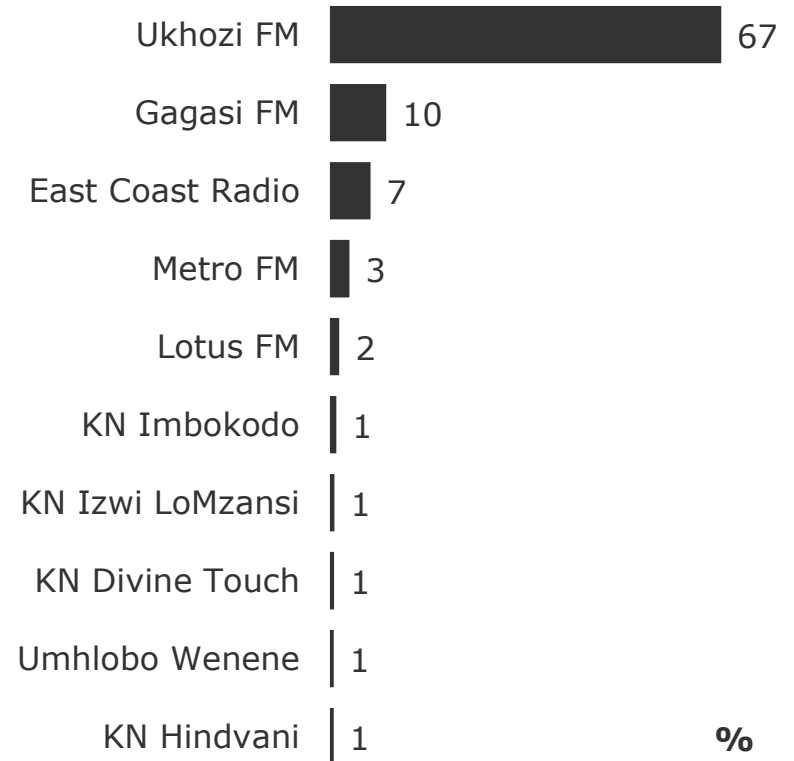
(% of **6.9m** listeners who listen in a week)



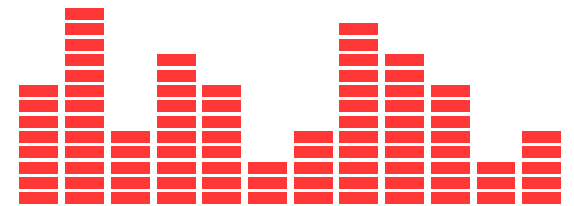
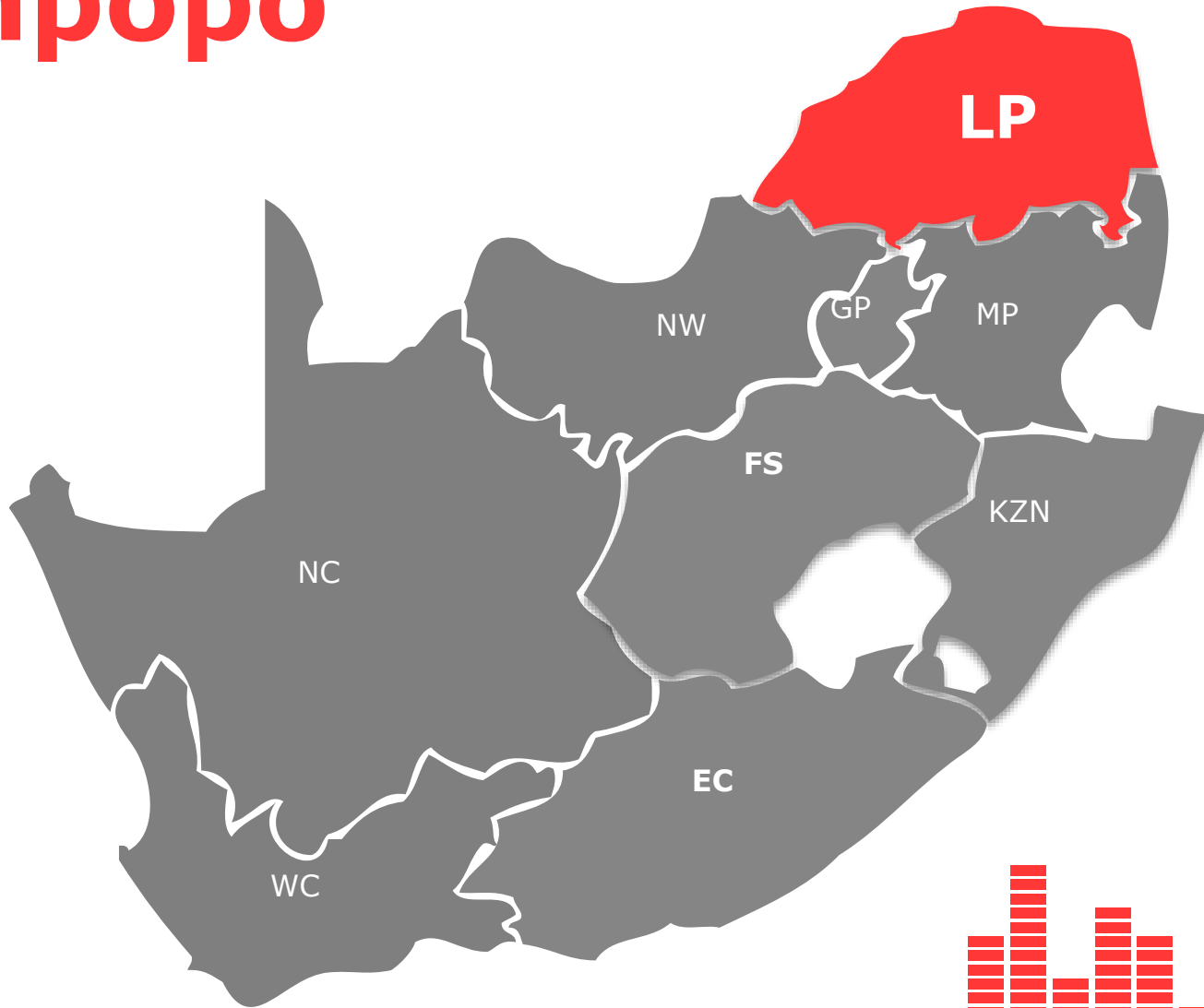
## Share of Listening



(% of **11.8b** listening minutes a week)

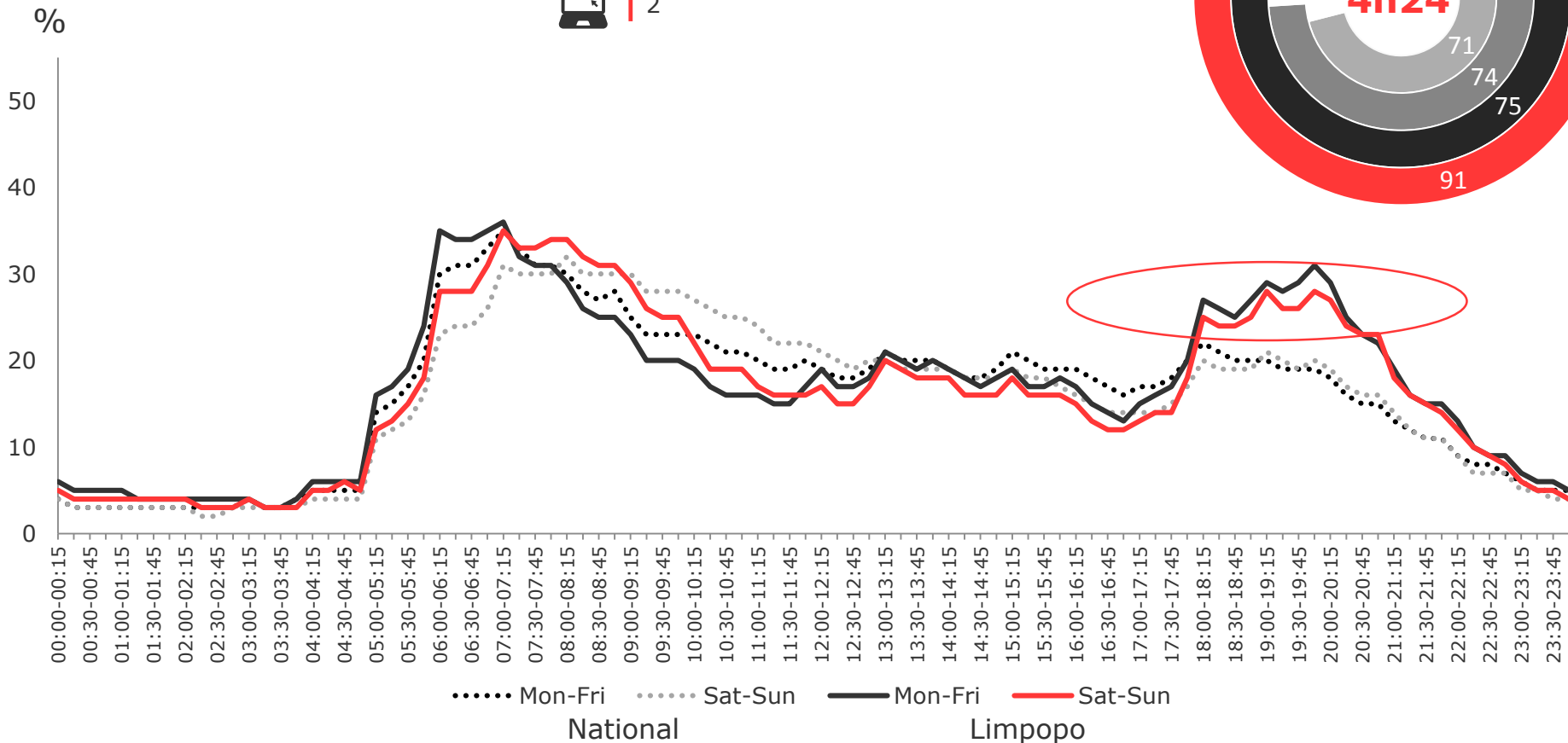
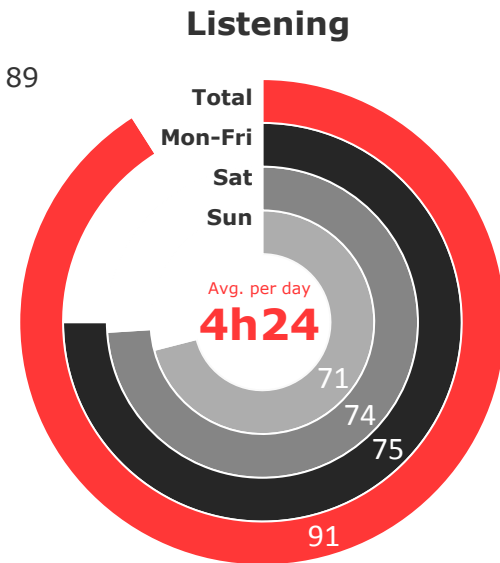
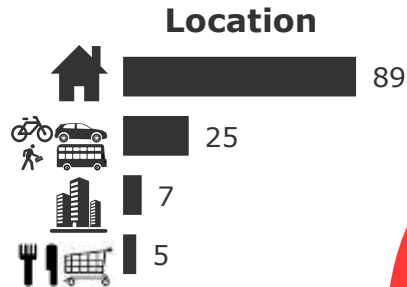
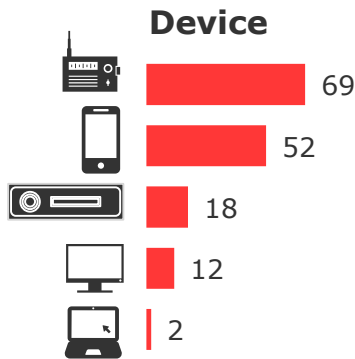


# Limpopo





# Limpopo

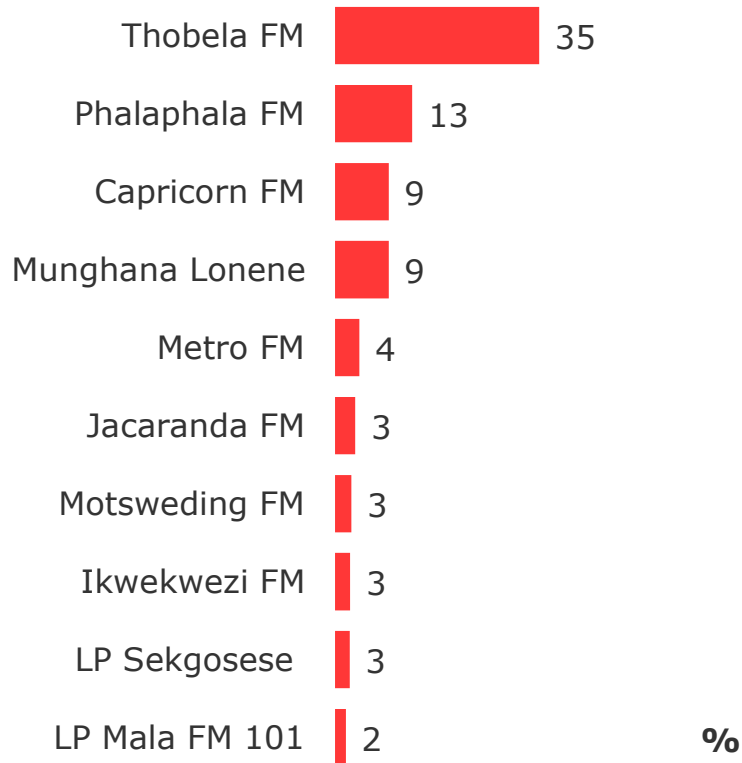


# Limpopo – Share of audience & Share of listening

## Share of Audience



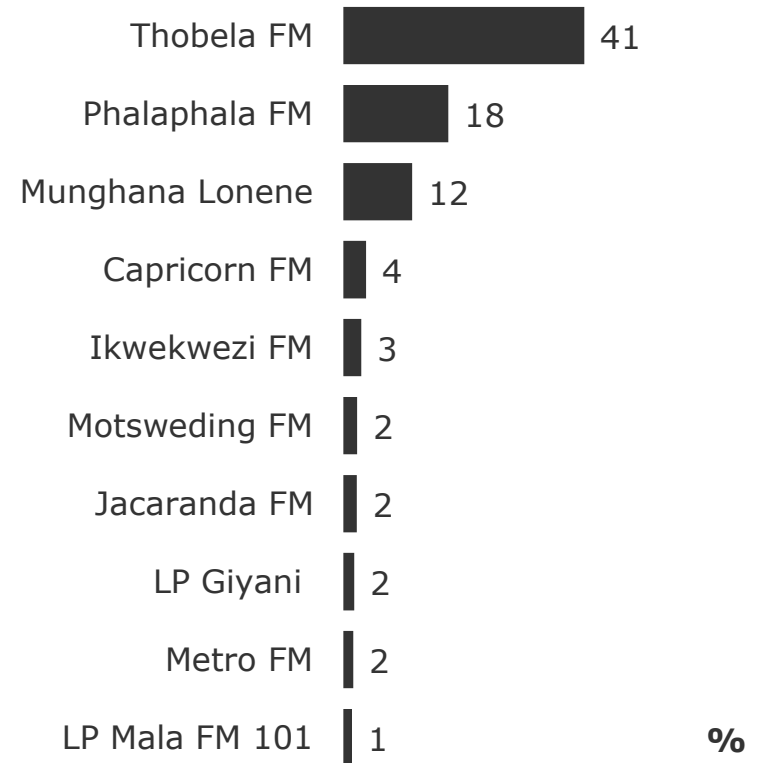
(% of **3.3m** listeners who listen in a week)



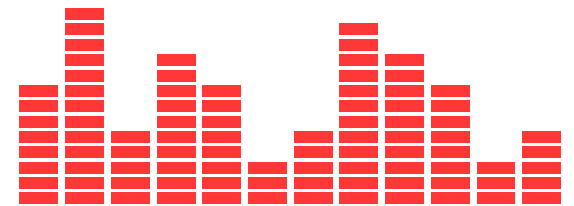
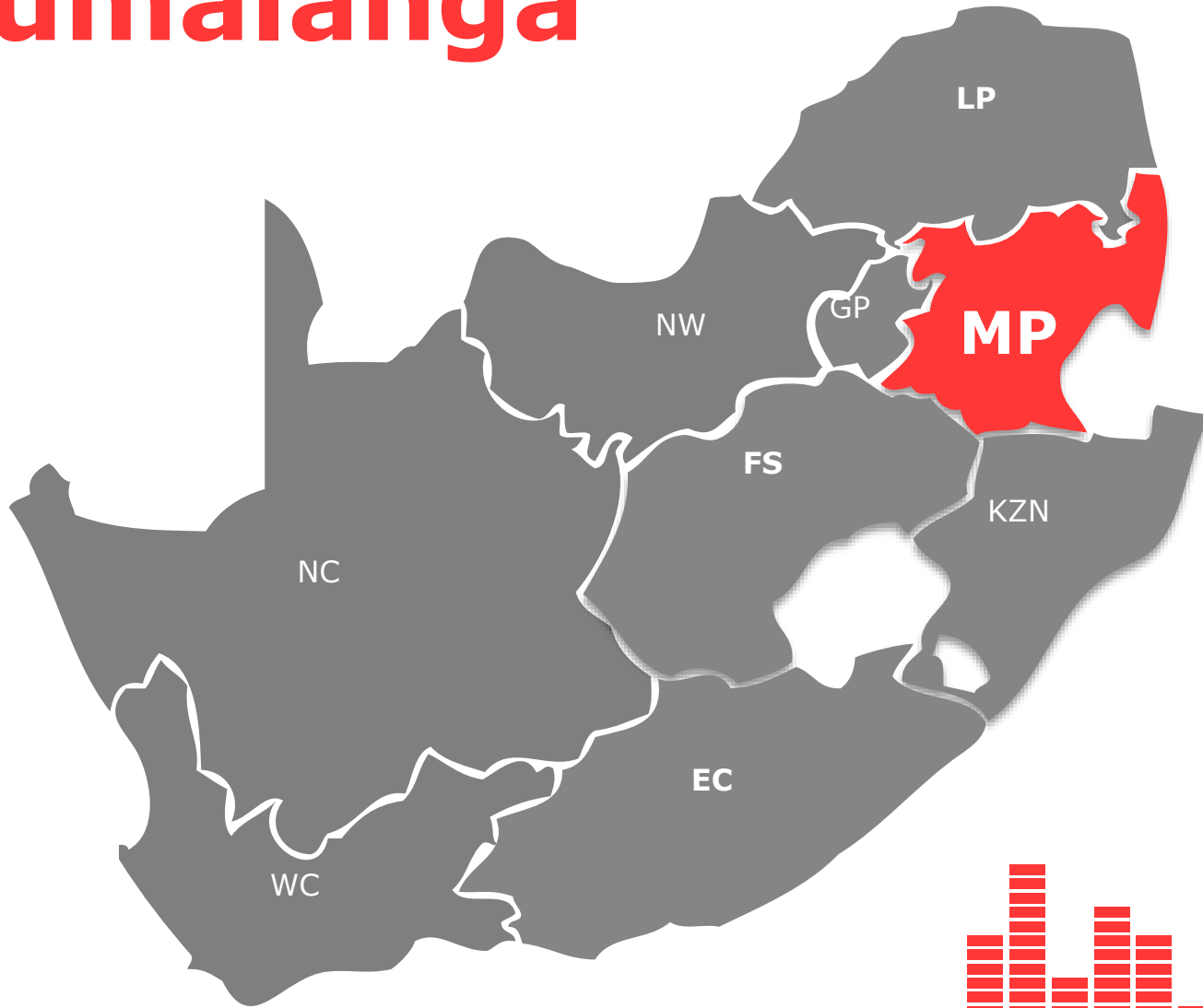
## Share of Listening



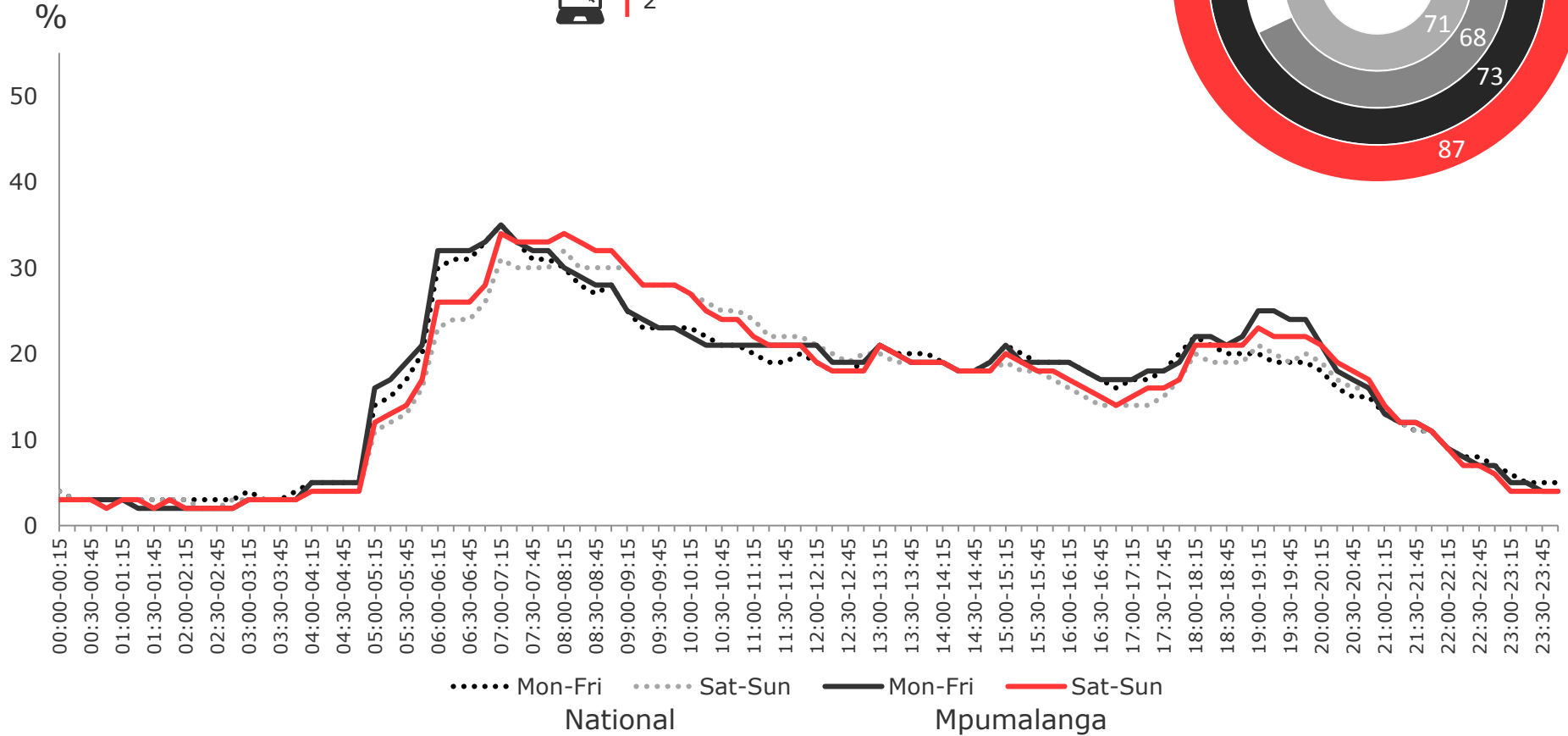
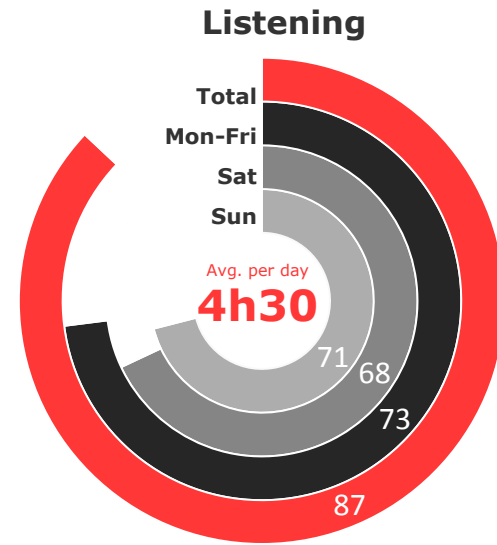
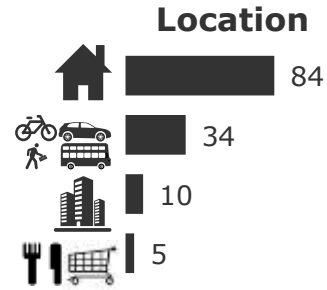
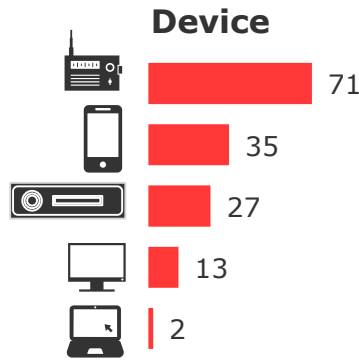
(% of **6.1b** listening minutes a week)



# Mpumalanga



# Mpumalanga

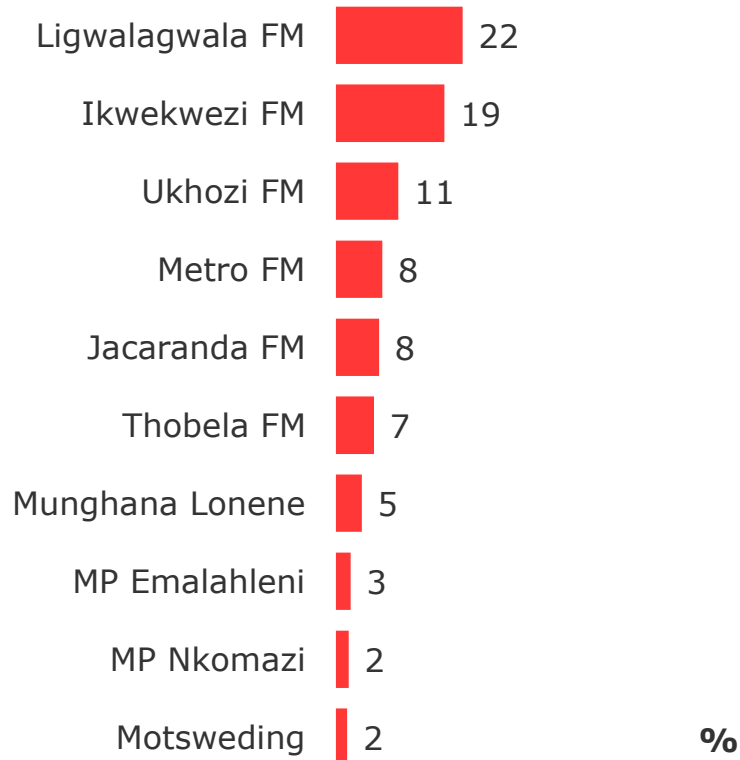


# Mpumalanga – Share of audience & Share of listening

## Share of Audience



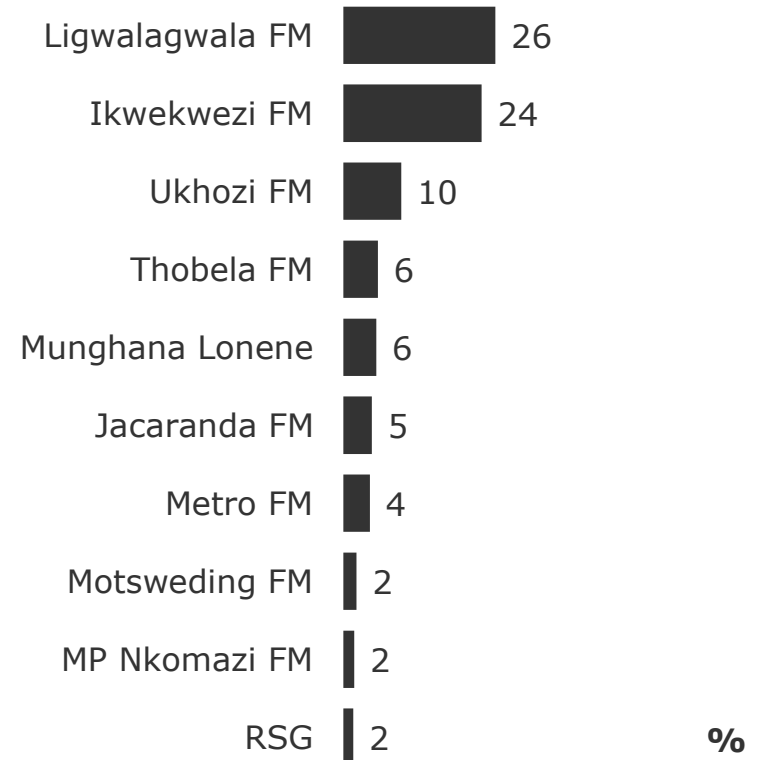
(% of **2.6m** listeners who listen in a week)



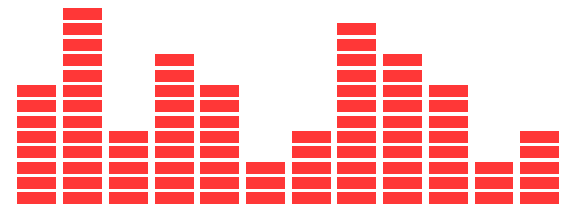
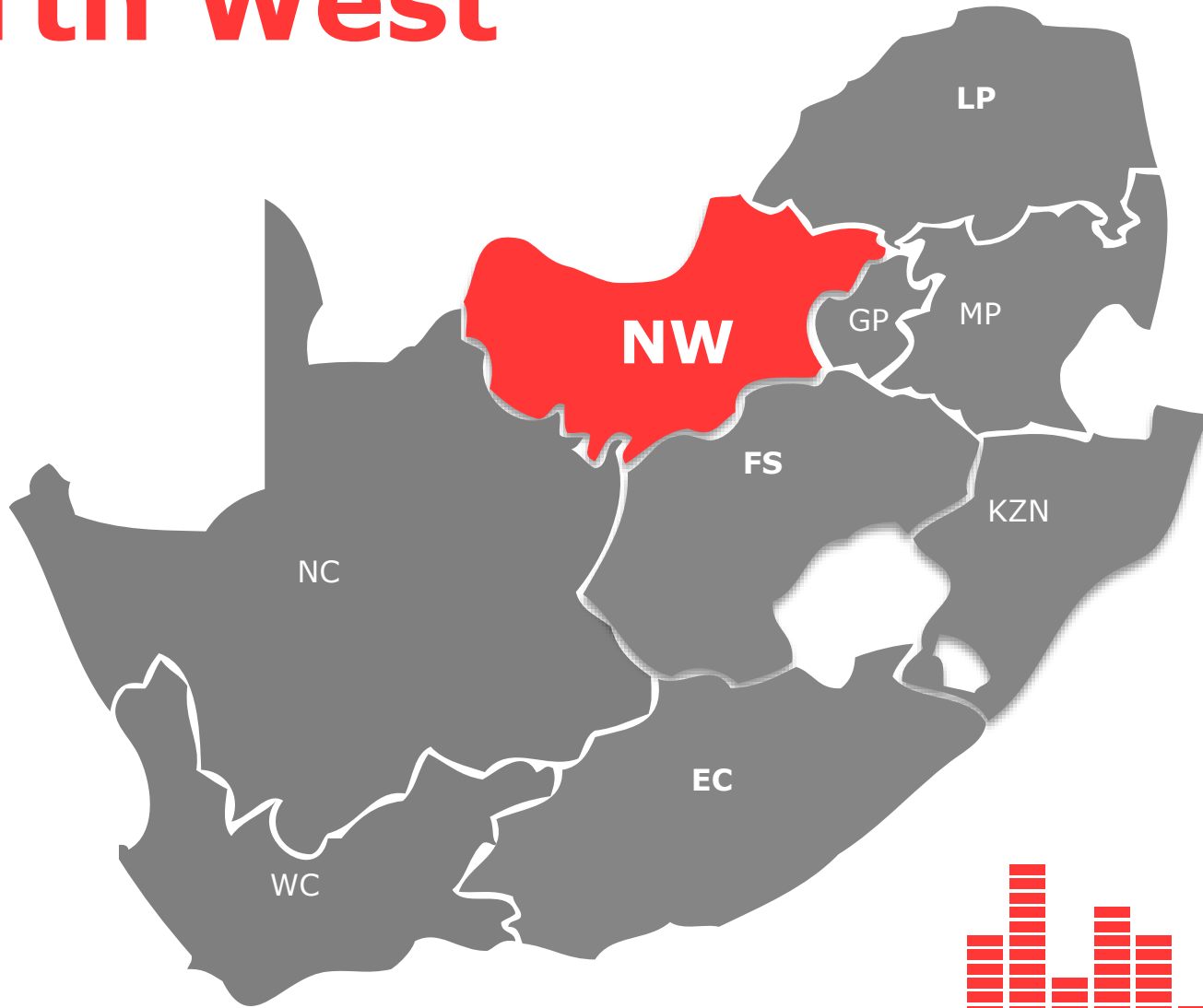
## Share of Listening



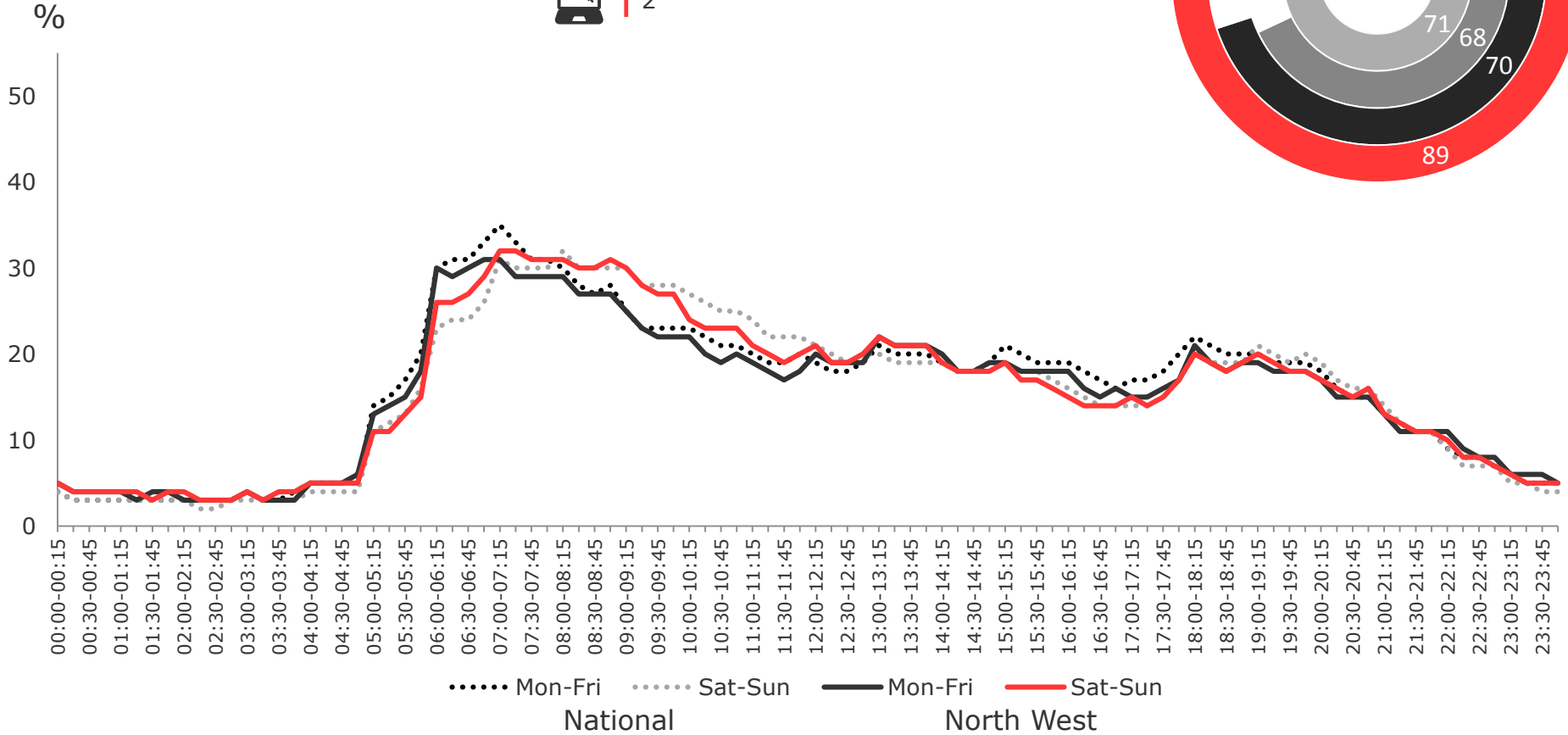
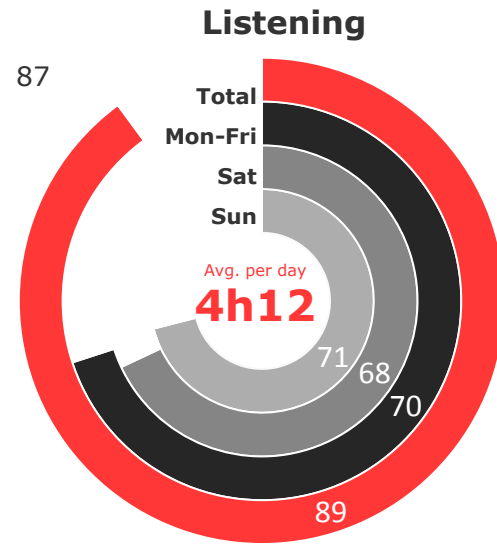
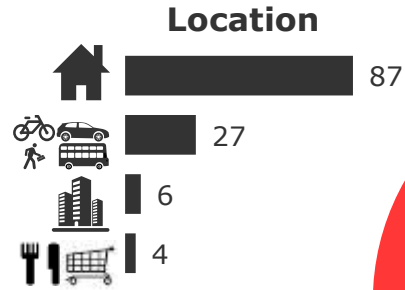
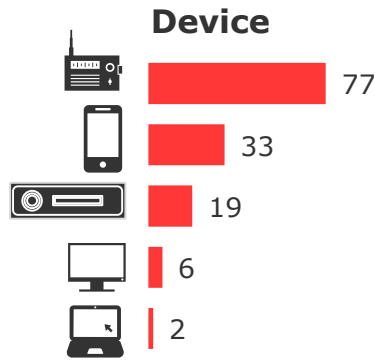
(% of **4.9b** listening minutes a week)



# North West



# North West

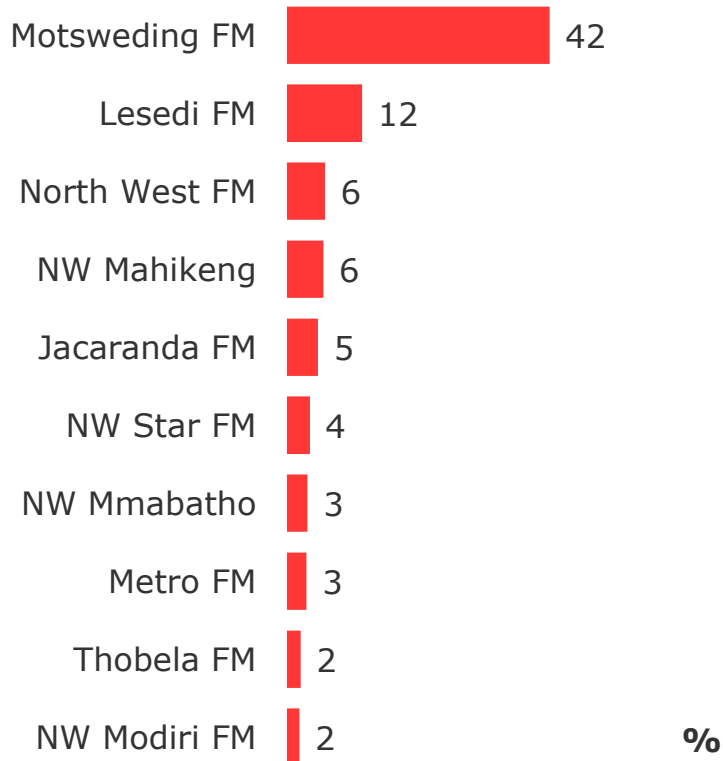


# North West – Share of audience & Share of listening

## Share of Audience



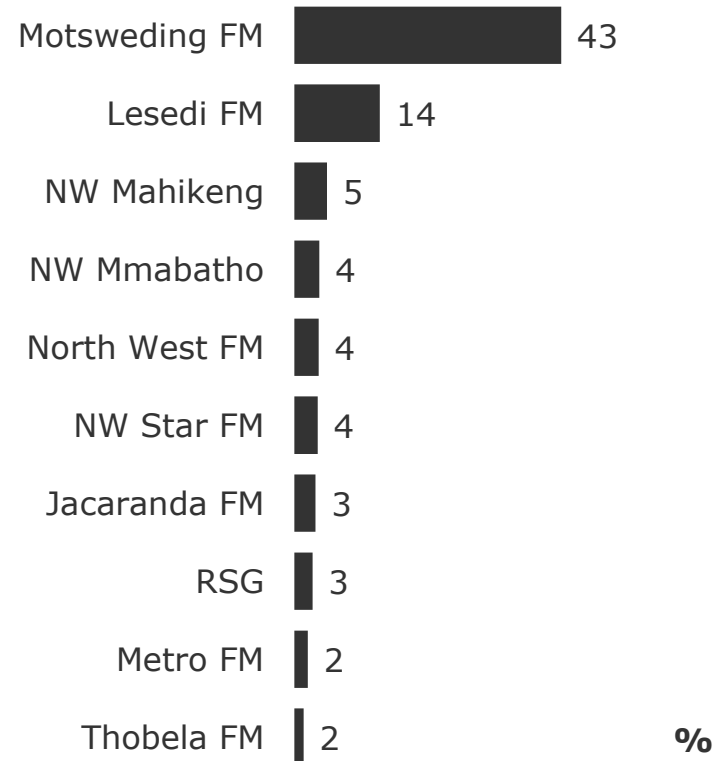
(% of **2.3m** listeners who listen in a week)



## Share of Listening

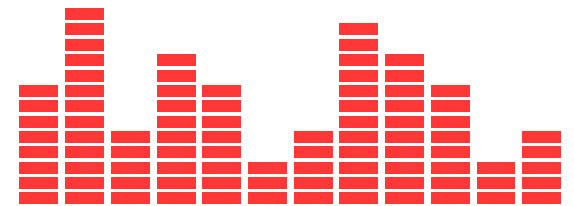
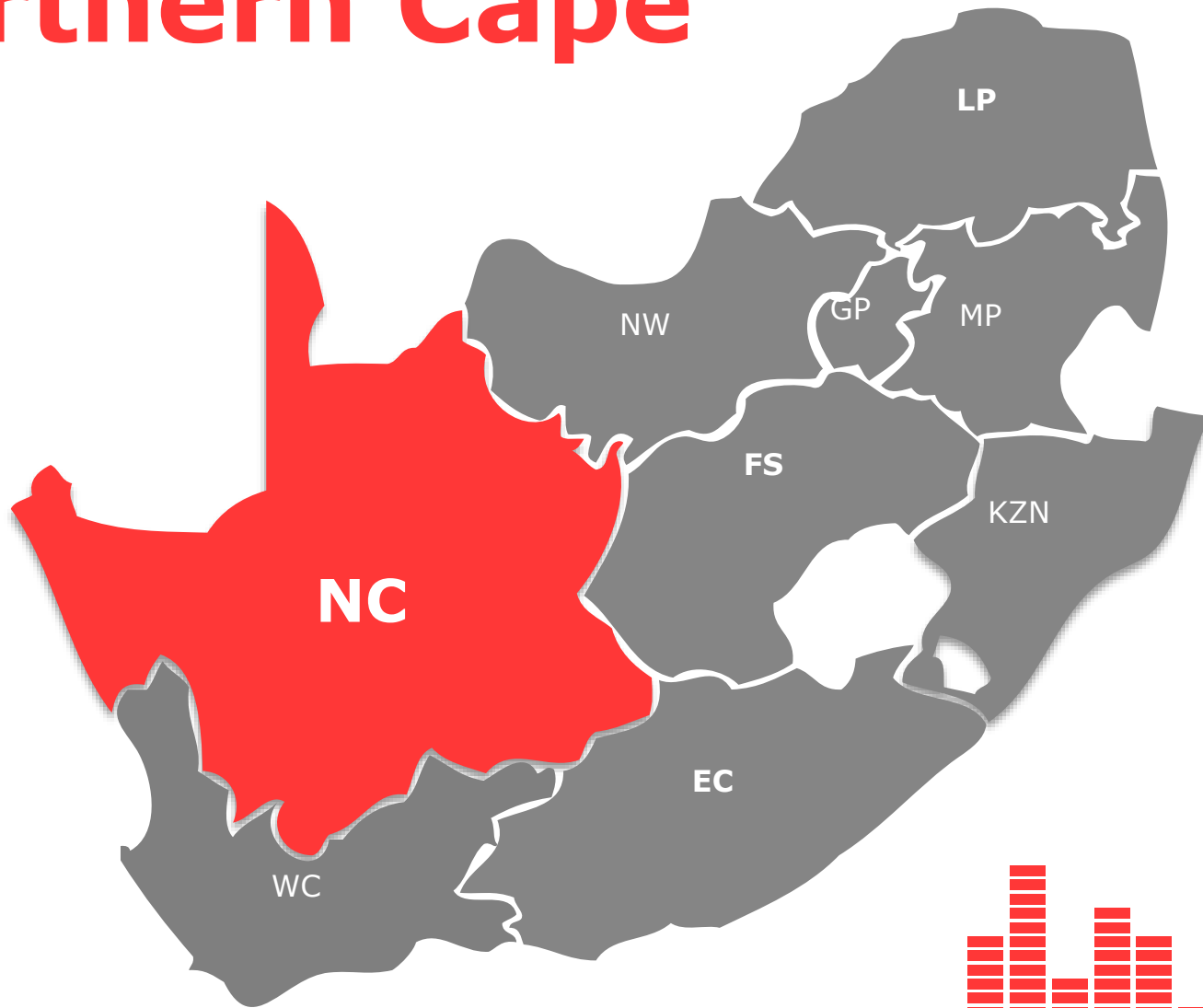


(% of **4.1b** listening minutes a week)



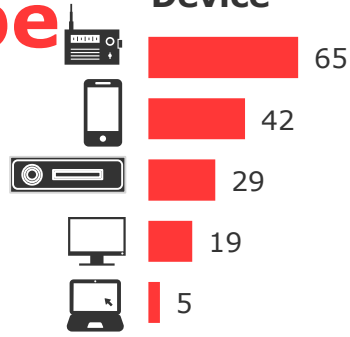


# Northern Cape

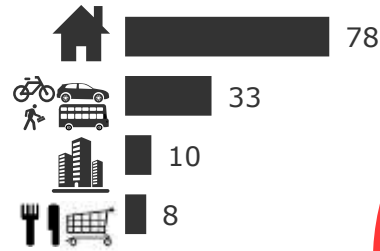


# Northern Cape

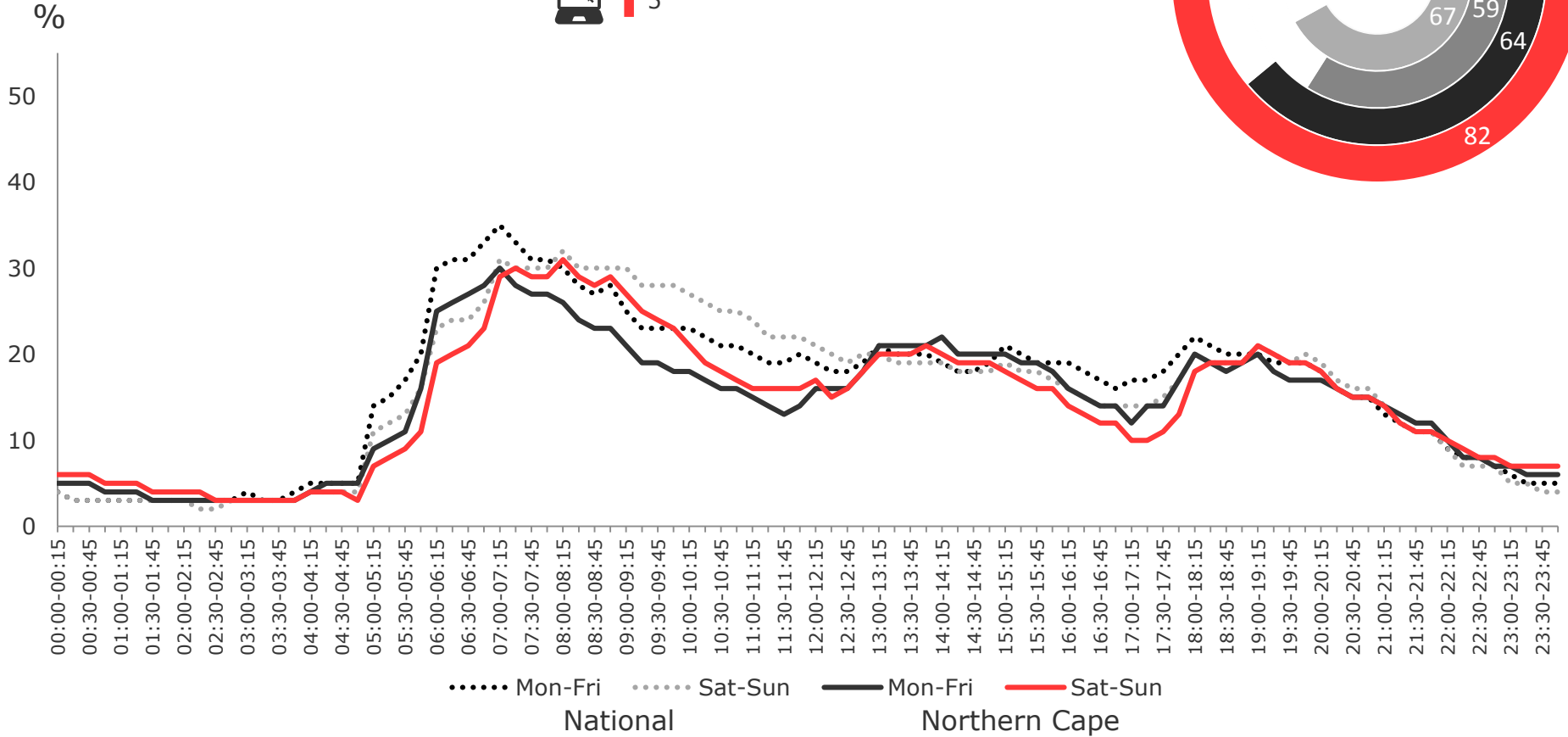
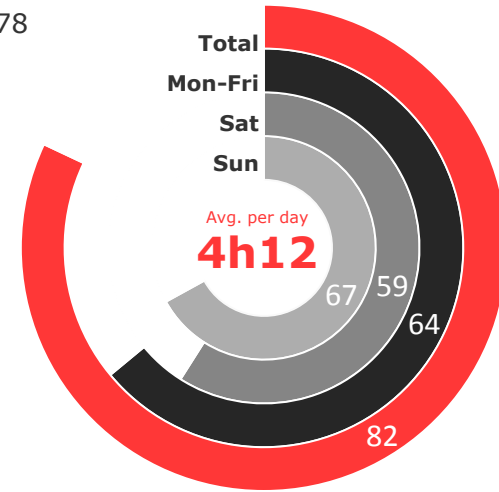
## Device



## Location



## Listening

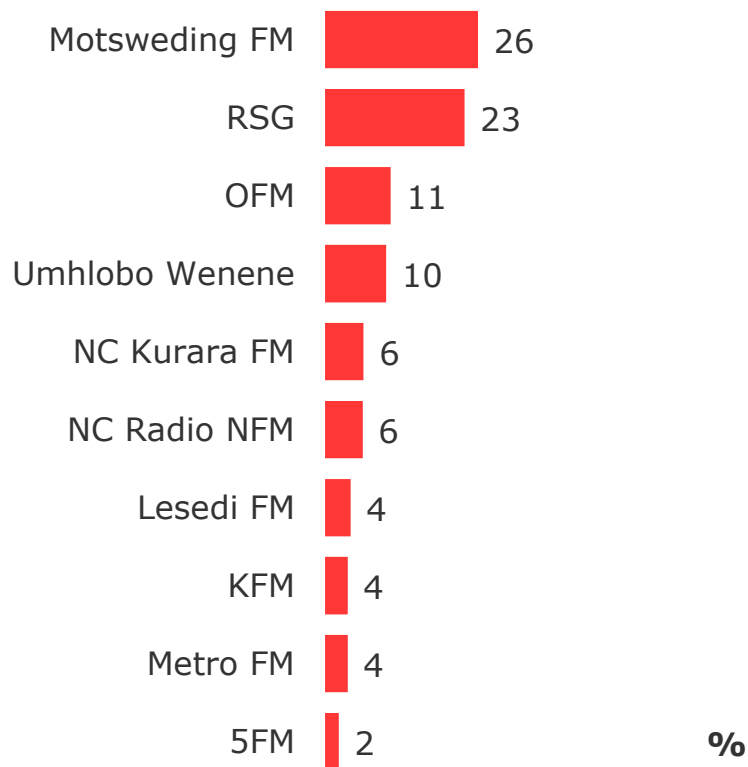


# Northern Cape – Share of audience & Share of listening

## Share of Audience



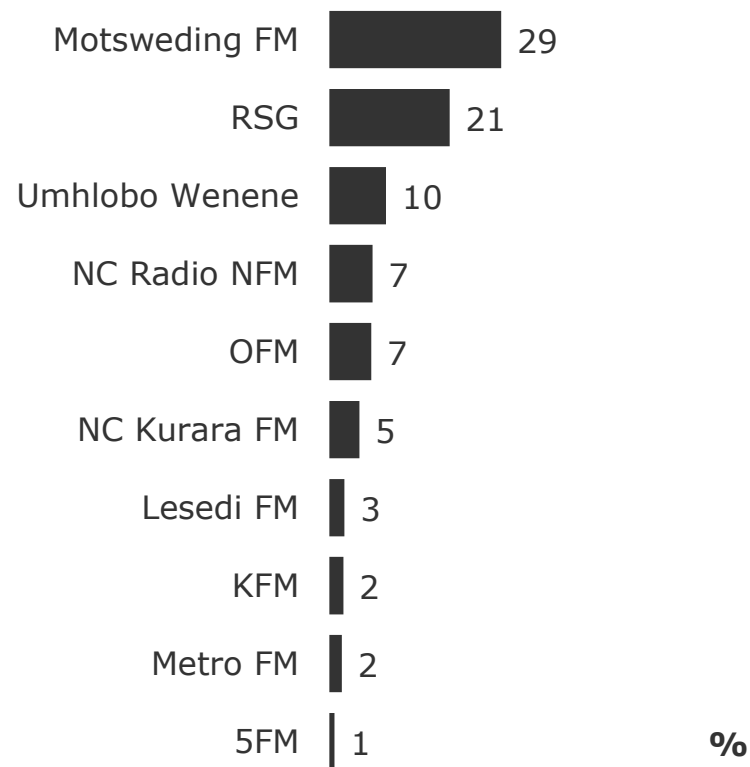
(% of **0.7m** listeners who listen in a week)



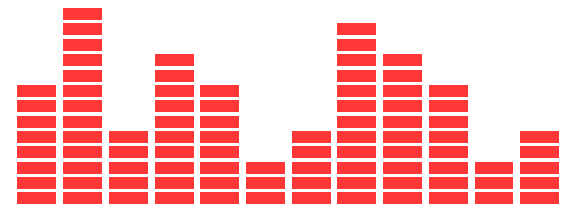
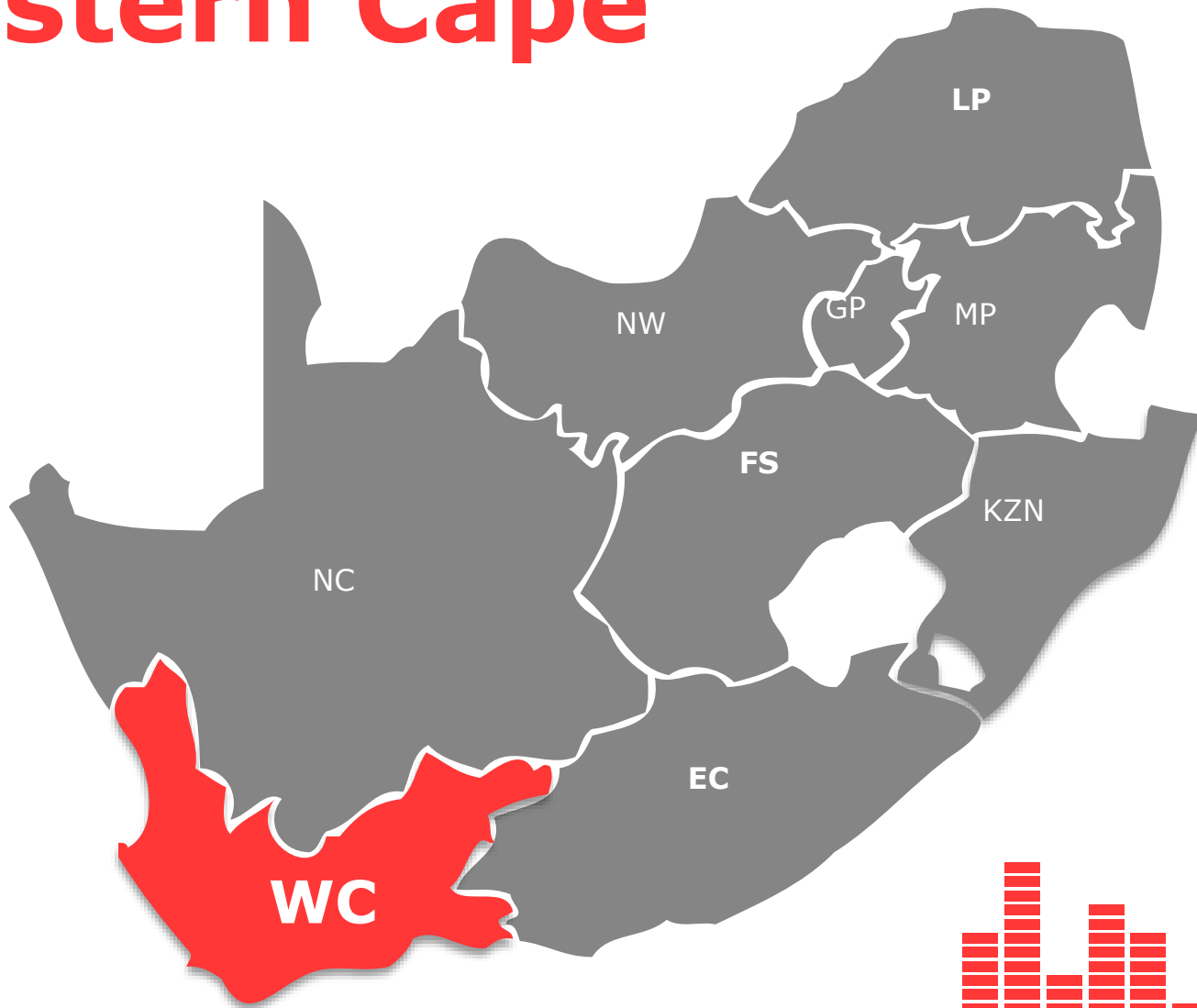
## Share of Listening



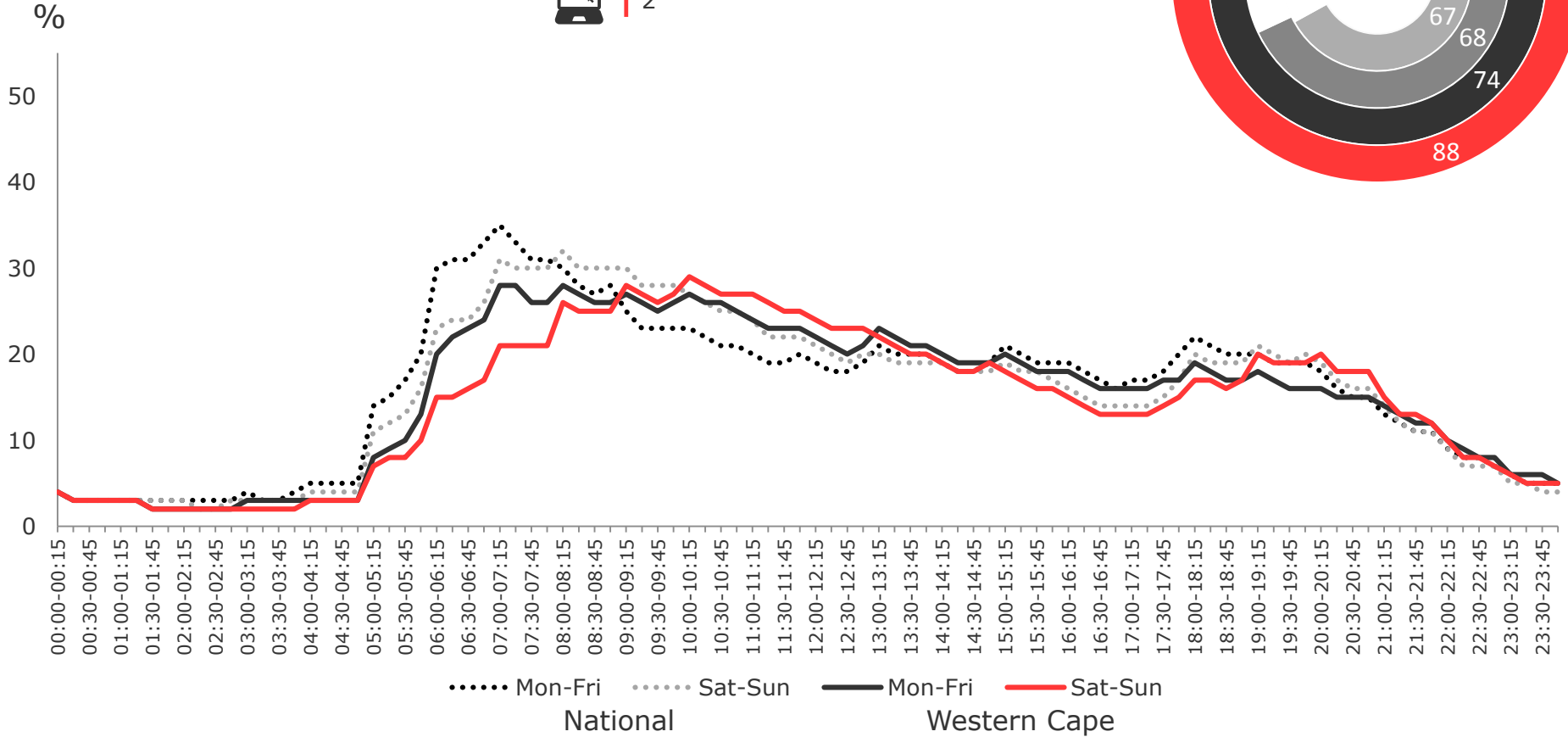
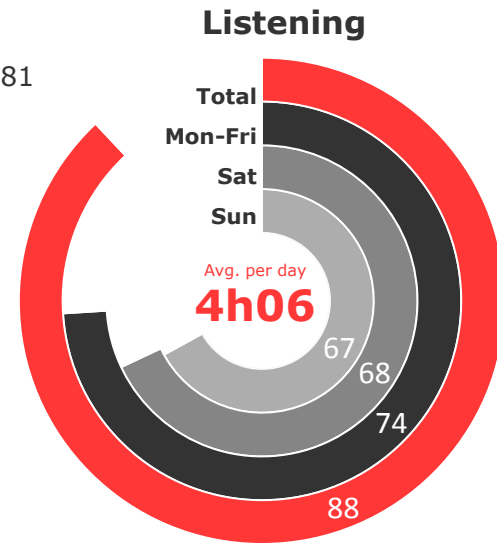
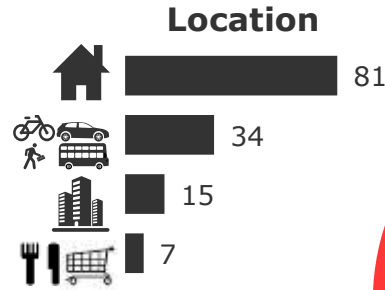
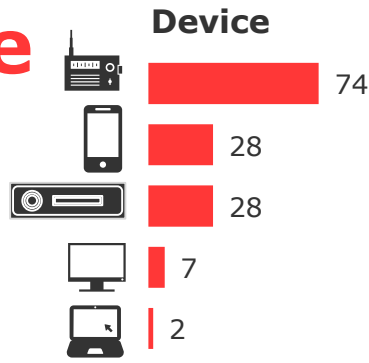
(% of **1.2b** listening minutes a week)



# Western Cape



# Western Cape

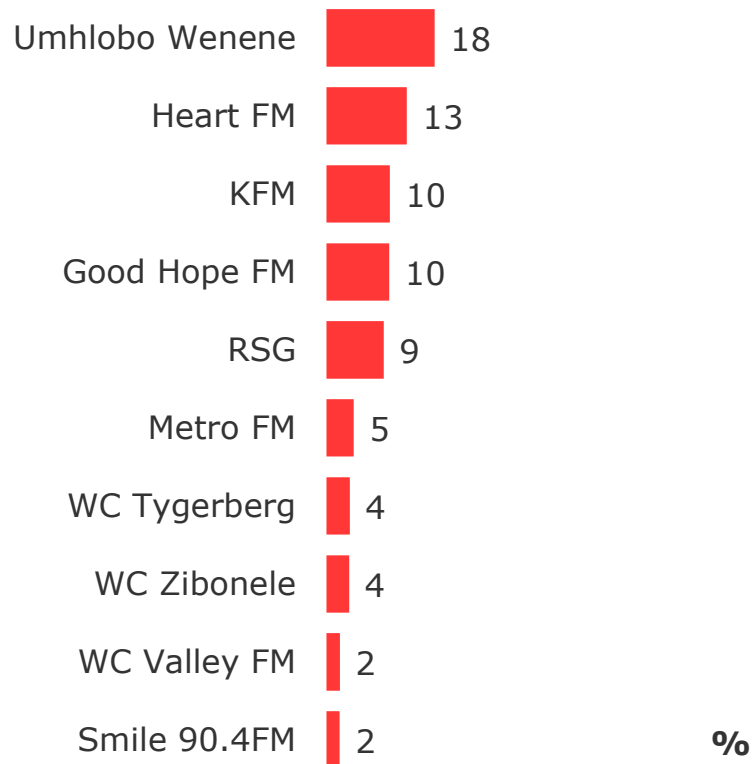


# Western Cape – Share of audience & Share of listening

## Share of Audience



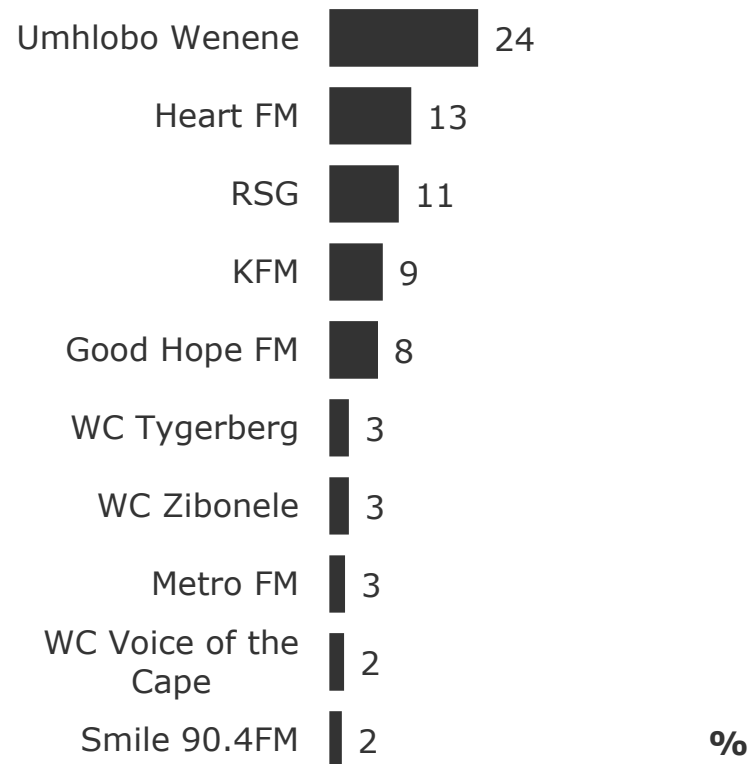
(% of **4.0m** listeners who listen in a week)



## Share of Listening



(% of **6.9b** listening minutes a week)



**RADIO IS  
PERSONAL, IT'S  
INTIMATE AND IT'S  
IMMEDIATE**



# Key **new** measures by station

Commercial and PBS



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



**Exclusive**  
**listeners**  
(%)



**Average hours**  
**per day**

Station	Avg. <b>daily</b> cume (Mon-Sun) ('000s)	One <b>week</b> cume (000's)	<b>Exclusive</b> <b>listeners</b> (%)	<b>Average hours</b> <b>per day</b>
Ukhozi FM	5,406	7,294	61	3h30
Umhlobo Wenene FM	3,964	5,171	54	3h48
Lesedi FM	2,433	3,429	53	3h30
Metro FM	2,273	4,159	26	1h48
Thobela FM	1,997	2,860	53	3h06
Motsweding FM	1,754	2,668	48	2h54
RSG	1,014	1,424	50	3h24
Ikwewezi FM	913	1,335	53	3h30
Gagasi FM	798	1,366	29	2h00
Jacaranda FM	777	1,329	38	2h00



# Key **new** measures by station

Commercial and PBS



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



**Exclusive**  
**listeners**  
(%)



**Average hours**  
per day

	Avg. <b>daily</b> cume (Mon-Sun) ('000s)	One <b>week</b> cume (000's)	<b>Exclusive</b> <b>listeners</b> (%)	<b>Average hours</b> per day
Munghana Lonene FM	702	1016	<b>53</b>	<b>3h24</b>
Ligwalagwala FM	673	917	<b>53</b>	<b>3h30</b>
East Coast Radio	644	987	<b>46</b>	<b>2h00</b>
Phalaphala FM	594	841	<b>56</b>	<b>3h42</b>
947	585	927	<b>40</b>	<b>1h54</b>
Heart 104.9 FM	577	838	<b>44</b>	<b>2h42</b>
5FM	496	862	<b>24</b>	<b>1h36</b>
Kaya FM 95.9	462	841	<b>19</b>	<b>1h42</b>
KFM	449	681	<b>40</b>	<b>2h12</b>
Good Hope FM	406	658	<b>24</b>	<b>2h00</b>

# Key **new** measures by station

Commercial and PBS



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



**Exclusive**  
**listeners**  
(%)



**Average hours**  
**per day**

	Avg. <b>daily</b> cume (Mon-Sun) ('000s)	One <b>week</b> cume (000's)	<b>Exclusive</b> <b>listeners</b> (%)	<b>Average hours</b> <b>per day</b>
Algoa FM (Radio Algoa)	379	576	<b>36</b>	<b>2h36</b>
YFM 99.2	362	666	<b>22</b>	<b>1h30</b>
702	323	547	<b>22</b>	<b>1h42</b>
Radio 2000	238	477	<b>14</b>	<b>1h42</b>
Capricorn FM	220	549	<b>11</b>	<b>1h18</b>
Lotus FM	182	276	<b>42</b>	<b>2h06</b>
OFM	172	291	<b>56</b>	<b>2h30</b>
North West FM	116	203	<b>22</b>	<b>1h54</b>
Smile 90.4FM	98	146	<b>39</b>	<b>2h30</b>
SAfm	95	176	<b>14</b>	<b>1h54</b>

# Key **new** measures by station

Commercial and PBS



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



**1**  
Exclusive  
listeners  
(%)



Average hours  
per day

trufm	79	145	3	1h42
Power 98.7	57	99	16	2h24
CapeTalk	50	77	35	2h00
<hr/>				
Vuma 103 FM	40	79	13	1h42
Classic FM 102.7	39	71	17	1h12

# Key **new** measures by station

## Community



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



**Exclusive**  
**listeners**  
(%)



**Average hours**  
**per day**

	Avg. <b>daily</b> cume (Mon-Sun) ('000s)	One <b>week</b> cume (000's)	<b>Exclusive</b> <b>listeners</b> (%)	<b>Average hours</b> <b>per day</b>
Jozi FM	262	456	20	2h06
Unitra Community Radio (UCR-FM)	164	283	3	1h54
Radio Tygerberg 104 FM	143	236	34	2h12
Mafikeng FM 96.7	131	193	24	2h42
Radio Zibonele	127	228	14	2h18
Vukani Community Radio	115	220	1	1h30
Voice of Tembisa FM	102	142	51	3h18
Forte FM	102	186	6	2h12
Thetha FM 100.6	95	177	30	2h12
Moretele Community Radio 106.6 FM	91	155	57	2h36

# Key **new** measures by station

Community



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



**Exclusive**  
**listeners**  
(%)



**Average hours**  
**per day**

	Avg. <b>daily</b> cume (Mon-Sun) ('000s)	One <b>week</b> cume (000's)	<b>Exclusive</b> <b>listeners</b> (%)	<b>Average hours</b> <b>per day</b>
Kasie FM 97.1	88	151	<b>13</b>	<b>1h54</b>
Voice of the Cape	87	122	<b>34</b>	<b>3h12</b>
Alfred Nzo	68	136	<b>22</b>	<b>1h48</b>
<hr/>				
Bok Radio 98.9FM	68	96	<b>51</b>	<b>2h12</b>
CCFM 107.5	68	112	<b>32</b>	<b>2h18</b>
Imbokodo 96.8FM	62	102	<b>20</b>	<b>2h54</b>
<hr/>				
Radio Pulpit /Kansel	61	97	<b>25</b>	<b>1h42</b>
Soshanguve Community	61	110	<b>24</b>	<b>2h18</b>
Izwi LoMzansi 98.0 FM	57	93	<b>17</b>	<b>2h18</b>
<hr/>				
Hindvani	43	65	<b>34</b>	<b>2h36</b>

# Key **new** measures by station

Community



Avg. **daily** cume  
(Mon-Sun) ('000s)



One **week**  
cume (000's)



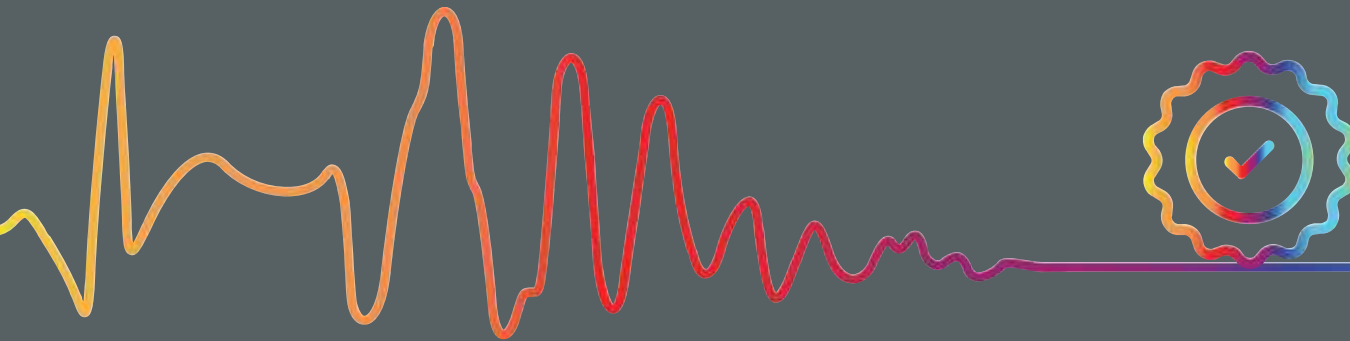
**1**  
Exclusive  
listeners  
(%)



Average hours  
per day

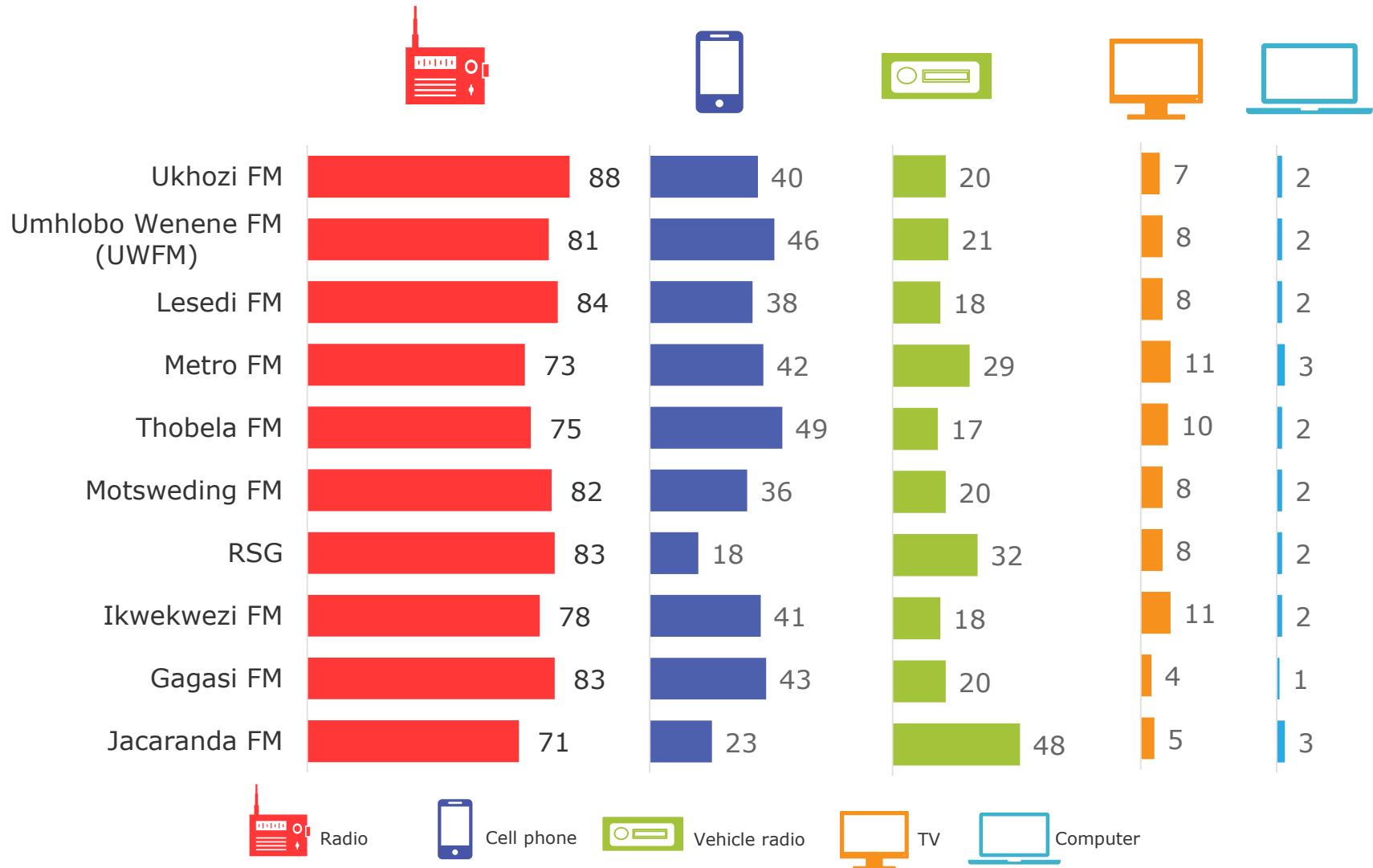
Mams FM	42	71	<b>15</b>	<b>2h06</b>
Motheo FM	41	89	<b>17</b>	<b>1h30</b>
Radio 786	41	66	<b>20</b>	<b>2h06</b>
<hr/>				
Bayfm 107.9	38	65	<b>17</b>	<b>1h42</b>
Mdantsane FM	30	62	<b>3</b>	<b>1h18</b>

# BRAND NEW TO RADIO AUDIENCE MEASUREMENT



# Station listening by DEVICE

Commercial and PBS

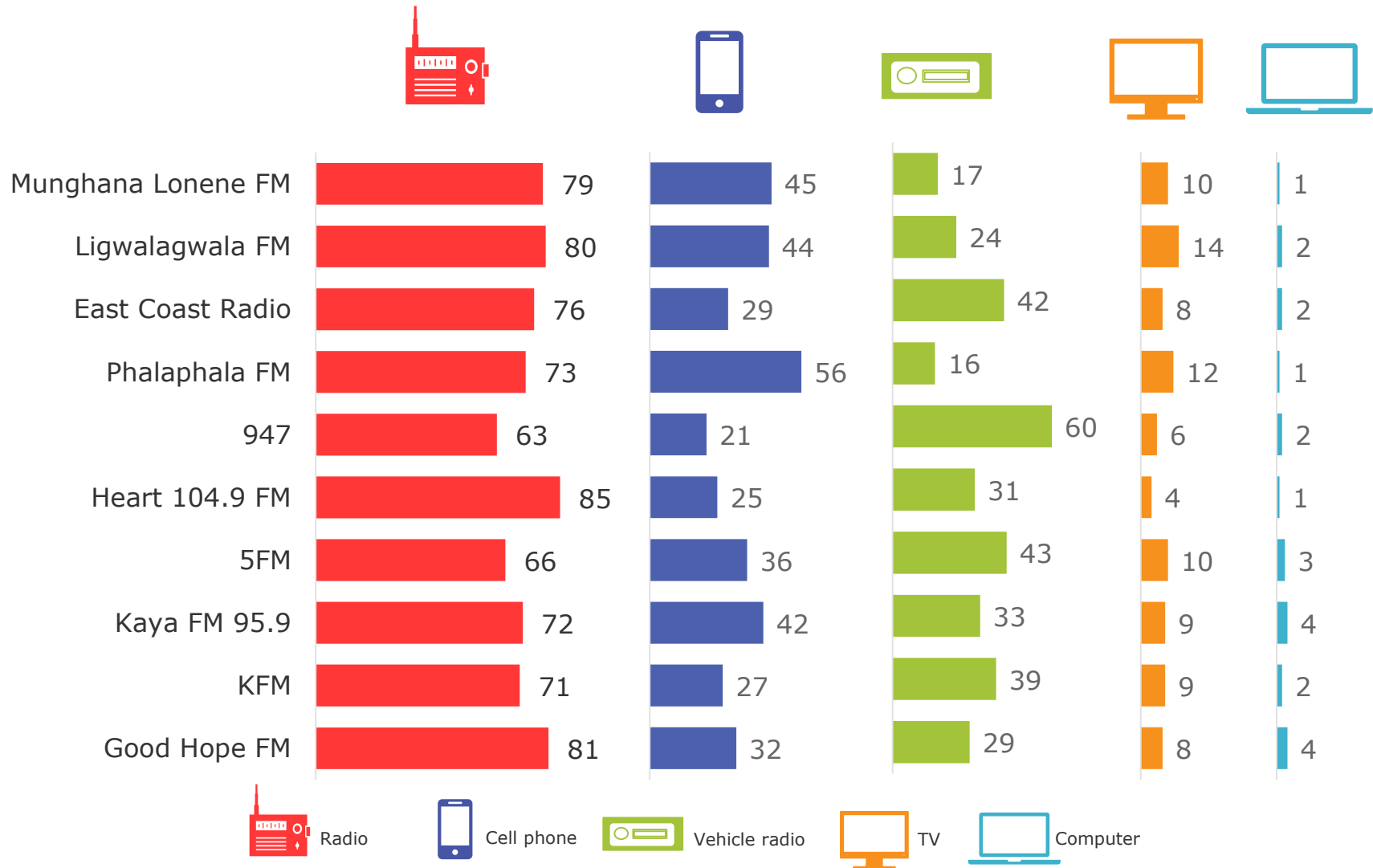


Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)



# Station listening by DEVICE

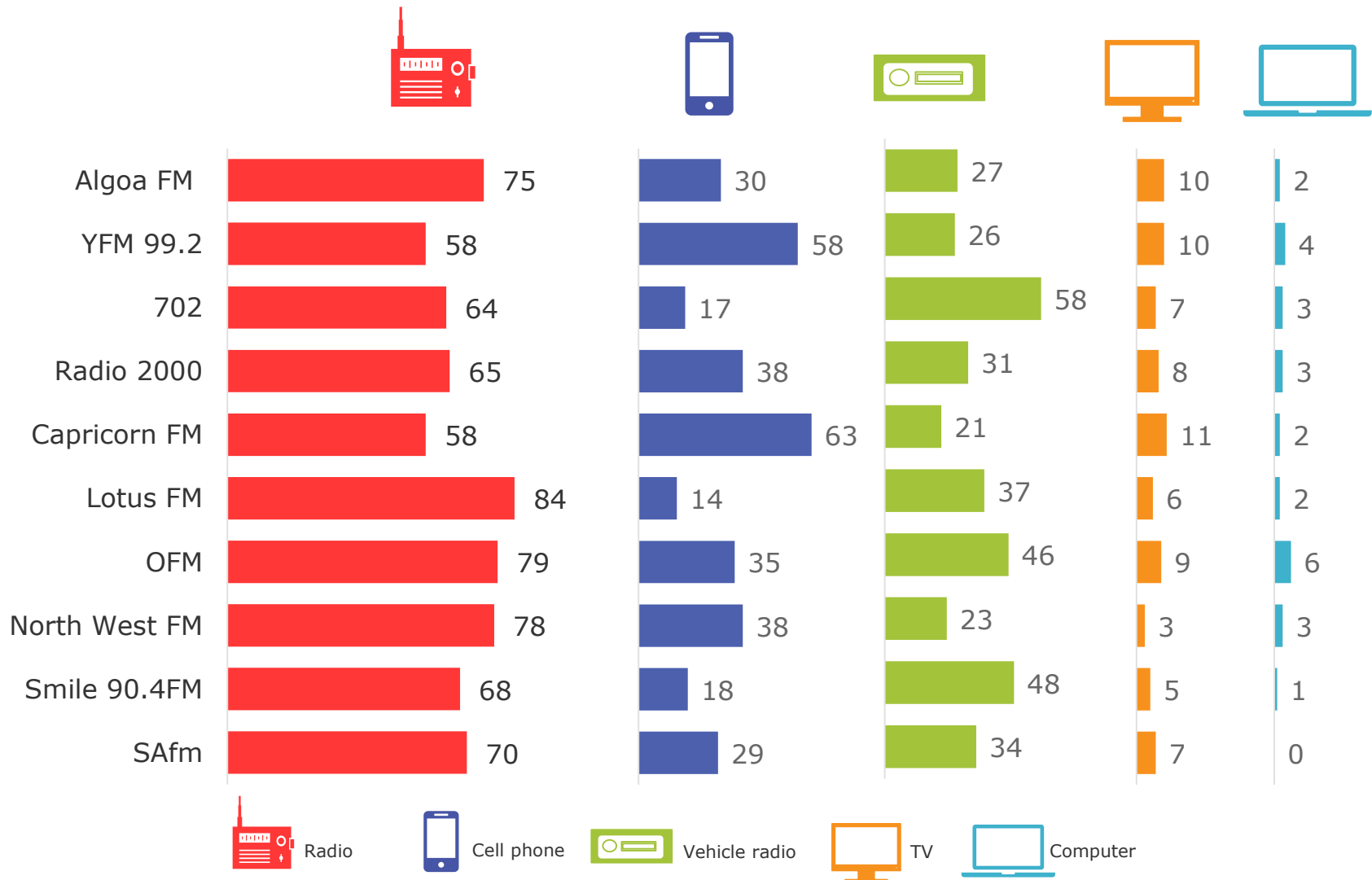
Commercial and PBS



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)

# Station listening by DEVICE

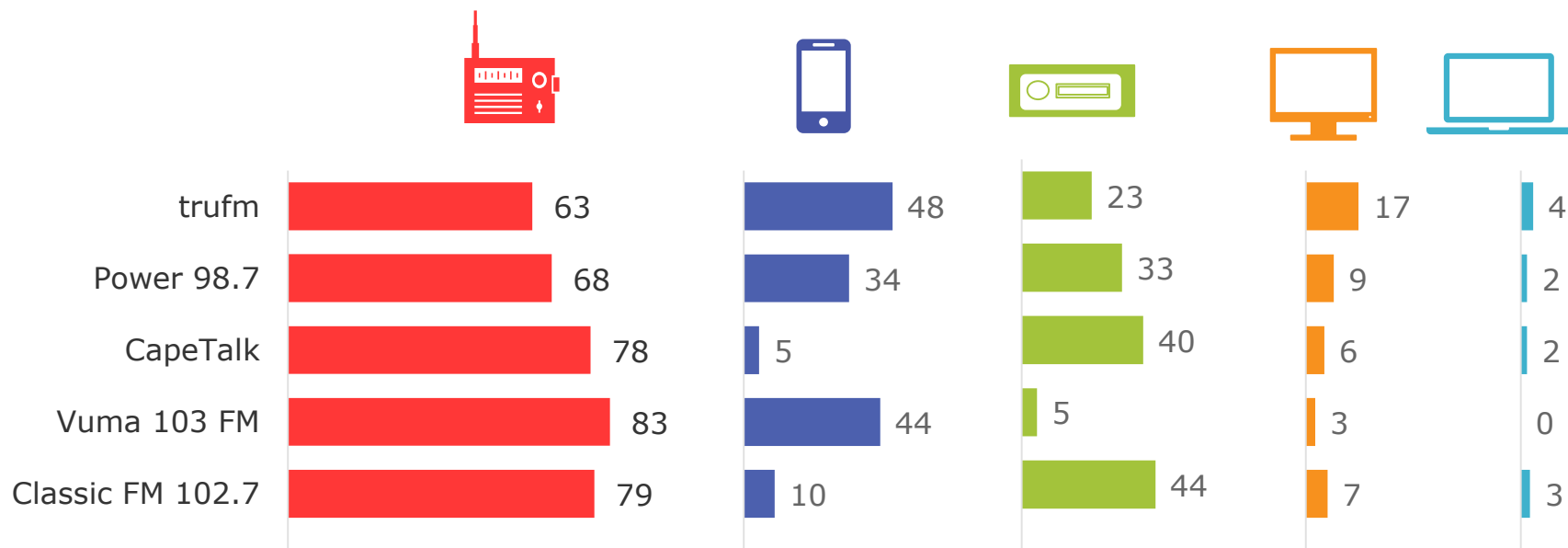
Commercial and PBS



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)

# Station listening by DEVICE

Commercial and PBS



Radio



Cell phone



Vehicle radio



TV

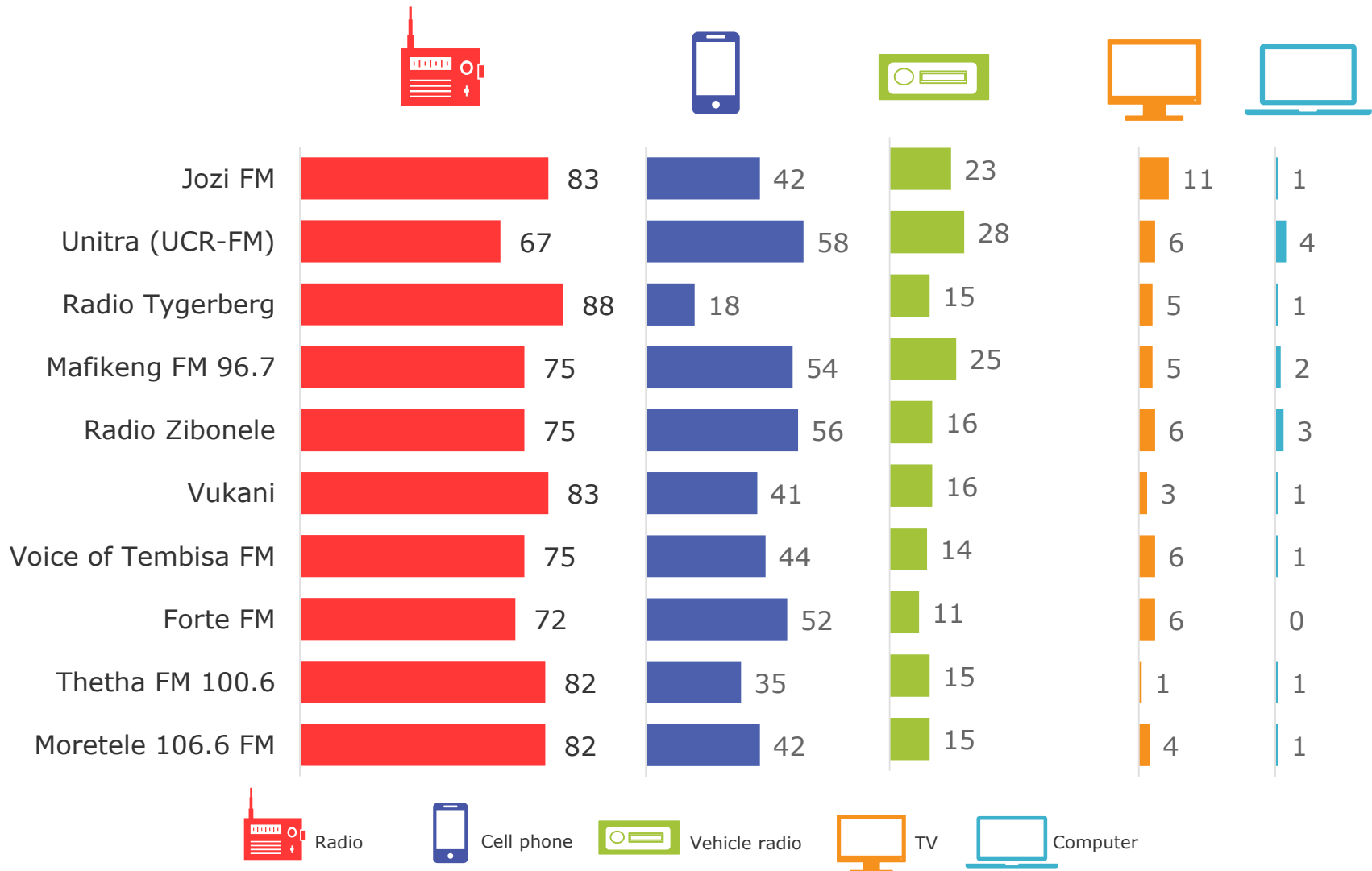


Computer

Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
 Stations ranked on avg. daily audience (Mon-Sun)  
 Commercial and PBS stations with base=>40

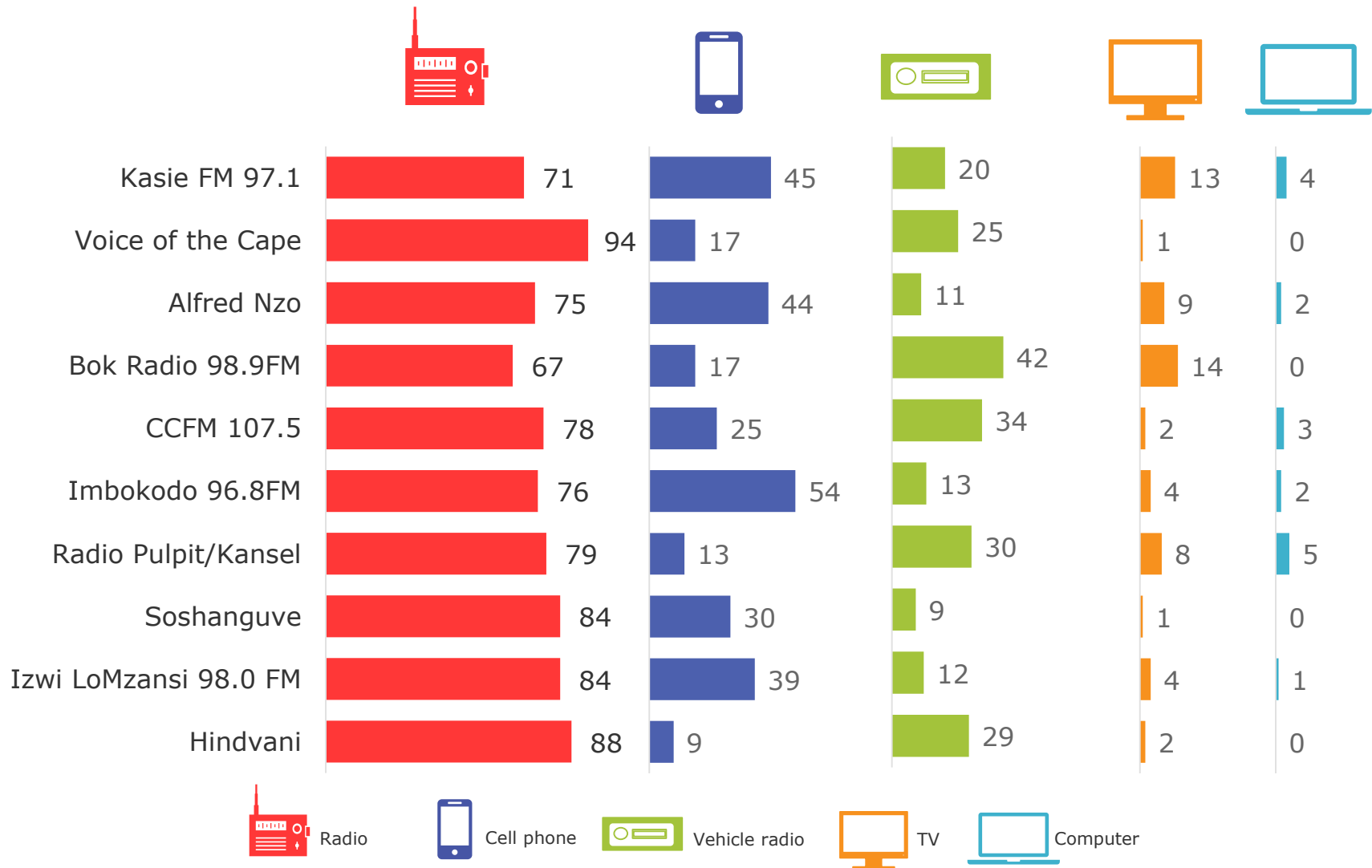
# Station listening by DEVICE

## Community



# Station listening by DEVICE

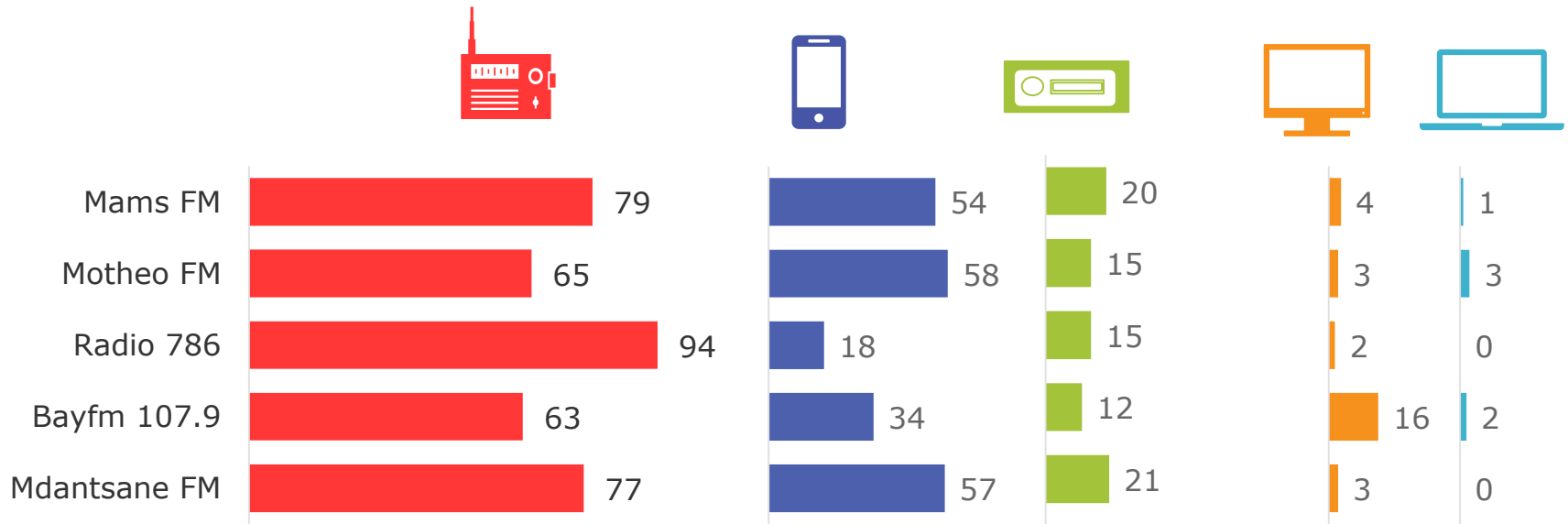
Community



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)

# Station listening by DEVICE

Community



Radio



Cell phone



Vehicle radio



TV



Computer

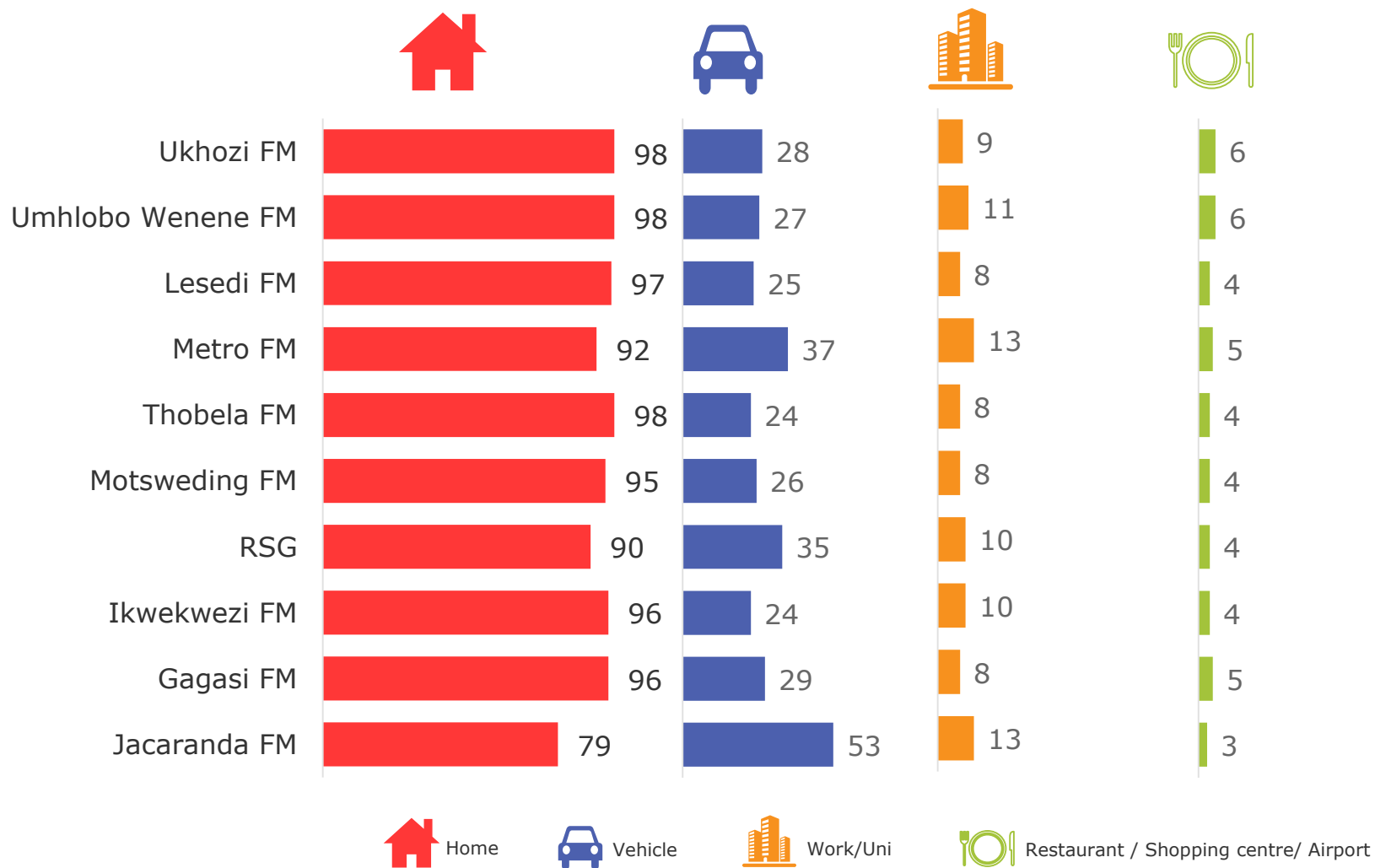
Source: BRC RAM Jan-Jun'16 (National: n=36,447)

Stations ranked on avg. daily audience (Mon-Sun)

Community stations with base > 90

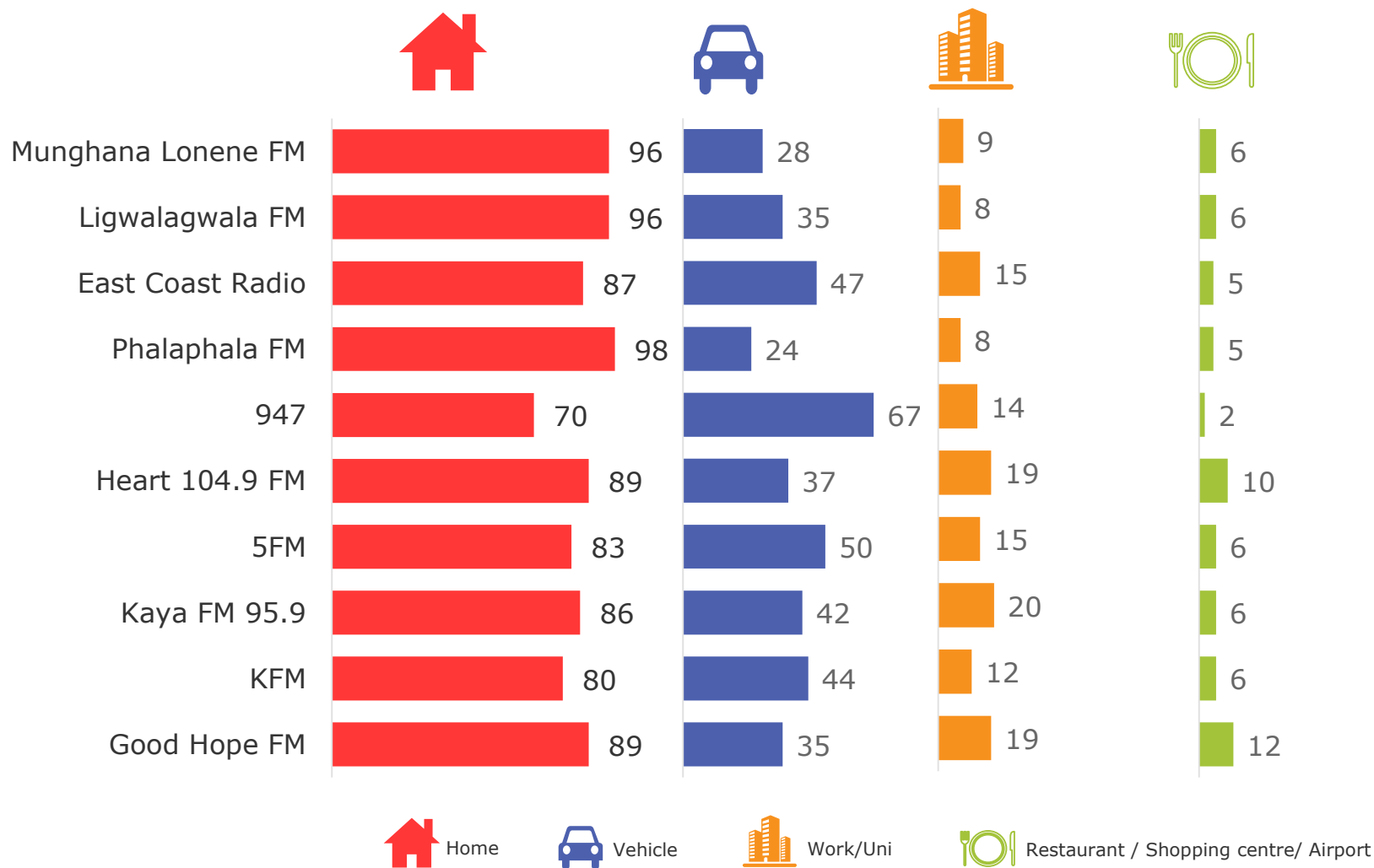
# Station listening by LOCATION

Commercial and PBS



# Station listening by LOCATION

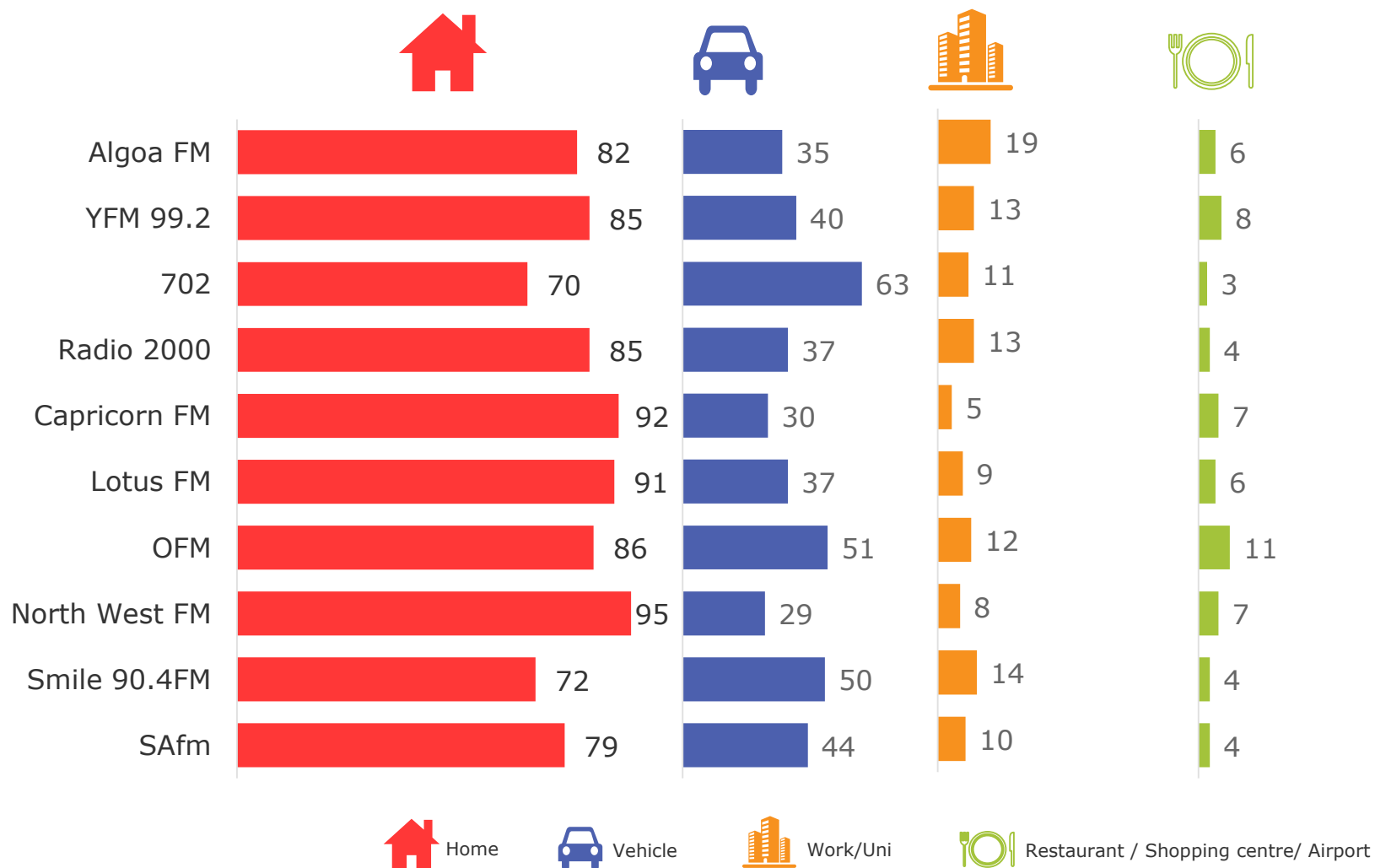
Commercial and PBS





# Station listening by LOCATION

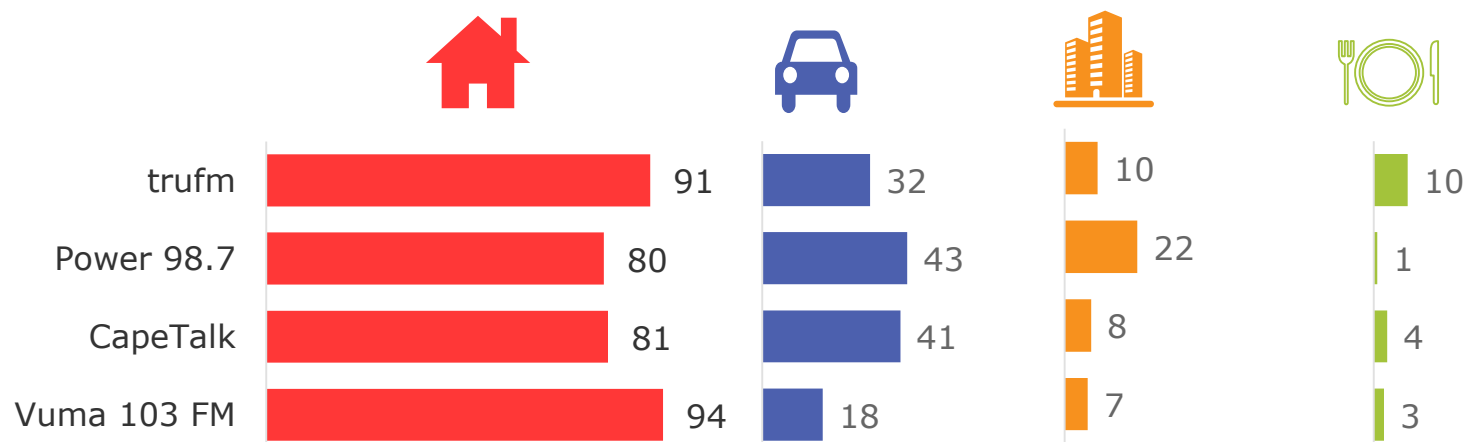
Commercial and PBS



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)

# Station listening by LOCATION

Commercial and PBS



Home



Vehicle



Work/Uni

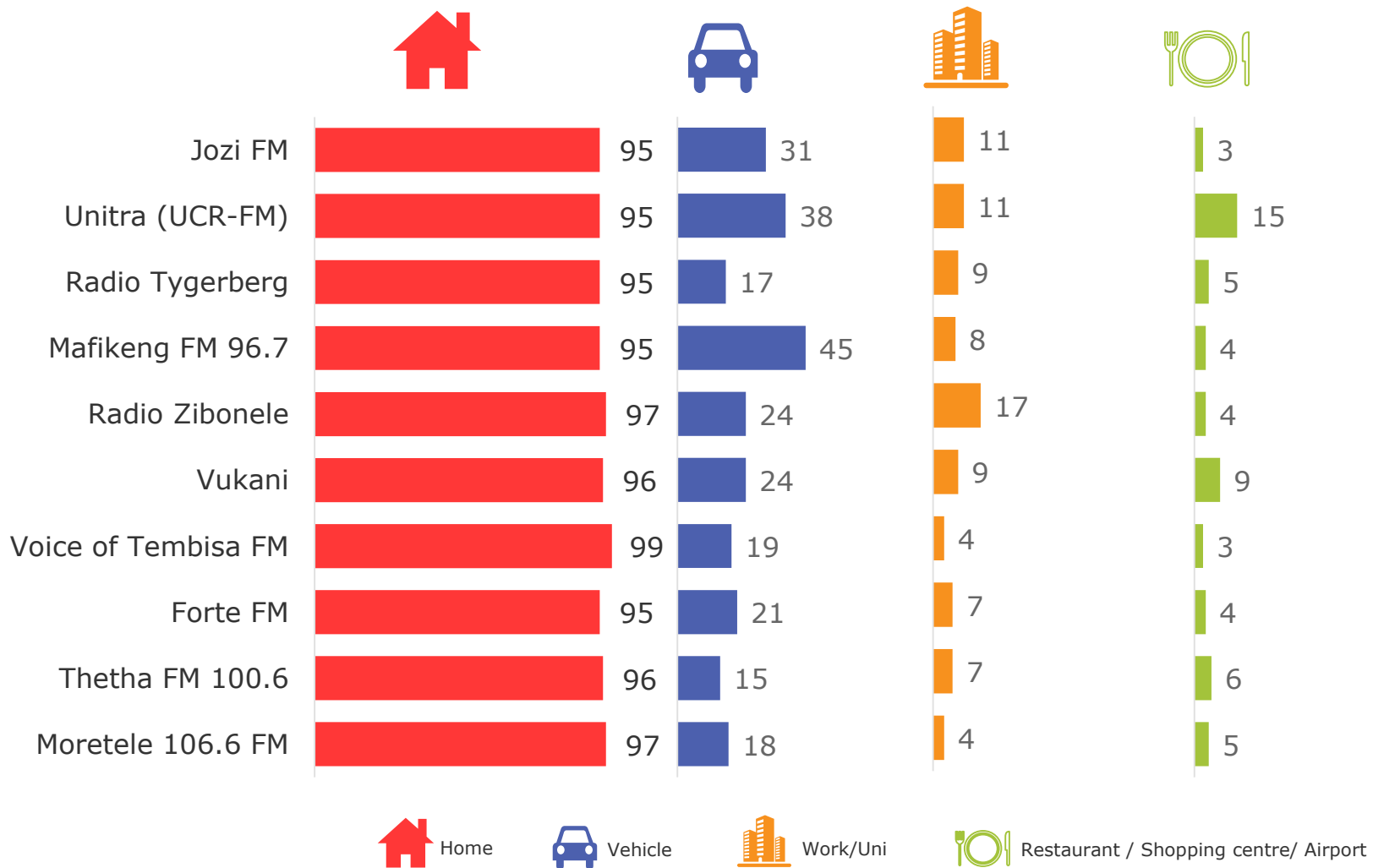


Restaurant / Shopping centre/ Airport

Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
 Stations ranked on avg. daily audience (Mon-Sun)  
 Commercial and PBS stations with base=>40

# Station listening by LOCATION

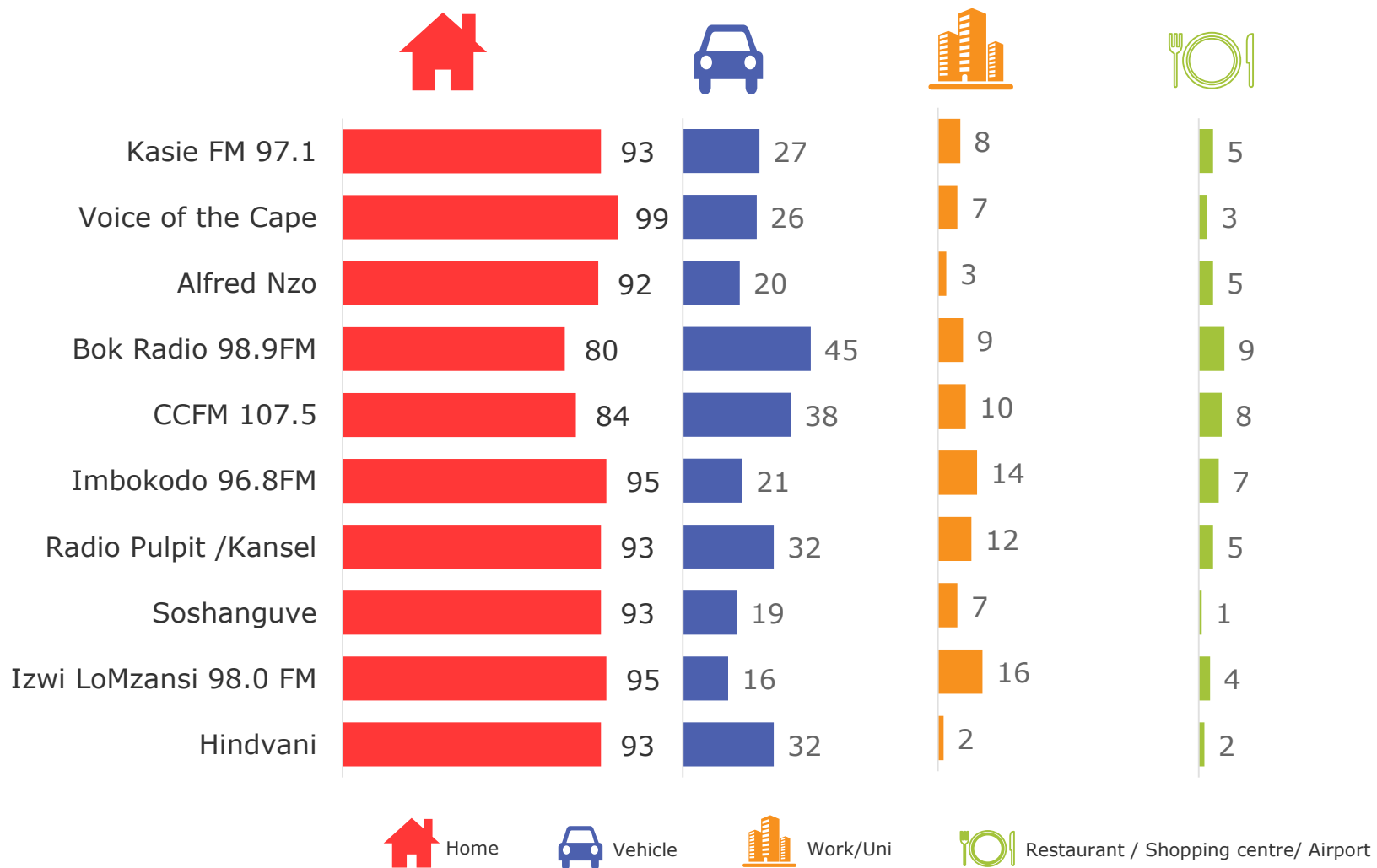
Community



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)

# Station listening by LOCATION

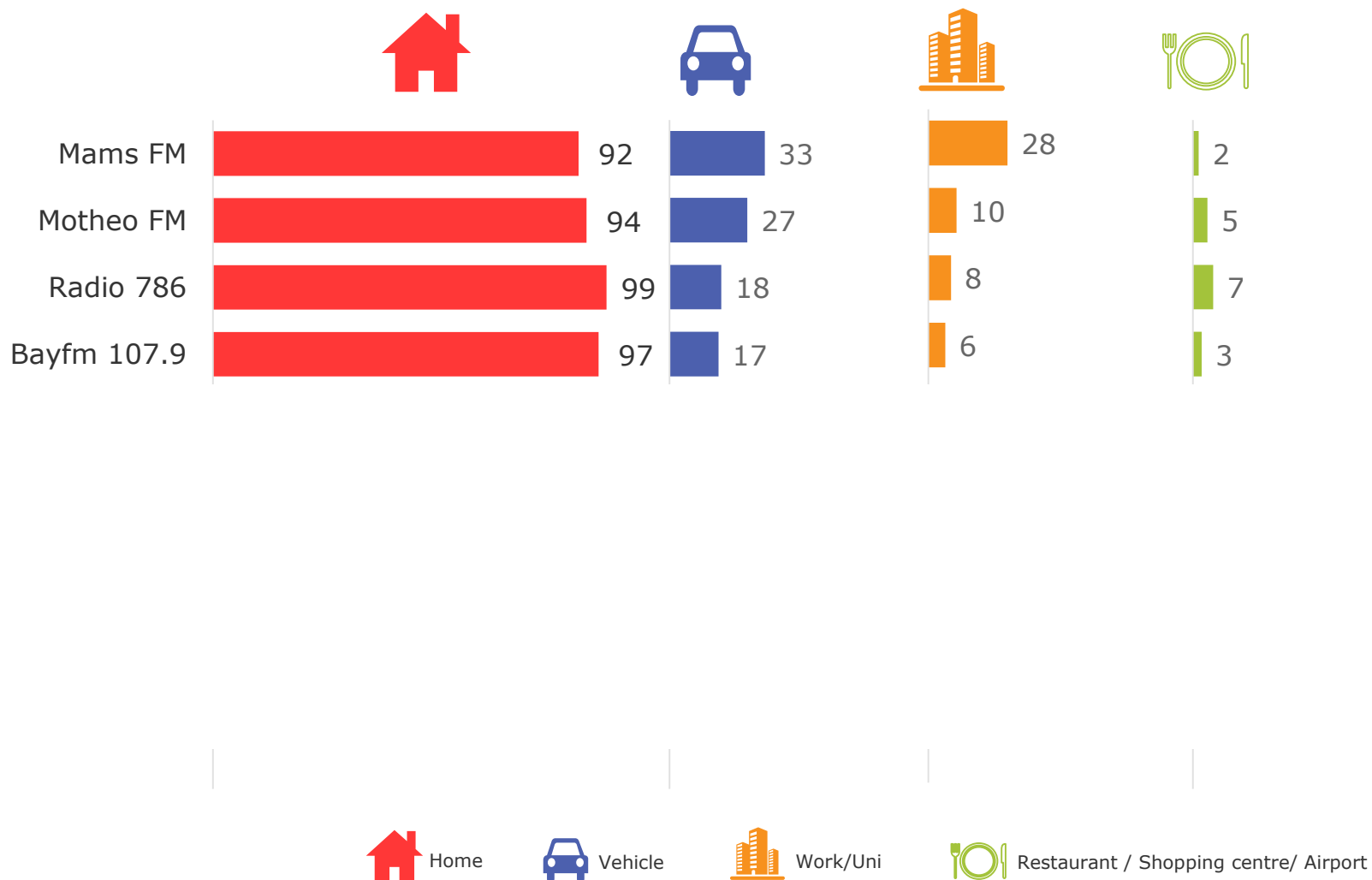
Community



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
Stations ranked on avg. daily audience (Mon-Sun)

# Station listening by LOCATION

Community



Source: BRC RAM Jan-Jun'16 (National: n=36,447)  
 Stations ranked on avg. daily audience (Mon-Sun)  
 Community stations with base > 90