

BRC RAM™ – AUGUST '17 RELEASE

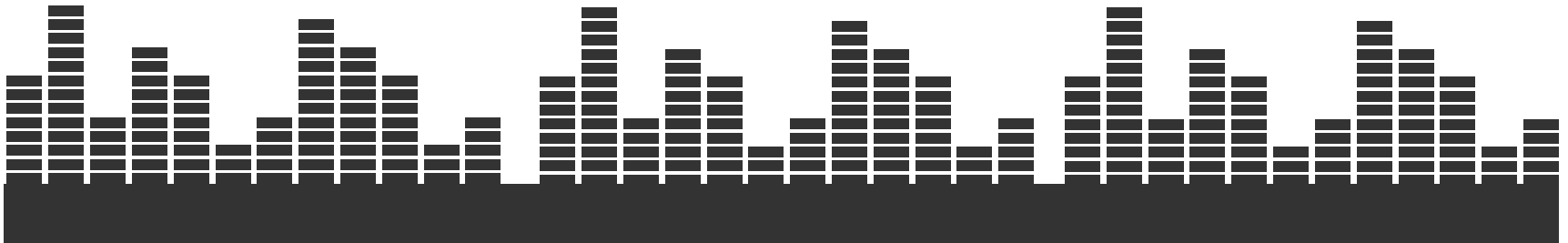


TRENDING...

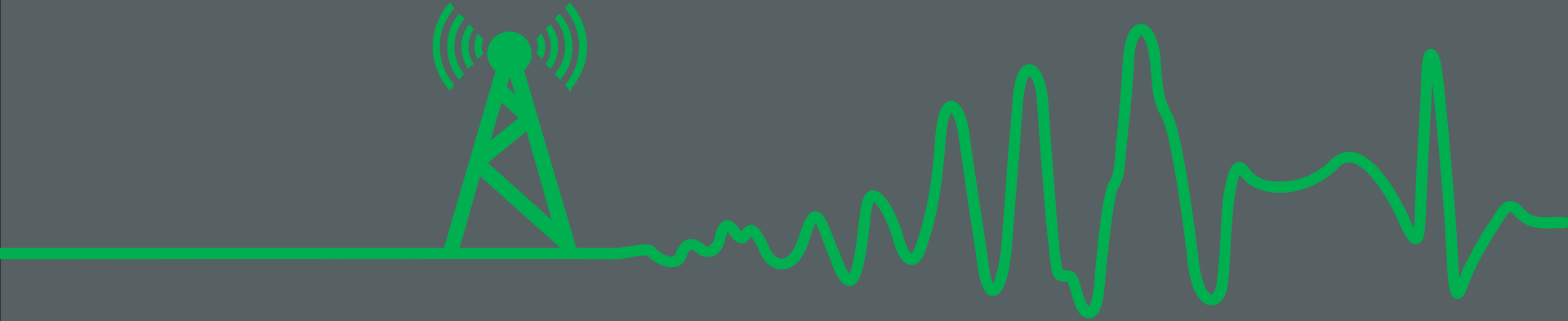


Oct'16-Mar'17 (sample=31,946 diaries)

Jan'17-Jun'17 (sample=31,178 diaries)

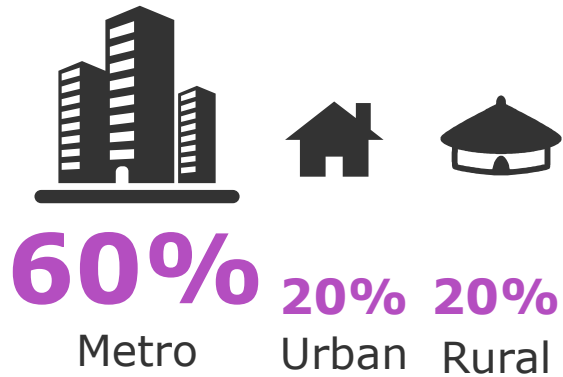


BRC RAM™ - VITAL SIGNS



BRC RAM™ AT A GLANCE...

Metro-skewed sample



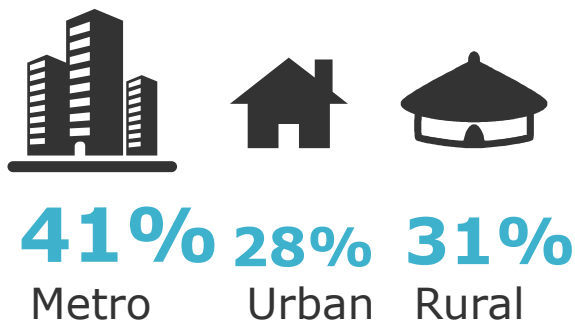
Random selection

- Small areas
- Starting points
- Households
- Main respondents

Methodology

- Placement interview
- 7-day diary

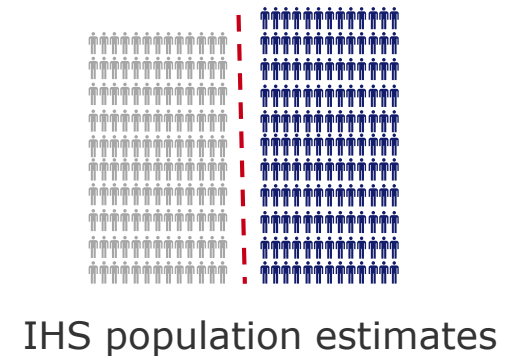
Re-Weighted to pop



Weighting variables

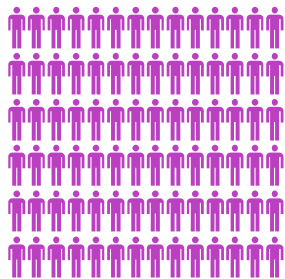
- Province
- Area type
- Gender
- Age
- Race

Annual universe update



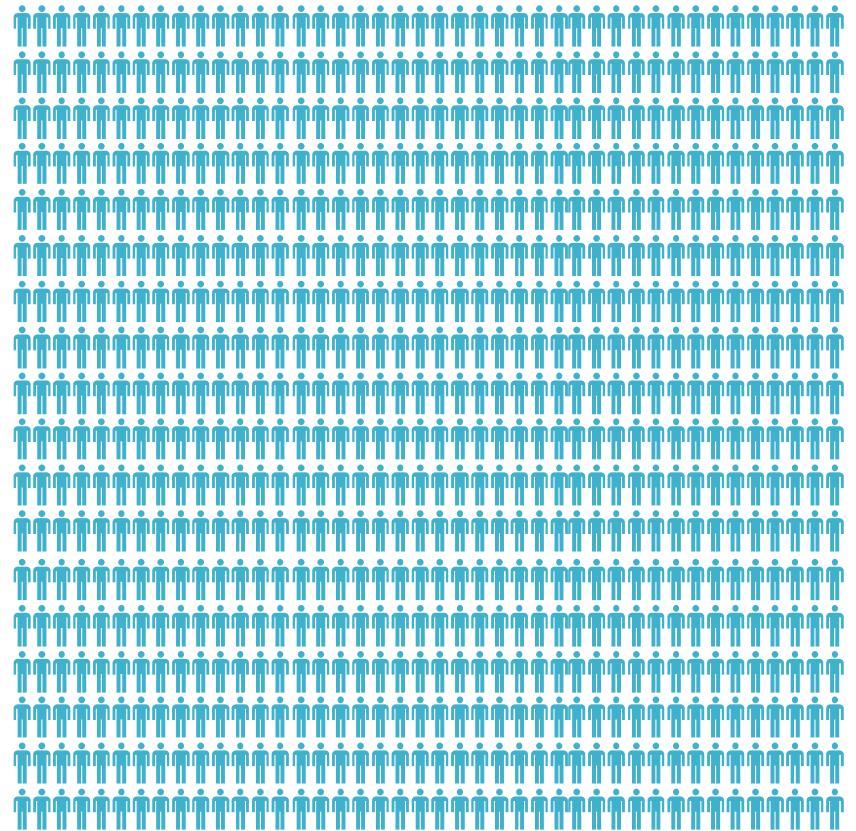
REPRESENTATIVE SAMPLE...

30,000 households
per annum



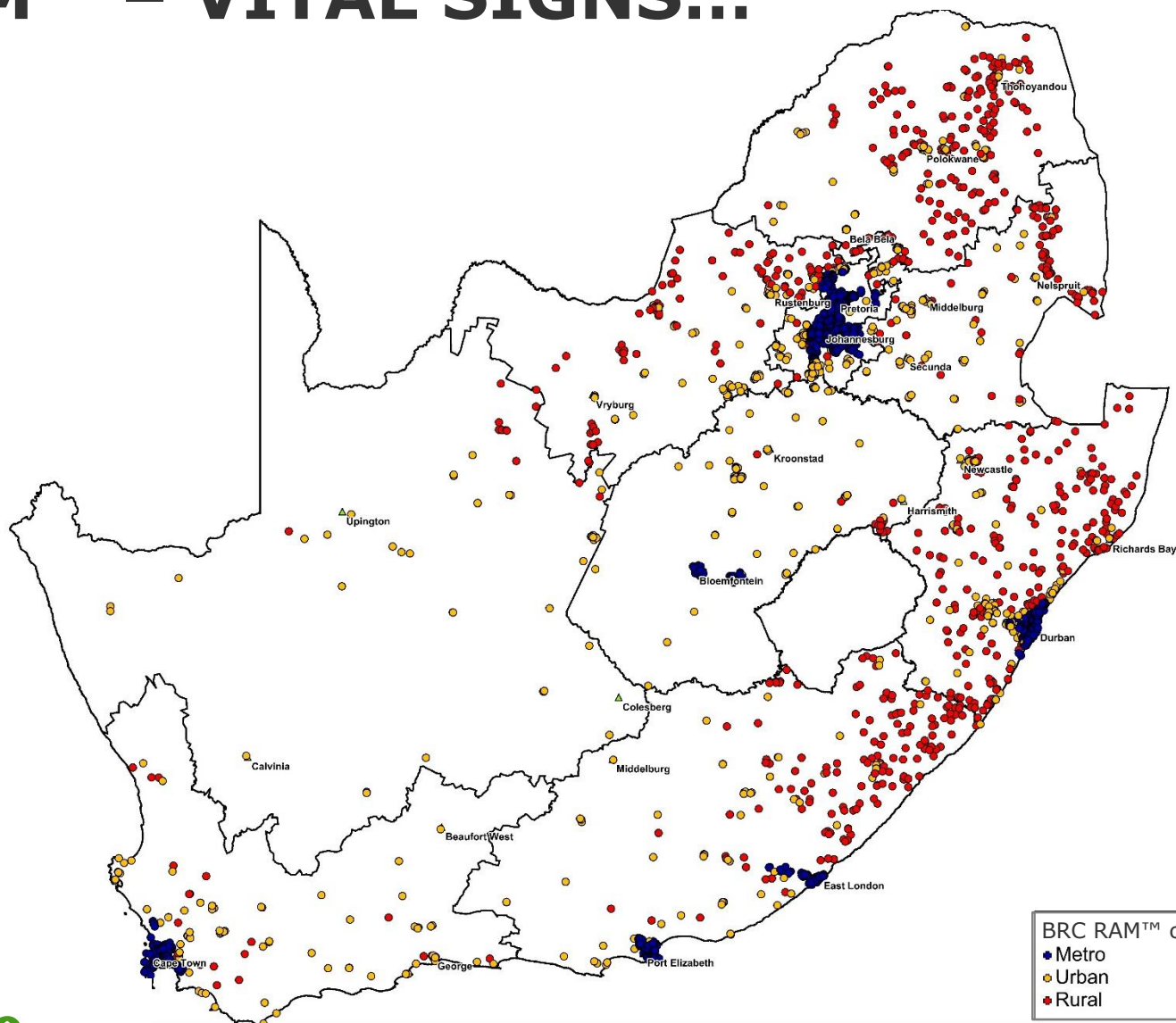
BRC RAM™ sample:
representative of the South
African population on a National
and Provincial level

300,000 households
per annum



**Sample that would be required to be
representative of all small areas in
South Africa**

BRC RAM™ – VITAL SIGNS...



Population (Age 15+):
39,5 million

BRC RAM™ – VITAL SIGNS...

Random selection,
household flooding

14,899

Households



31,178

Individuals



Jan'17-Jun'17 sample



BRC RAM™ – VITAL SIGNS...

Consistent area split (sample frame)



60% Metro



20% Urban



20% Rural

Stations included

39 Commercial and PBS stations

269 Community stations



THE METRO SAMPLE...



Metro

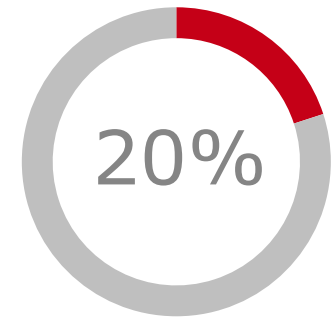
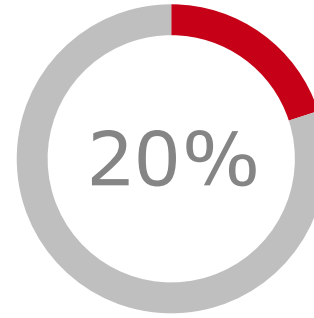
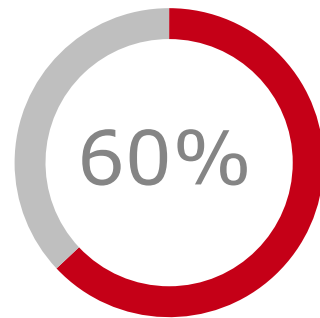


Urban

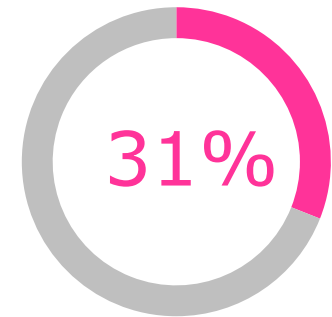
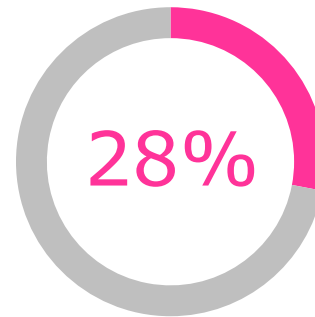
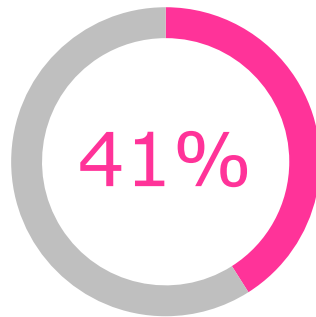


Rural

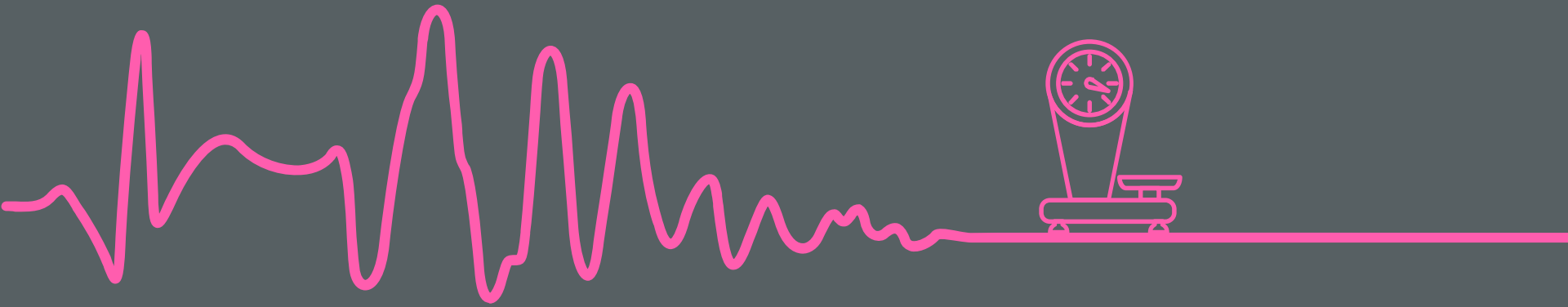
**Sample
Frame:**



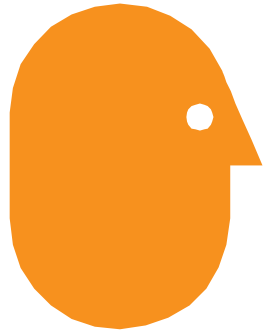
Population:



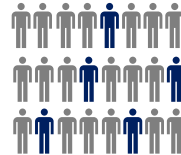
SCRUTINY & WEIGHTING



REVIEW, EXAMINE, REFINE...



Weighting review



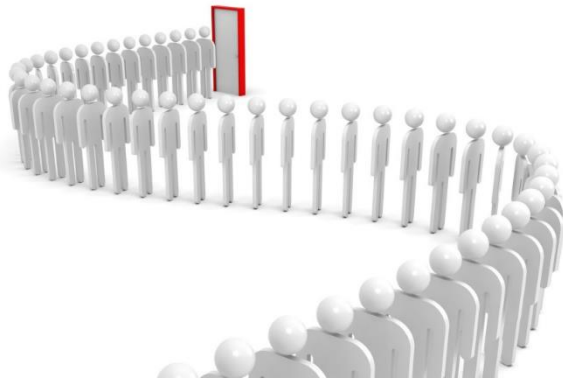
Sampling review



Queries

THE FOUR GATES...

SAMPLE GATE



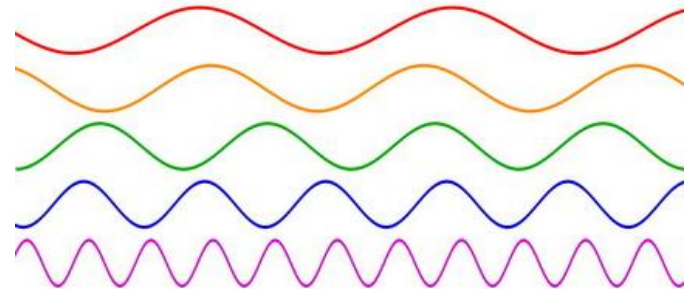
STABILITY GATE



WEIGHTING GATE



STATION CHANGE GATE



WEIGHTING...



Average weighting efficiency

APR-SEP'16

84%

JUL-DEC'16

81%

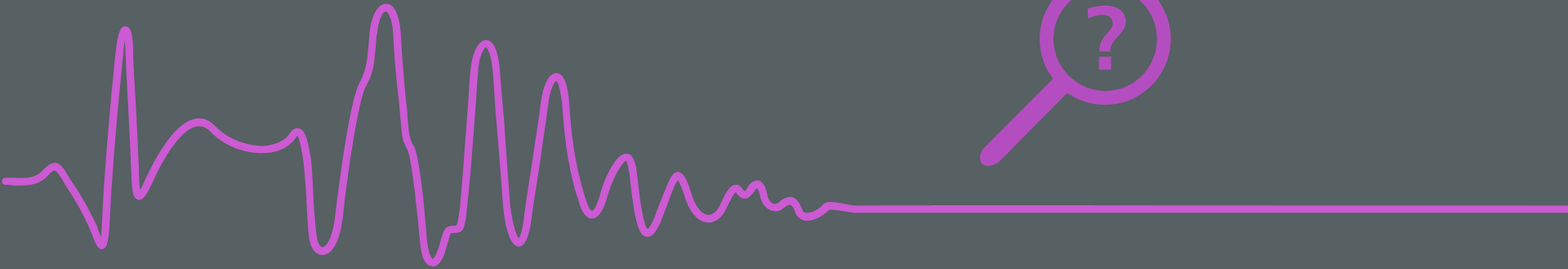
OCT'16-MAR'17

87%

JAN'17-JUN'17

89%

PROGRAMME INSIGHTS

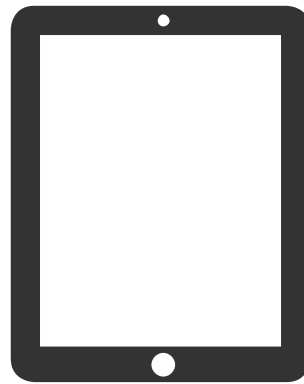


NEW INSIGHTS...

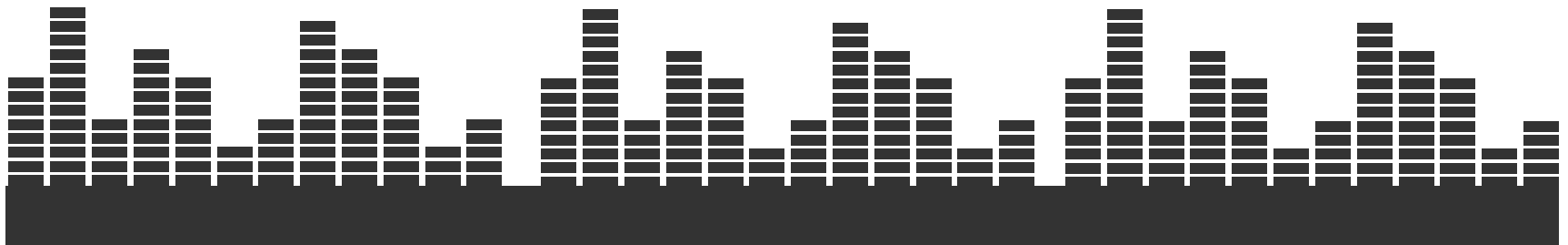
MAIN RESPONDENTS



THE INSTRUMENT (placement survey)



PROGRAMME INSIGHTS



PROGRAMME INSIGHTS...



“Which of the following types of broadcast/ topics do you **normally** listen to **on the radio**?”

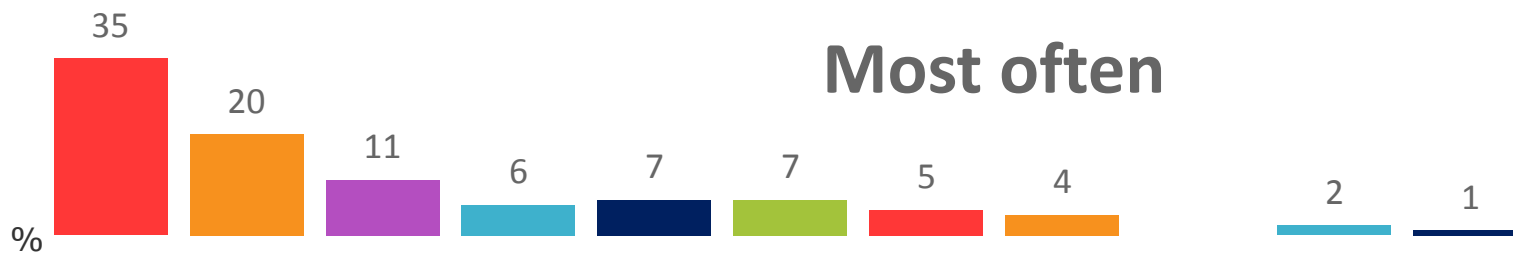
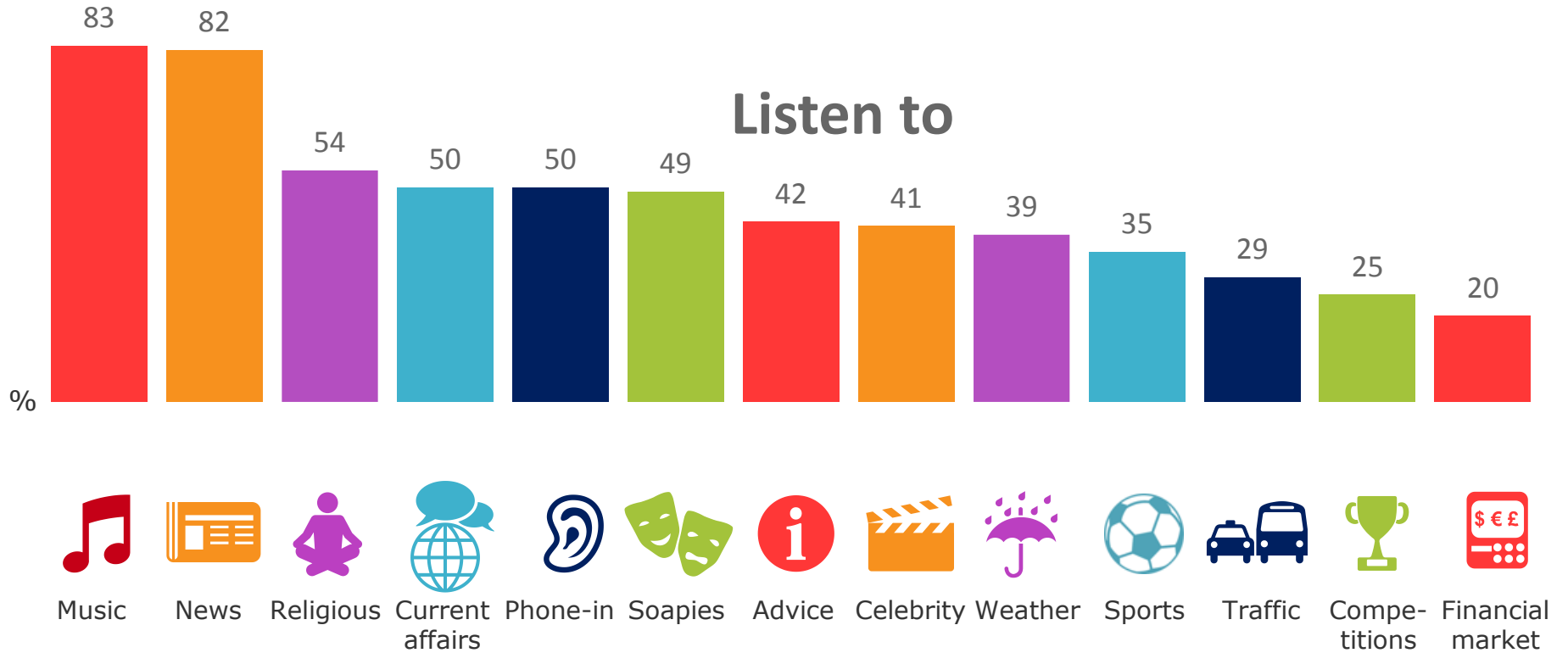
“And which do you listen to **most often**?”



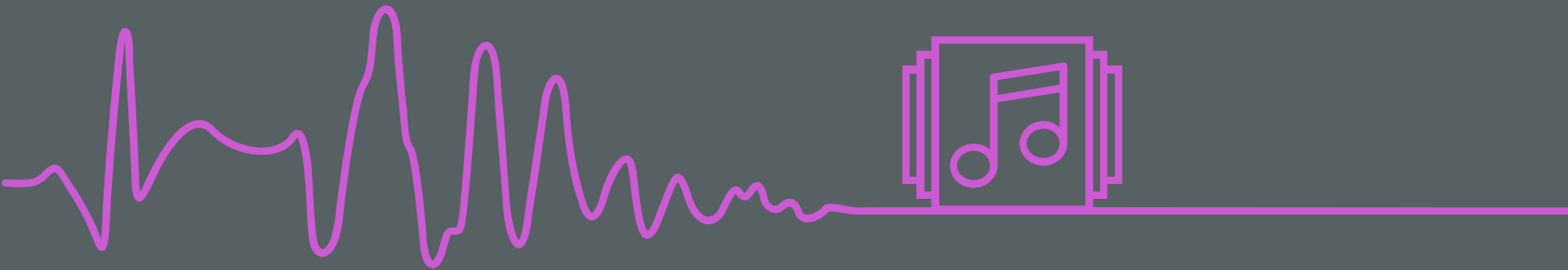
General radio preference,
not asked of a specific station

Can provide insight into general preferences of a **key demographic.**

LISTEN TO/MOST OFTEN...

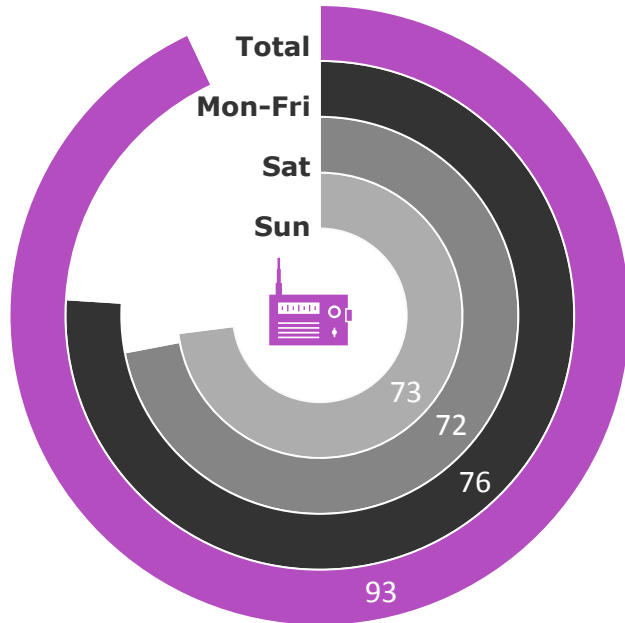


KEY SOUNDBITES



RADIO REACH is ...

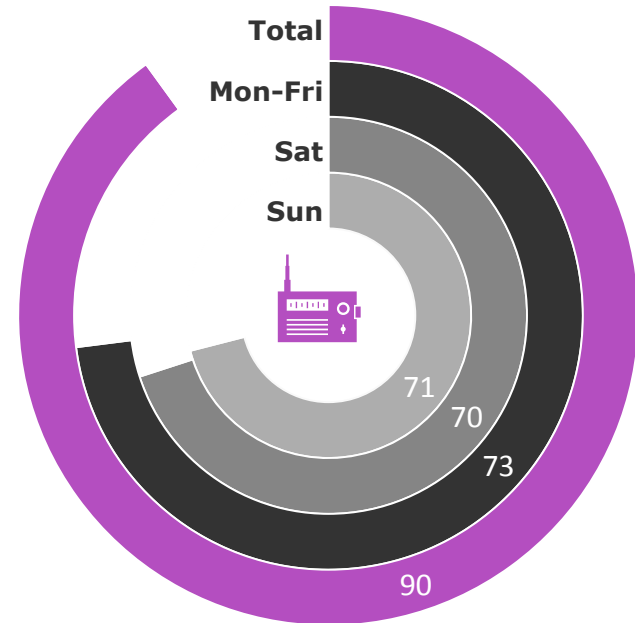
Oct'16-Mar'17



93% weekly reach = 36.6 million listeners listening anytime in the week

76% daily reach (Mon-Fri) = 30.1 million listeners on an average weekday

Jan'17-Jun'17



90% weekly reach = 35.7 million listeners listening anytime in the week

73% daily reach (Mon-Fri) = 29.0 million listeners on an average weekday

... EVERYWHERE!

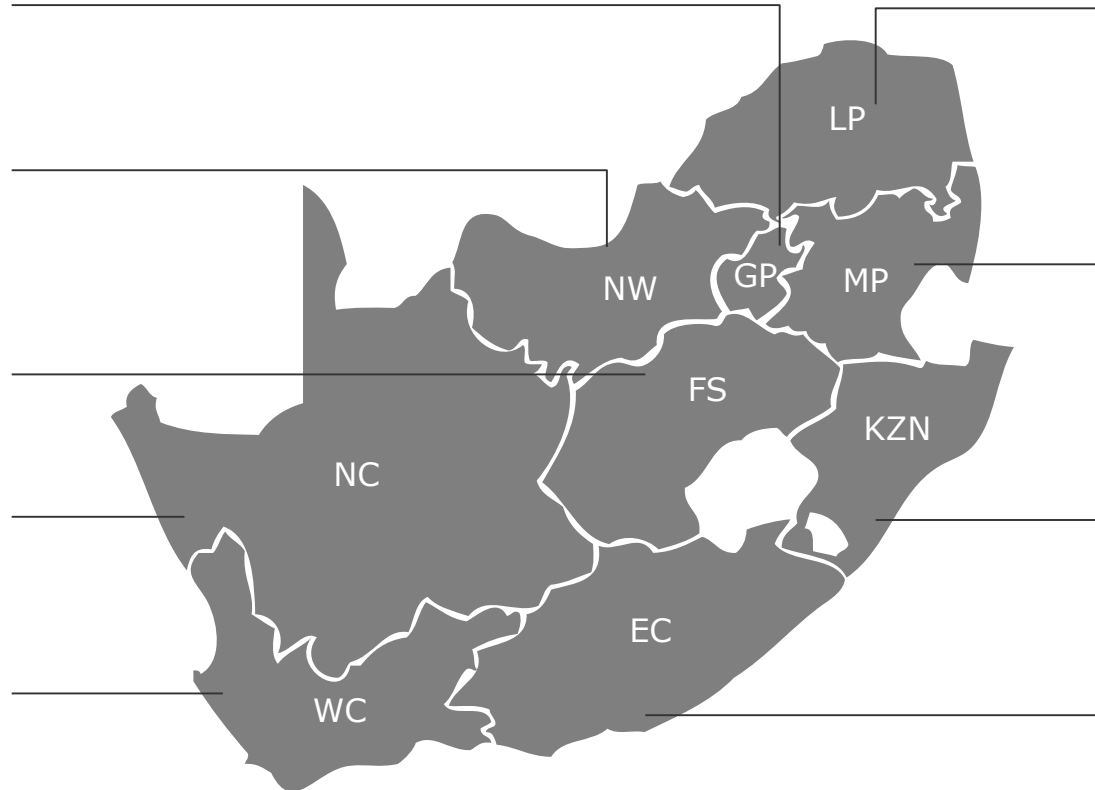
91% =
9.1m

84% =
2.2m

85% =
1.7m

83% =
725k

87% =
4.2m



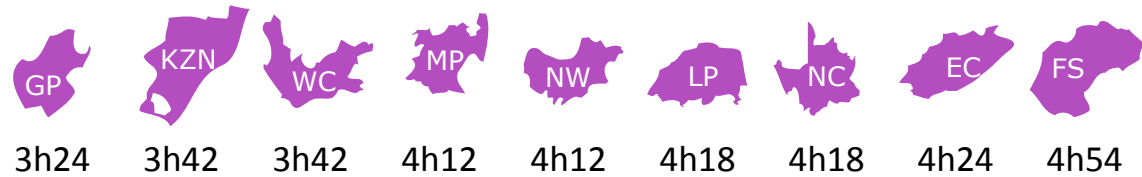
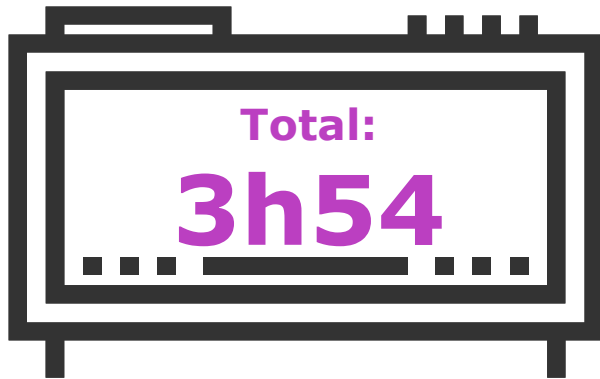
93% =
3.6m

90% =
2.6m

94% =
7.1m

92% =
4.4m

LONG LISTENING...



3h24



4h00



4h30



2h30



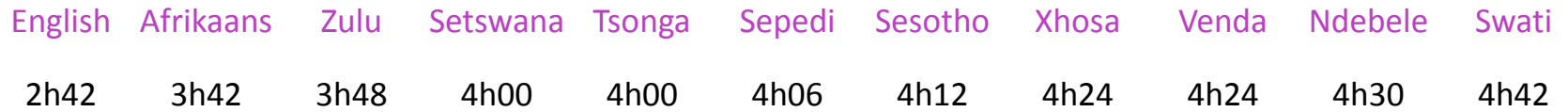
3h00



3h42

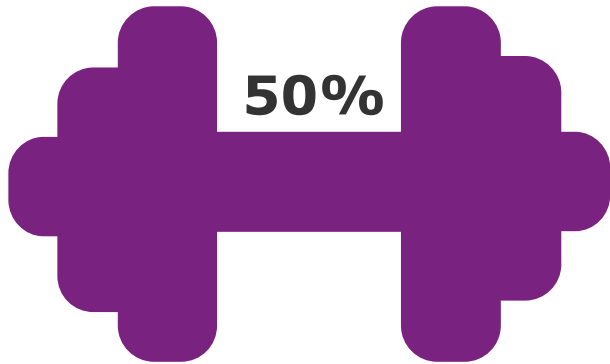


4h06

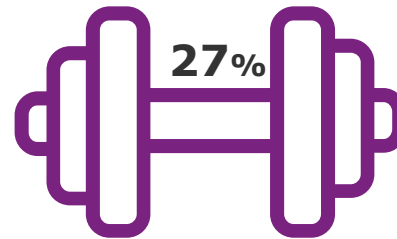


HEAVY LISTENING...

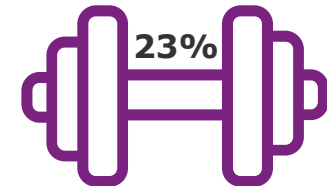
Heavy
(>20 hours pw)



Medium
(10.25-20 hours pw)



Light
(0.25-10 hours pw)



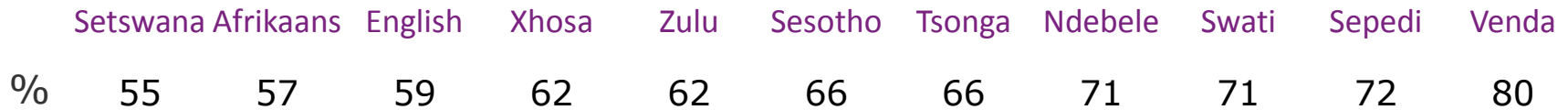
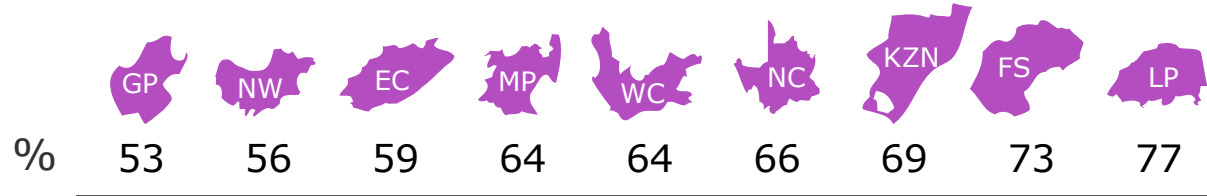
LOYAL LISTENERS...



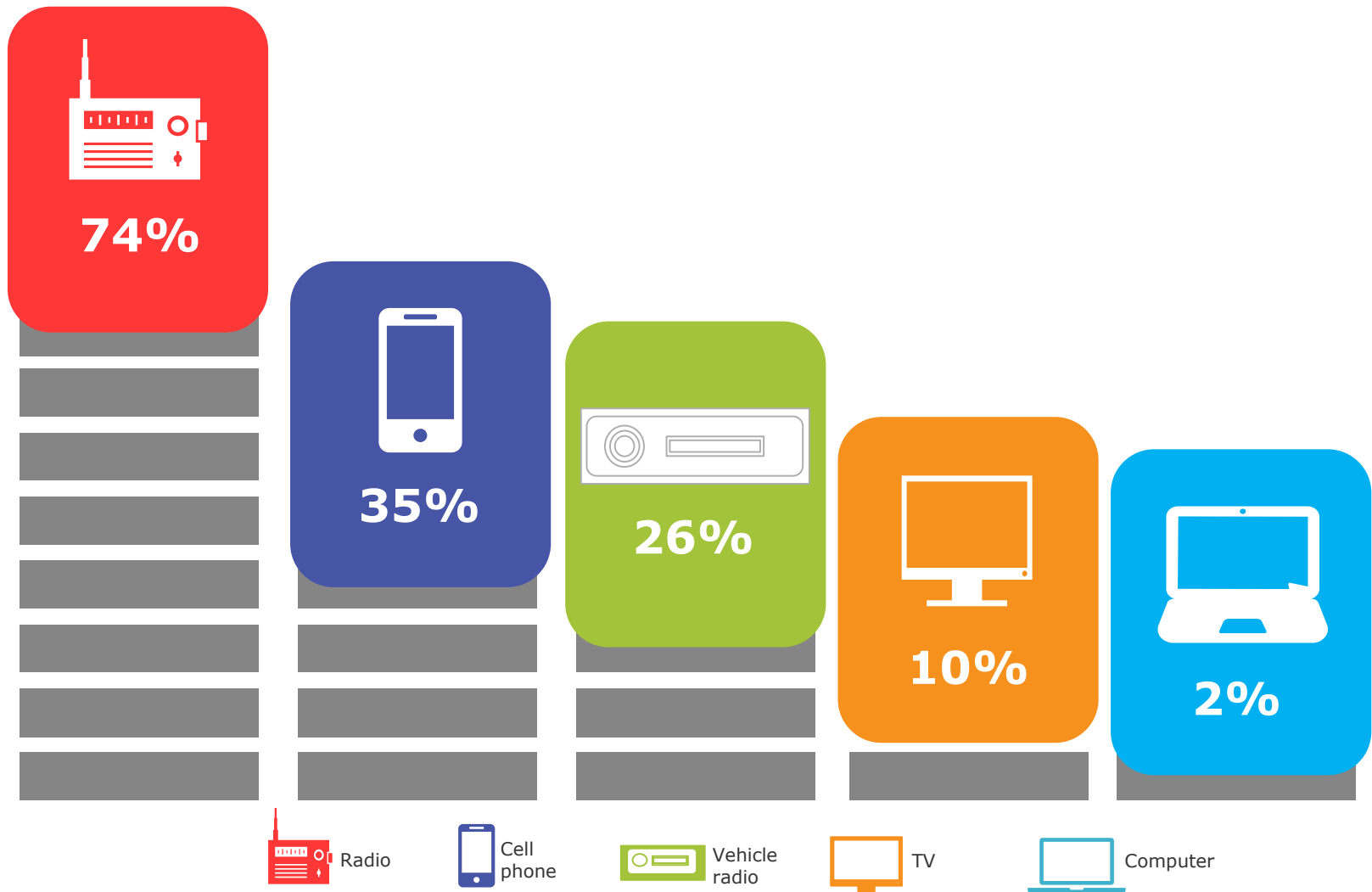
Total:

63%

listen to only one station

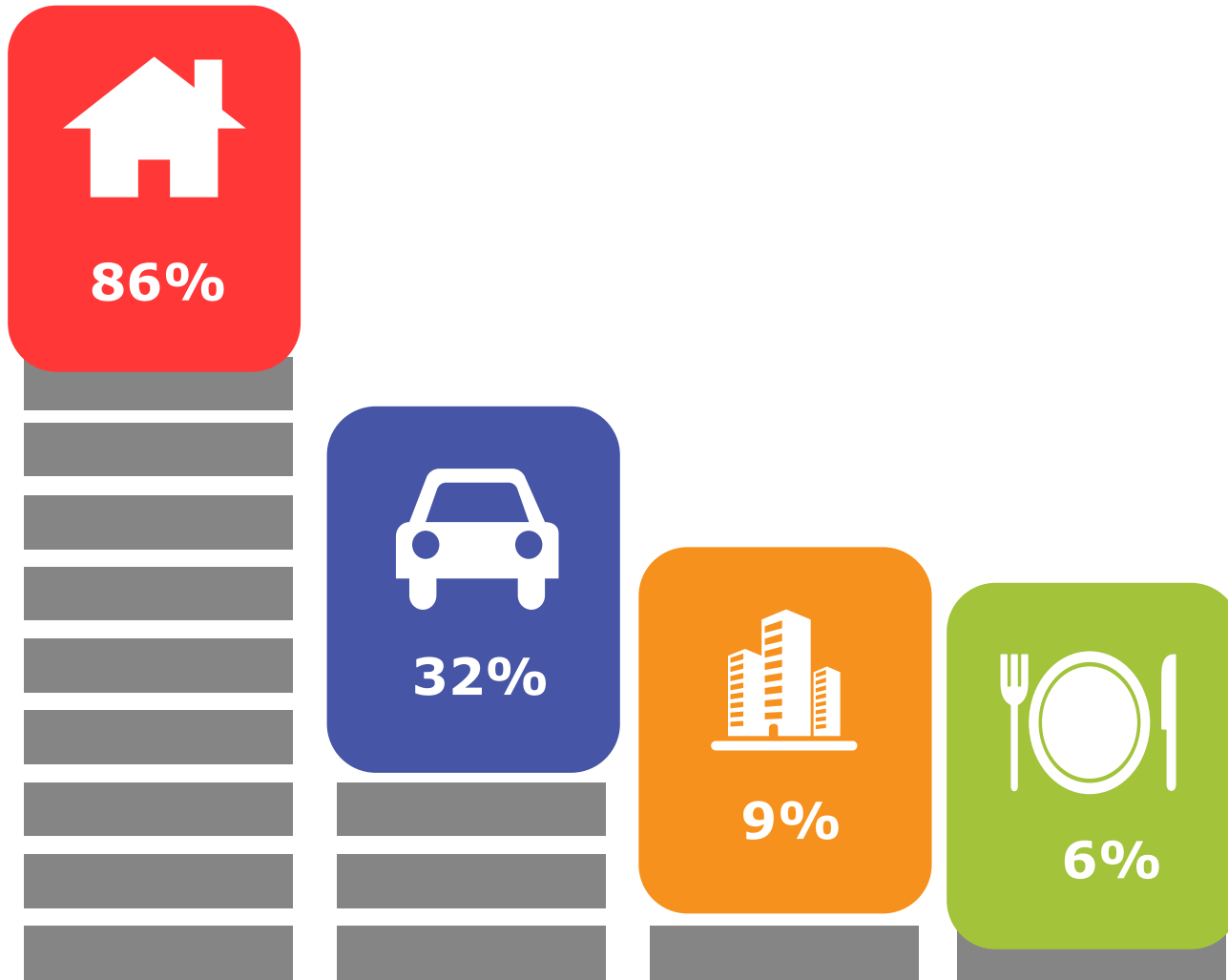


DEVICE captures HOW...



Source: BRC RAM™ Jan'17-Jun'17 (n=31,178)

LOCATION captures WHERE...



Home



Vehicle

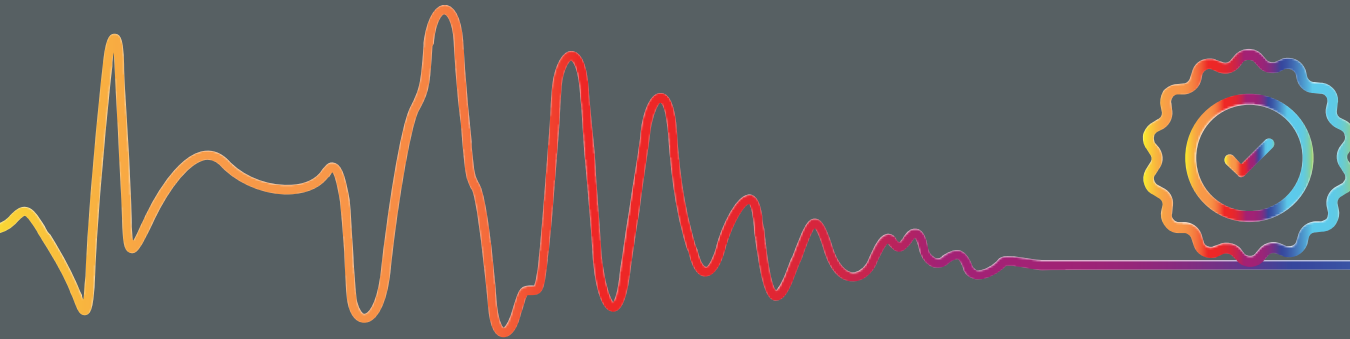


Work/University/
College



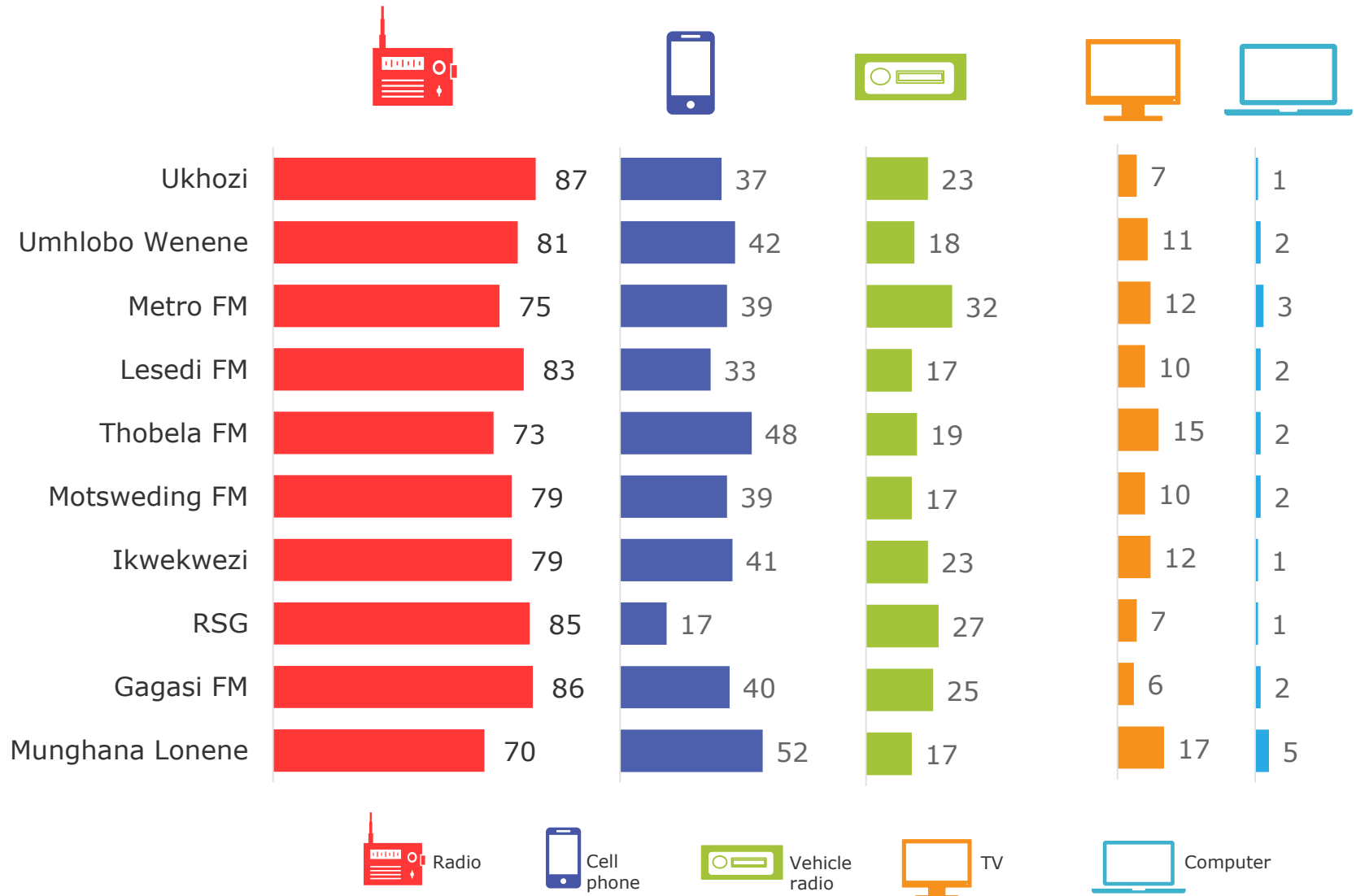
Restaurant/Shopping centre/
Airport

DEVICE & LOCATION



Station listening by **DEVICE**

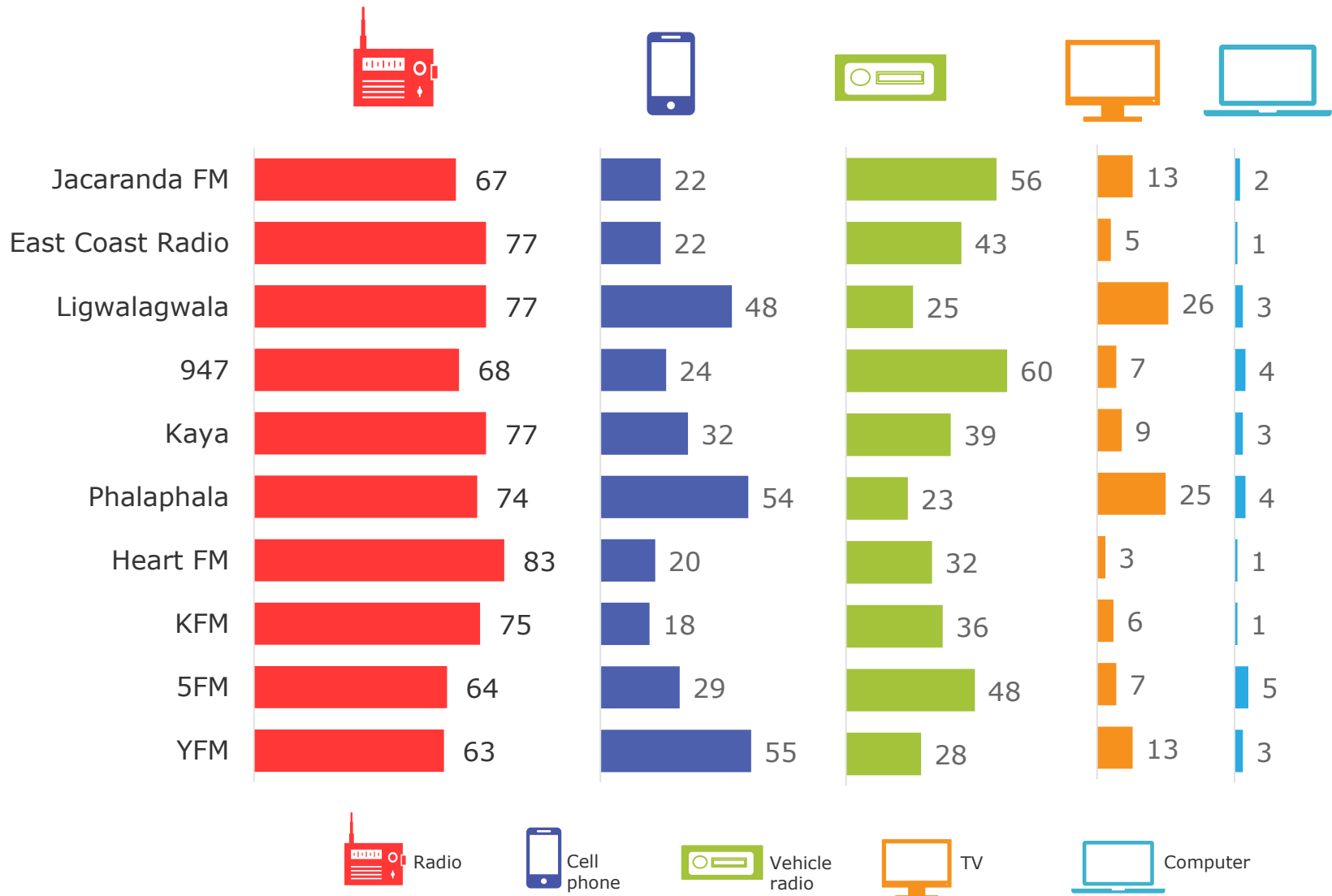
Commercial and PBS



Source: BRC RAM™ Jan'17-Jun'17 (National: n=31,178)
Stations ranked on avg. daily audience (Mon-Sun)

Station listening by **DEVICE**

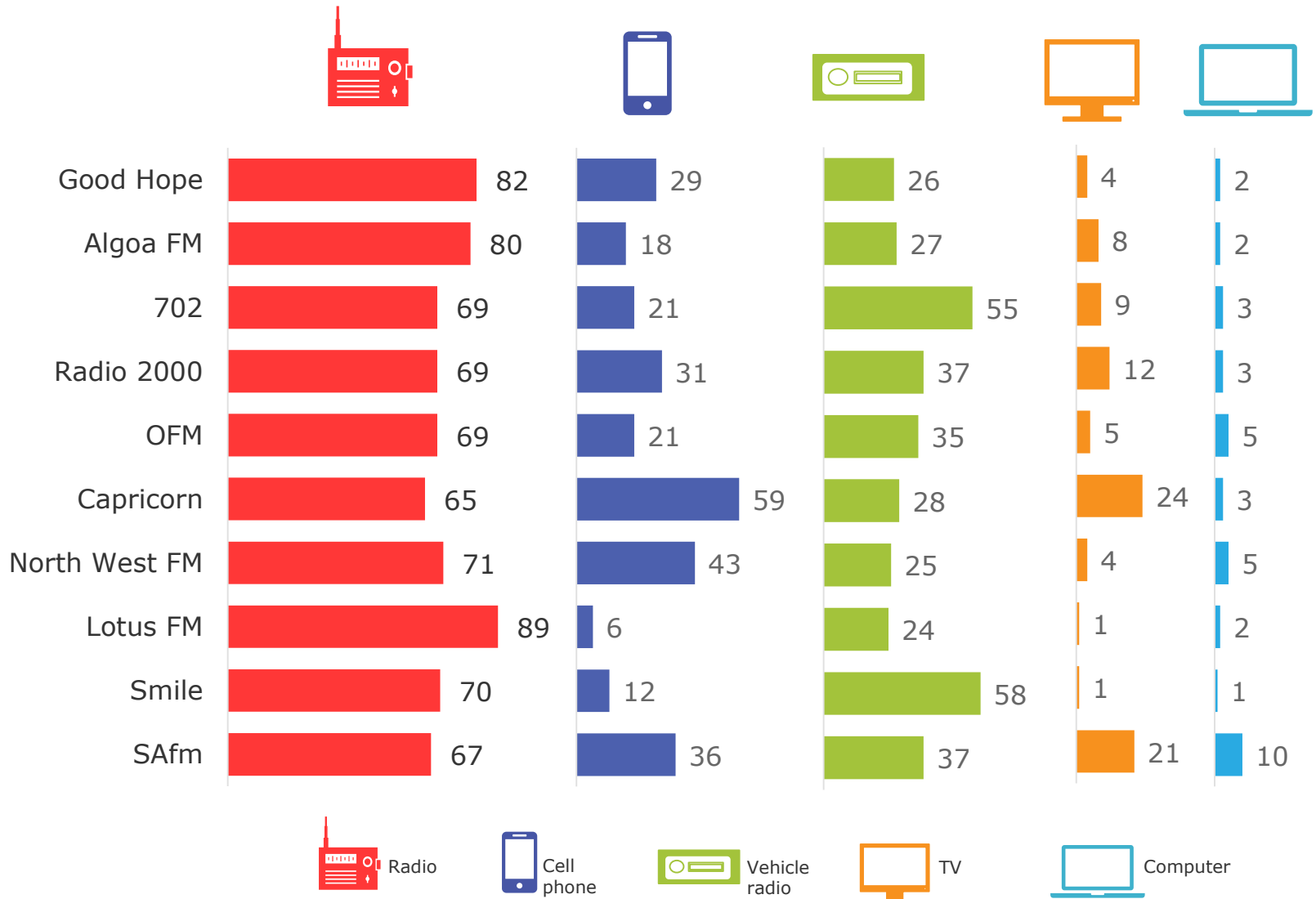
Commercial and PBS



Source: BRC RAM™ Jan'17-Jun'17 (National: n=31,178)
Stations ranked on avg. daily audience (Mon-Sun)

Station listening by **DEVICE**

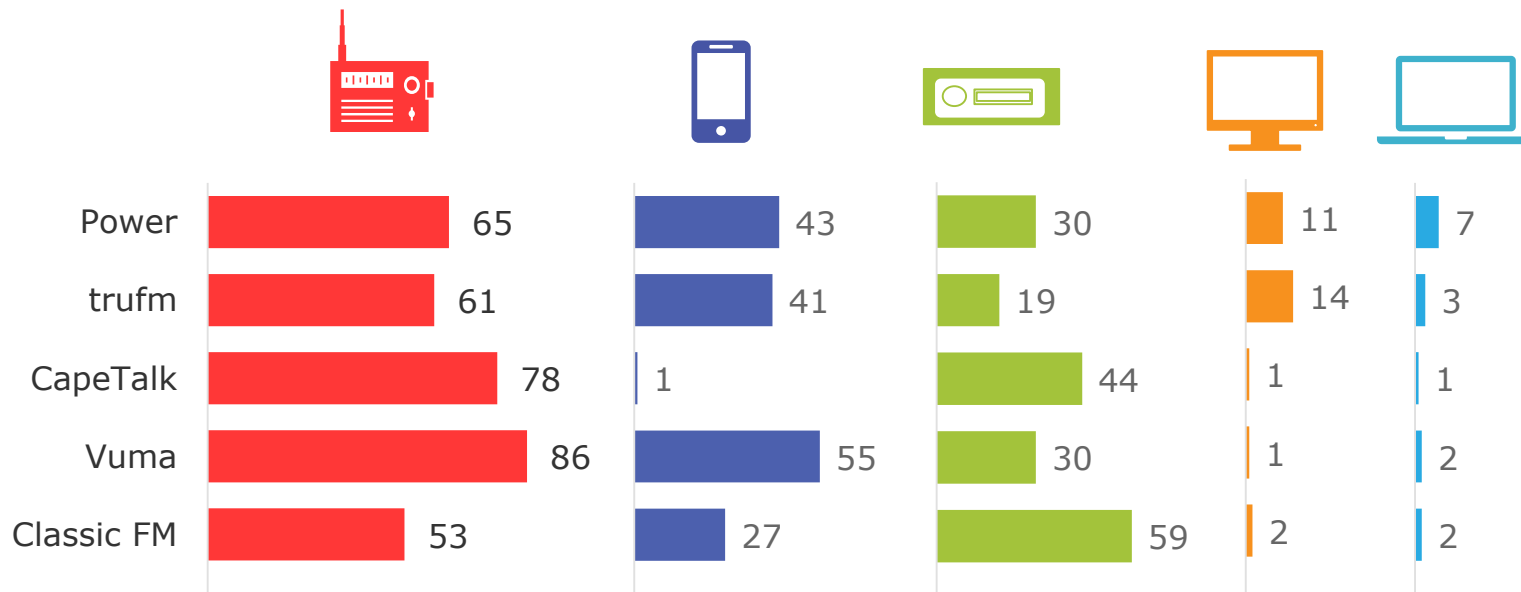
Commercial and PBS



Source: BRC RAM™ Jan'17-Jun'17 (National: n=31,178)
Stations ranked on avg. daily audience (Mon-Sun)

Station listening by **DEVICE**

Commercial and PBS



Radio



Cell phone



Vehicle radio



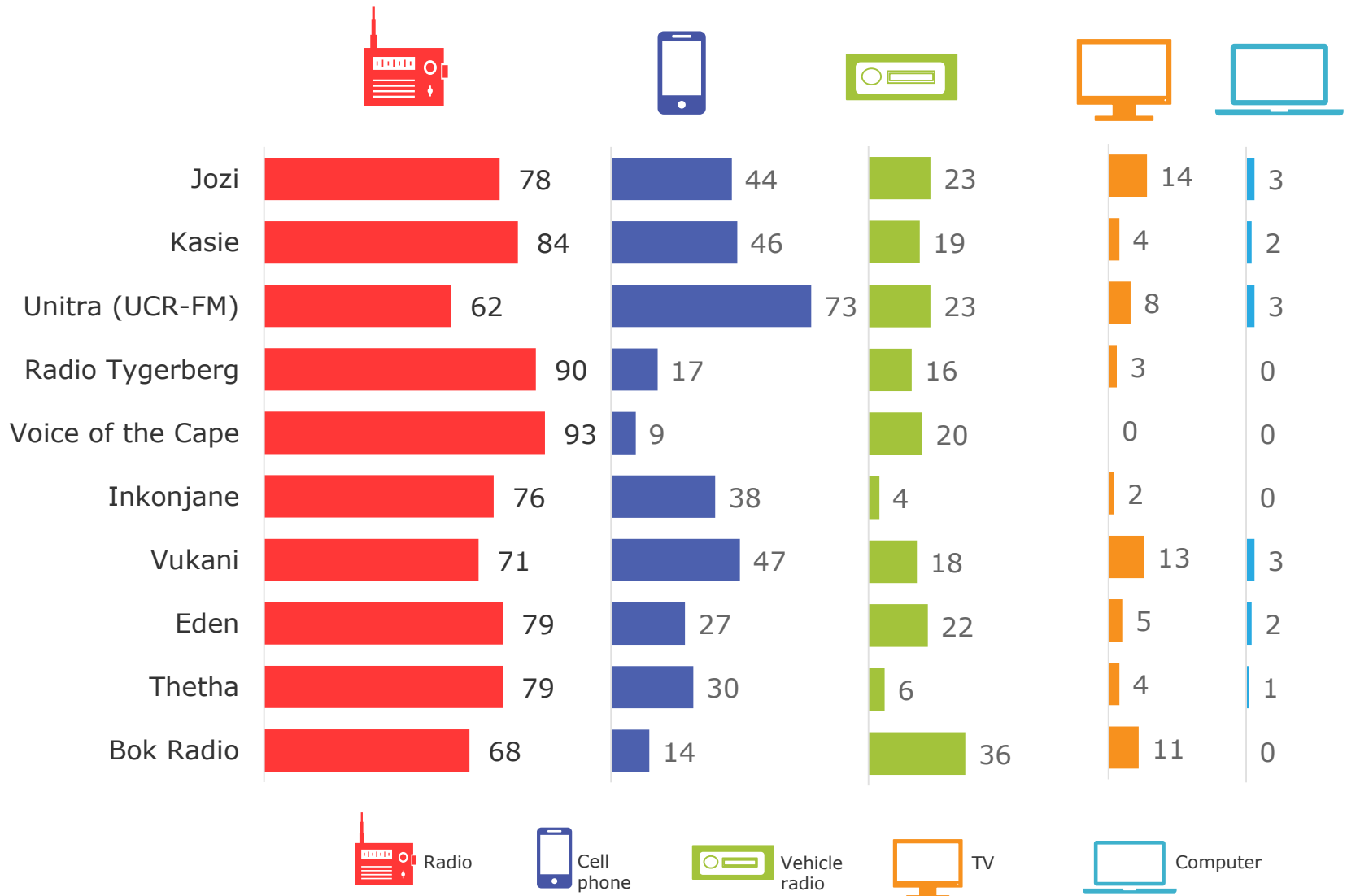
TV



Computer

Station listening by **DEVICE**

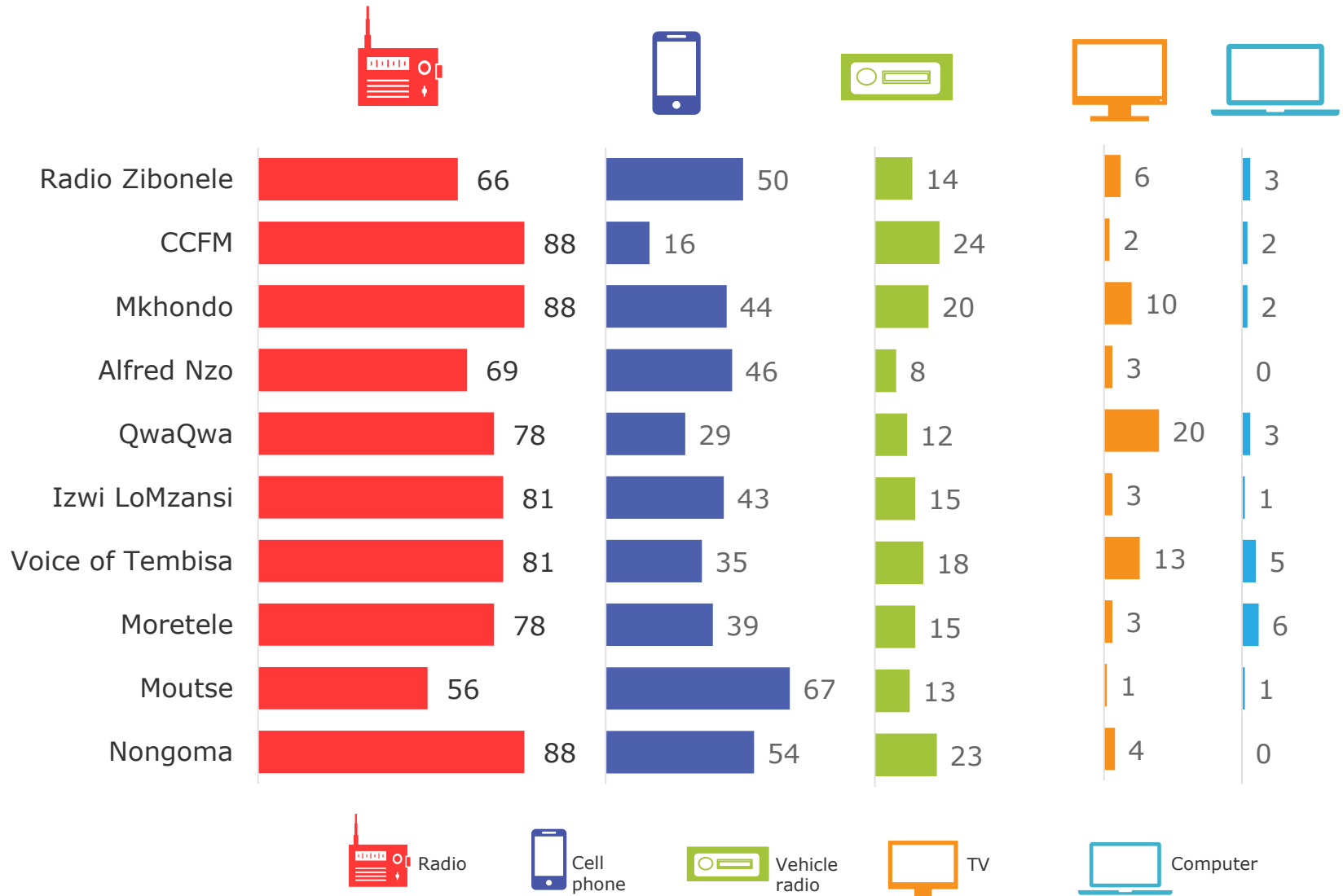
Community



Source: BRC RAM™ Jan'17-Jun'17 (National: n=31,178)
Stations ranked on avg. daily audience (Mon-Sun)

Station listening by **DEVICE**

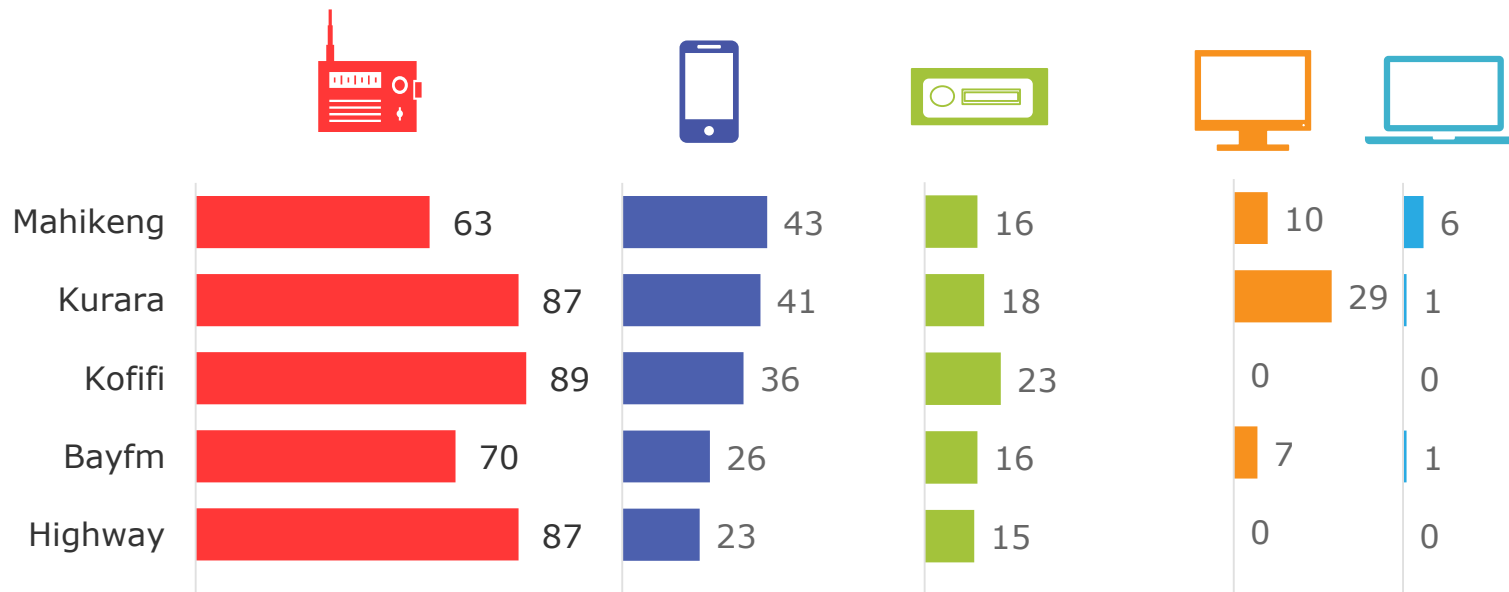
Community



Source: BRC RAM™ Jan'17-Jun'17 (National: n=31,178)
Stations ranked on avg. daily audience (Mon-Sun)

Station listening by **DEVICE**

Community



Radio



Cell phone



Vehicle radio



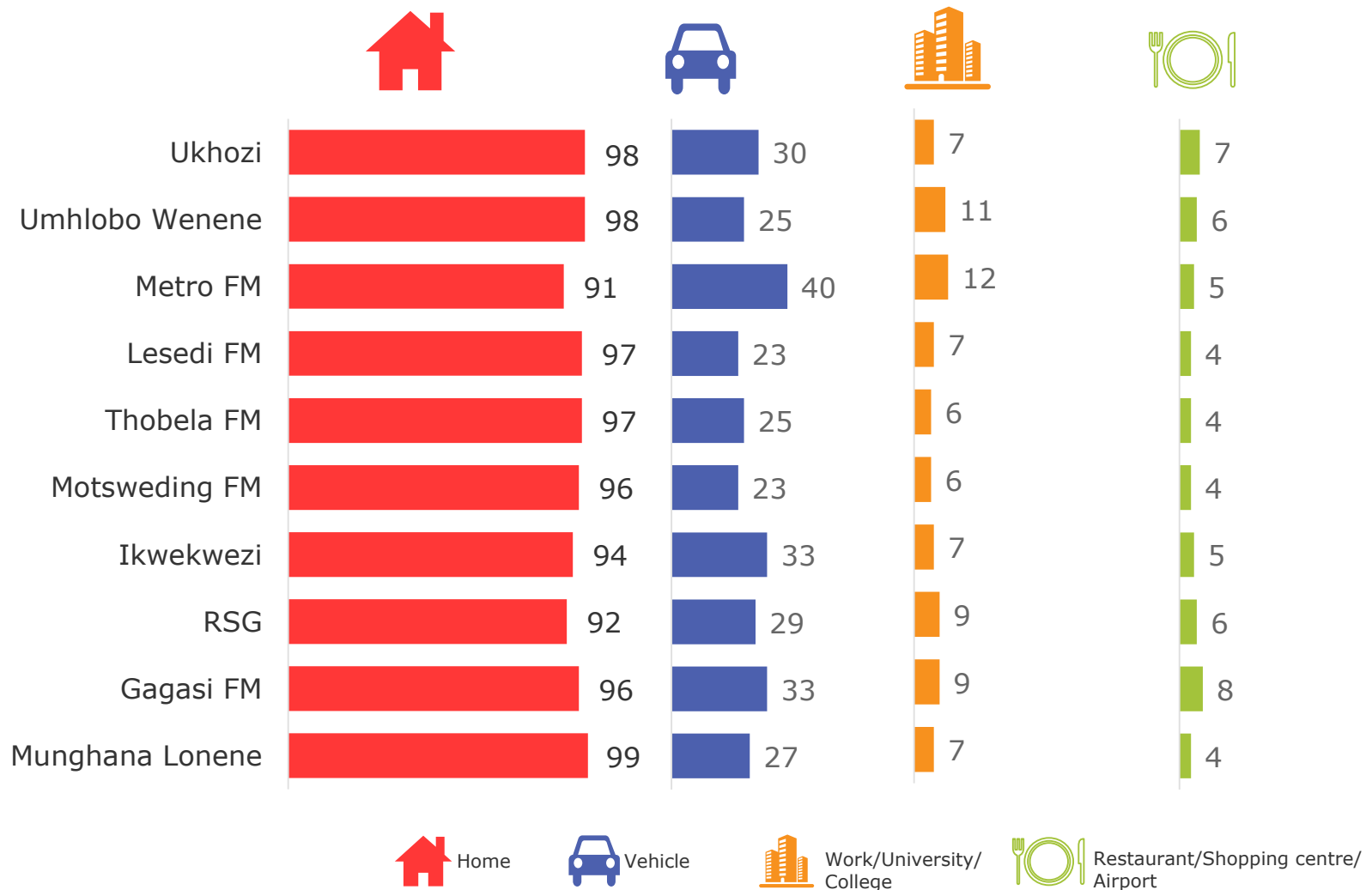
TV



Computer

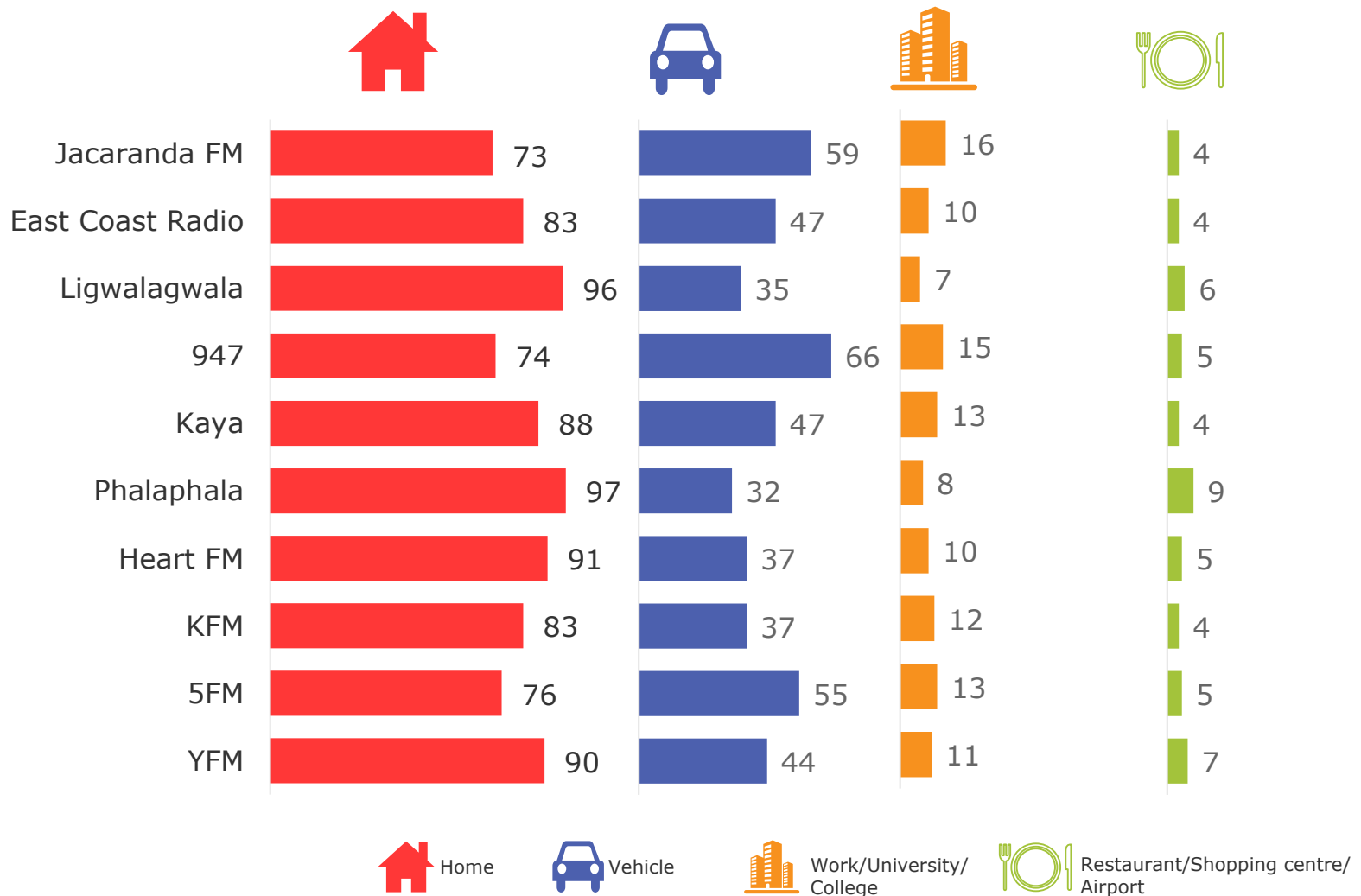
Station listening by LOCATION

Commercial and PBS



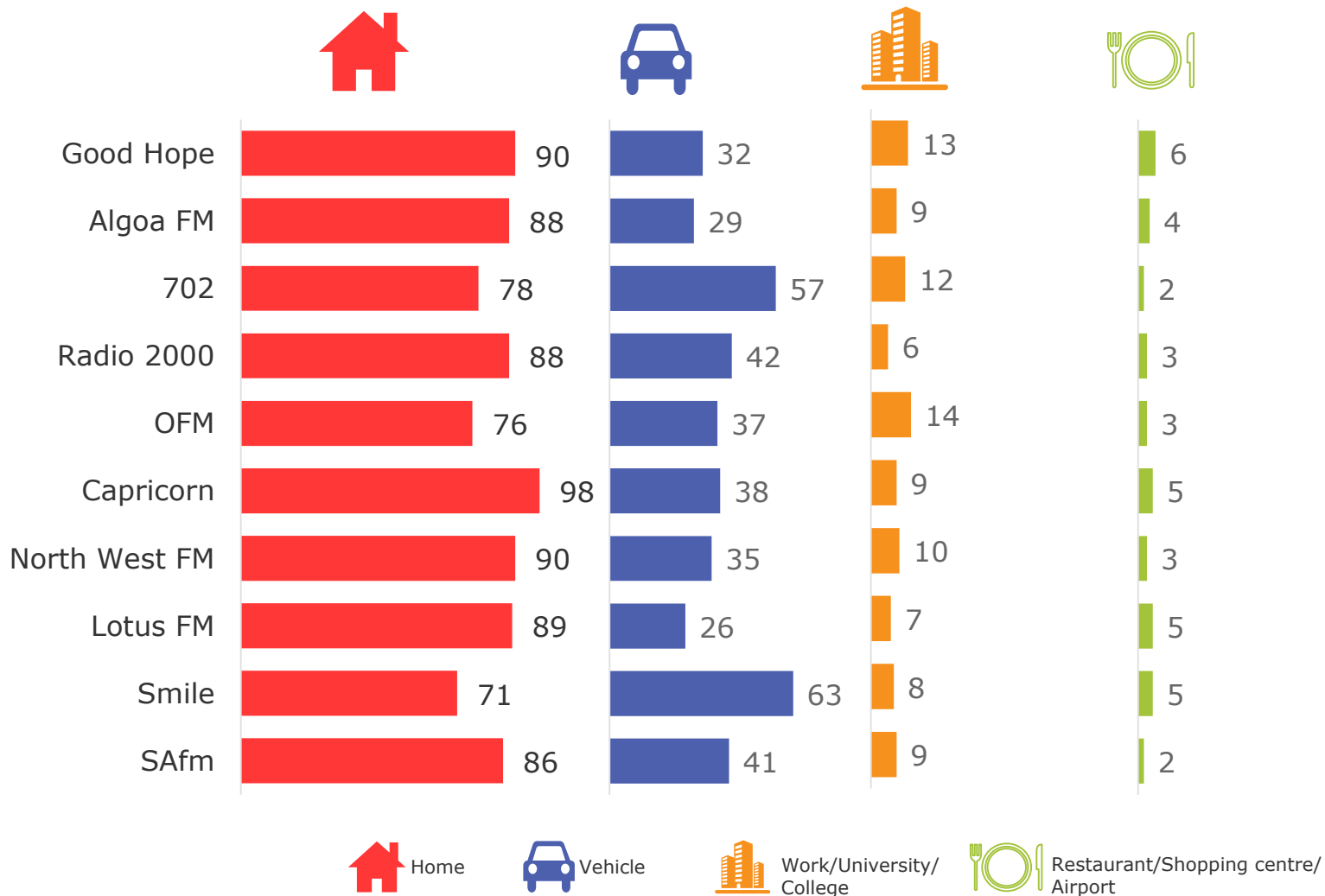
Station listening by LOCATION

Commercial and PBS



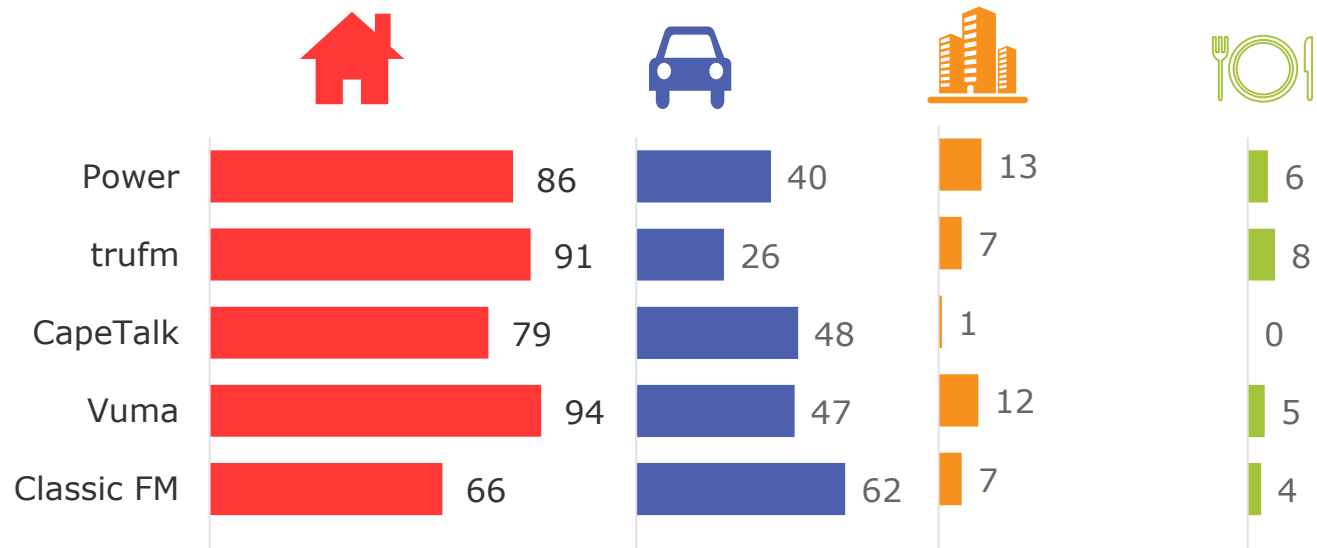
Station listening by LOCATION

Commercial and PBS



Station listening by LOCATION

Commercial and PBS



Home



Vehicle



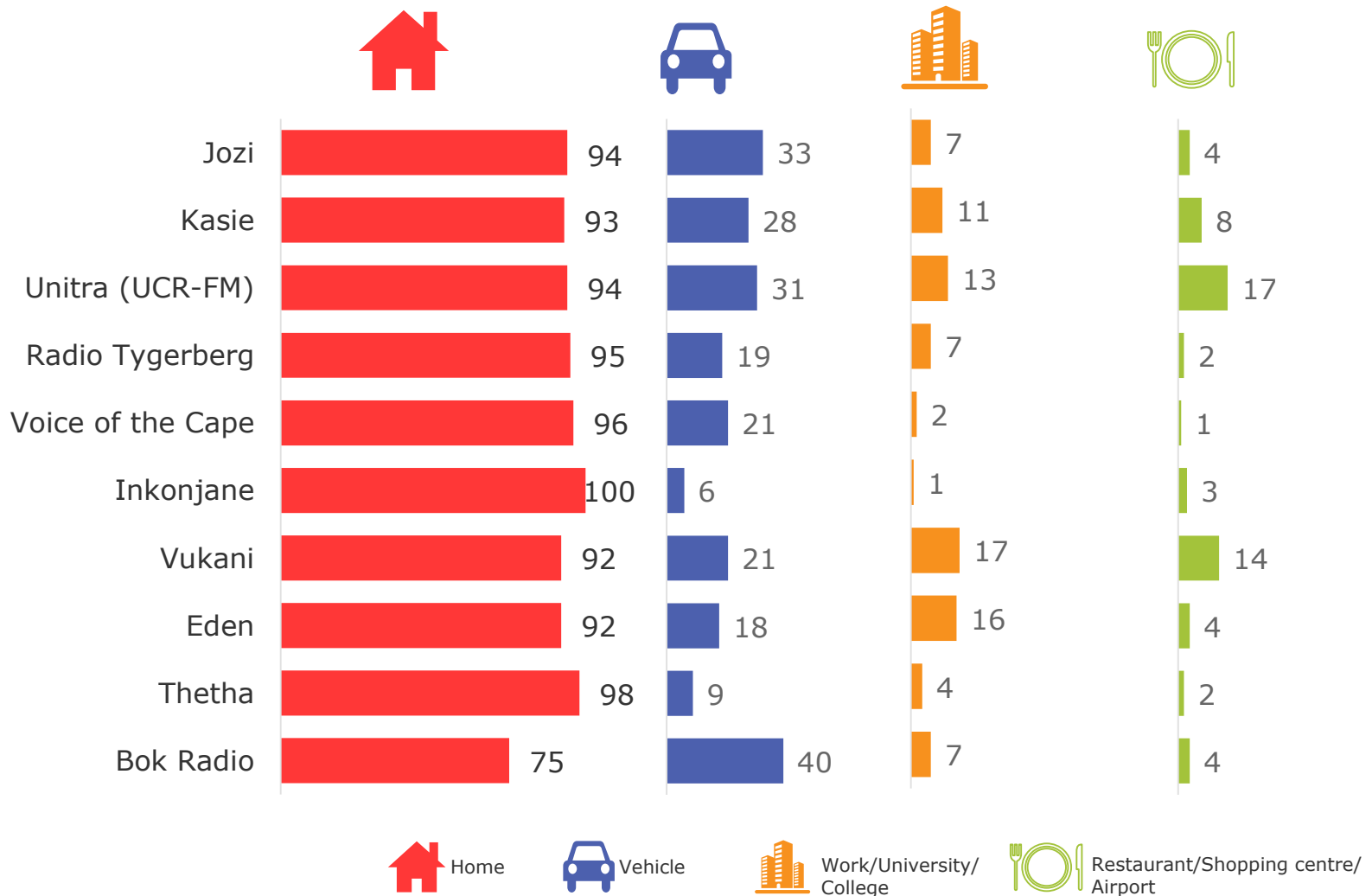
Work/University/
College



Restaurant/Shopping centre/
Airport

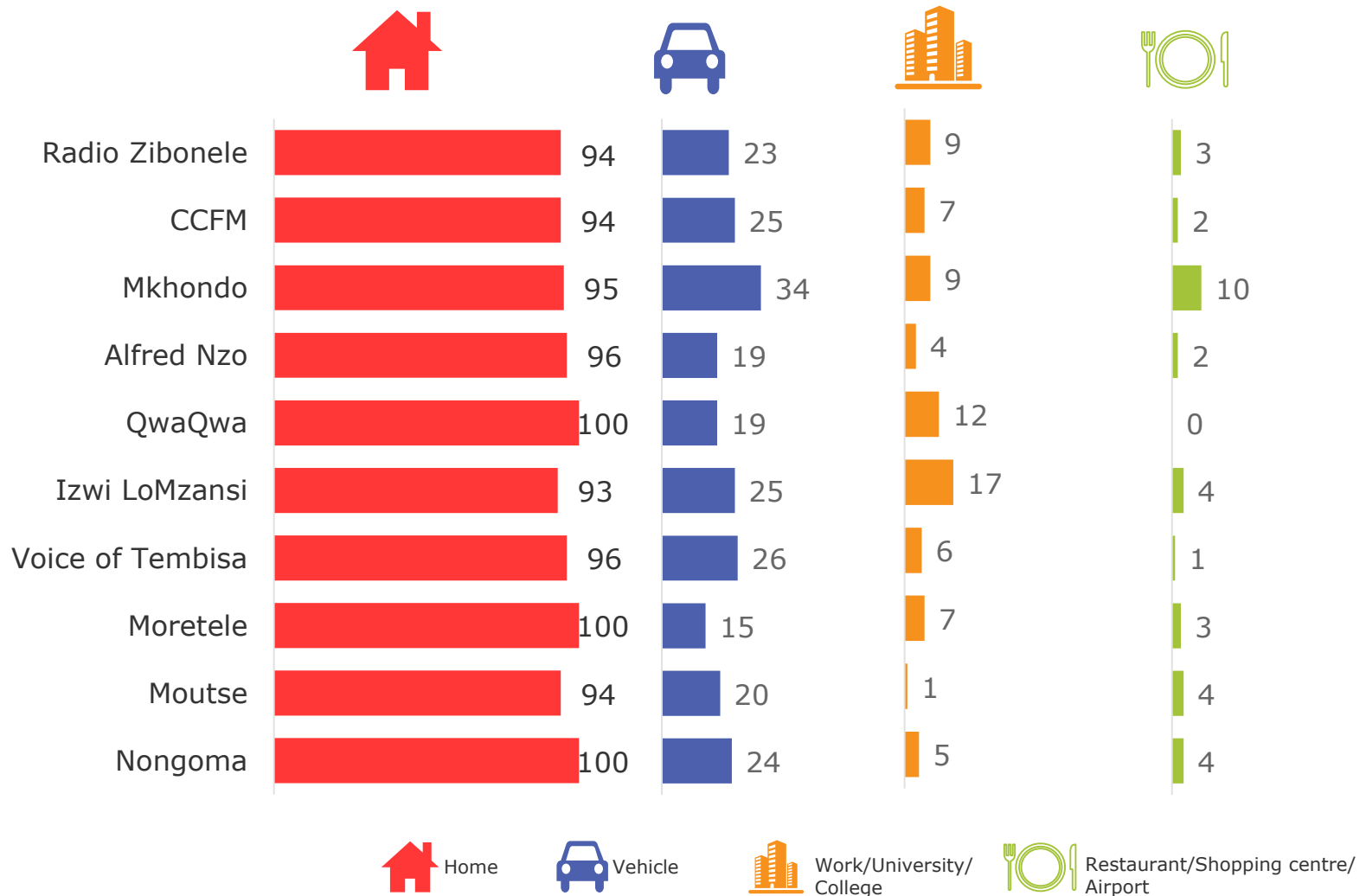
Station listening by LOCATION

Community



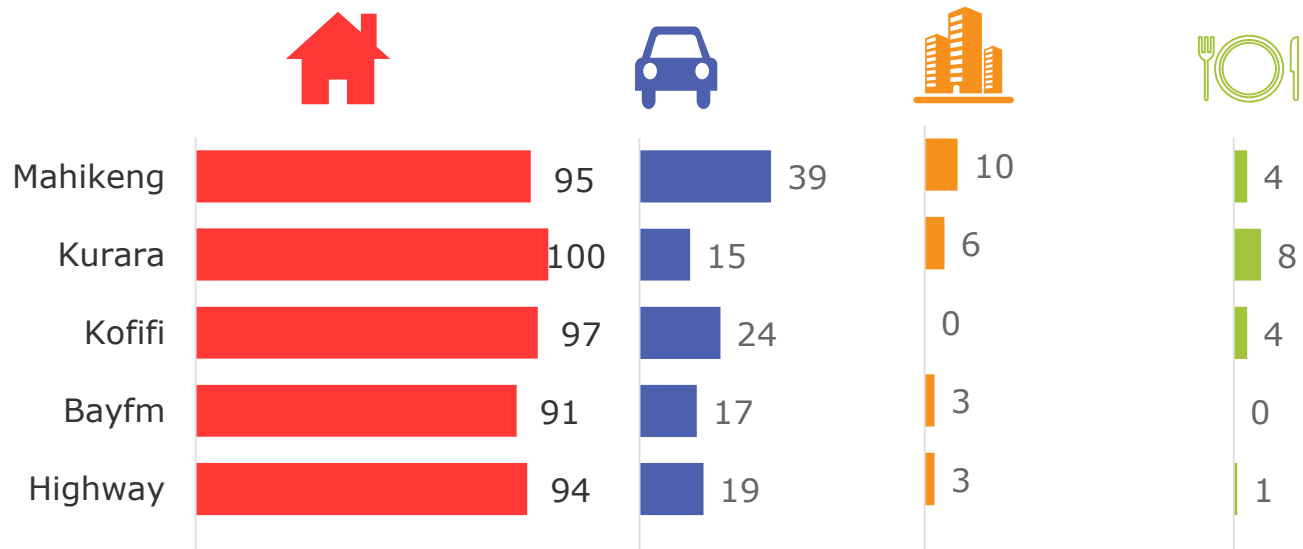
Station listening by LOCATION

Community



Station listening by LOCATION

Community



Home



Vehicle



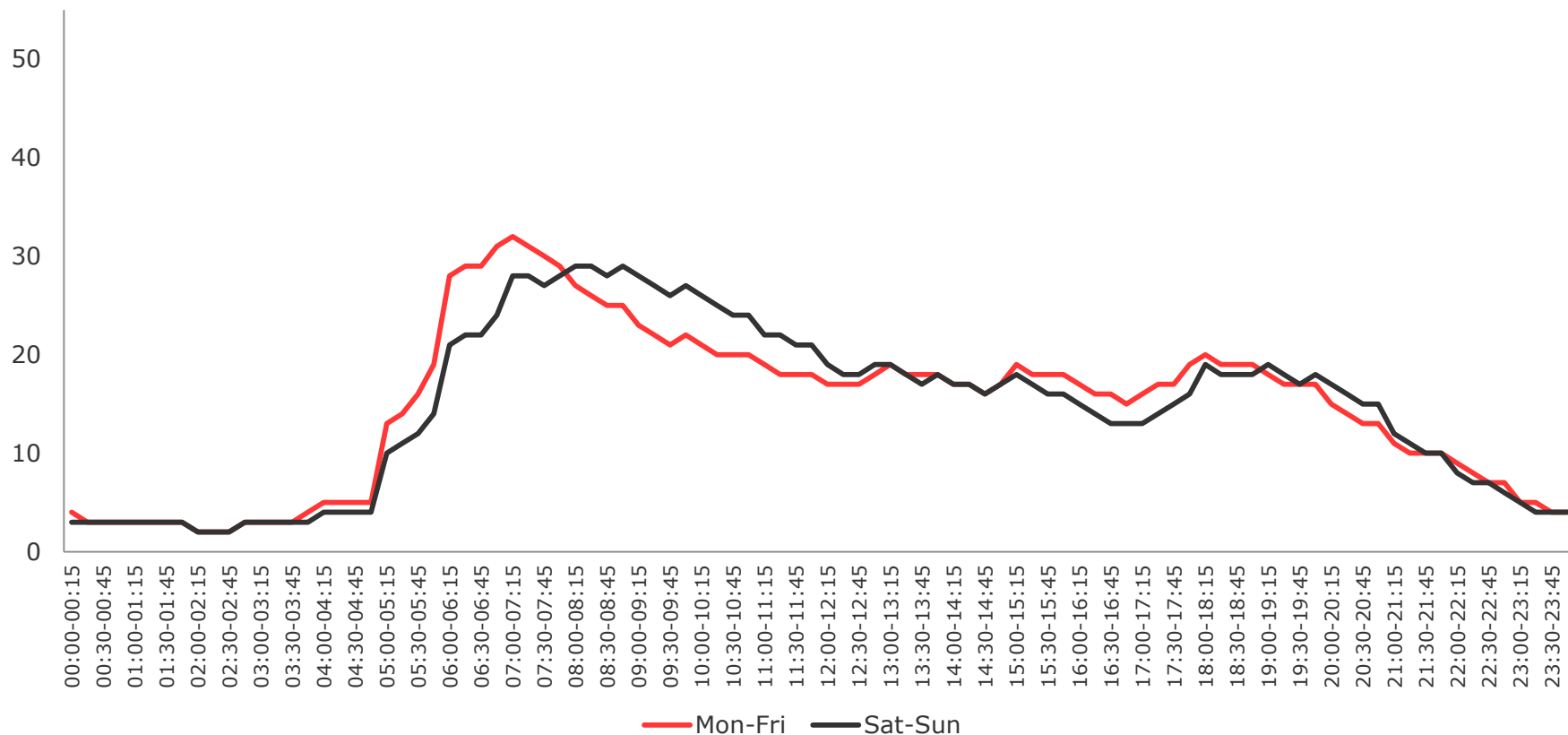
Work/University/
College



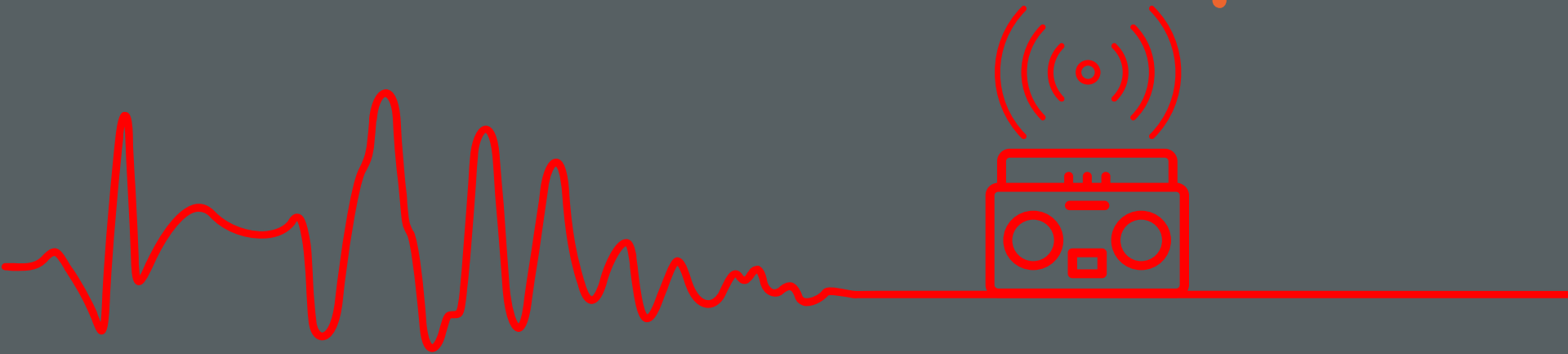
Restaurant/Shopping centre/
Airport

THE CURVE (LONG, HEAVY, LOYAL)

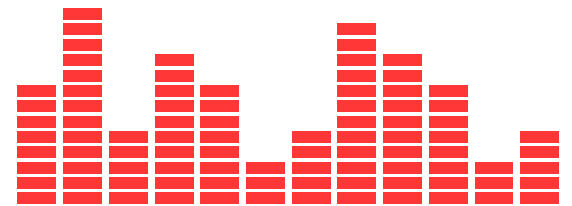
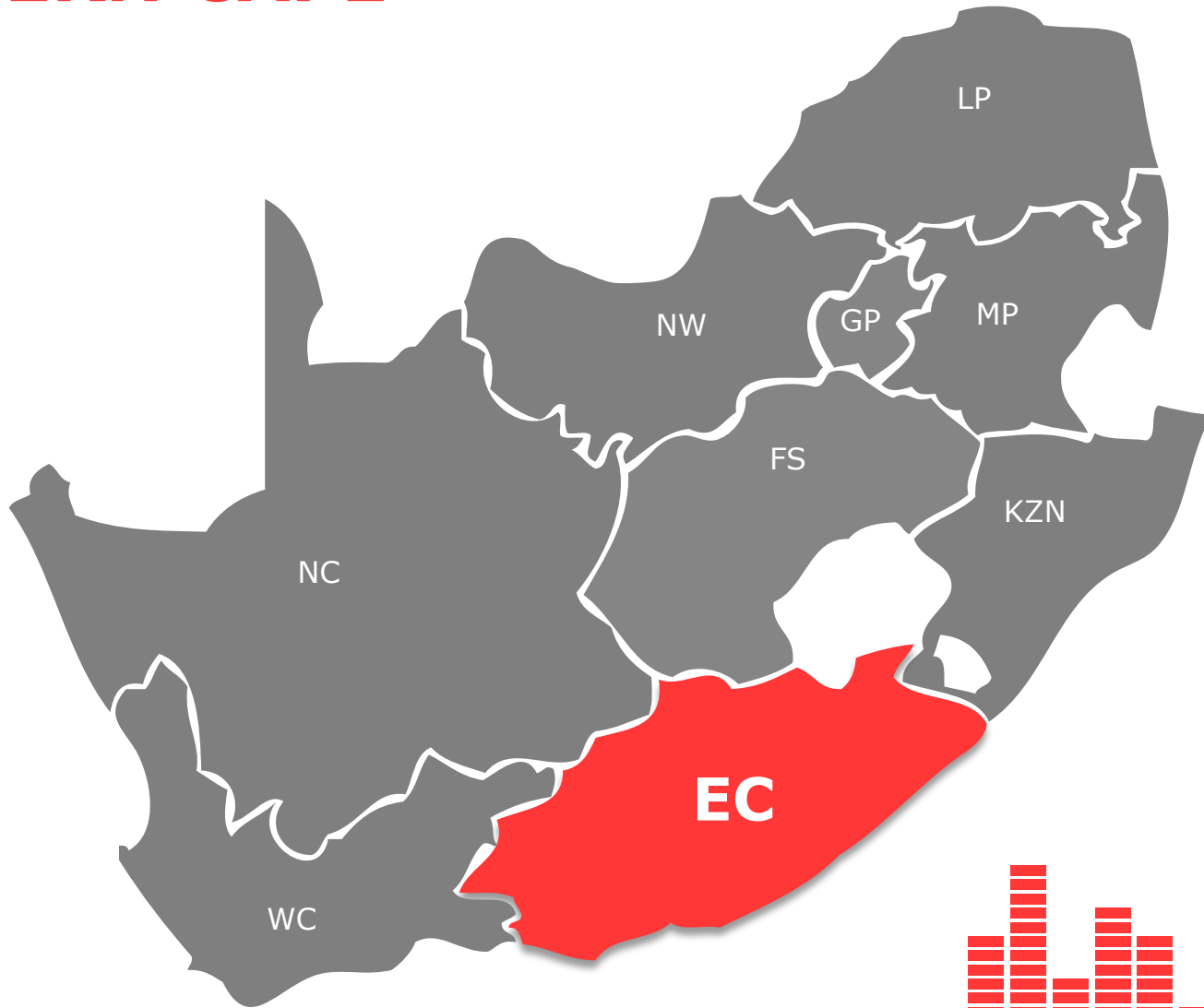
% Radio listening by ¼ hour - National
Ave ¼ hour (Mon-Fri; Sat-Sun)

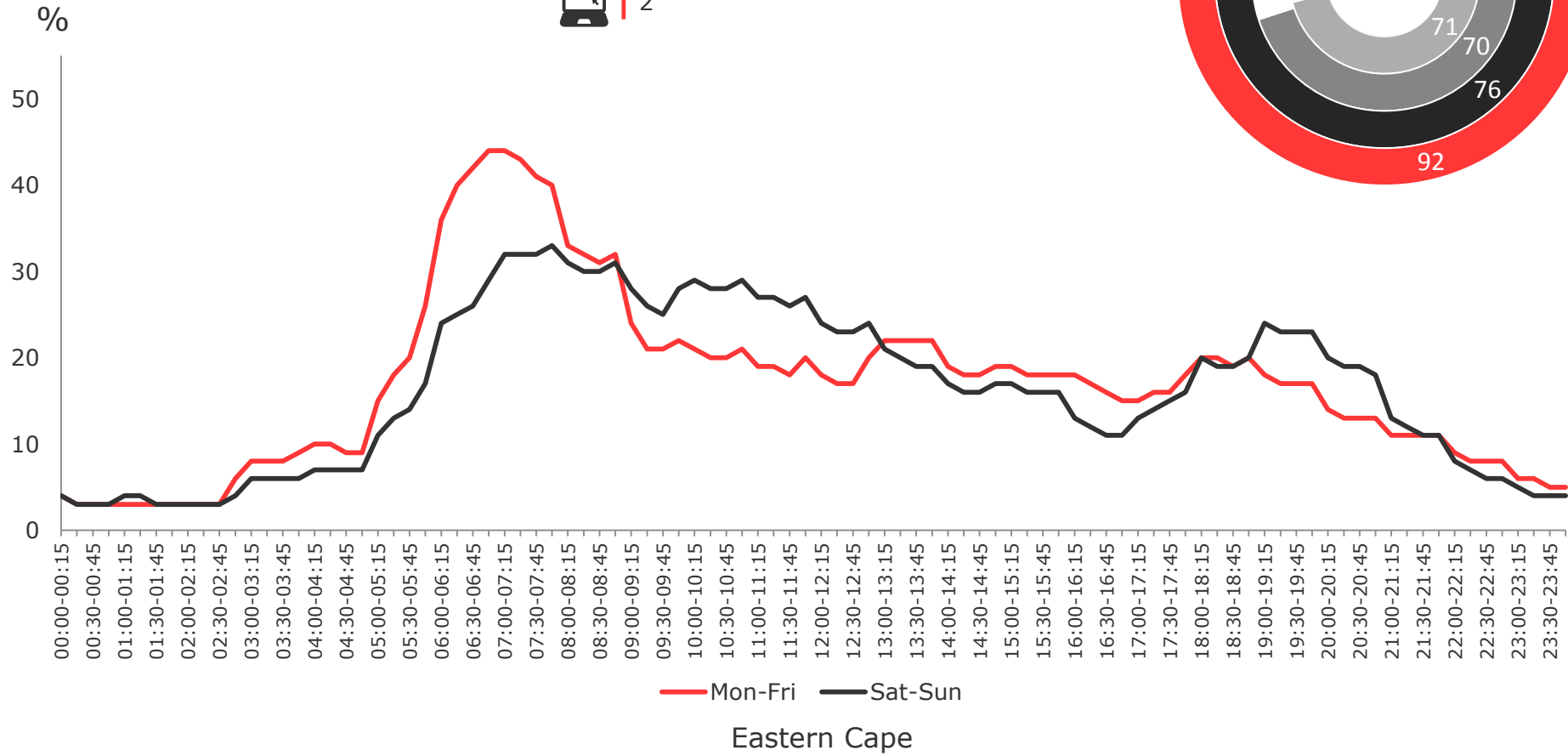
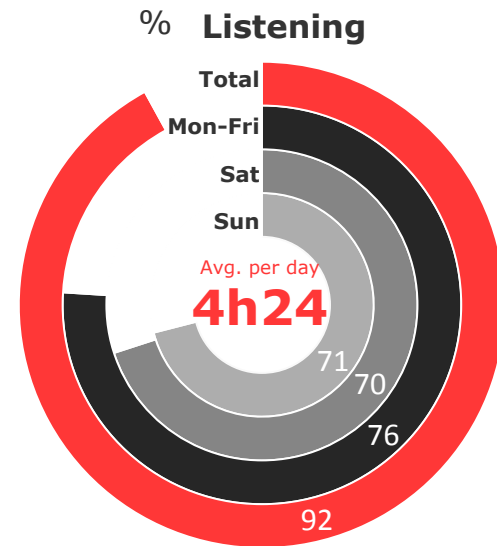
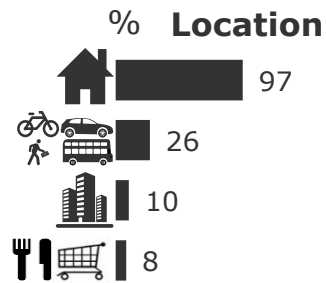
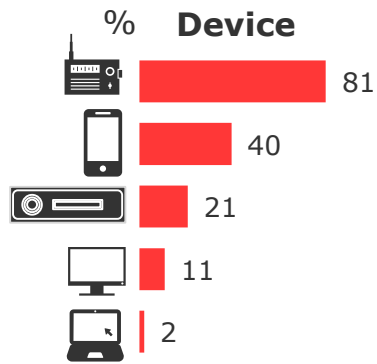


THE PROVINCES



EASTERN CAPE



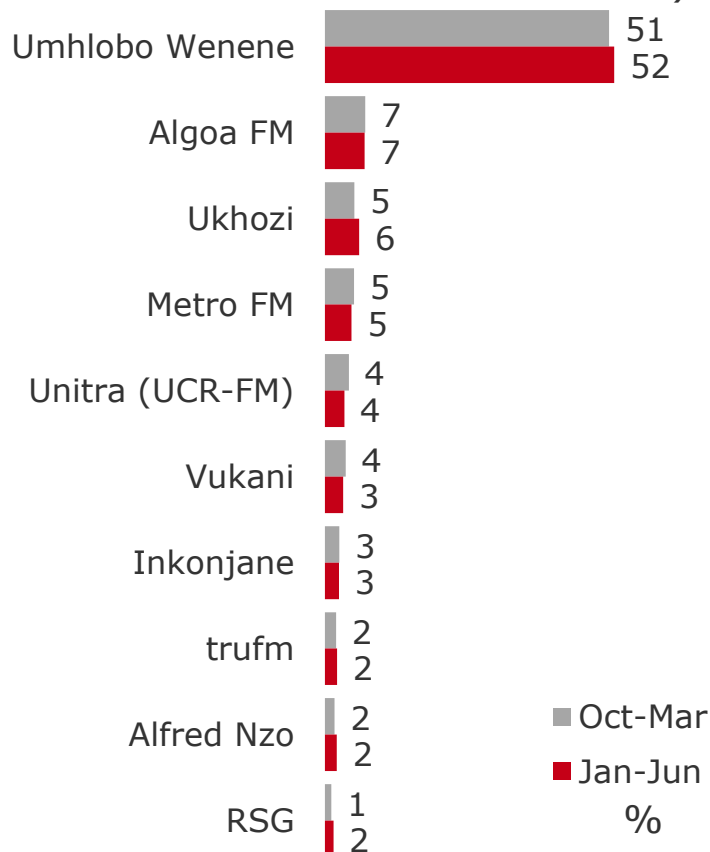


EASTERN CAPE - SHARE

Share of Audience



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



Share of Listening

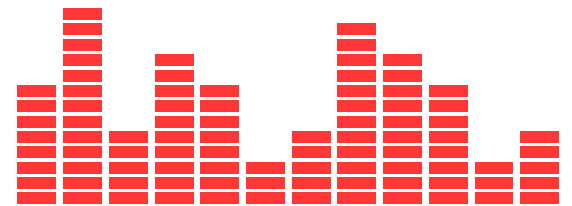
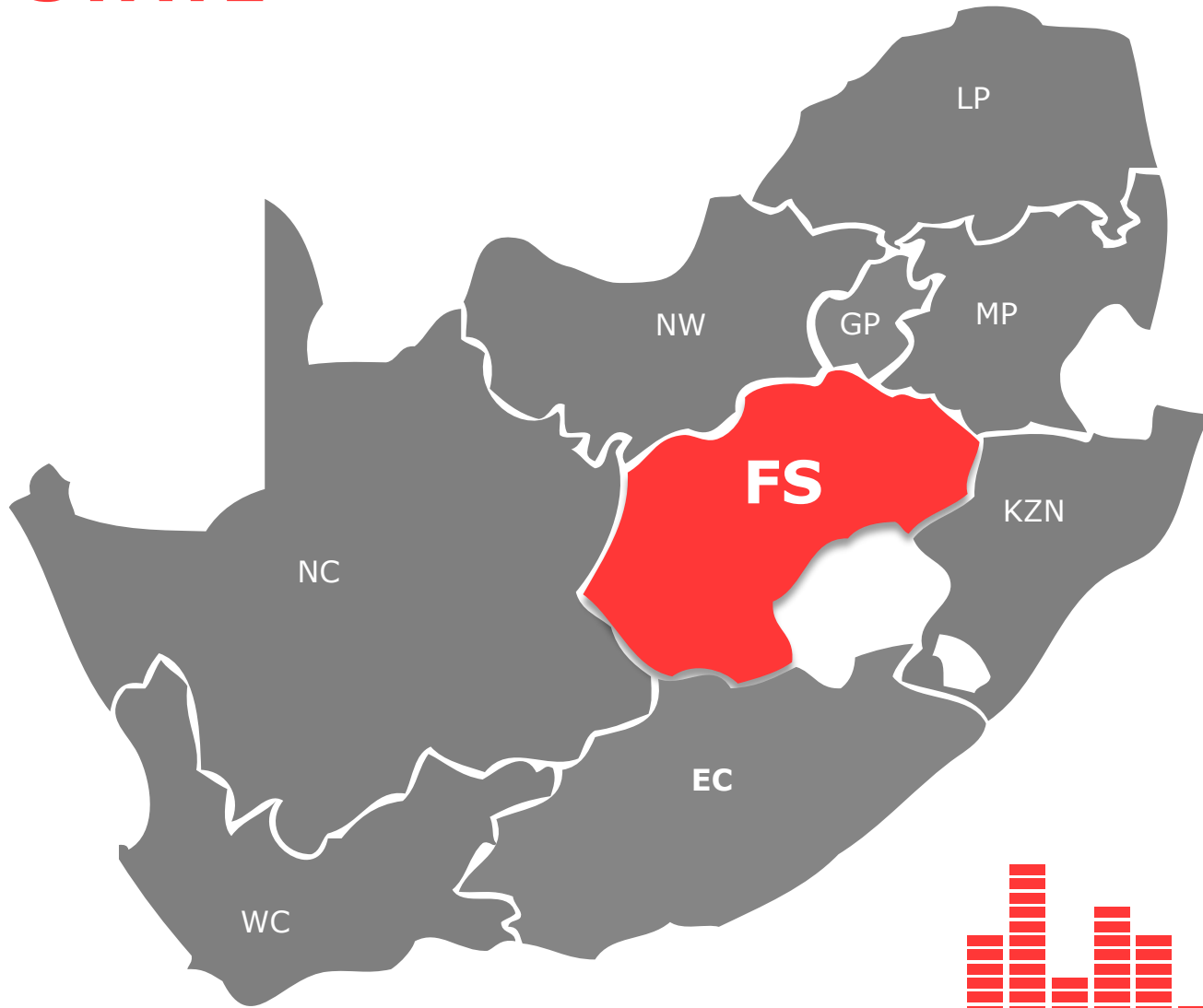


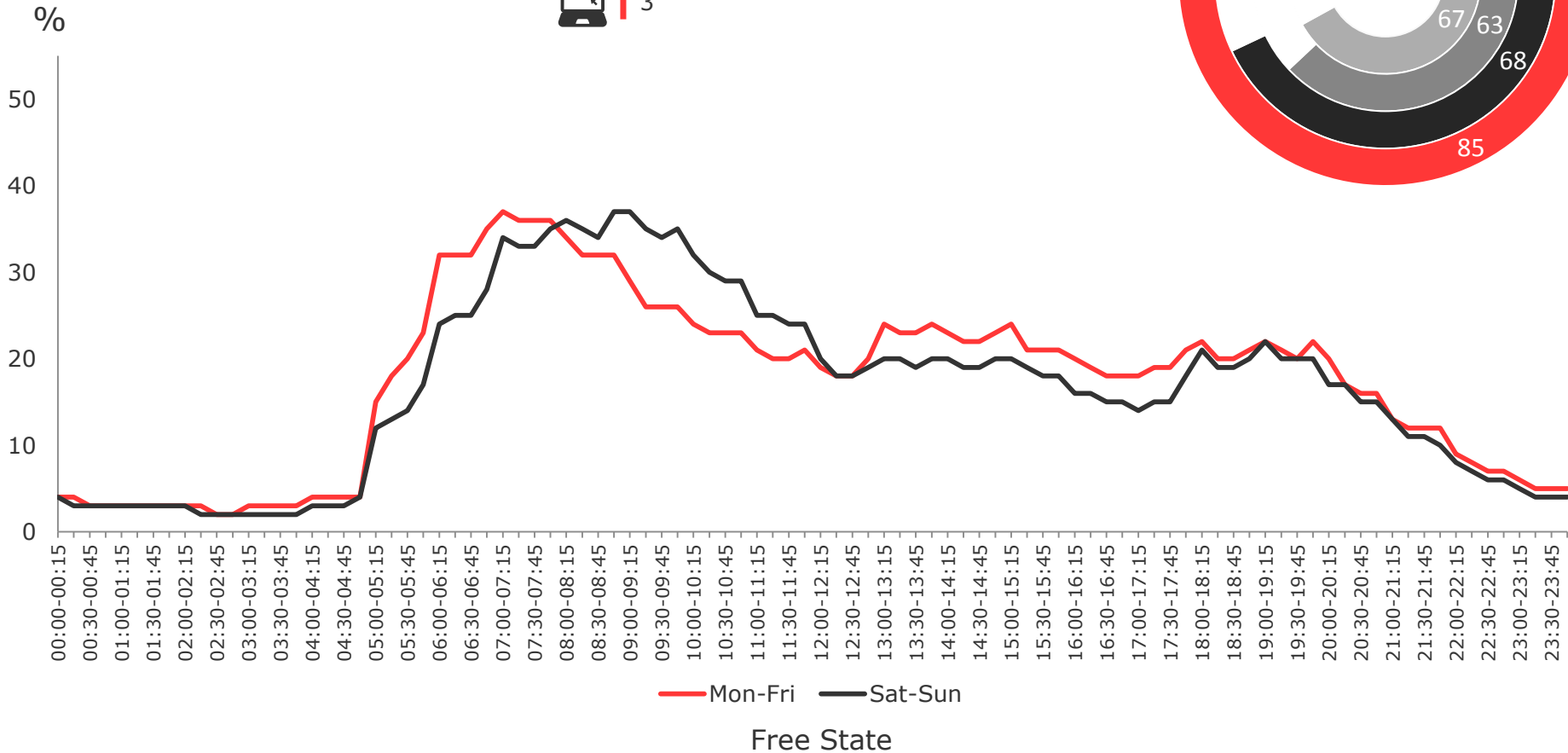
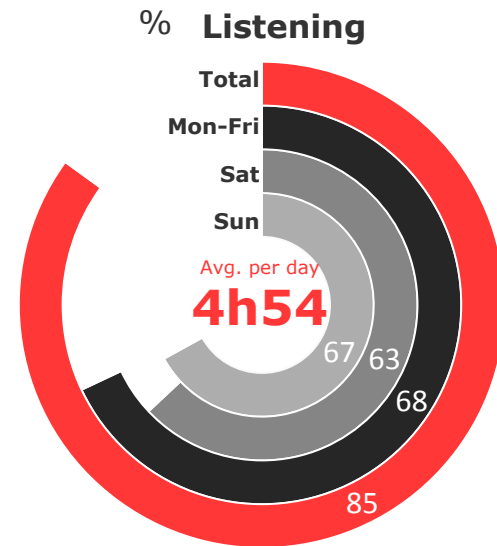
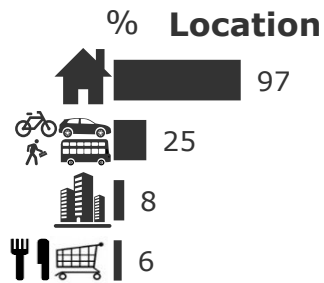
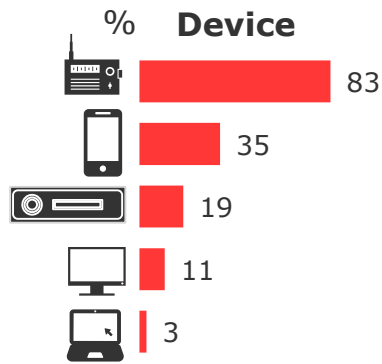
(% of 8.1b listening minutes a week)



Source: BRC RAM™ Oct'16-Mar'17 (n=4,006); Jan'17-Jun'17 (n=3,972)

FREE STATE



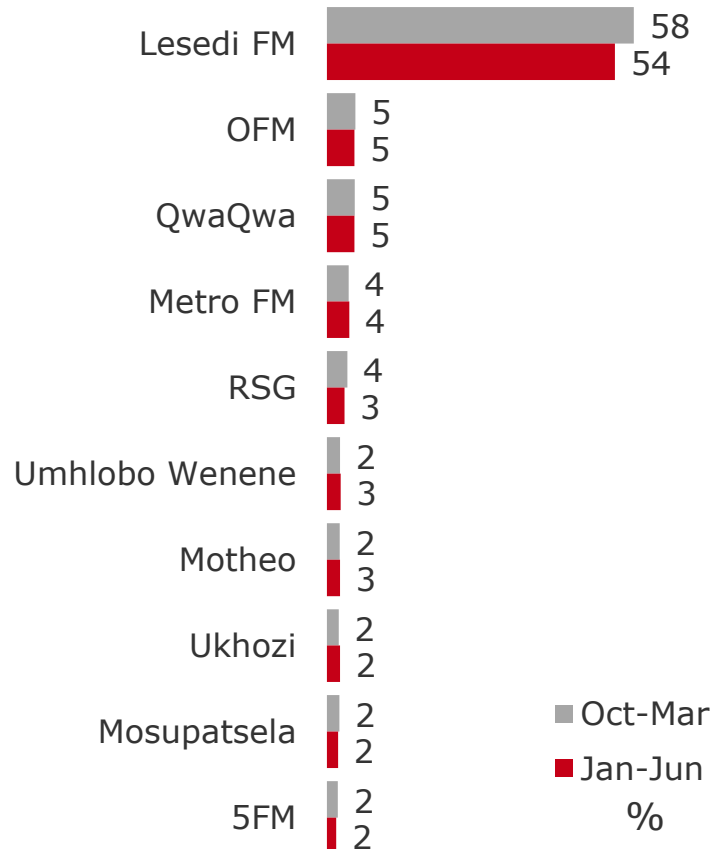


FREE STATE - SHARE

Share of Audience



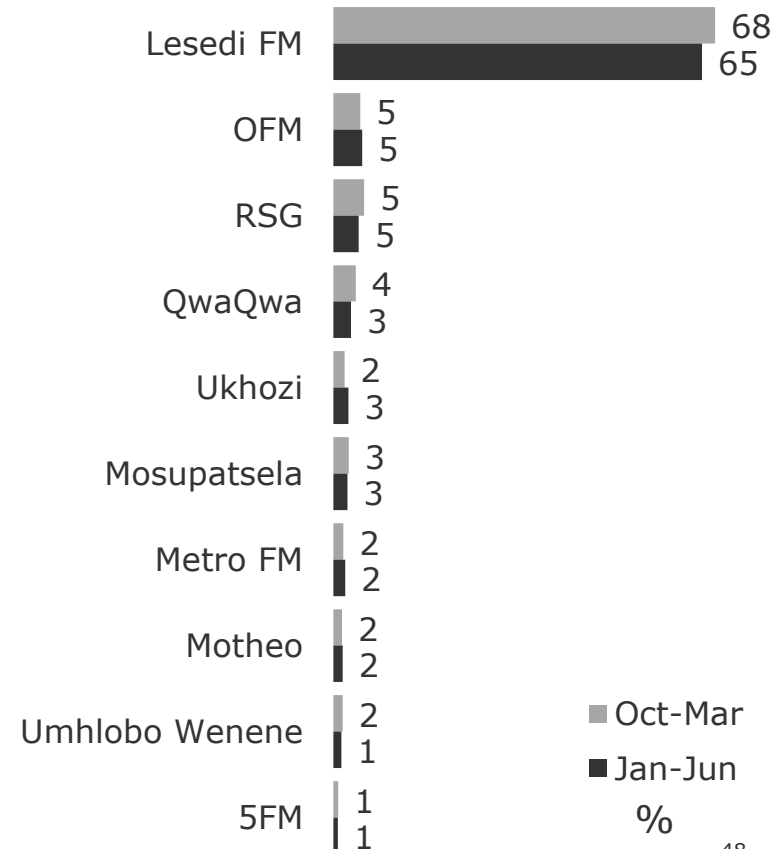
(% of 1.7m listeners who listen in a week)



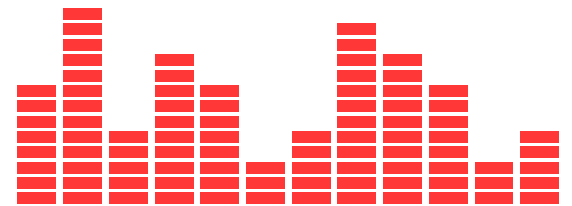
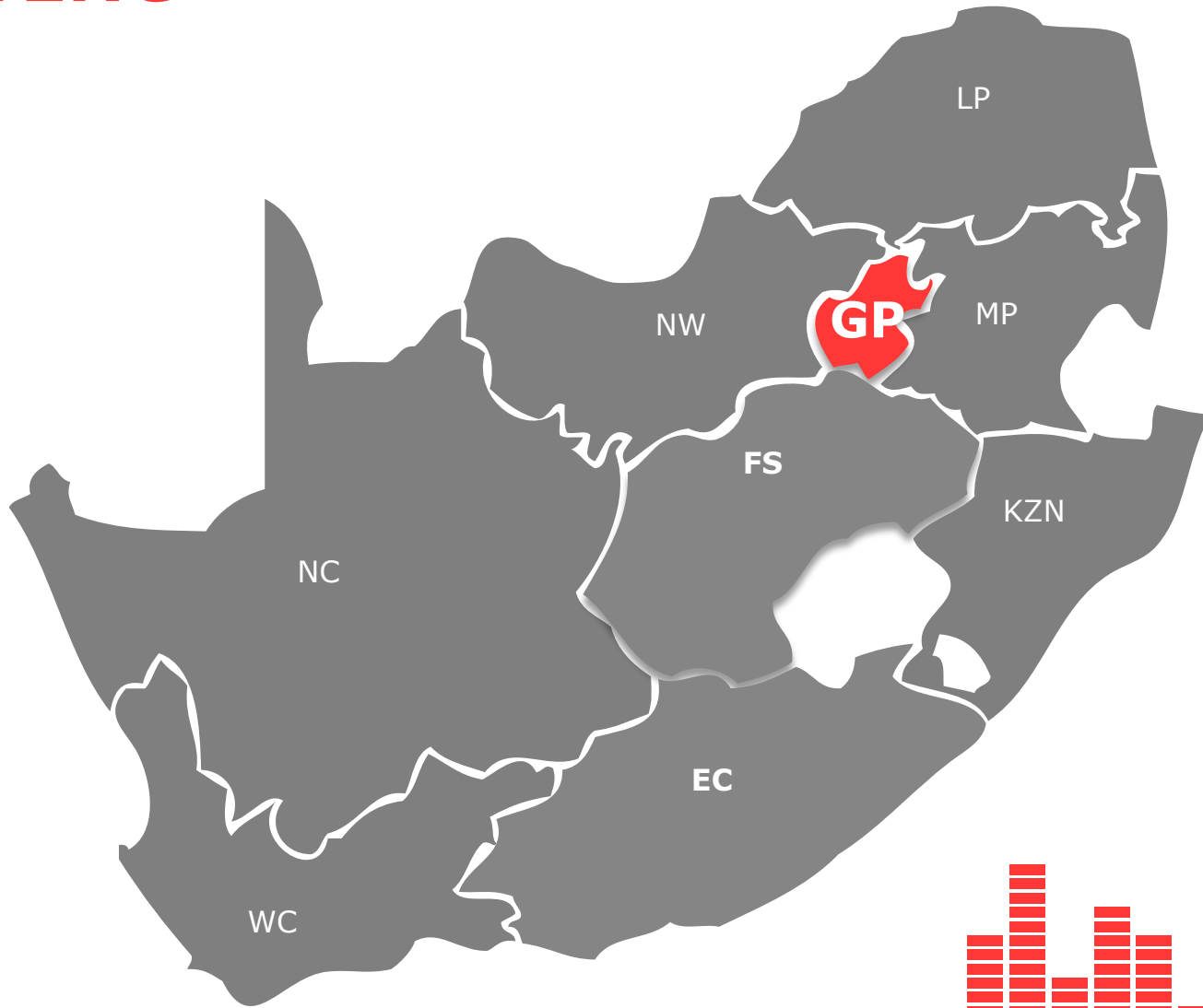
Share of Listening

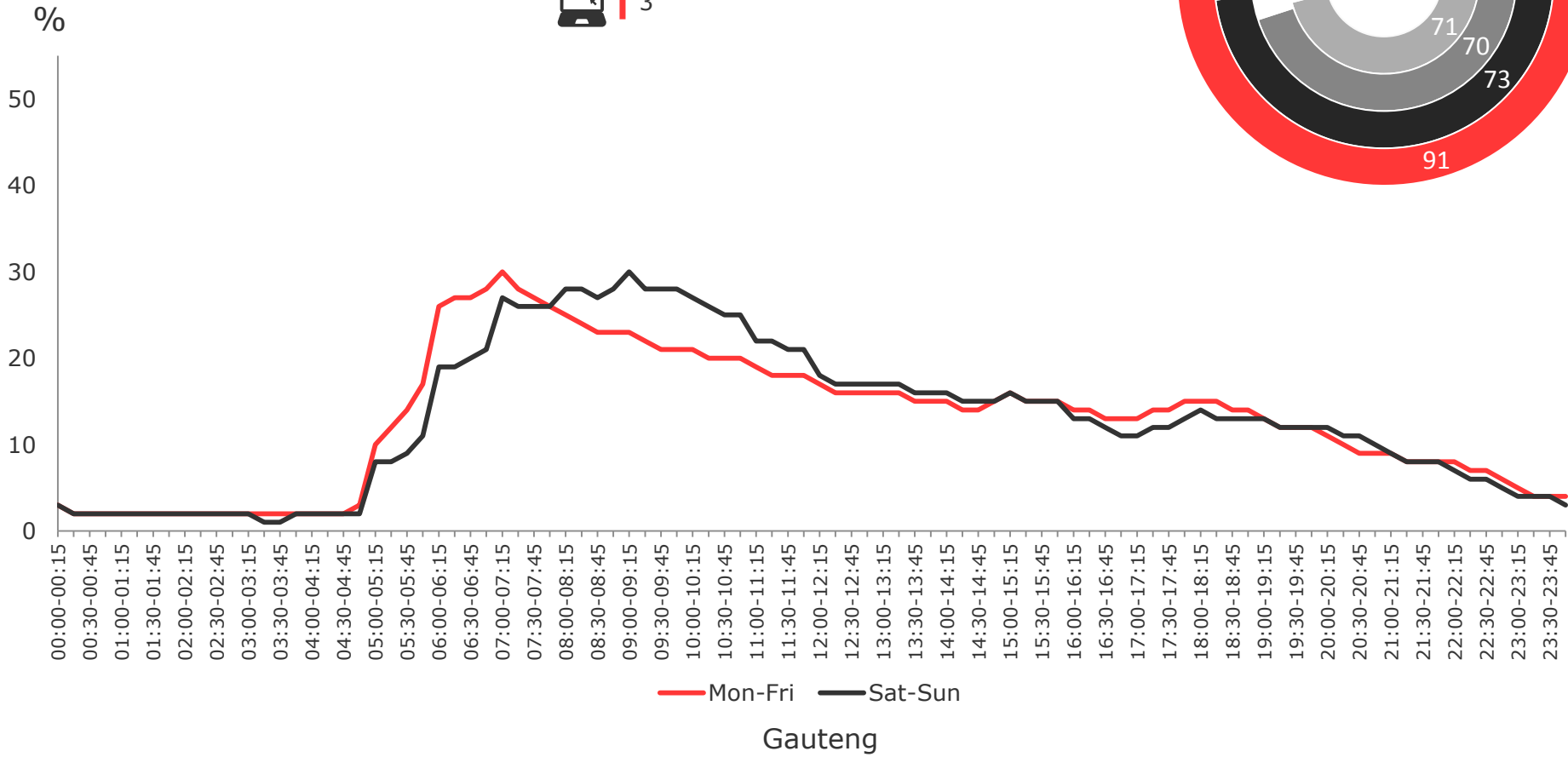
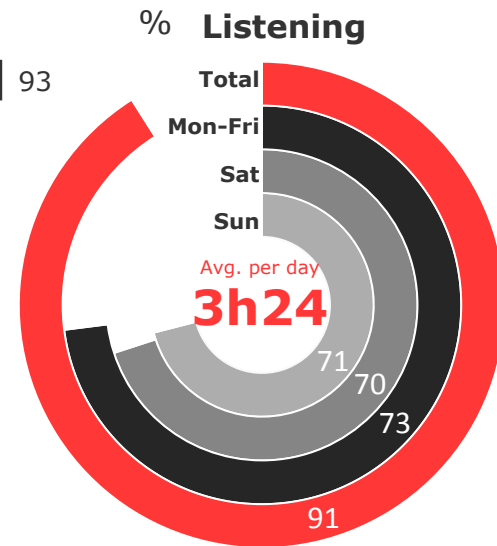
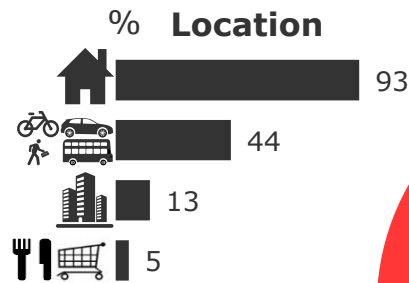
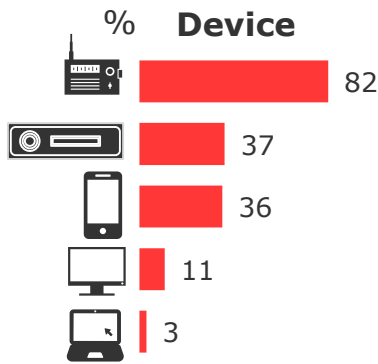


(% of 3.5b listening minutes a week)



GAUTENG



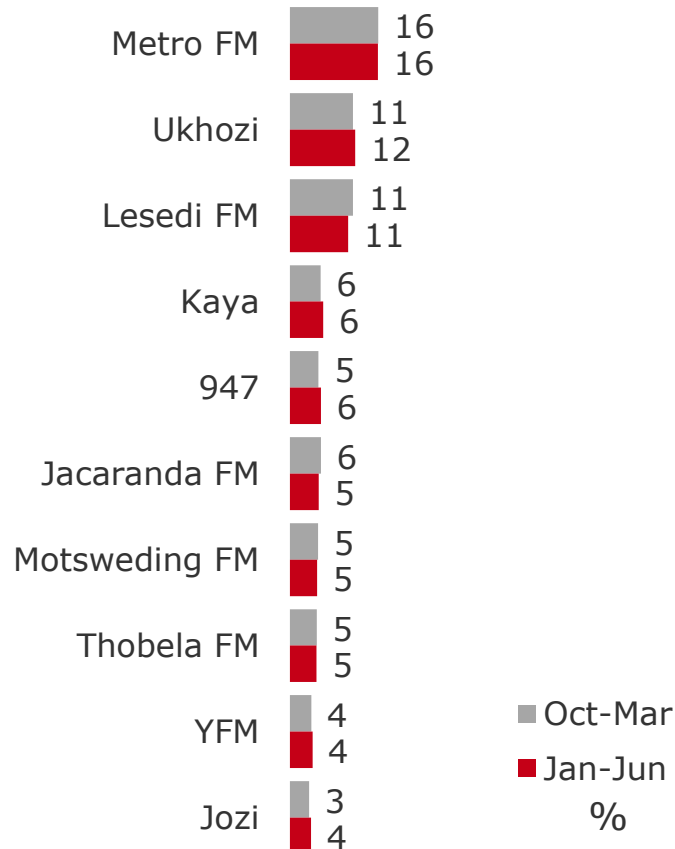


GAUTENG - SHARE

Share of Audience



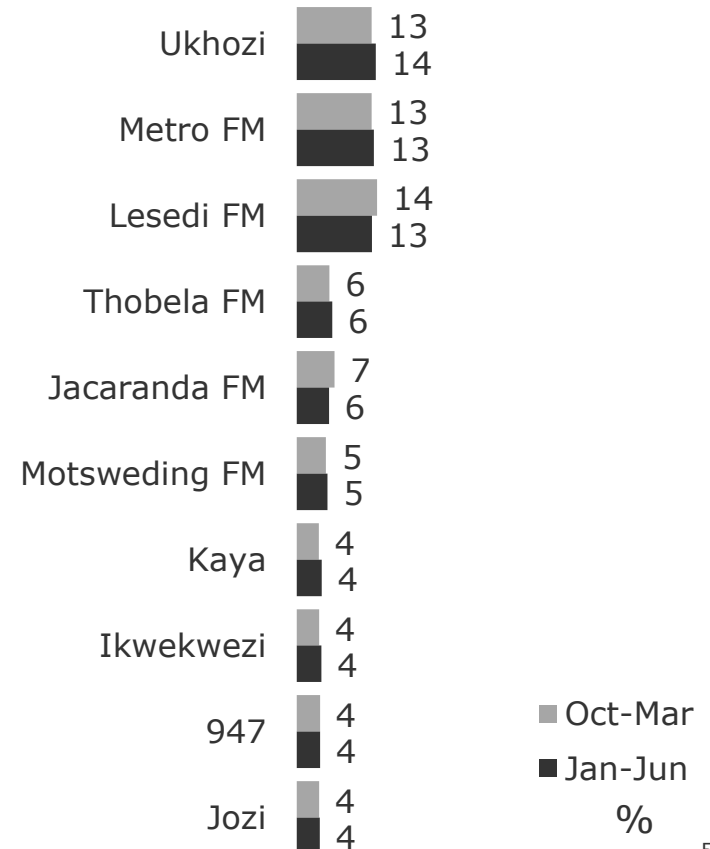
(% of 9.1m listeners who listen in a week)



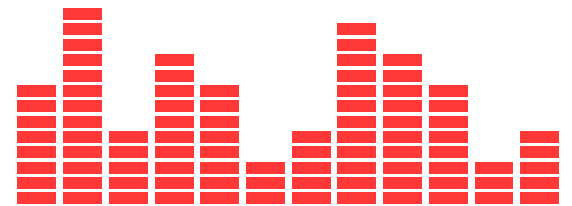
Share of Listening

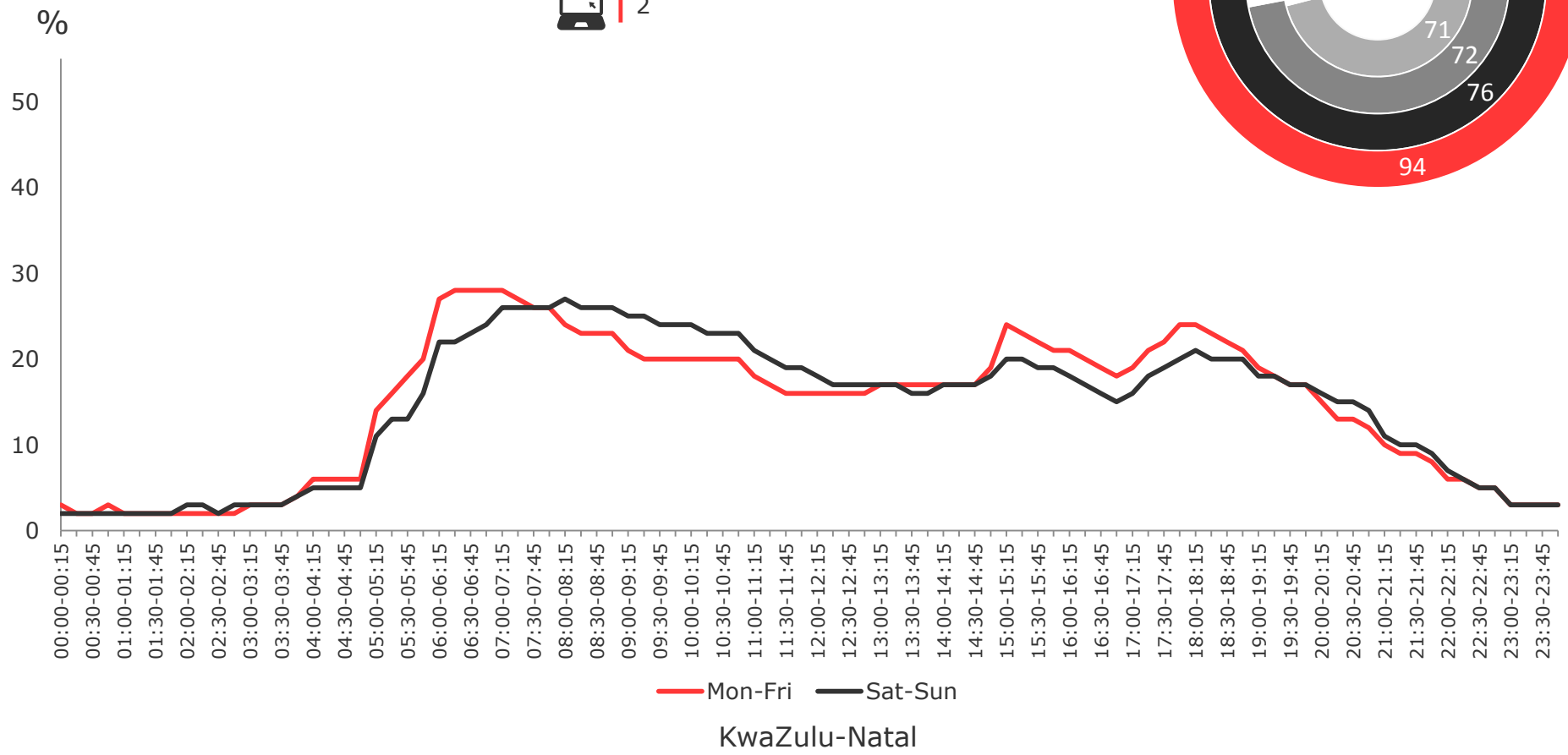
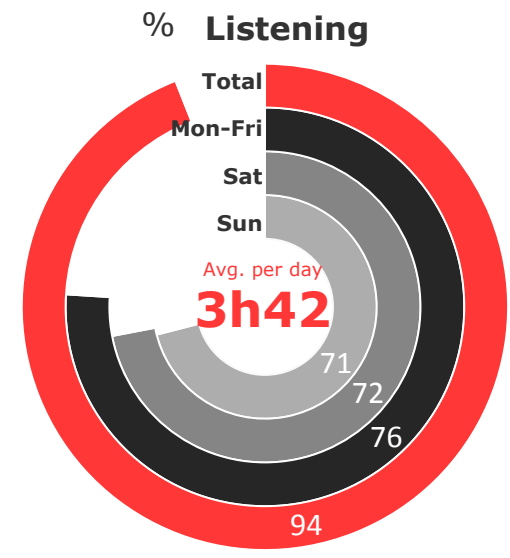
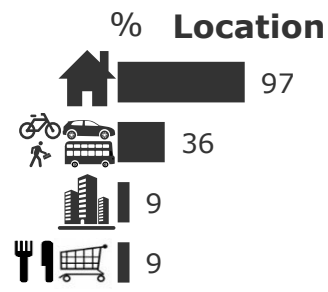
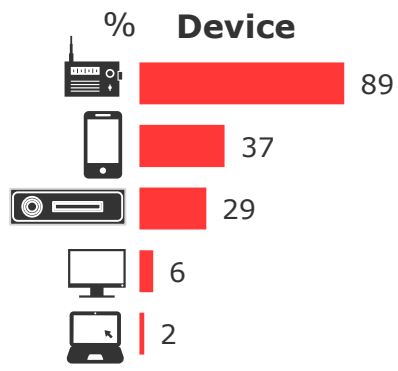


(% of 13.0b listening minutes a week)



KWAZULU-NATAL



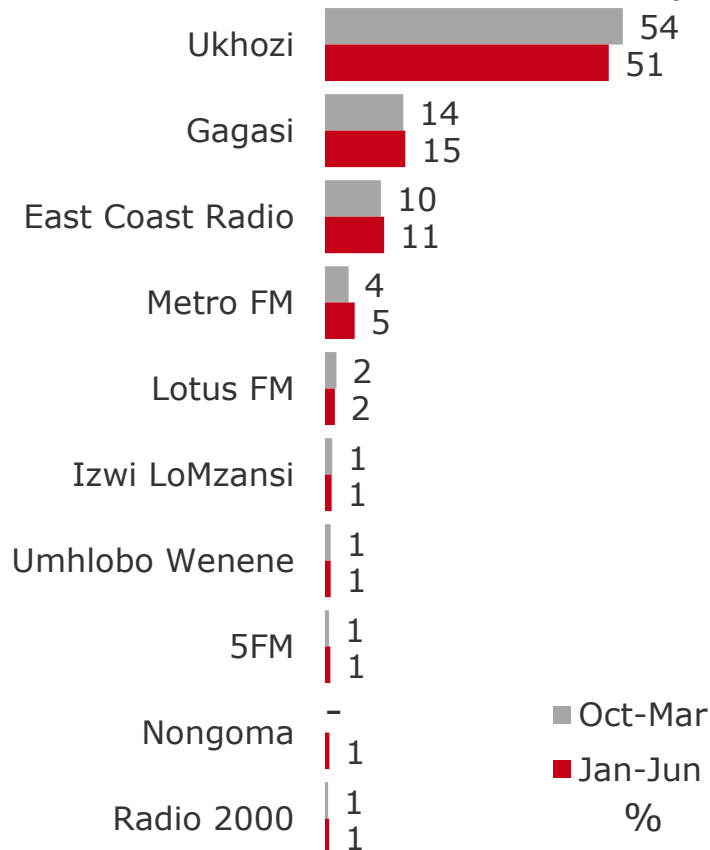


KWAZULU-NATAL - SHARE

Share of Audience



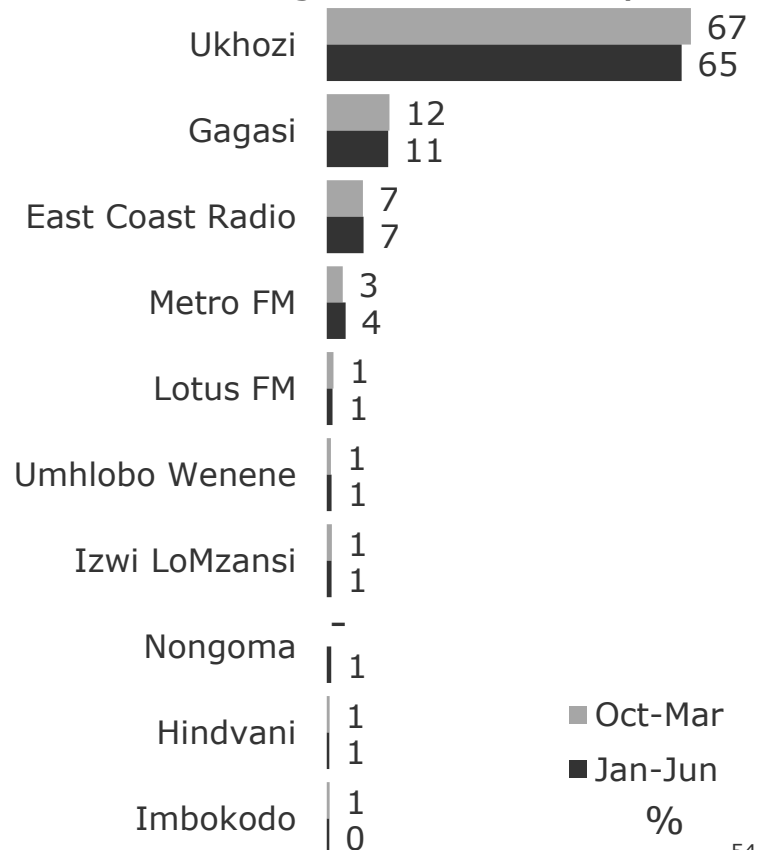
(% of 7.1m listeners who listen in a week)



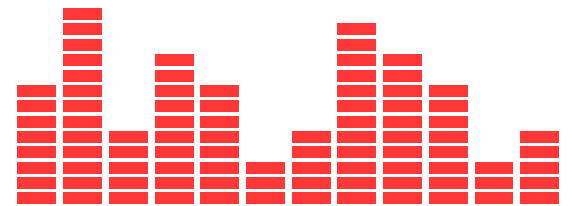
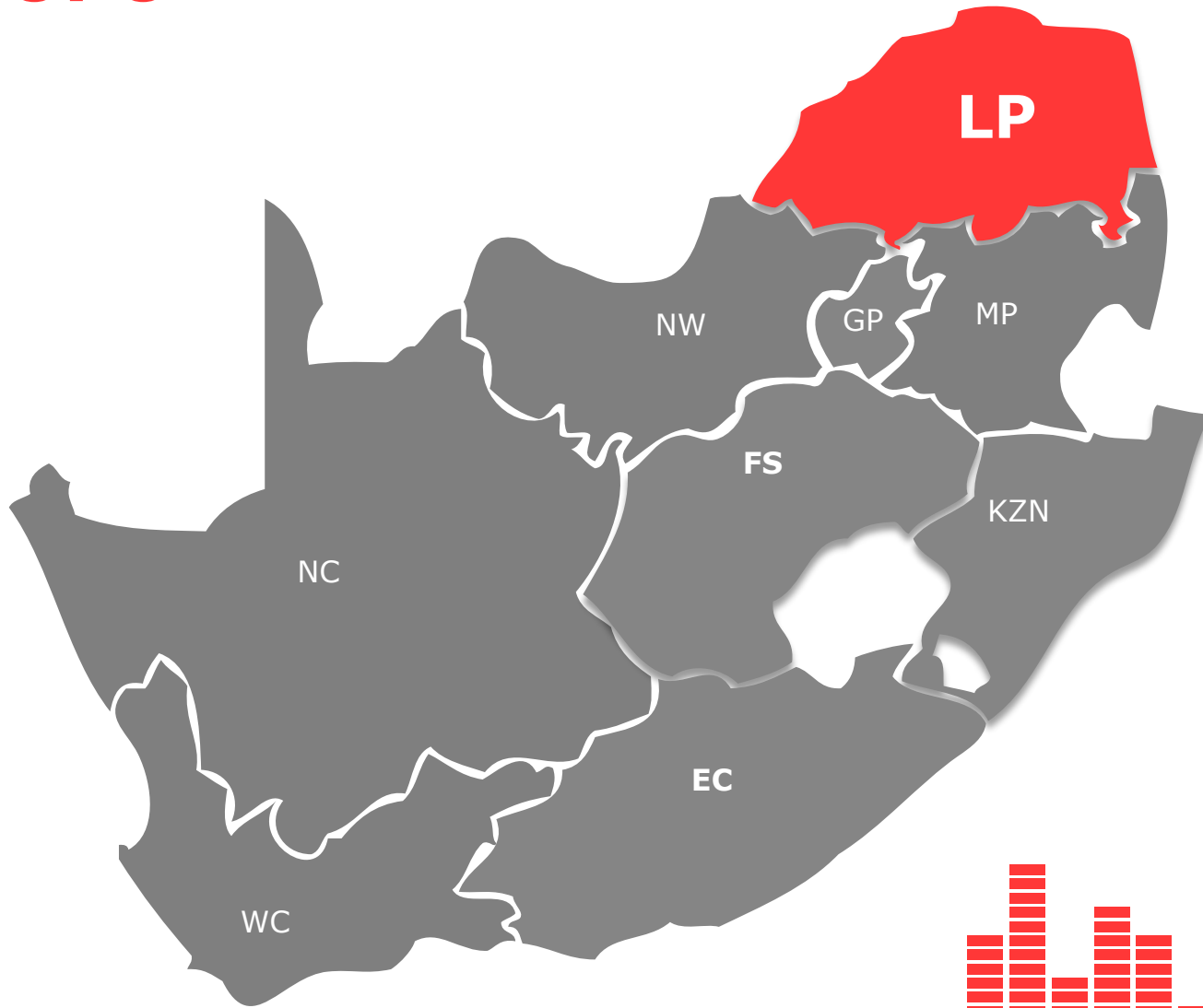
Share of Listening

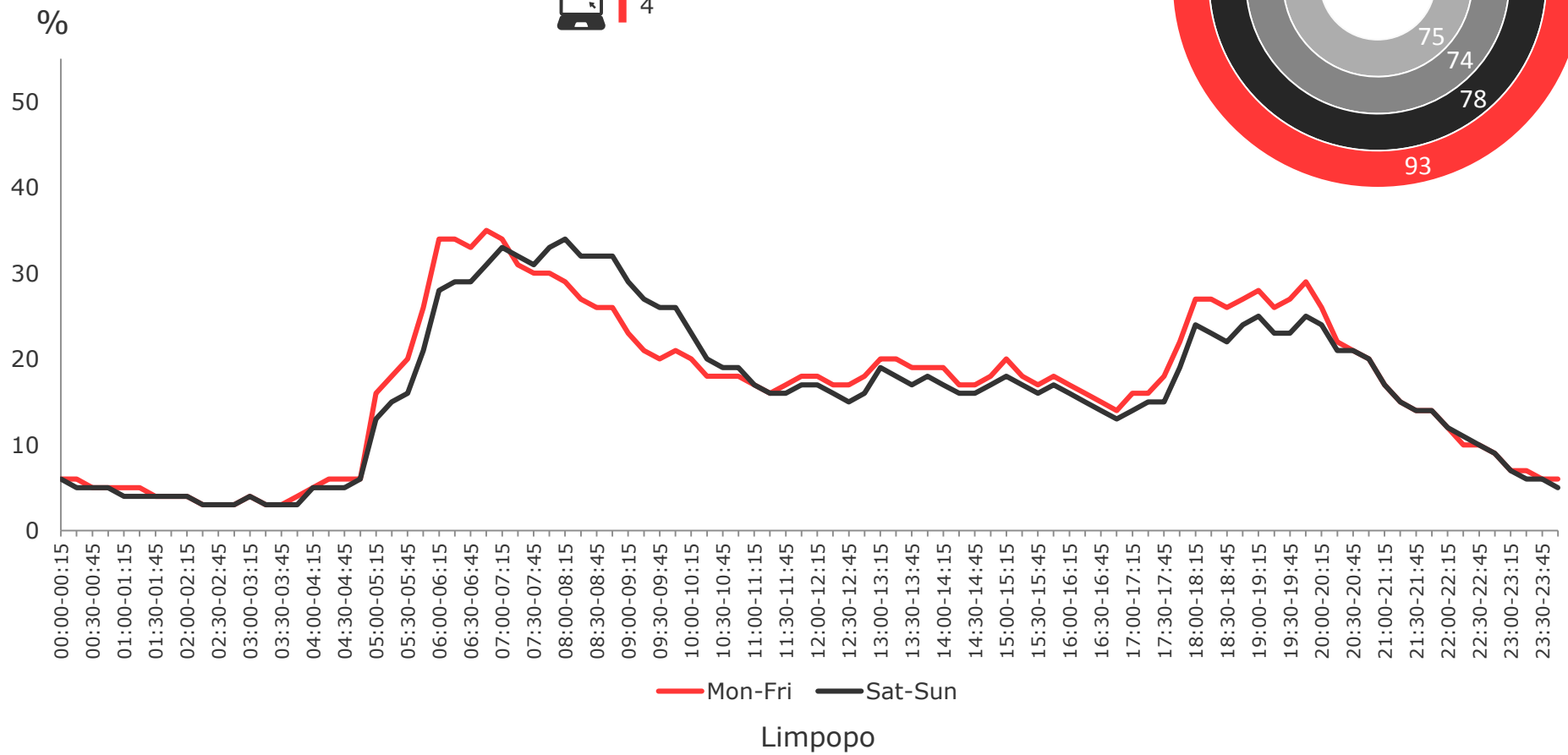
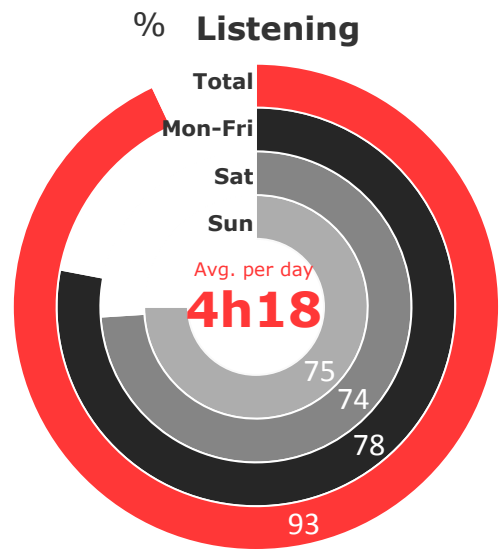
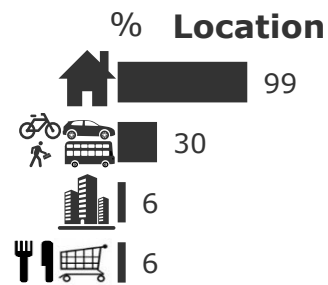
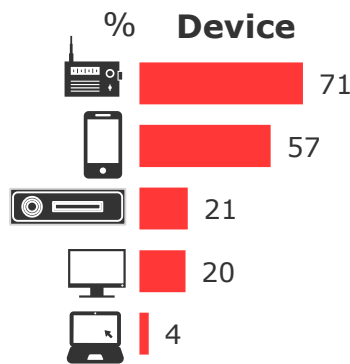


(% of 11.1b listening minutes a week)



LIMPOPO



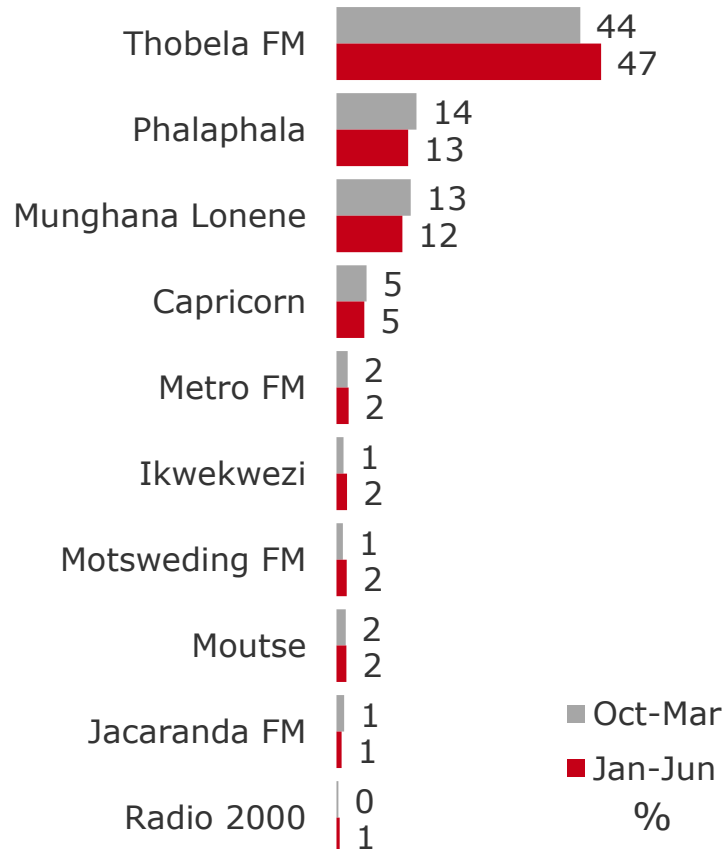


LIMPOPO - SHARE

Share of Audience



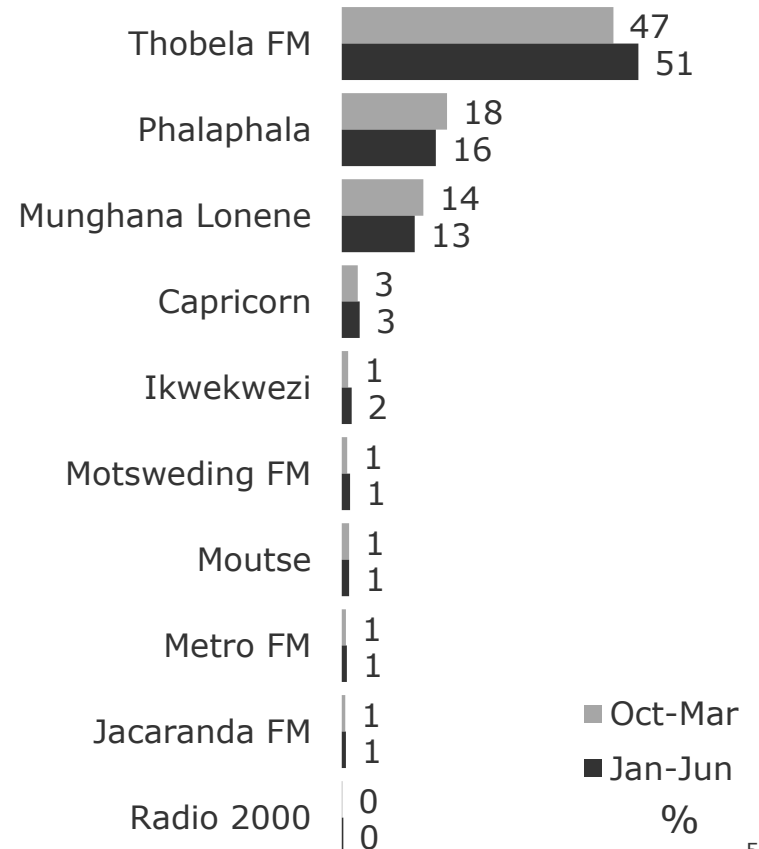
(% of 3.6m listeners who listen in a week)



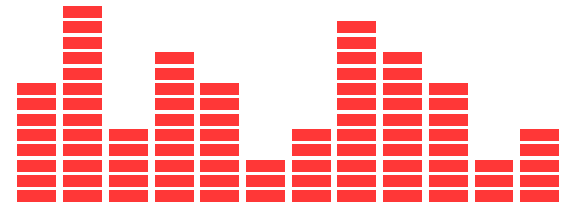
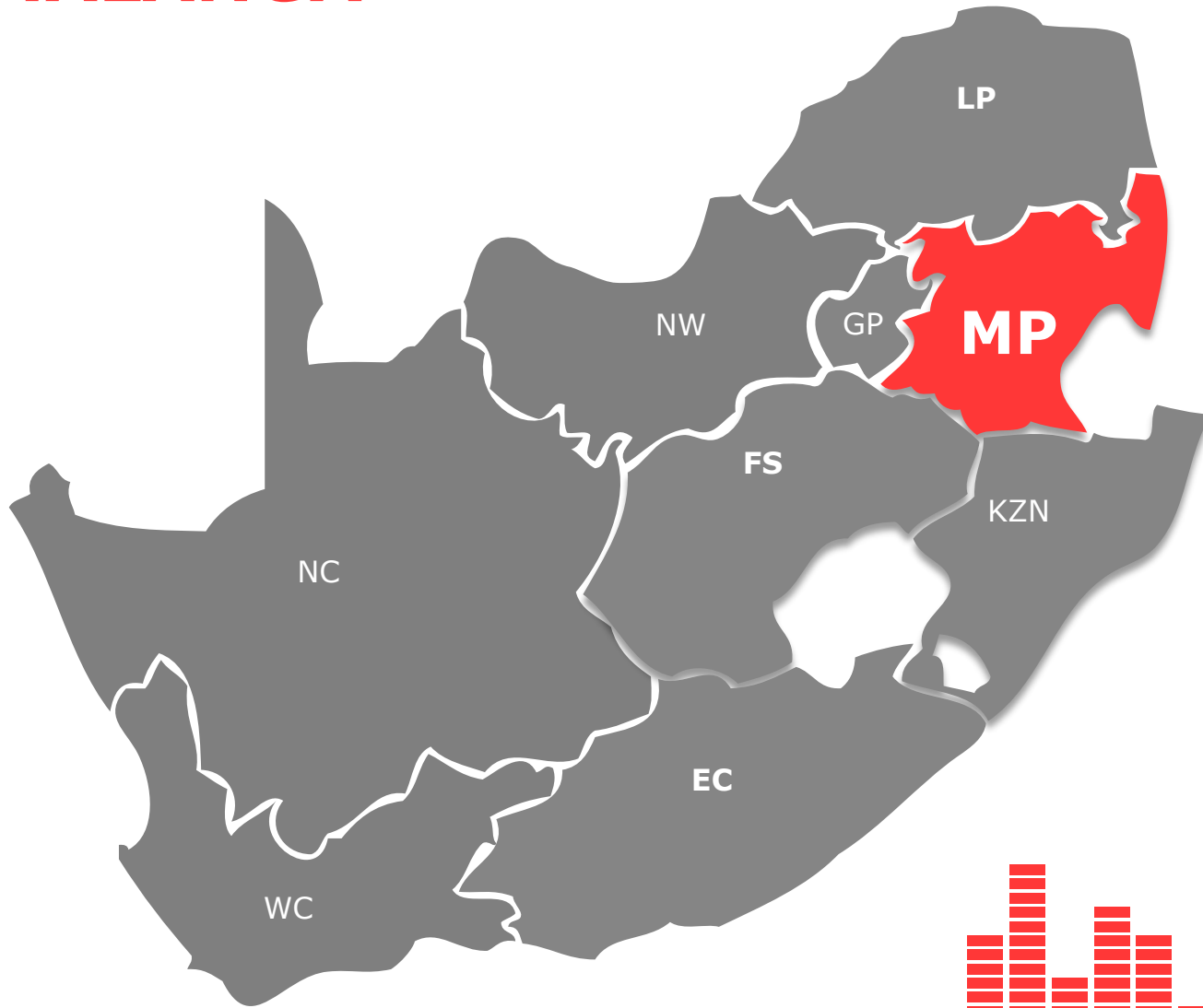
Share of Listening

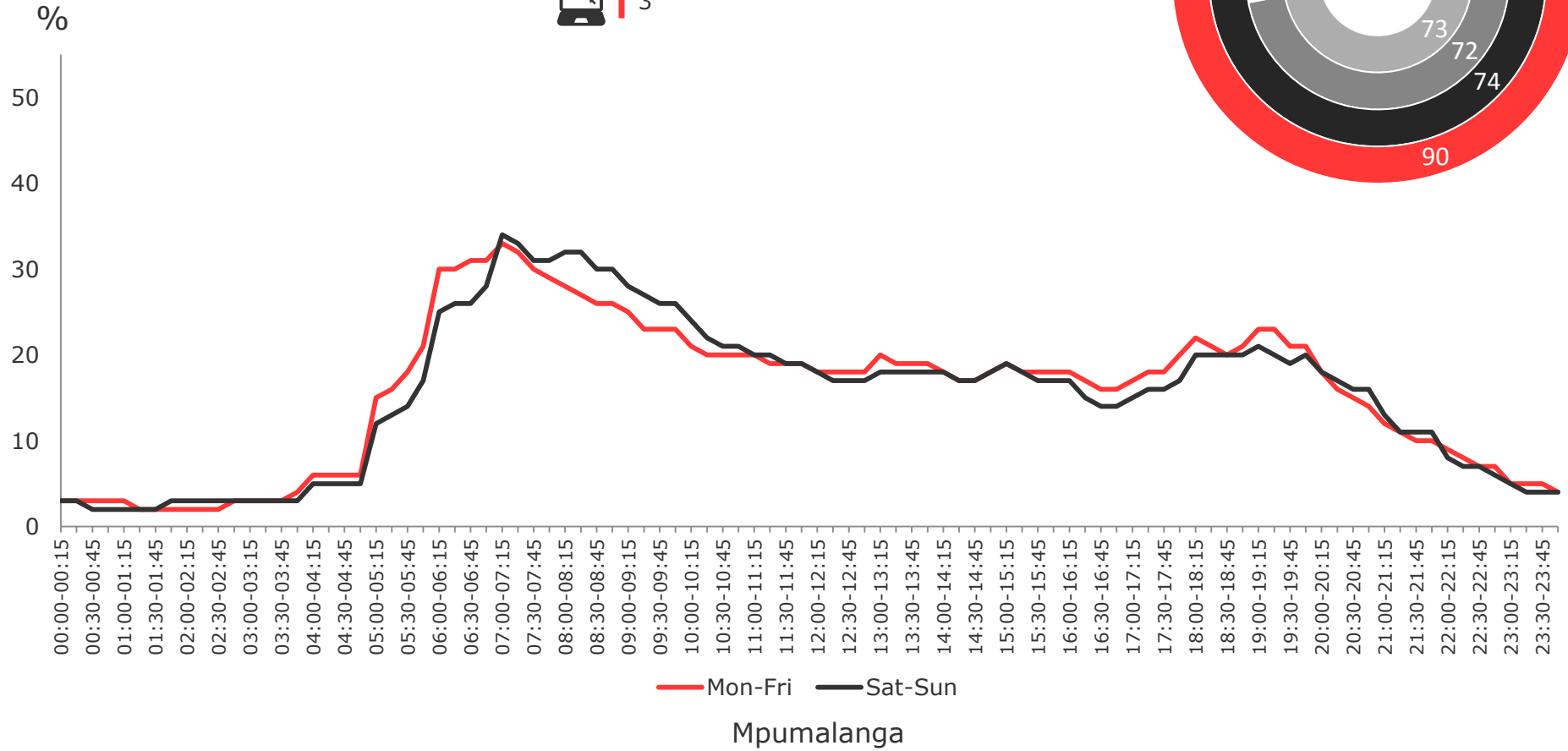
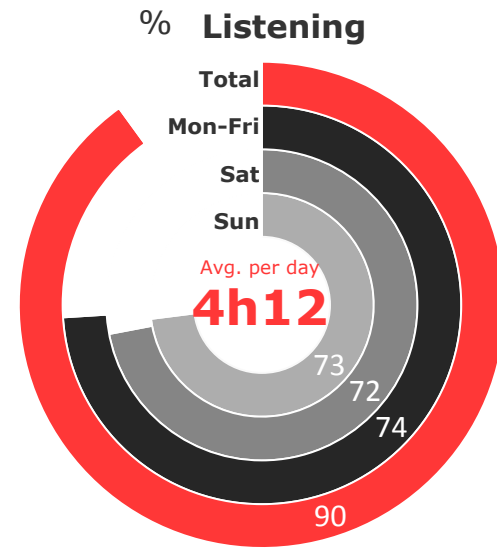
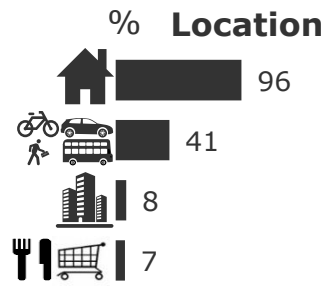
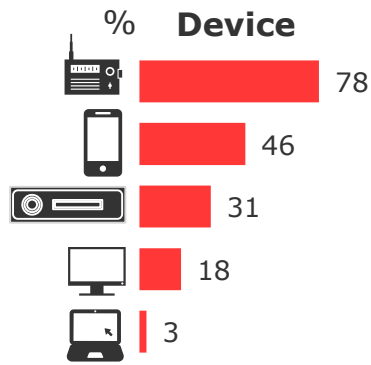


(% of 6.5b listening minutes a week)



MPUMALANGA



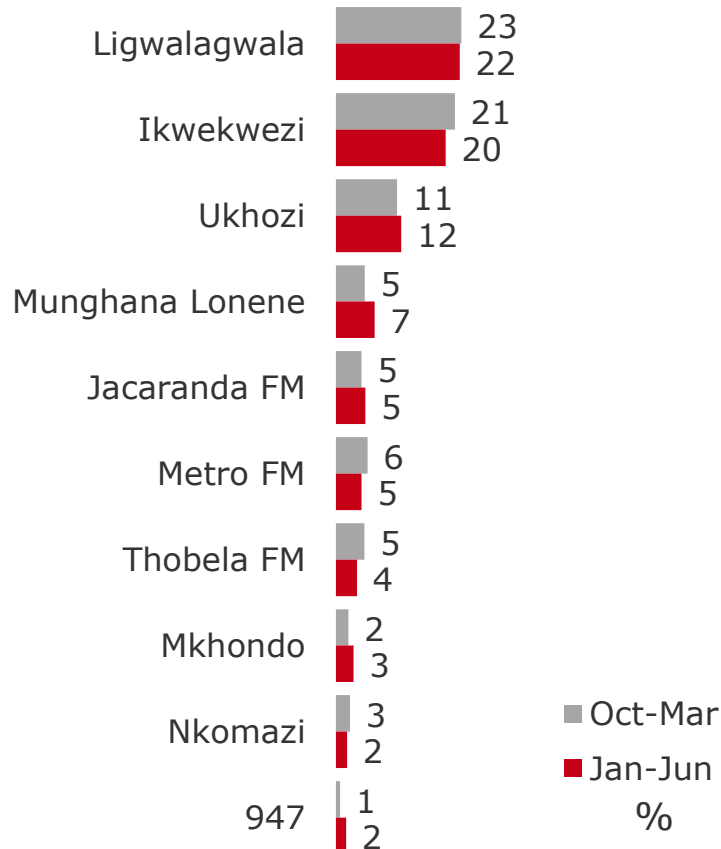


MPUMALANGA - SHARE

Share of Audience



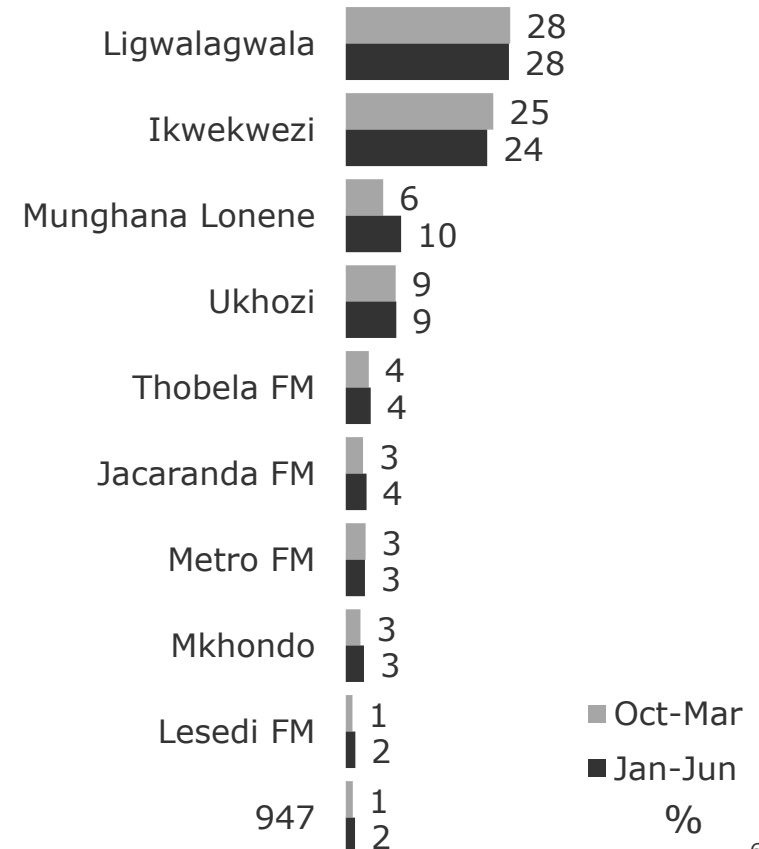
(% of 2.6m listeners who listen in a week)



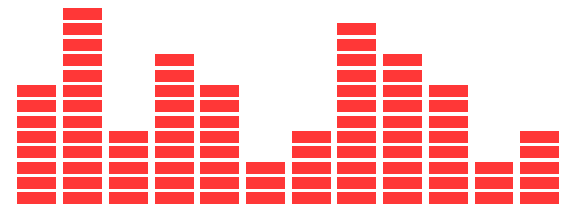
Share of Listening

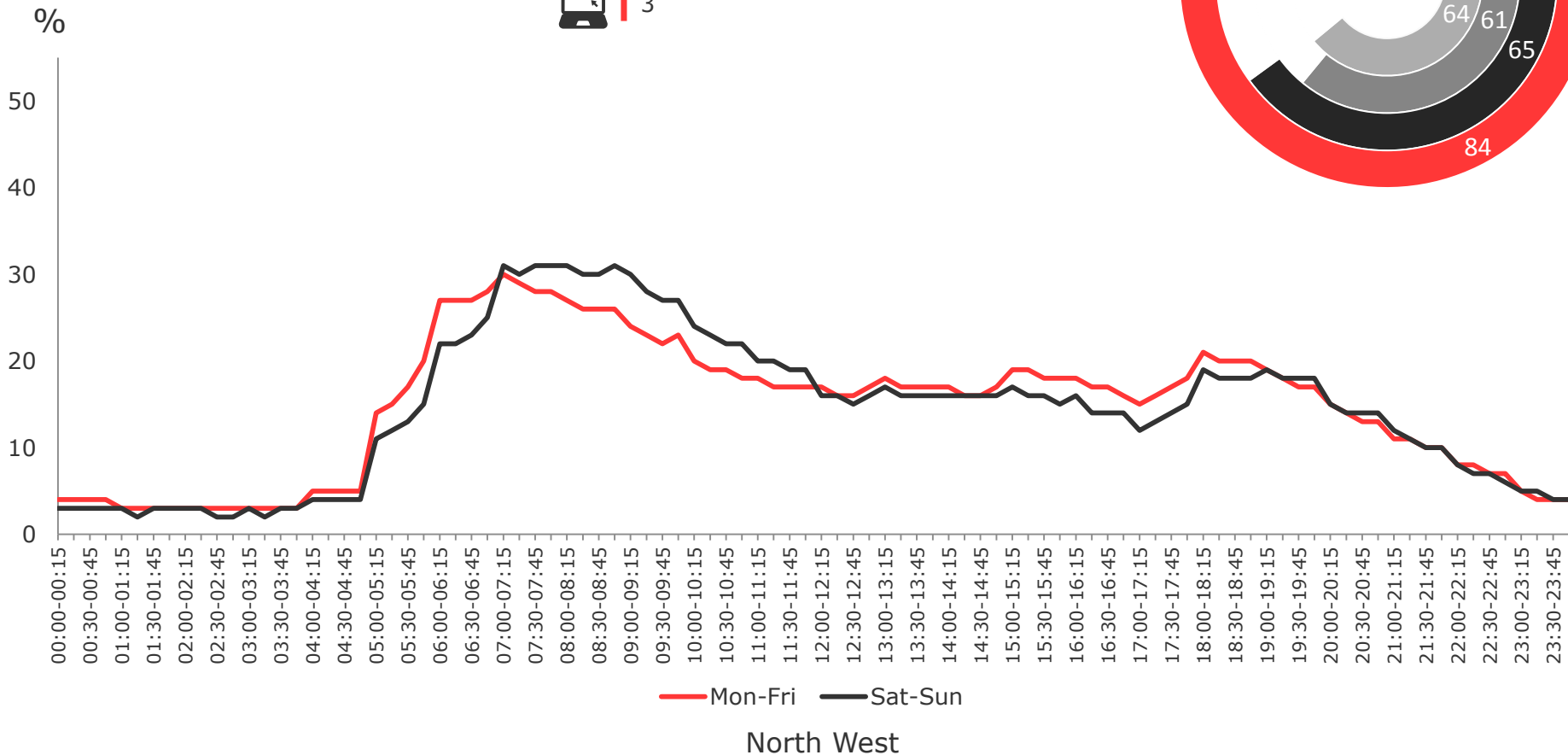
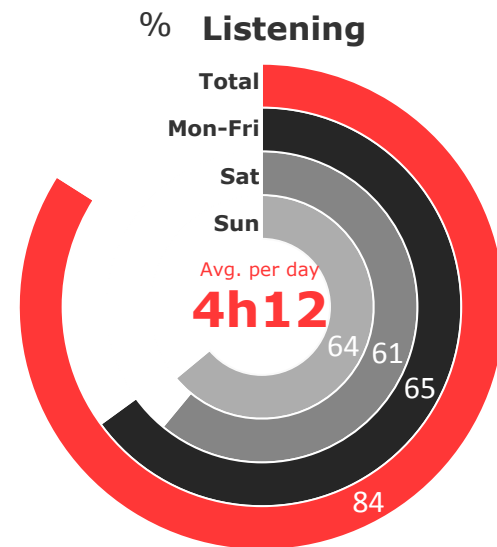
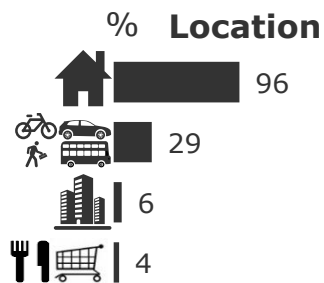
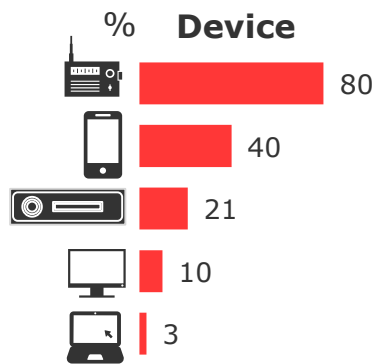


(% of 4.6b listening minutes a week)



NORTH WEST



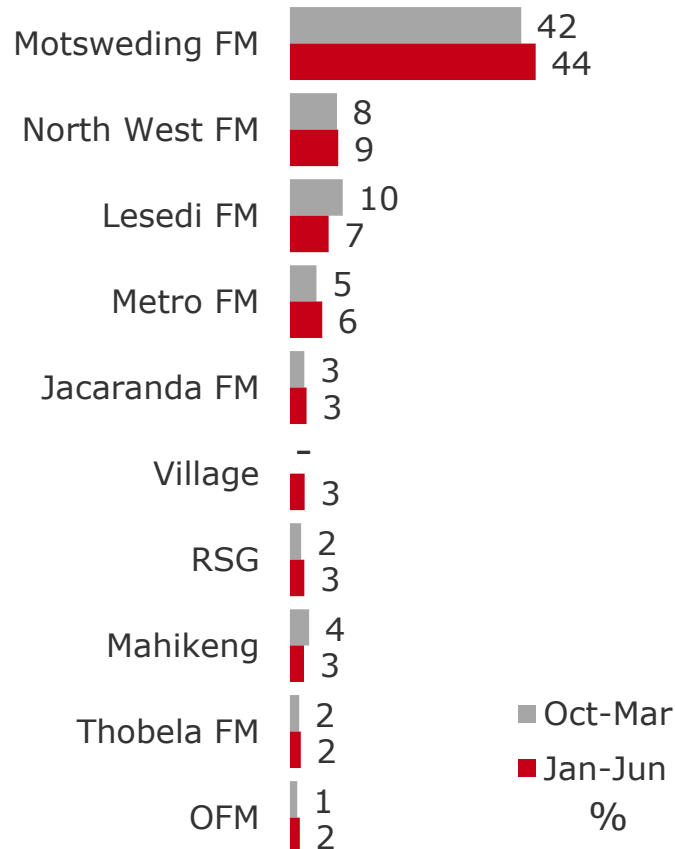


NORTH WEST - SHARE

Share of Audience



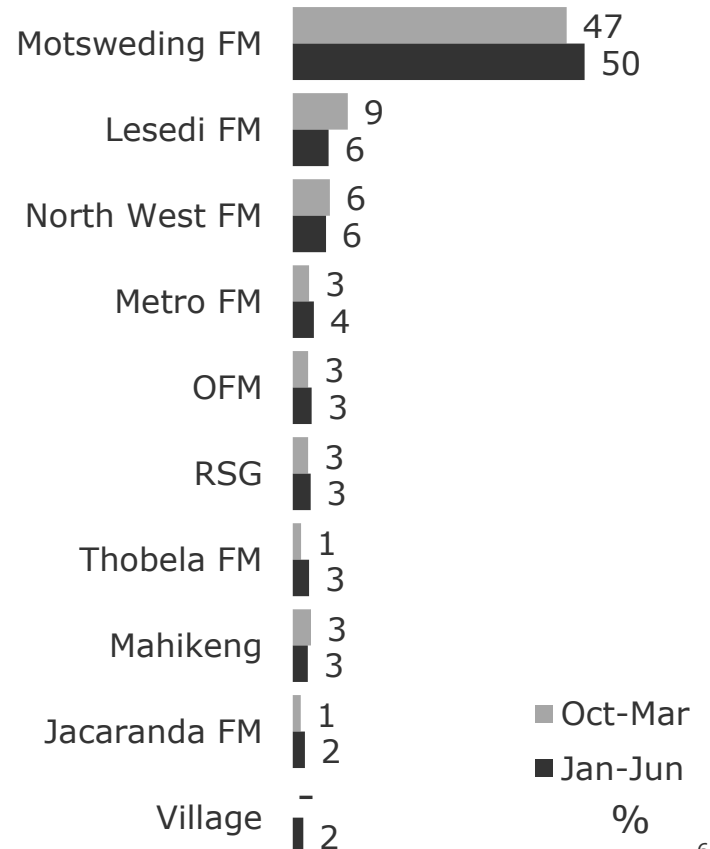
(% of 2.2m listeners who listen in a week)



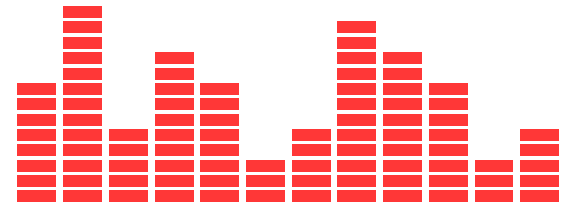
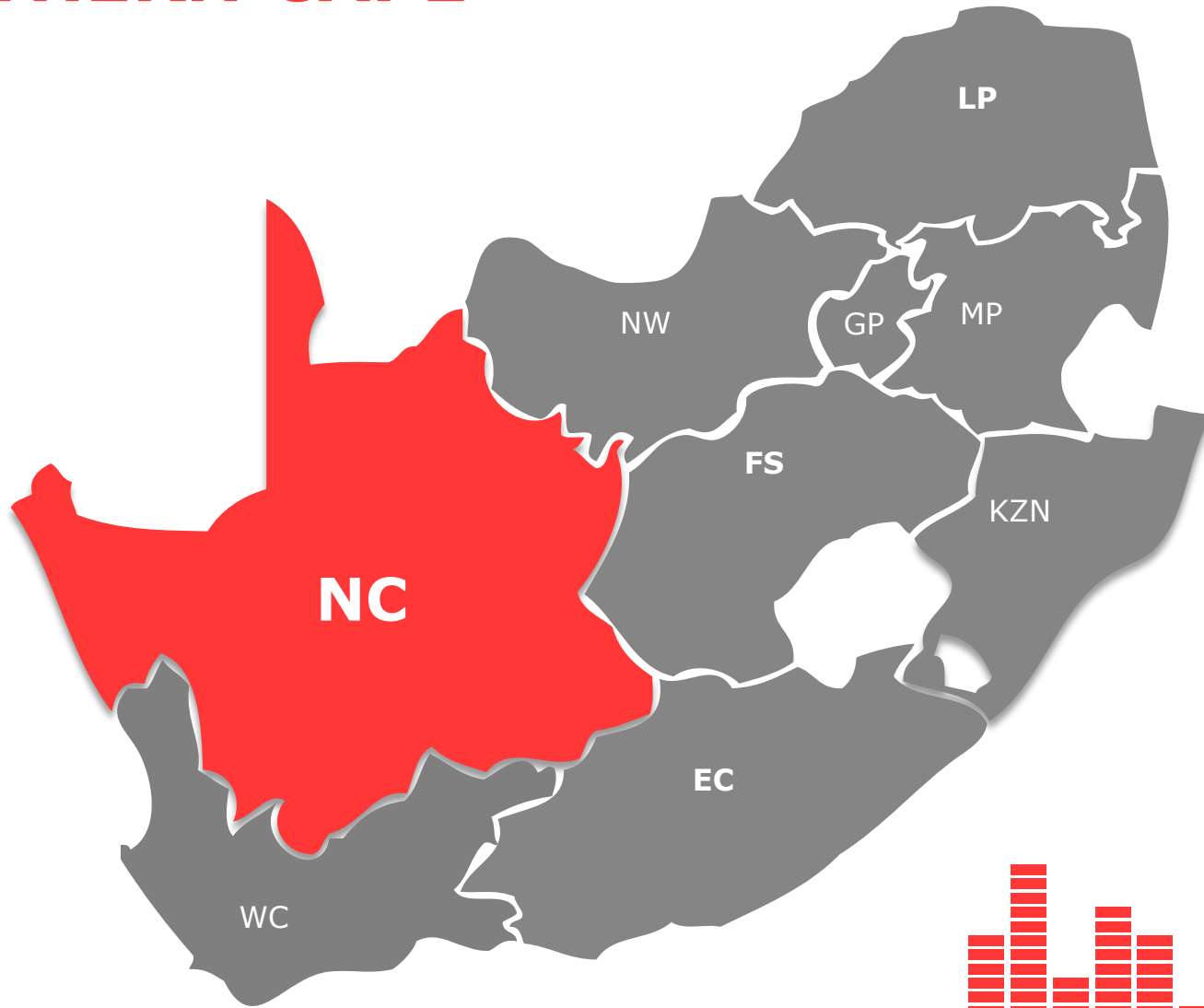
Share of Listening

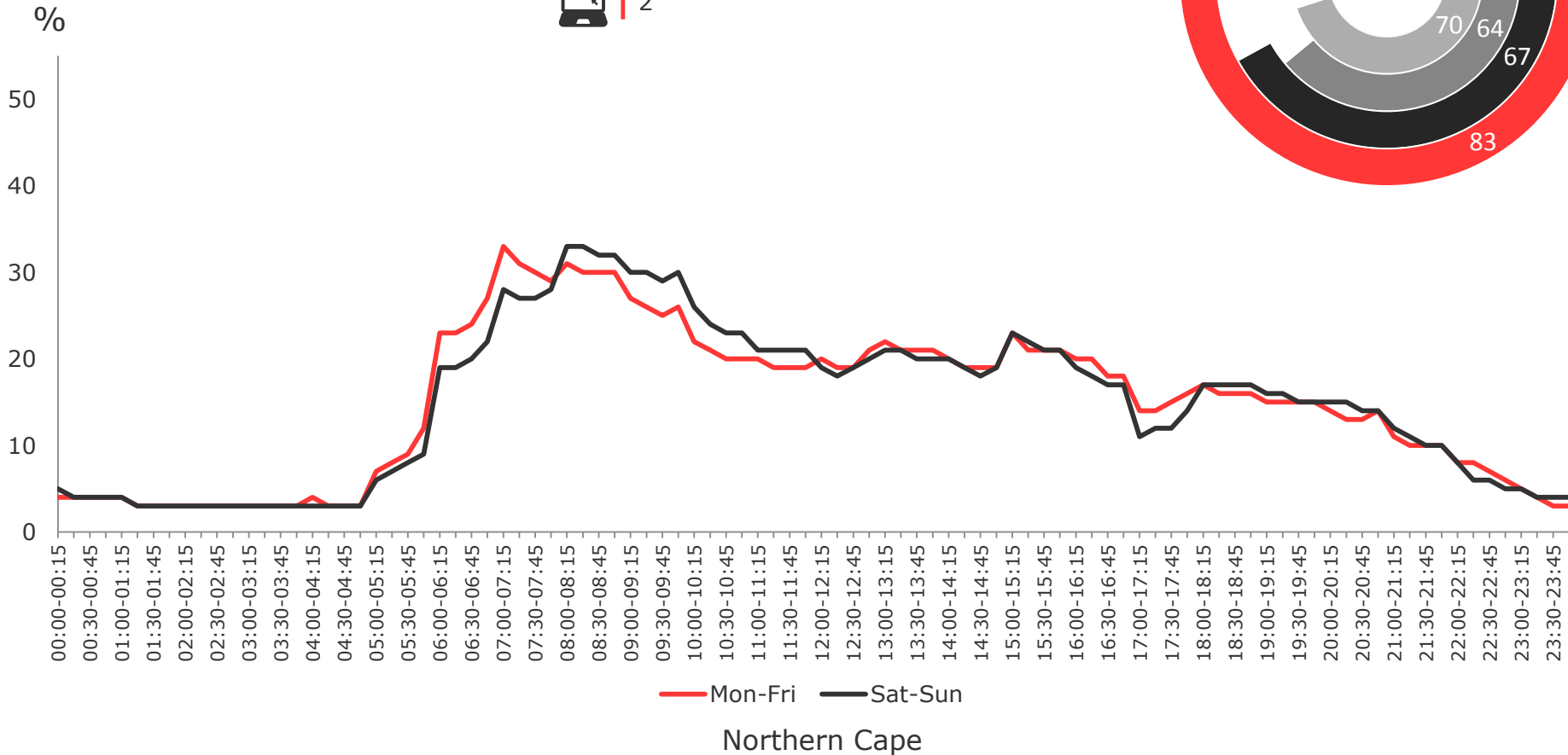
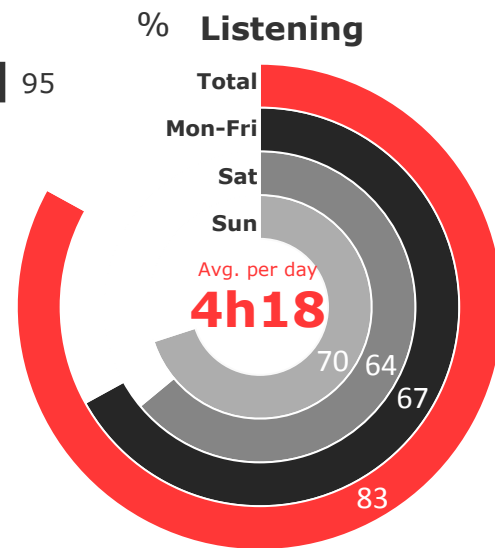
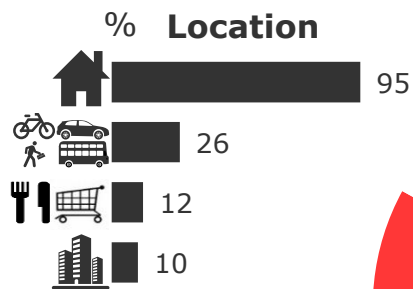
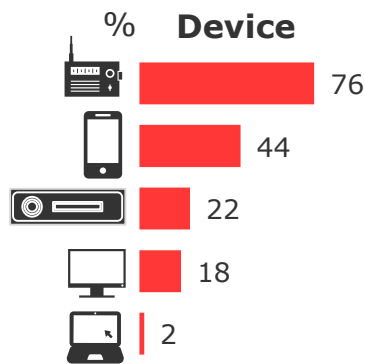


(% of 3.9b listening minutes a week)



NORTHERN CAPE



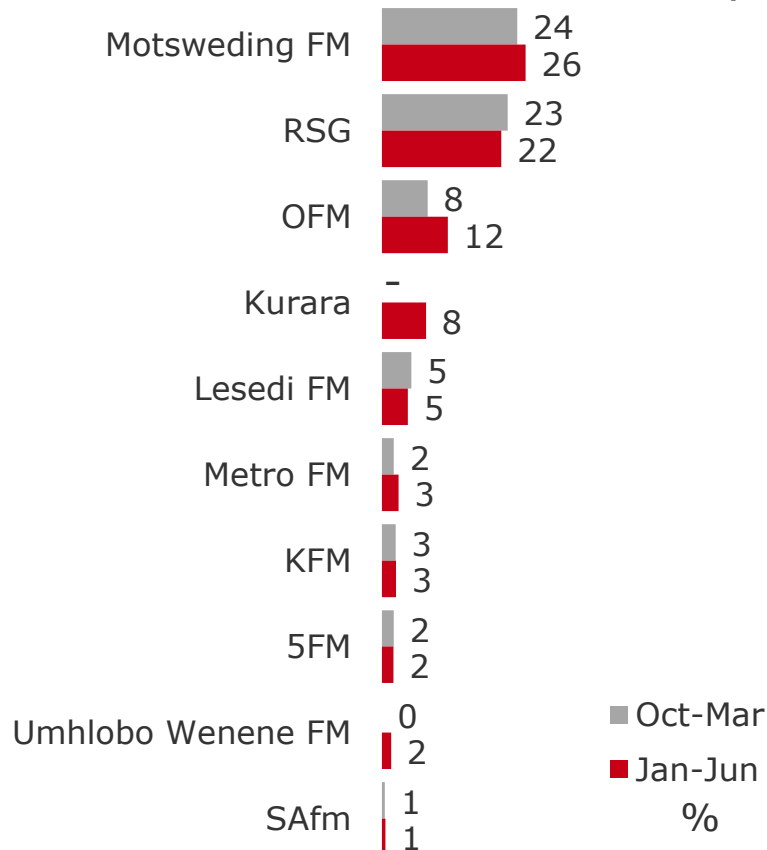


NORTHERN CAPE - SHARE

Share of Audience



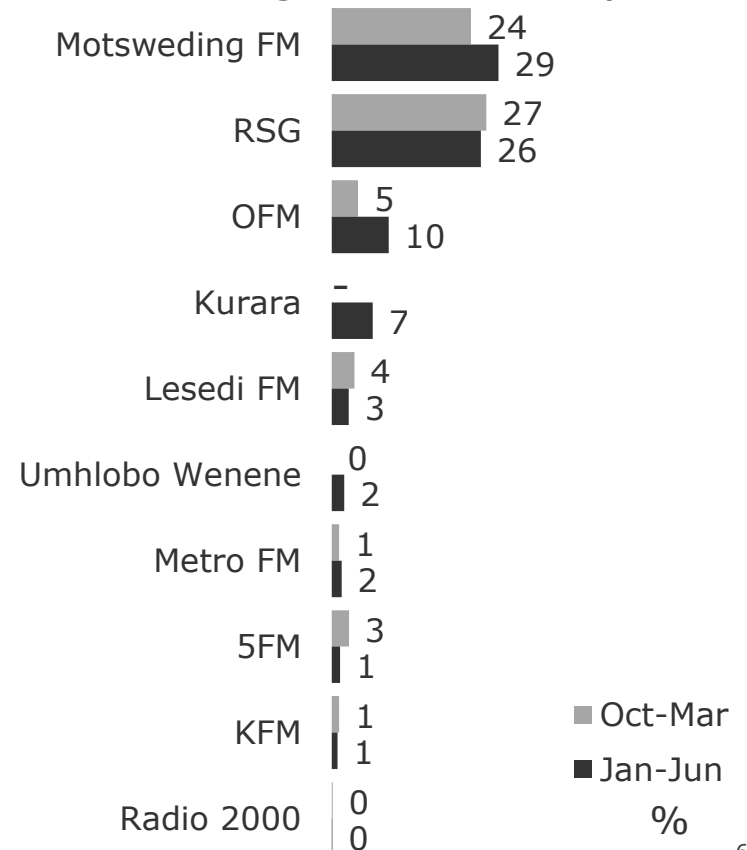
(% of 0.7m listeners who listen in a week)



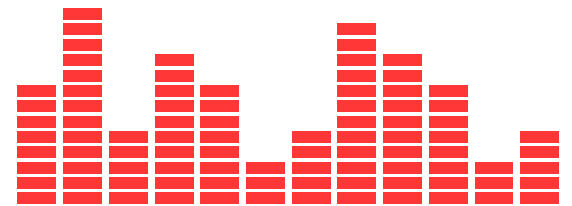
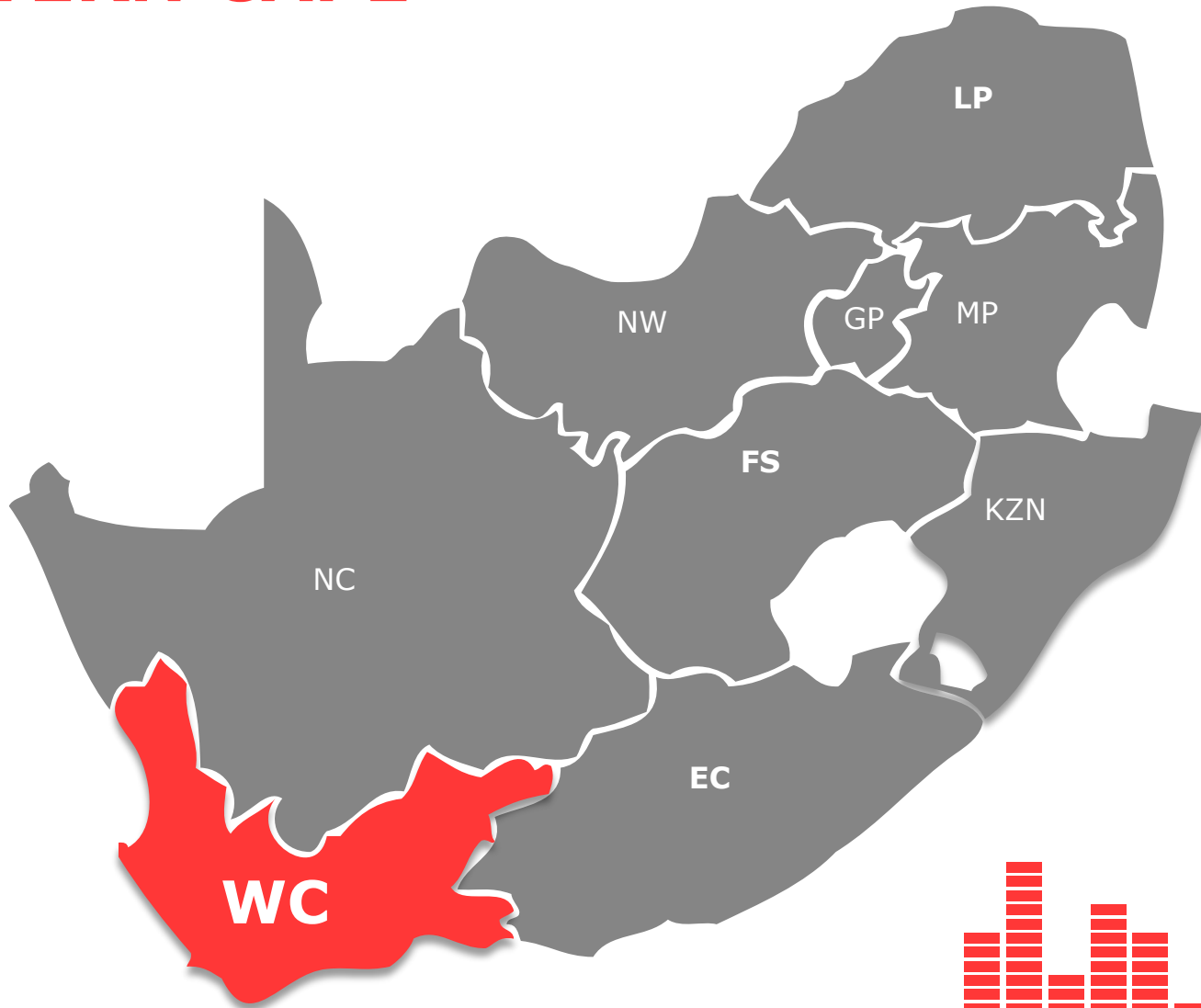
Share of Listening

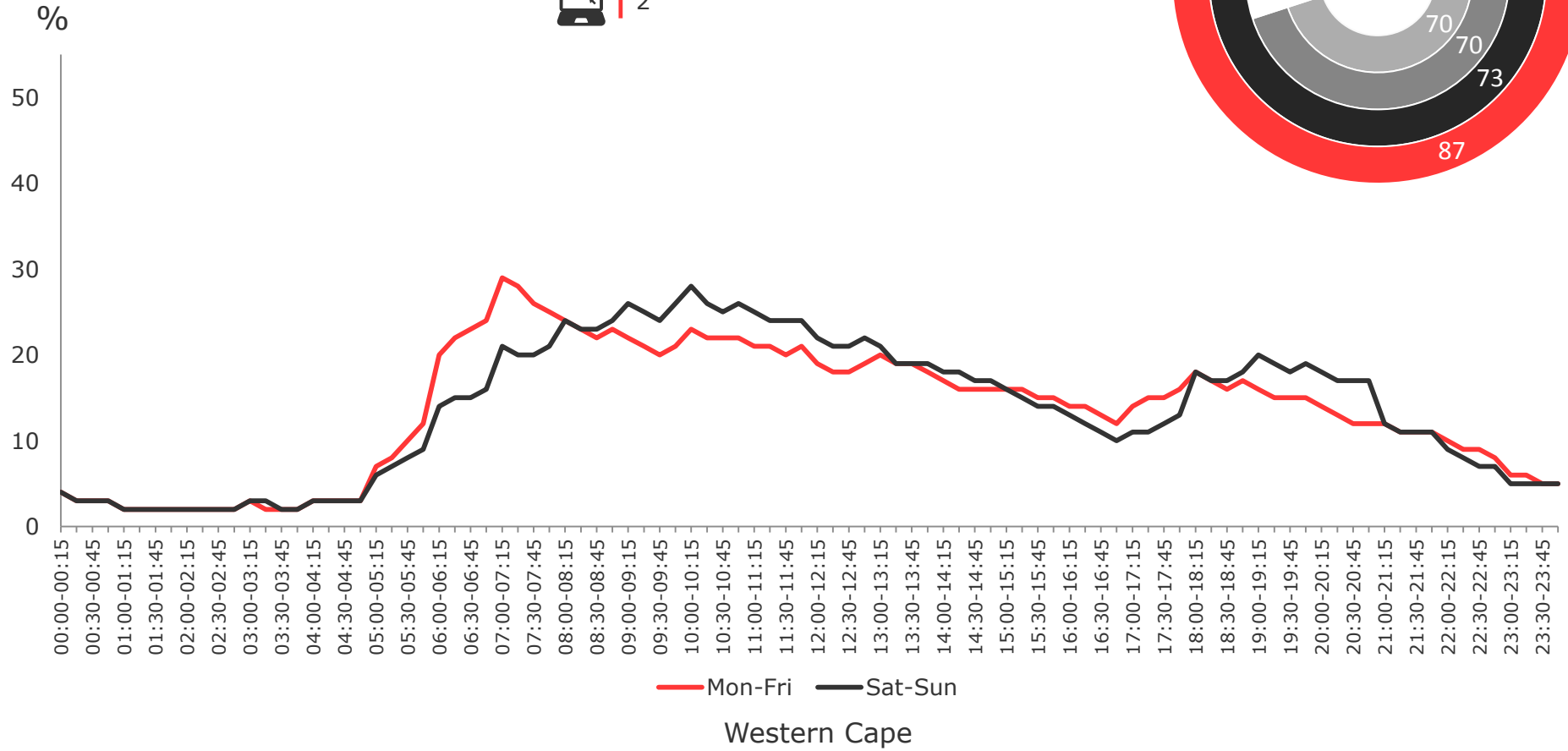
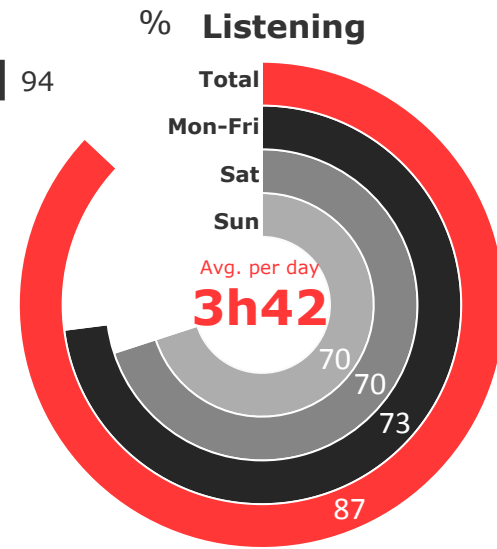
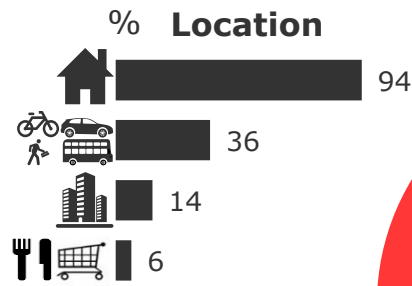
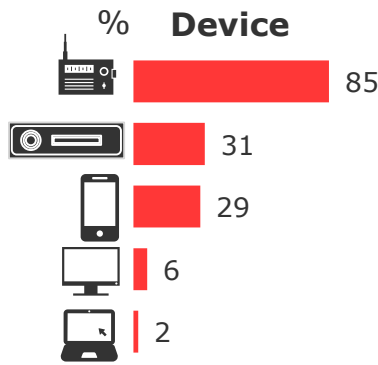


(% of 1.3b listening minutes a week)



WESTERN CAPE



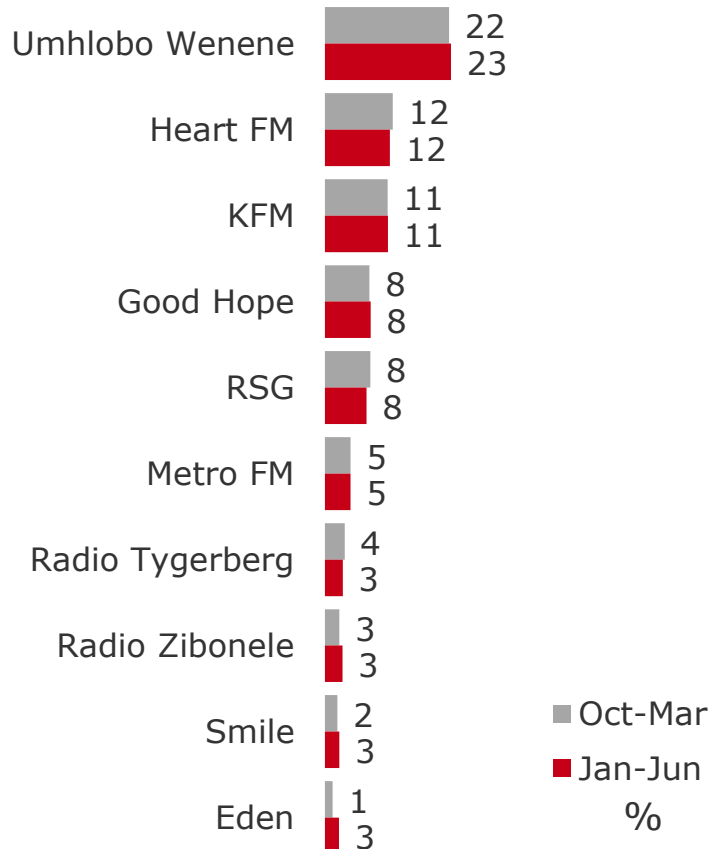


WESTERN CAPE - SHARE

Share of Audience



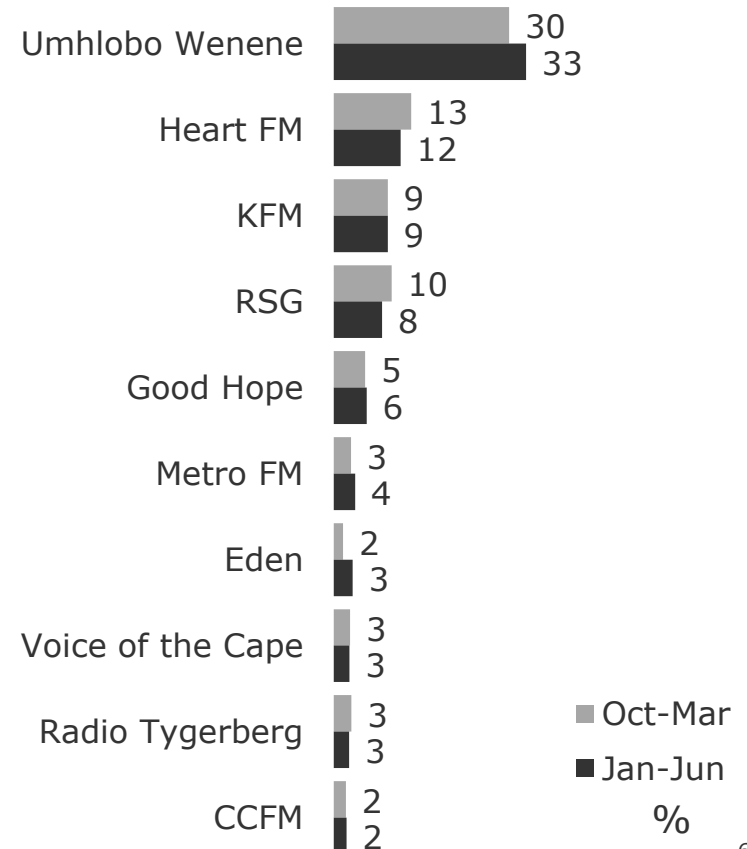
(% of 4.2m listeners who listen in a week)



Share of Listening



(% of 6.7b listening minutes a week)



KEY STATION MEASURES (THE CURRENCY)

OCT'16-MAR'17
JAN'17-JUN'17



KEY STATION MEASURES

Commercial and PBS



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Ukhozi	5,748	5,497	7,600	7,574
Umhlobo Wenene	4,226	4,119	5,501	5,422
Metro FM	2,395	2,371	4,007	4,044
Lesedi FM	2,522	2,245	3,513	3,212
Thobela FM	2,095	2,234	2,842	2,939
Motsweding FM	1,775	1,698	2,601	2,538
Ikwewezi	1,013	983	1,401	1,337
RSG	931	897	1,260	1,246
Gagasi	888	882	1,327	1,397
Munghana Lonene	802	797	1,098	1,057

KEY STATION MEASURES

Commercial and PBS



Exclusive listeners (%)



Avg. hrs p.d

	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Ukhozi	62	58	3h06	3h12
Umhlobo Wenene	57	60	3h42	3h42
Metro FM	29	26	1h42	1h48
Lesedi FM	57	55	3h24	3h18
Thobela FM	70	71	3h18	3h36
Motsweding FM	49	50	2h48	3h00
Ikwekwezi	52	52	3h00	3h12
RSG	50	44	3h18	3h00
Gagasi	39	34	2h18	2h06
Munghana Lonene	69	72	3h24	3h42

KEY STATION MEASURES

Commercial and PBS



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Jacaranda FM	772	741	1,191	1,136
East Coast Radio	725	730	1,010	1,101
Ligwalagwala	738	691	990	931
947	550	604	810	913
Kaya	512	566	848	931
Phalaphala	629	560	785	696
Heart FM	545	501	755	736
KFM	486	486	726	736
5FM	474	446	757	732
YFM	377	395	626	665

KEY STATION MEASURES

Commercial and PBS



Exclusive listeners (%)



Avg. hrs p.d

	Exclusive listeners (%)		Avg. hrs p.d	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Jacaranda FM	41	44	2h18	2h12
East Coast Radio	57	50	1h54	1h48
Ligwalagwala	55	56	3h24	3h30
947	35	35	1h48	1h36
Kaya	20	17	1h30	1h30
Phalaphala	77	78	4h00	4h12
Heart FM	47	44	2h54	2h30
KFM	46	41	2h12	2h06
5FM	30	29	1h36	1h24
YFM	23	21	1h36	1h30

KEY STATION MEASURES

Commercial and PBS



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Good Hope	318	336	509	536
Algoa FM	355	330	544	511
702	279	279	428	448
Radio 2000	195	224	371	412
OFM	169	200	248	294
Capricorn	195	190	329	298
North West FM	181	160	306	287
Lotus FM	171	135	258	206
Smile	96	114	140	164
SAfm	85	87	145	143

KEY STATION MEASURES

Commercial and PBS



Exclusive listeners (%)



Avg. hrs p.d

	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Good Hope	36	30	1h48	1h42
Algoa FM	46	47	1h54	1h48
702	24	20	1h42	1h42
Radio 2000	16	11	1h24	1h24
OFM	67	63	3h24	3h36
Capricorn	32	31	1h48	2h12
North West FM	23	20	2h06	1h54
Lotus FM	46	33	1h36	1h48
Smile	51	55	1h48	1h42
SAfm	21	29	1h30	1h30

KEY STATION MEASURES

Commercial and PBS



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Power	83	84	126	138
trufm	71	77	151	158
CapeTalk	76	66	97	92
Vuma	28	34	44	54
Classic FM	29	32	51	60
Rise FM	-	-	37	45
Magic828 AM	-	-	24	16

KEY STATION MEASURES

Commercial and PBS



Exclusive listeners (%)



Avg. hrs p.d

	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Power	14	16	2h00	2h06
trufm	0	5	1h18	1h24
CapeTalk	48	33	2h36	2h12
Vuma	23	13	1h54	1h42
Classic FM	24	13	1h12	1h00

KEY STATION MEASURES

Community



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Jozi	331	342	522	574
Kasie	147	172	223	258
Unitra (UCR-FM)	185	139	299	235
Radio Tygerberg	140	124	221	202
Voice of the Cape	111	111	143	146
Inkonjane	104	103	184	171
Vukani	132	103	263	222
Eden	50	100	87	163
Thetha	104	95	159	156
Bok Radio	71	91	95	124

KEY STATION MEASURES

Community



Exclusive listeners (%)



Avg. hrs p.d

	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Jozi	27	27	2h24	2h06
Kasie	10	12	1h24	1h30
Unitra (UCR-FM)	5	3	1h54	2h00
Radio Tygerberg	39	39	2h18	2h06
Voice of the Cape	39	44	3h12	3h00
Inkonjane	33	30	1h48	2h24
Vukani	0	0	1h30	1h06
Eden	46	51	3h06	3h12
Thetha	64	49	2h54	2h36
Bok Radio	71	64	1h36	1h54

KEY STATION MEASURES

Community



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Radio Zibonele	80	91	161	198
CCFM	101	87	158	148
Mkhondo	59	82	86	120
Alfred Nzo	82	77	128	145
QwaQwa	83	76	117	119
Izwi LoMzansi	79	71	126	118
Voice of Tembisa	61	69	102	113
Moretele	85	67	127	112
Moutse	72	67	108	102
Nongoma	-	59	-	80

KEY STATION MEASURES

Community



Exclusive listeners (%)



Avg. hrs p.d

	Exclusive listeners (%)		Avg. hrs p.d	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Radio Zibonele	20	19	1h48	1h48
CCFM	37	31	2h12	2h24
Mkhondo	24	25	3h18	2h54
Alfred Nzo	27	23	3h24	2h36
QwaQwa	27	39	3h00	2h12
Izwi LoMzansi	14	18	2h00	2h00
Voice of Tembisa	26	31	1h48	1h48
Moretele	56	52	3h06	2h30
Moutse	36	34	4h00	2h12
Nongoma	-	50	-	2h48

KEY STATION MEASURES

Community



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



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

	Avg. daily cume (Mon-Sun) ('000s)		One week cume (000's)	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Mahikeng	86	56	126	84
Kurara	-	55	-	73
Kofifi	44	53	65	85
Bayfm	56	52	85	81
Highway	52	50	74	70

KEY STATION MEASURES

Community



Exclusive listeners (%)



















Avg. hrs p.d

	Exclusive listeners (%)		Avg. hrs p.d	
	Oct'16-Mar'17	Jan'17-Jun'17	Oct'16-Mar'17	Jan'17-Jun'17
Mahikeng	32	20	2h30	2h54
Kurara	-	47	-	3h00
Kofifi	48	31	3h00	2h18
Bayfm	29	22	1h36	1h30
Highway	30	40	1h36	1h42

STATION DASHBOARDS


BRC RAM Station Detail
Jan'17-Jun'17
TNS

Commercial and PBS Stations

									
702	5FM	947	Algoa FM	Cape Talk	Capricorn	Classic FM	East Coast Radio	Gagasi	Good Hope
									
Heart FM	Ikwekwezi	Jacaranda FM	Kaya	KFM	Lesedi FM	Ligwalawala	Lotus FM	Metro FM	Motswedding FM
									
Mungqana Loane	North West FM	OFM	Phalaphala	Power	Radio 2000	RSG	SAfm	Smile	Thobela FM
									
truFM	Ukhozi	Ukhlobo Wenene	Yuma	YFM					

Community Stations

									
Alfred Nzo	Bayfm	Bok Radio	CCFM	Eden	Forte	Highway Radio	Inkonjane	Izwi LoMzansi	Jozi

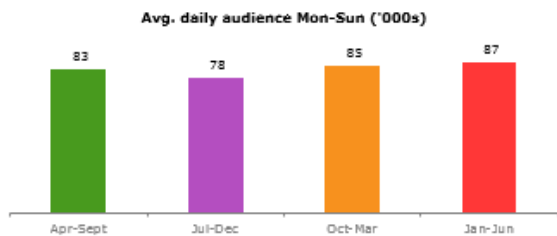
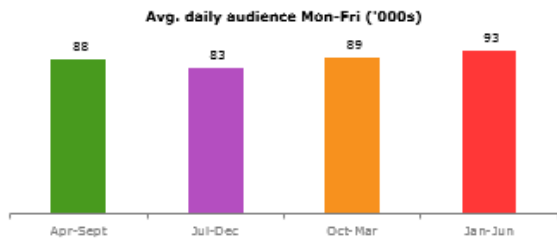
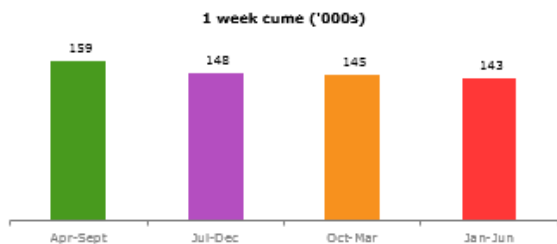
TRENDING: APR-SEP / JUL-DEC / OCT-MAR / JAN-JUN

Station A



Key Measures (Total audience)

sample= 31178

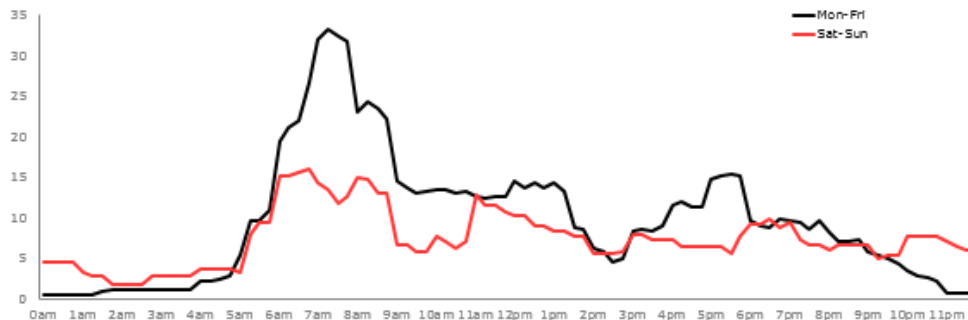


Station listeners (one week cumc)

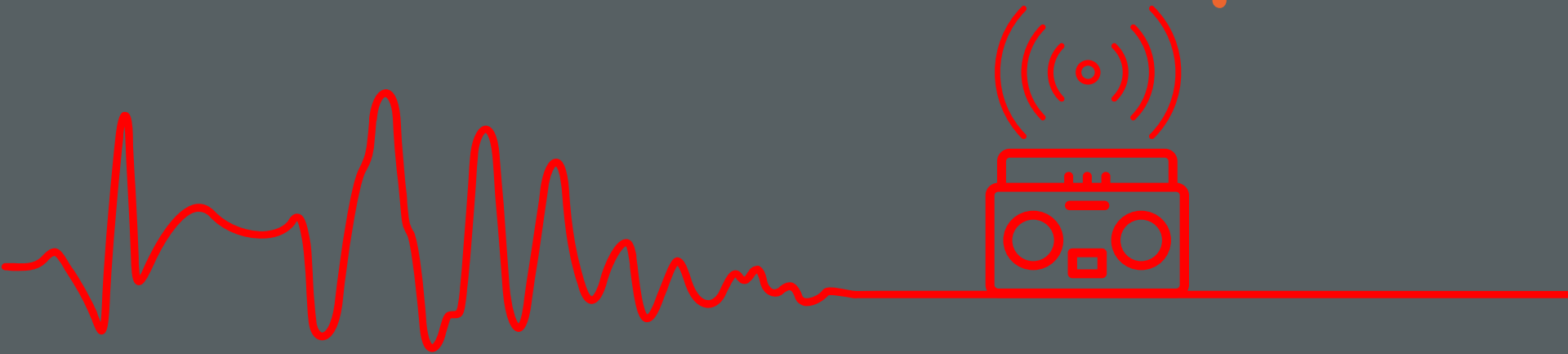
sample= 104



Radio listening by 1/4 hour ('000s)

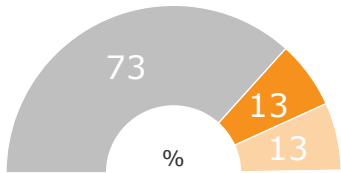


**COMING IN
NOVEMBER
2017...**

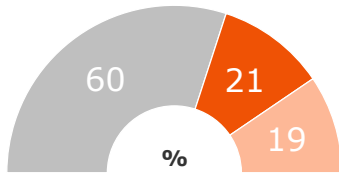


ES SEM™ DATA in BRC RAM...

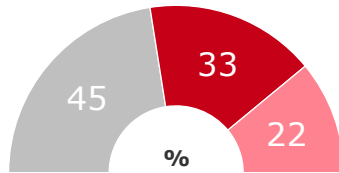
SEM 1
4,9 million (13%)



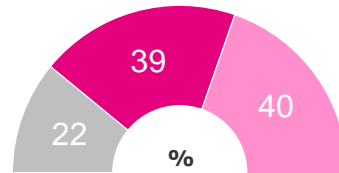
SEM 2
6,7 million (17%)



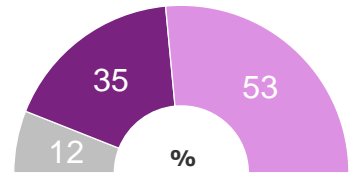
SEM 3
5,2 million (14%)



SEM 4
3,9 million (10%)



SEM 5
4,1 million (10%)

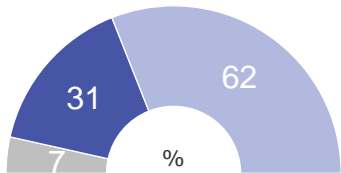


■ Rural

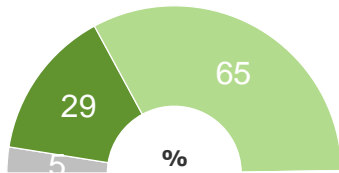
■ Urban

■ Metro

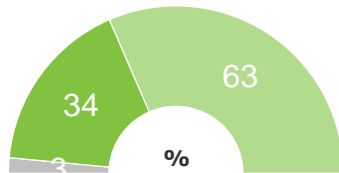
SEM 6
3,2 million (8%)



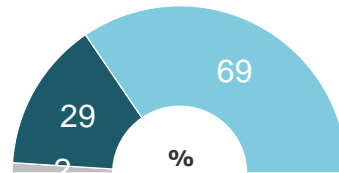
SEM 7
3,4 million (9%)



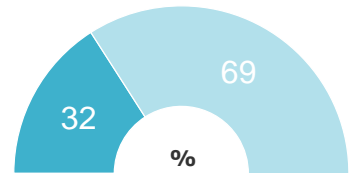
SEM 8
2,8 million (7%)



SEM 9
2 million (5%)



SEM 10
2,6 million (7%)



■ Rural

■ Urban

■ Metro

**SEE YOU AGAIN IN
NOVEMBER 2017**

APR-SEP'17

