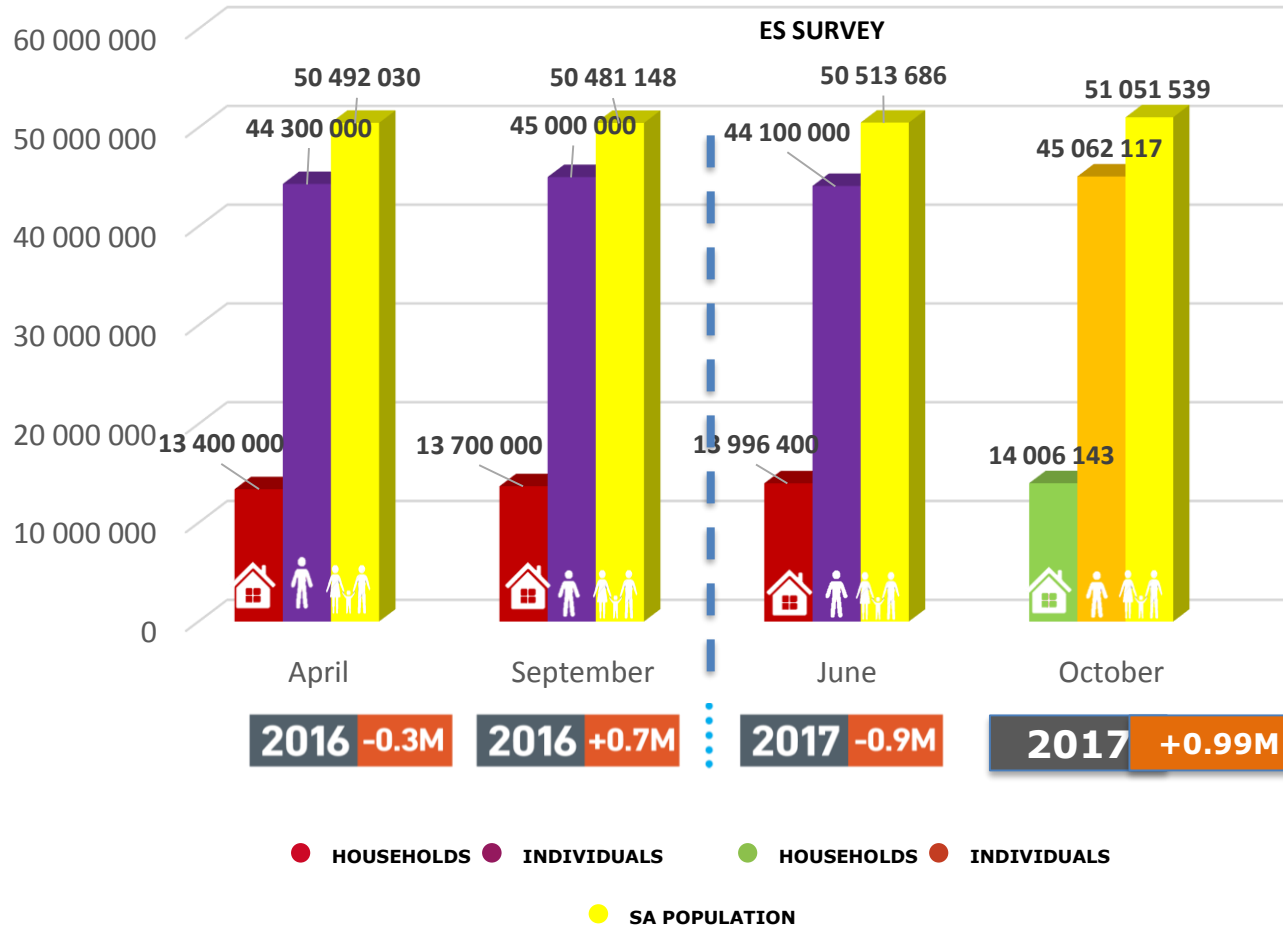






# ES SURVEY





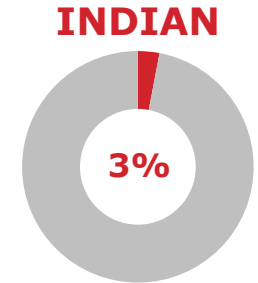
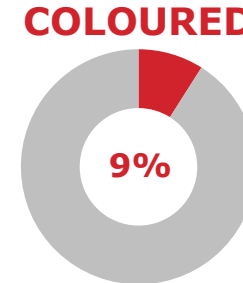
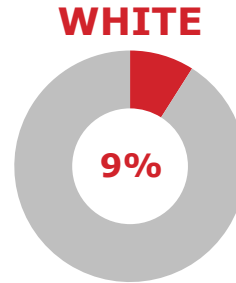
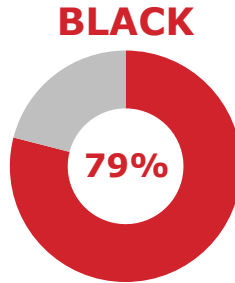
# FACTS FROM THE ES



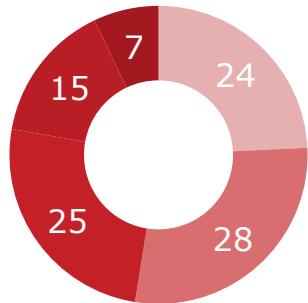
# P7D TV VIEWERS DEMOGRAPHIC LANDSCAPE...



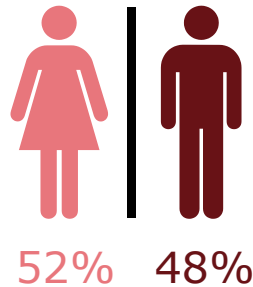
**37.1 million**  
ADULTS 15 YEARS+



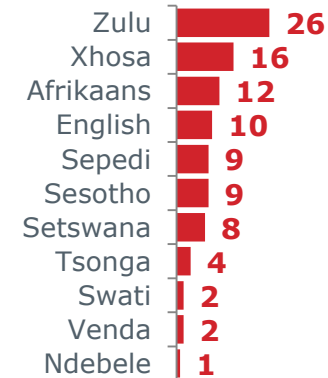
## AGE %



- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +



## HOME LANGUAGE %



# P7D TV VIEWERS GEOGRAPHIC LANDSCAPE...



## PROVINCE % and population figures



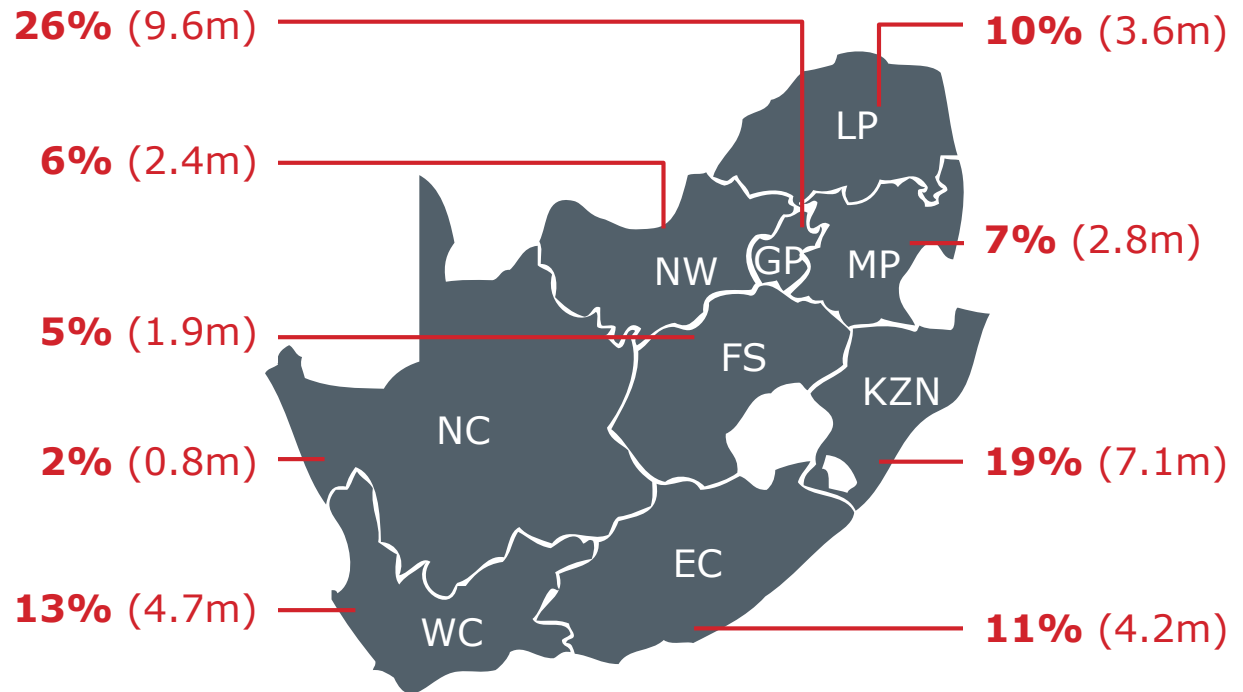
42%  
METRO



28%  
URBAN



30%  
RURAL

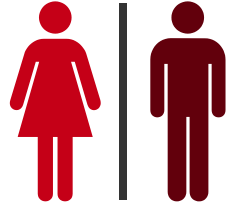




# FREE TO AIR VIEWERS DEMOGRAPHIC LANDSCAPE...

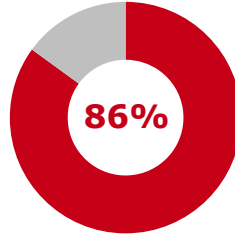


**18.1 million**  
ADULTS 15 YEARS+

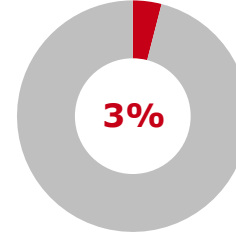


**52%** **48%**

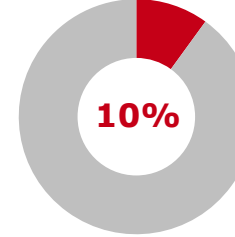
**BLACK**



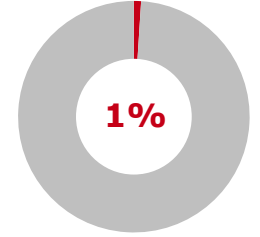
**WHITE**



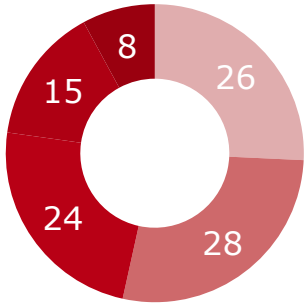
**COLOURED**



**INDIAN**



**AGE %**

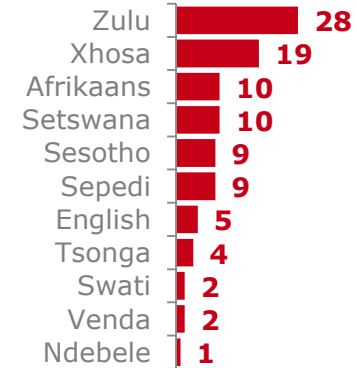


- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

**MONTHLY  
HOUSEHOLD INCOME  
AVERAGE: R5,971**



**HOME LANGUAGE %**

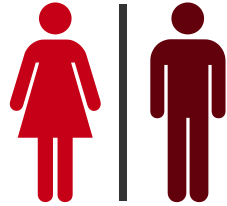




# PAY TV SUBSCRIBERS DEMOGRAPHIC LANDSCAPE...

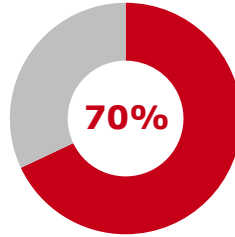


**15.4 million**  
ADULTS 15 YEARS+

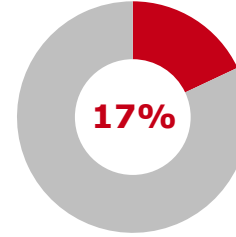


**51%** **49%**

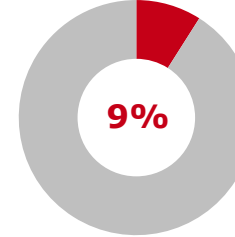
**BLACK**



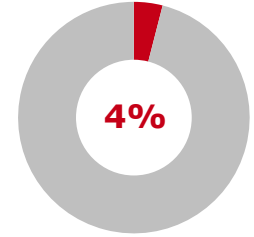
**WHITE**



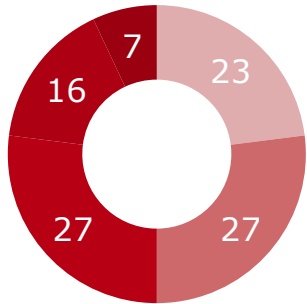
**COLOURED**



**INDIAN**



**AGE %**

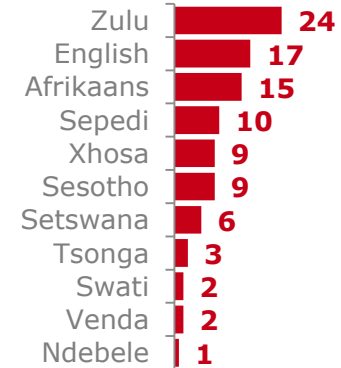


- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

**MONTHLY  
HOUSEHOLD INCOME  
AVERAGE: R16,882**



**HOME LANGUAGE %**





# VIEWING REACH...



**90%**

of the population  
in a **day**



**94%**

of the population  
in a **week**

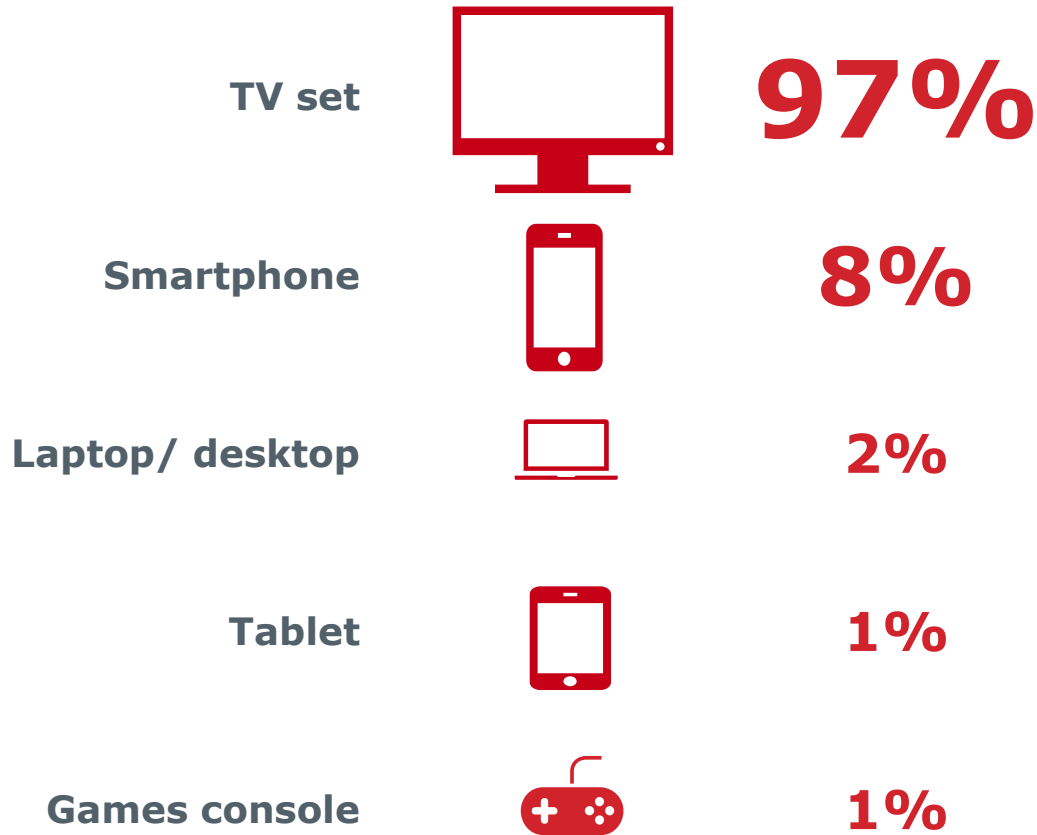


**95%**

of the population  
in a **month**



# VIEWING DEVICE...



# VIEWING LOCATION...



Location  
in past week %

Home/someone else's home



98



Shopping centre/shop/bank



7

Bar/shebeen/pub/café



6



Work



5



Restaurant/coffee shop



5

Car/taxi/bus



4



School/university/college



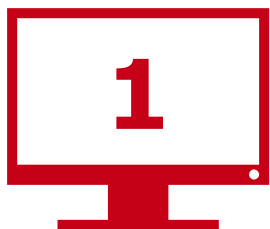
1



# TV SETS IN HH...



Average of 1.1 working TV sets in household



**92%**

Have 1 working TV set



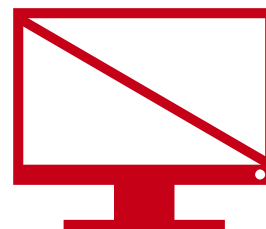
**7%**

Have 2 working TV sets



**1%**

Have 3+ working TV sets



**5%**

Also have a non-working TV set in home



# EQUIPMENT IN HH...



## FLAT SCREEN/HD VS STANDARD BOX TELEVISION SETS IN HH



**60%**

Standard box



**42%**

Flat screen/HD

## PLUG-IN EQUIPMENT



**54%**

DVD player



**4%**

Media player



**2%**

VHS recorder



**1%**

Games console



# TECHNOLOGY IN HH...



**46%**  
Satellite dish



**8%**  
PVR decoder



**51%**  
Antenna/Aerial



**38%**  
Standard decoder



# TV & INTERNET PLATFORMS...



**46%**

**showmax**



**1%**

**OPENVIEW HD**

**NETFLIX**



**0.3%**



**21,462 individuals**

**0.05%**

**\*\* very small base**



# VIEWING BEHAVIOUR...



**96%**  
Live TV



**10%**  
Recorded TV



**7%**  
Automatically  
stored on decoder



**13%**  
DVD box set



**3%**  
Online

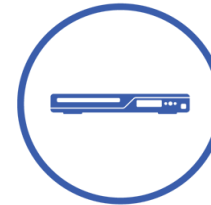
*9% have internet enabled TV sets  
2% claim internet usage on TV set*





# FROM THE ES TO THE DAILY PANEL...

- The daily panel is compared to the ES TV Universe on a household and individual level.
- Theoretically, in a perfectly representative panel, everyone has the same weight.



# THE NATURE OF LIVE PANELS...

- Panels churn, **CHANGE** and **EVOLVE** all the time
- Polling on any given day will not collect data from the whole panel.
- To **PROJECT** the correct picture, panels require **DAILY ADJUSTMENT** by **WEIGHTING**



# HOUSEHOLD RIM WEIGHTING STRUCTURE...

## HOUSEHOLD RIMS

Province  
Race  
Area (M/U/R)  
Pay TV/Non Pay TV  
Household Size

Total Number of Categories

## CATEGORIES

9  
4  
3  
2  
3

21

Min

1,124

AVG Factor

5,402

Max

16,523

Efficiency Index

73.14



# INDIVIDUAL RIM WEIGHTING STRUCTURE...

## INDIVIDUAL RIMS

Age Group  
Kids/Adults x Pay TV/Non Pay TV  
Kids/Adults x Gender  
Kids/Adults x Province  
Kids/Adults x Race  
Kids/Adults x Area (M/U/R)

Total Number of Categories

## CATEGORIES

8  
4  
4  
18  
8  
6

48

Min

1,689

AVG Factor

4,043

Max

13,487

Efficiency Index

93.28





# THE PANEL...

KPI Panel Health	August 2014	August 2015	August 2016	August 2017
Installed Panel	2658	2667	2899	2935
Polling	95%	94.5%	93%	97.1%
Reporting (Intabs)	90.9%	89.8%	89.7%	91.0%
Coverage of TV sets	89.3%	92.8%	91%	94%



# WEIGHTING EFFICIENCIES...

KPI Panel Health	August 2014	August 2015	August 2016	August 2017
Ind. weighting efficiency	64.9%	79.5%	75%	93%
H/H weighting efficiency	54.5%	65%	65%	74%
Ind. maximum weight	40 860	22 618	22 618	18 634

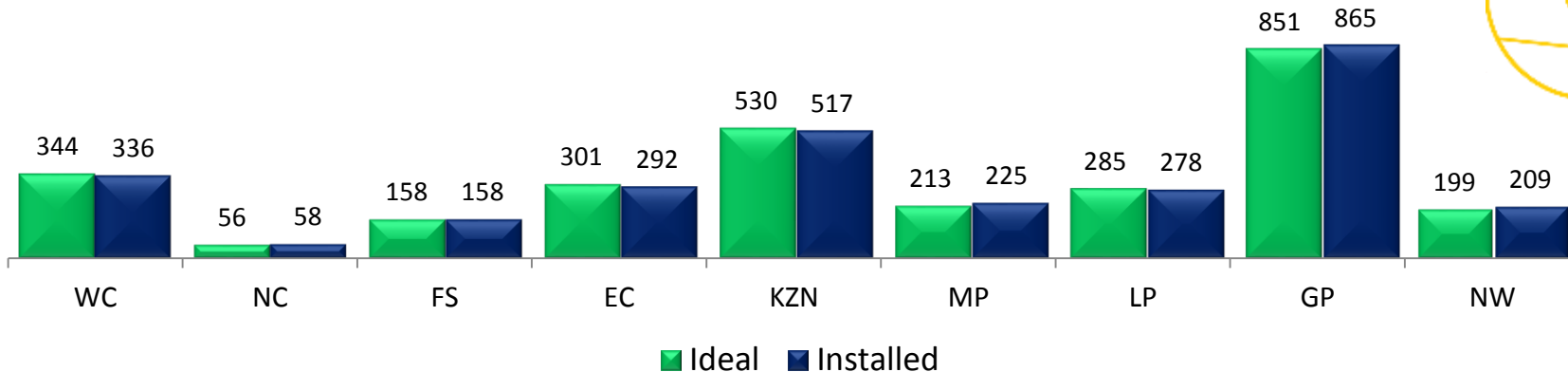


# PANEL BALANCE BY PROVINCE

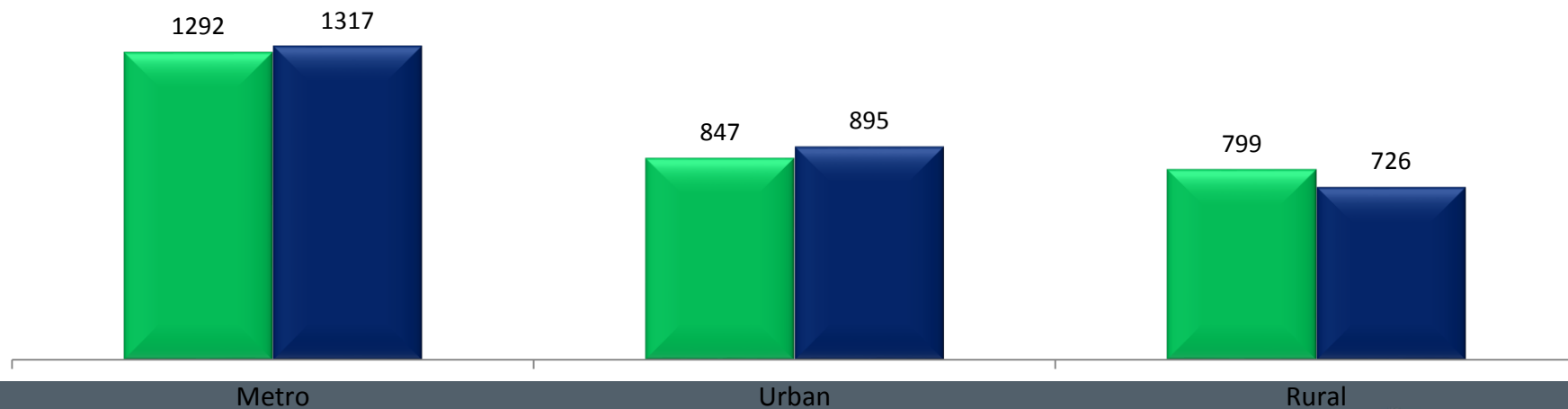
New Universe Update



## PROVINCE



## AREA





# TV & INTERNET PLATFORMS... ON TAMS



**showmax**

This will be tracked on the BRC TAMS Panel, as this is a live panel and will give us a better indication of TV Internet Platforms

**NETFLIX**



Smart TV's will be tracked on the BRC TAMS Panel, as this is a live panel and will give us a better indication of TV Internet Platforms

**18 HHs  
equates to 840,000  
homes when weighted  
up 6% of TV  
Households**

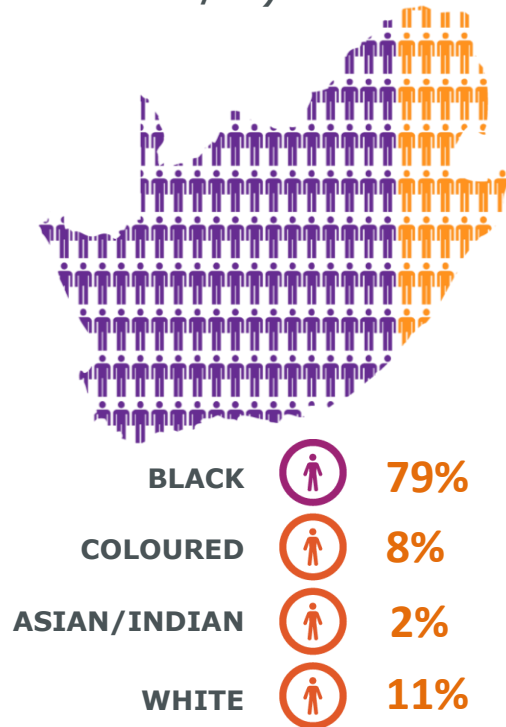




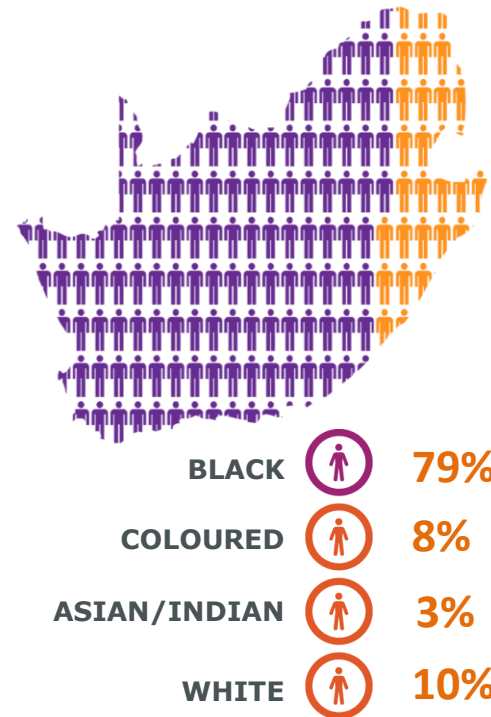
# TV UNIVERSE UPDATE (from the ES)

# BRC TAMS INSTALLED PANEL ALIGNED TO ES TV UNIVERSE...

**BRC TAMS PANEL**  
(installed H/H)



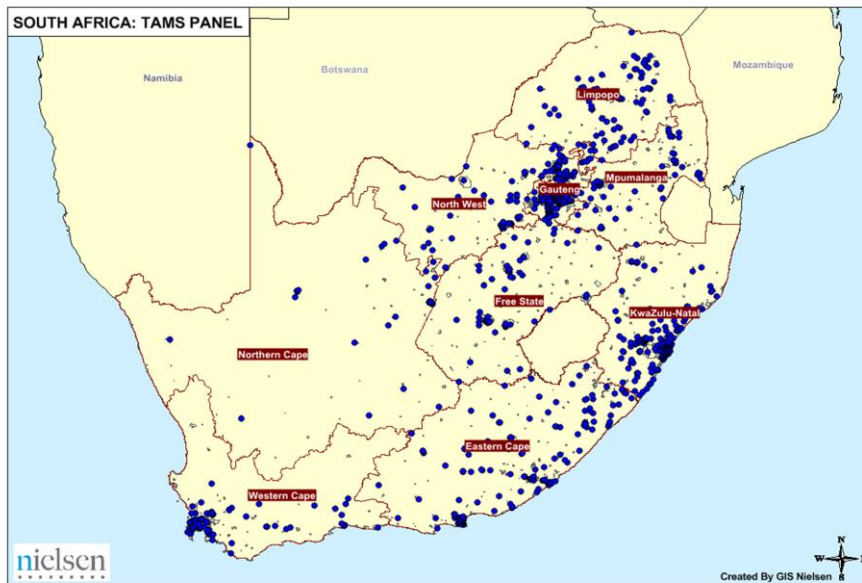
**ES TV Universe**



# BRC TAMS VITAL SIGNS

**Universe: Population age 4+**  
**45.0 million**

**14,021 Individual Sample**  
**OCT 2017**



44%

METRO



29%

URBAN



27%

RURAL



# BRC TAMS SNAPSHOTS...



TOTAL TV HOUSEHOLDS H/H

**14 006 143**



FREE TO AIR (FTA)

**8,221,606**



DSTV

**5,784,537**



OVHD

**700,307**



TOTAL TV HOUSEHOLDS H/H

**14.00 MILLION**

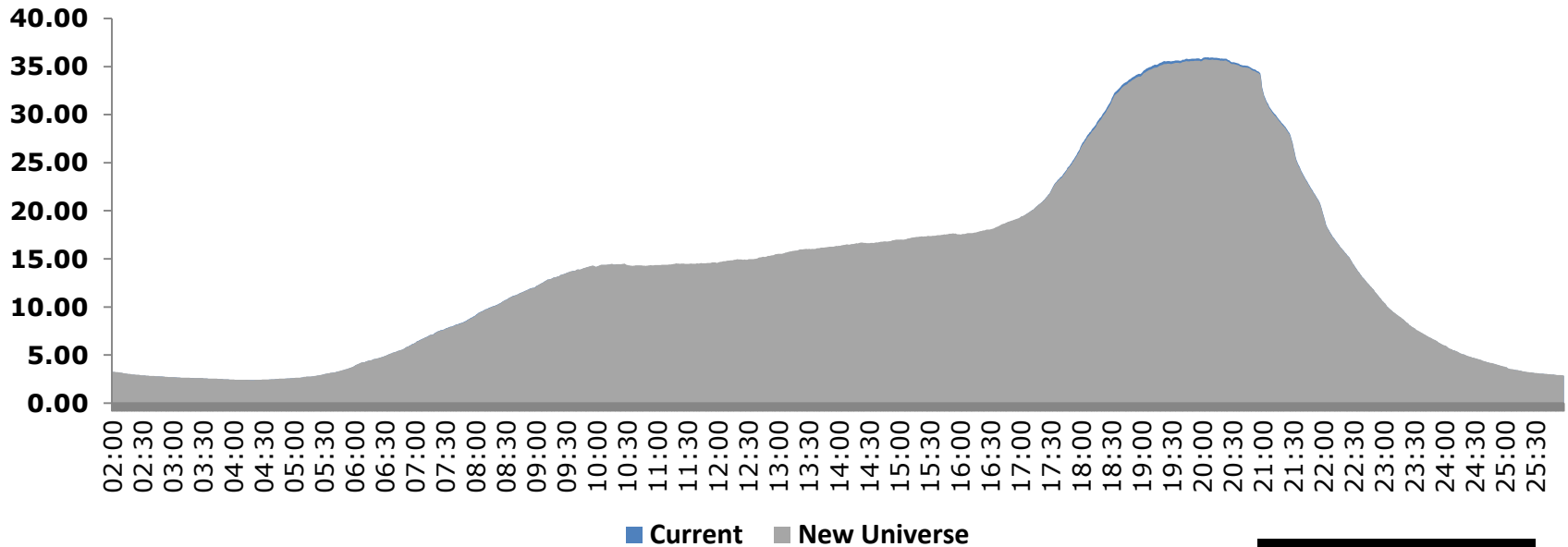


No, of TV CHANNELS

**111**



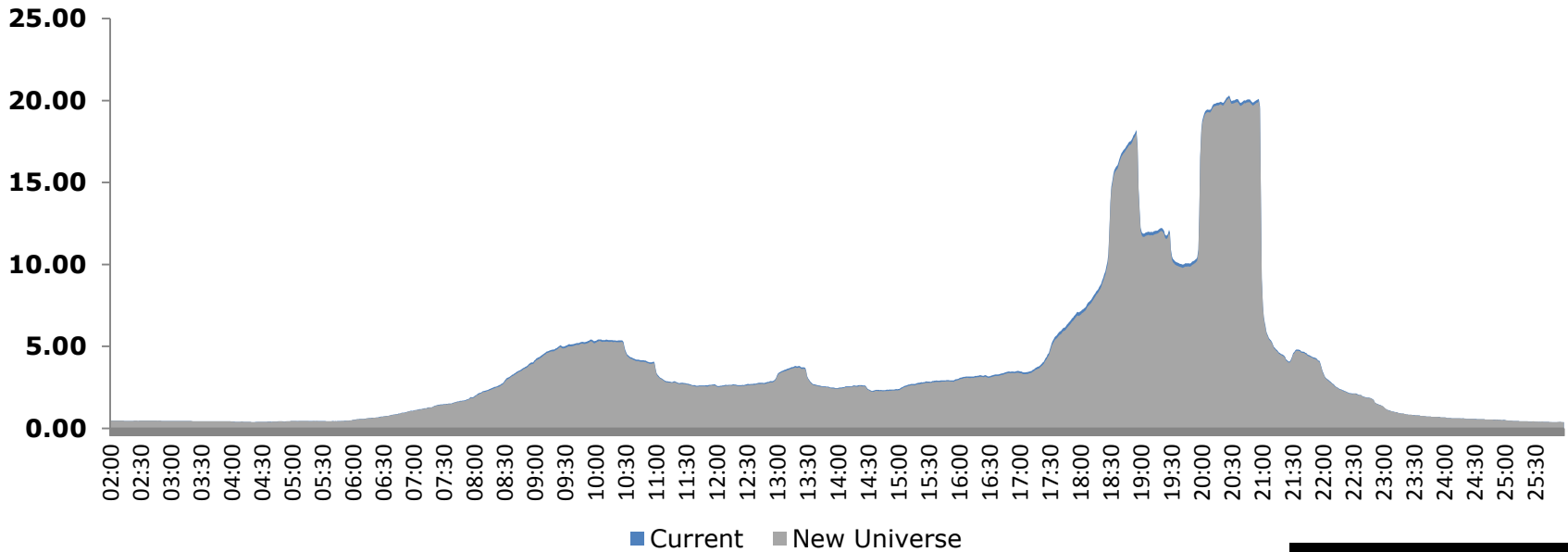
# TOTAL TELEVISION...



SOURCE: 17 Jul - 30 Jul 17



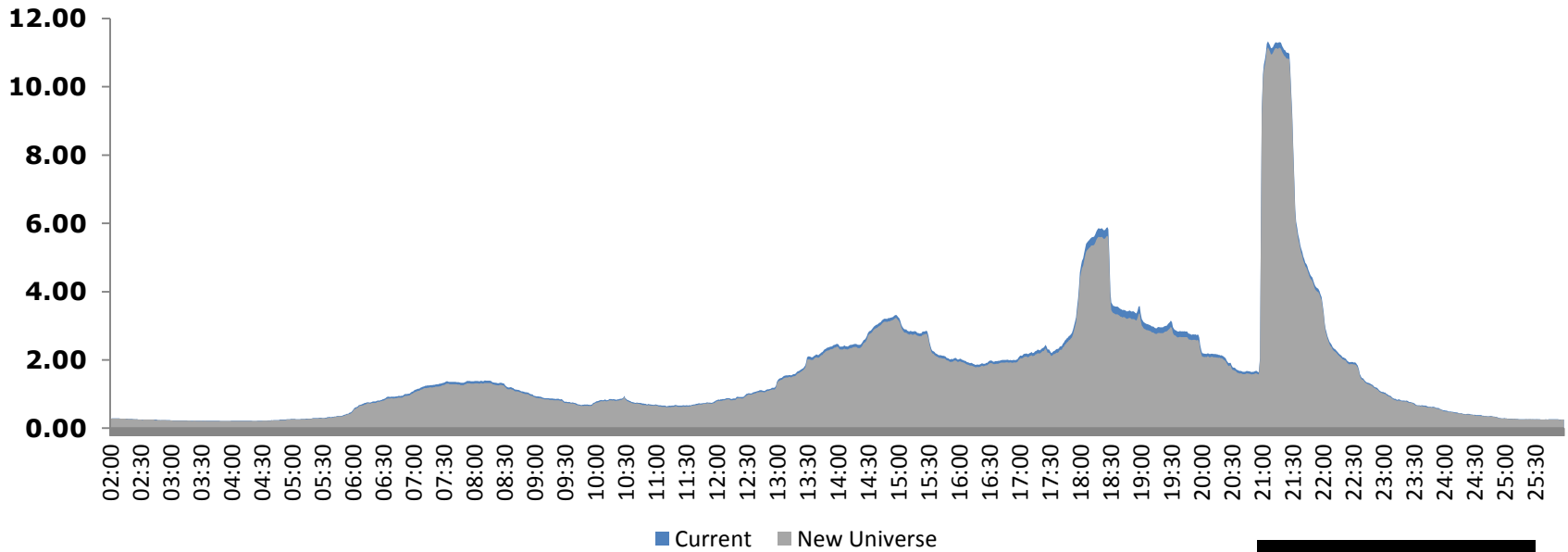
# SABC 1...



SOURCE: 17 Jul - 30 Jul 17



# SABC 2...

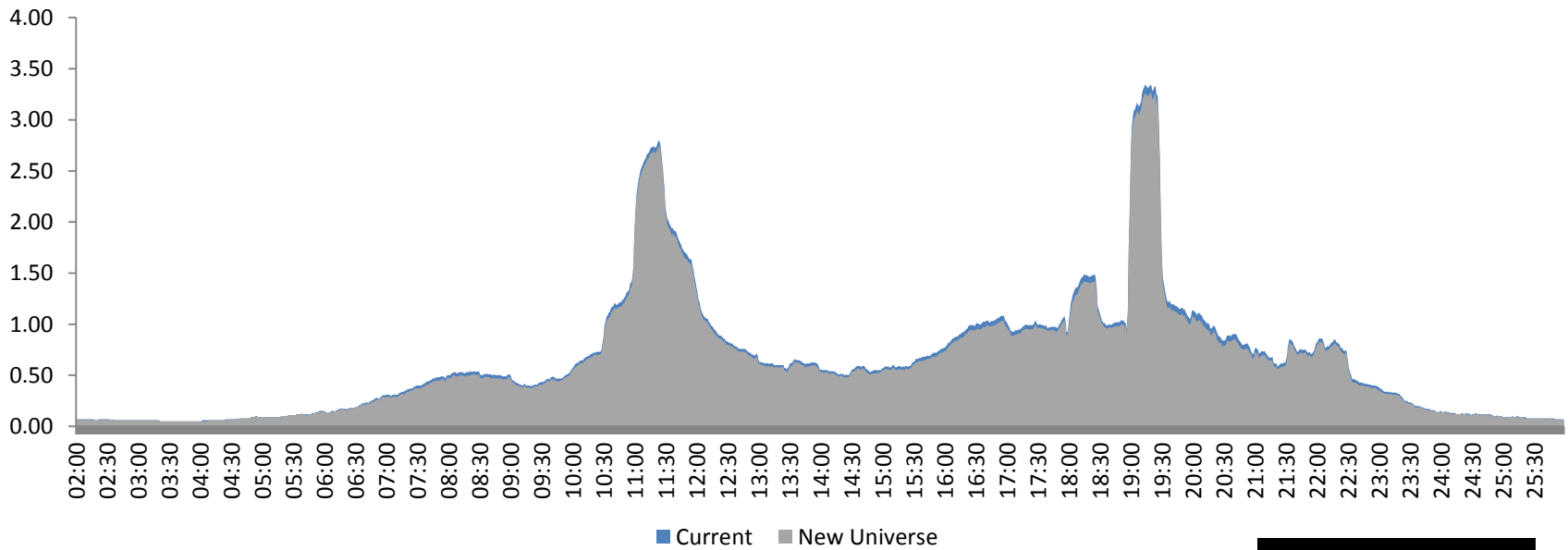


SOURCE: 17 Jul - 30 Jul 17





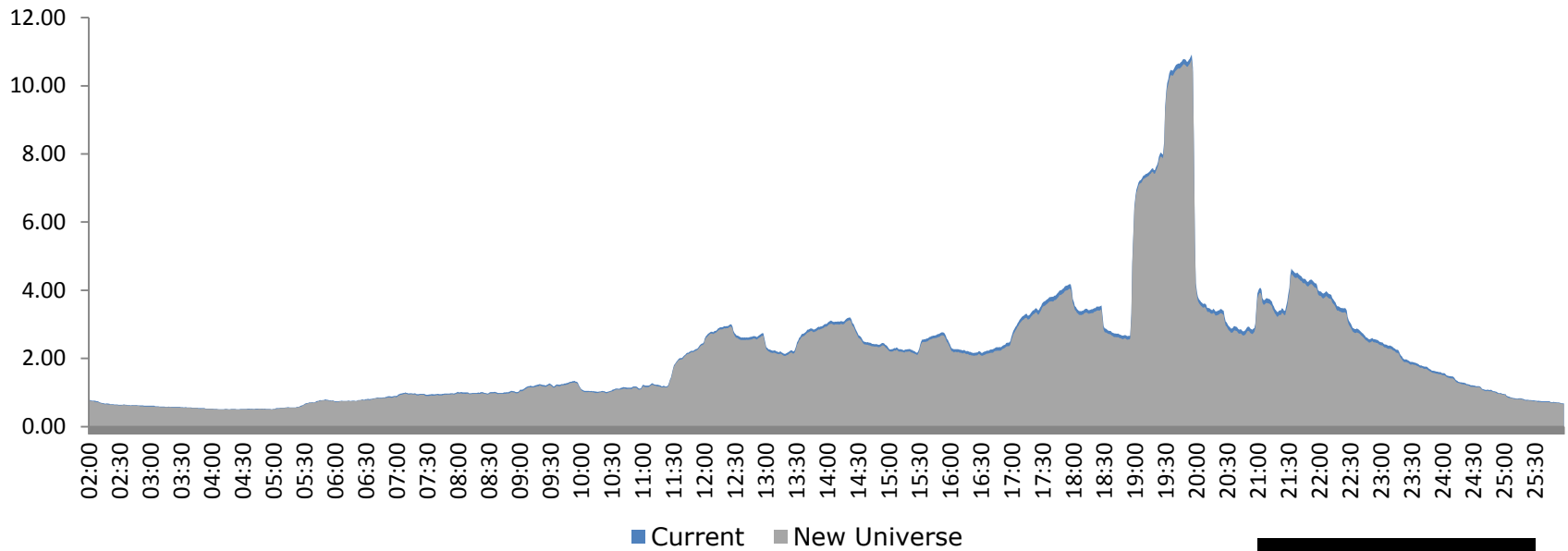
# SABC 3...



SOURCE: 17 Jul - 30 Jul 17



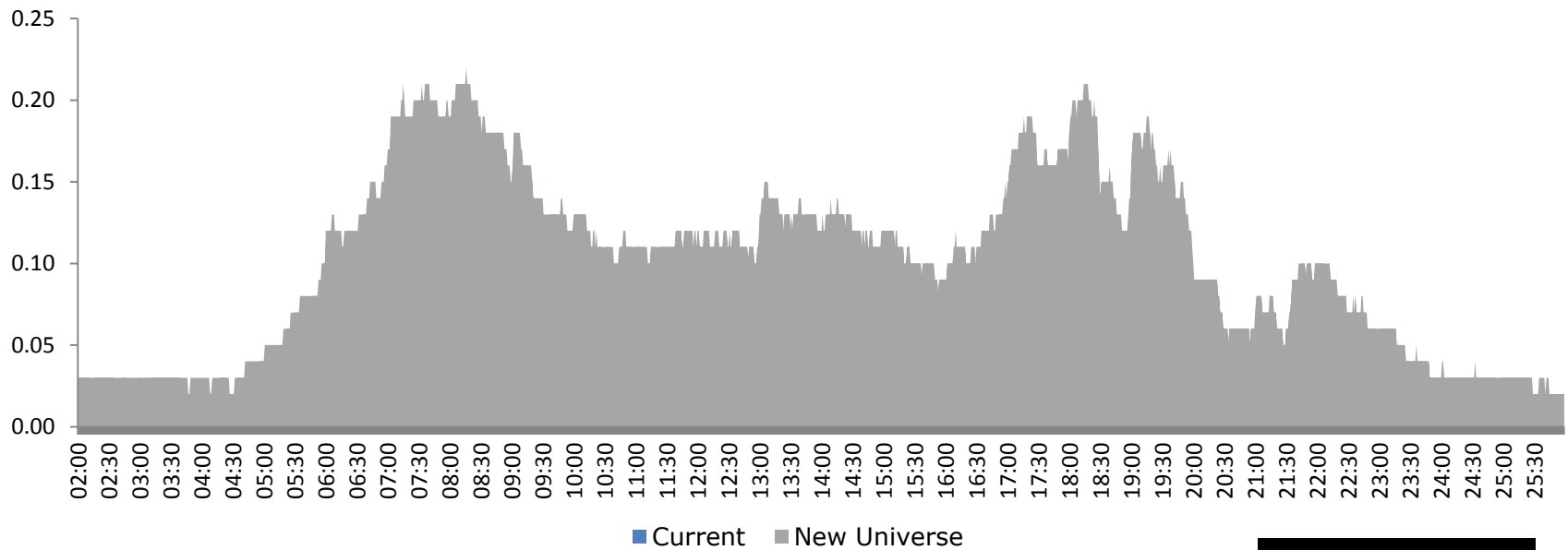
# eTV...



SOURCE: 17 Jul - 30 Jul 17



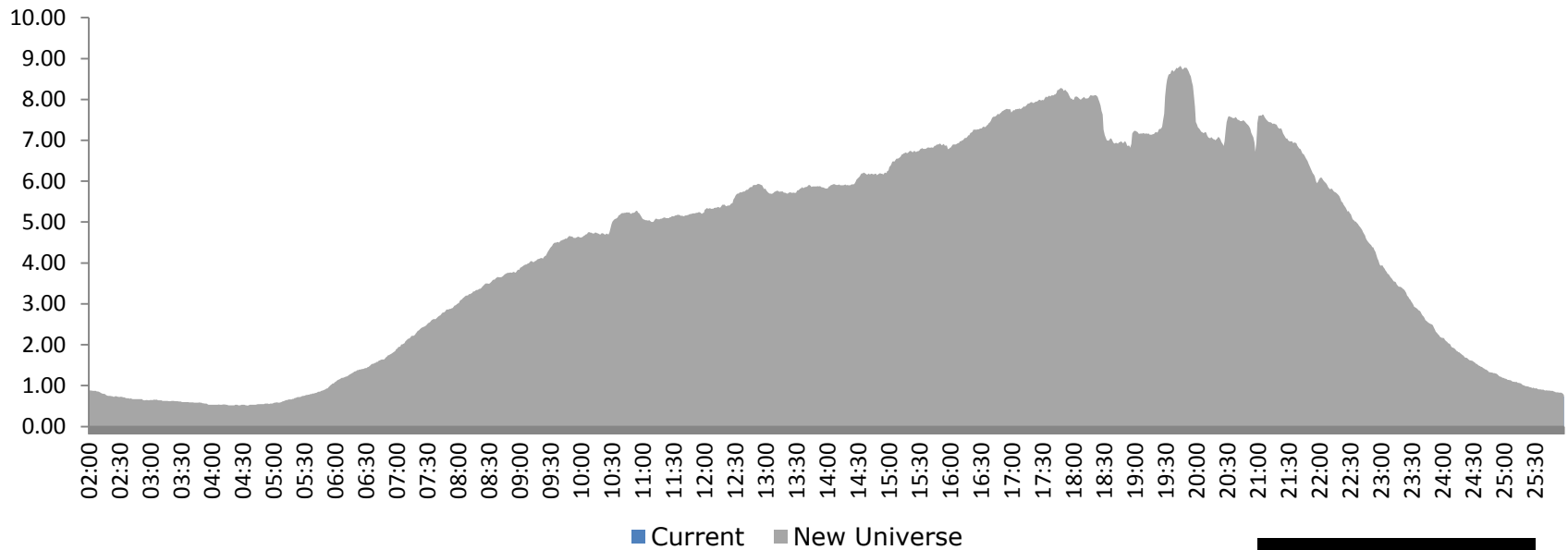
# eNCA...



SOURCE: 17 Jul - 30 Jul 17



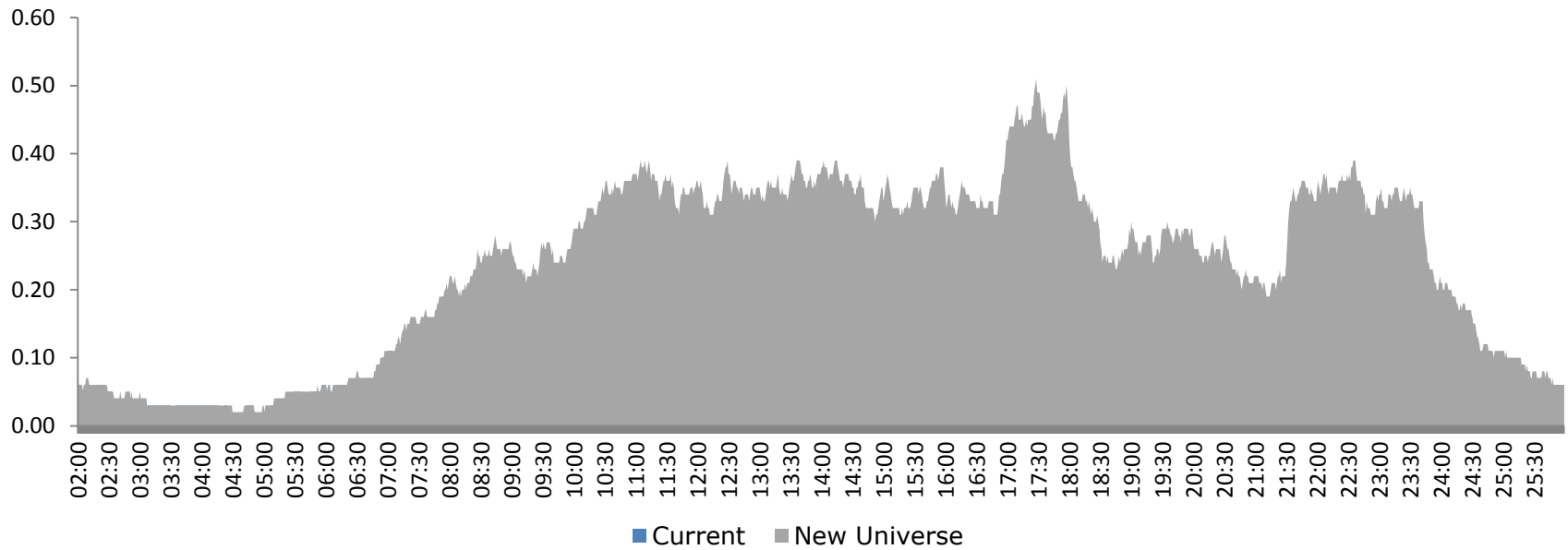
# DStv...



SOURCE: 17 Jul - 30 Jul 17



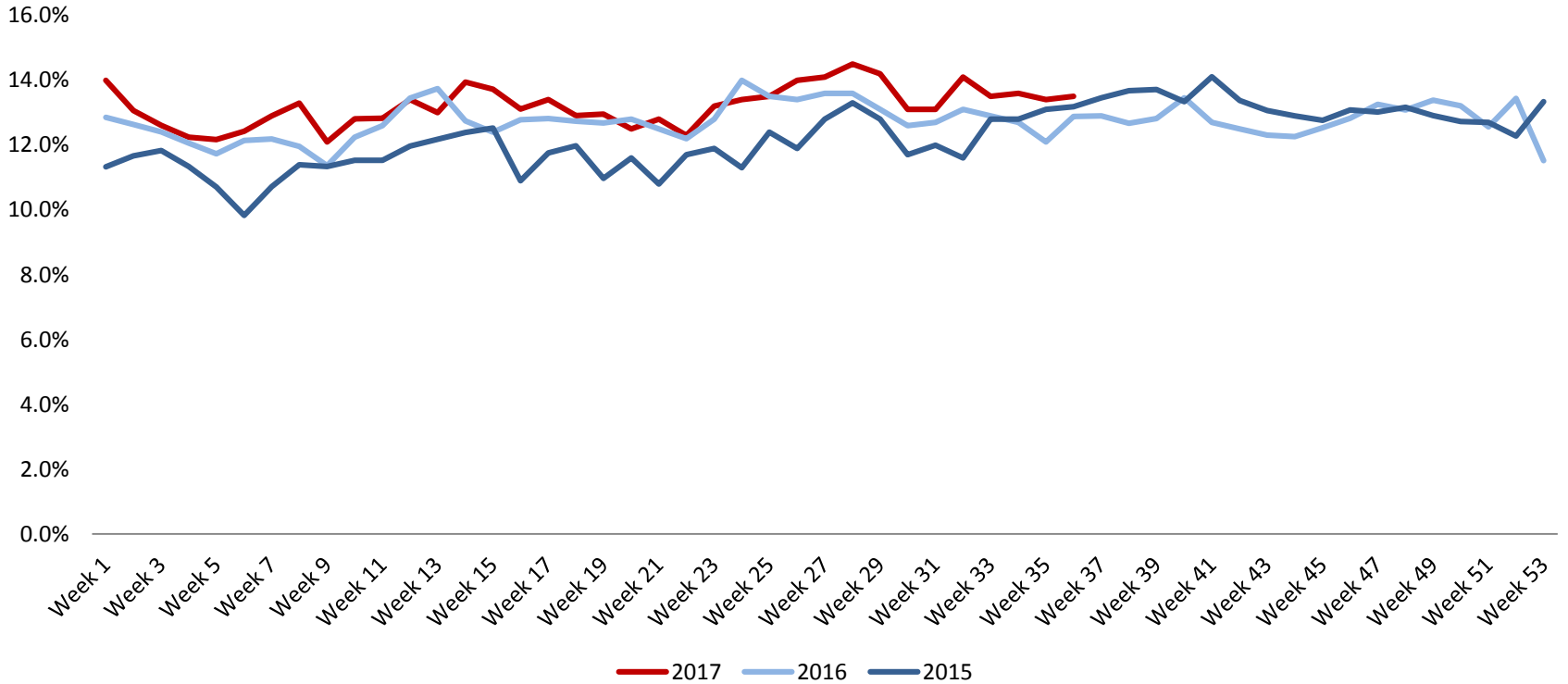
# MTV...





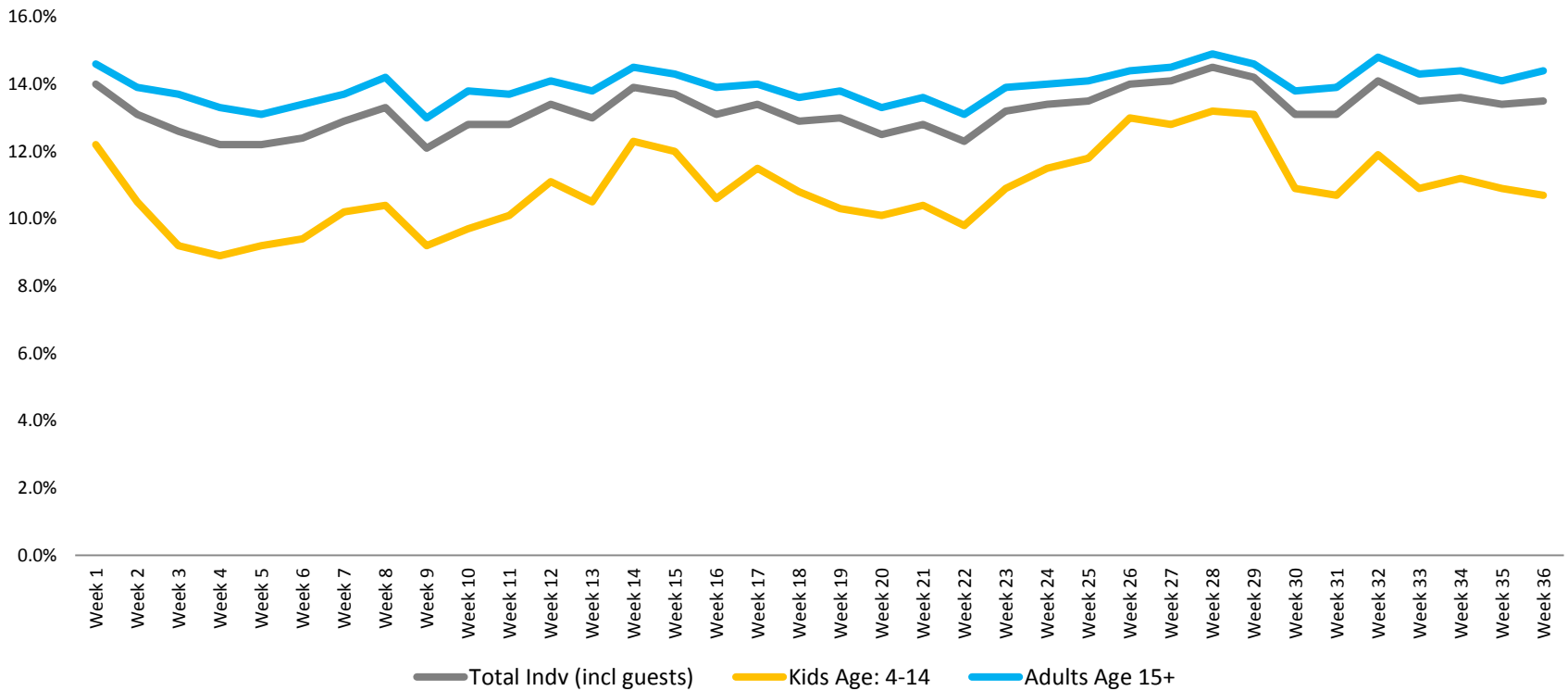
# TOTAL TV- ALL DAY

TOTAL TV: ALL DAY - ALL INDIVIDUALS



# TOTAL TV-ALL DAY

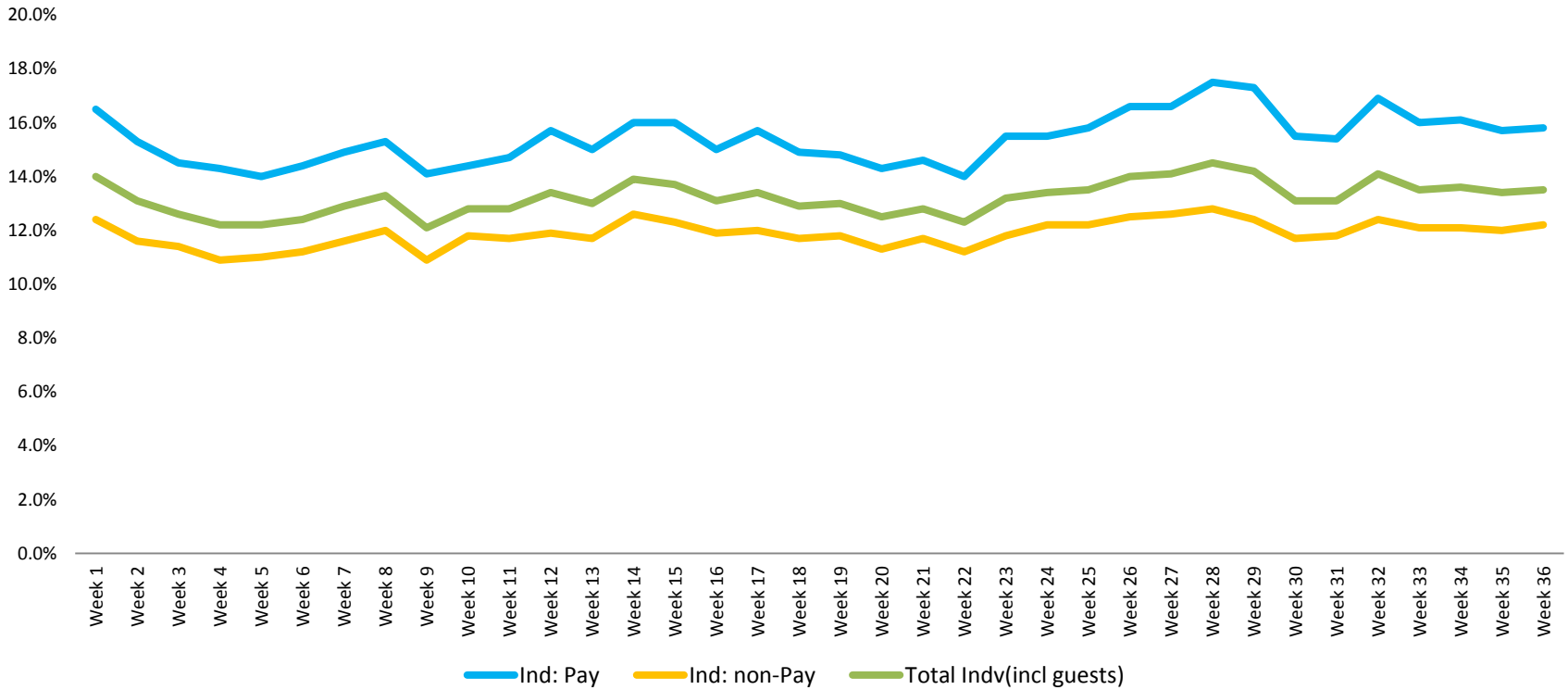
TOTAL TV: ALL DAY BY ADULTS/KIDS





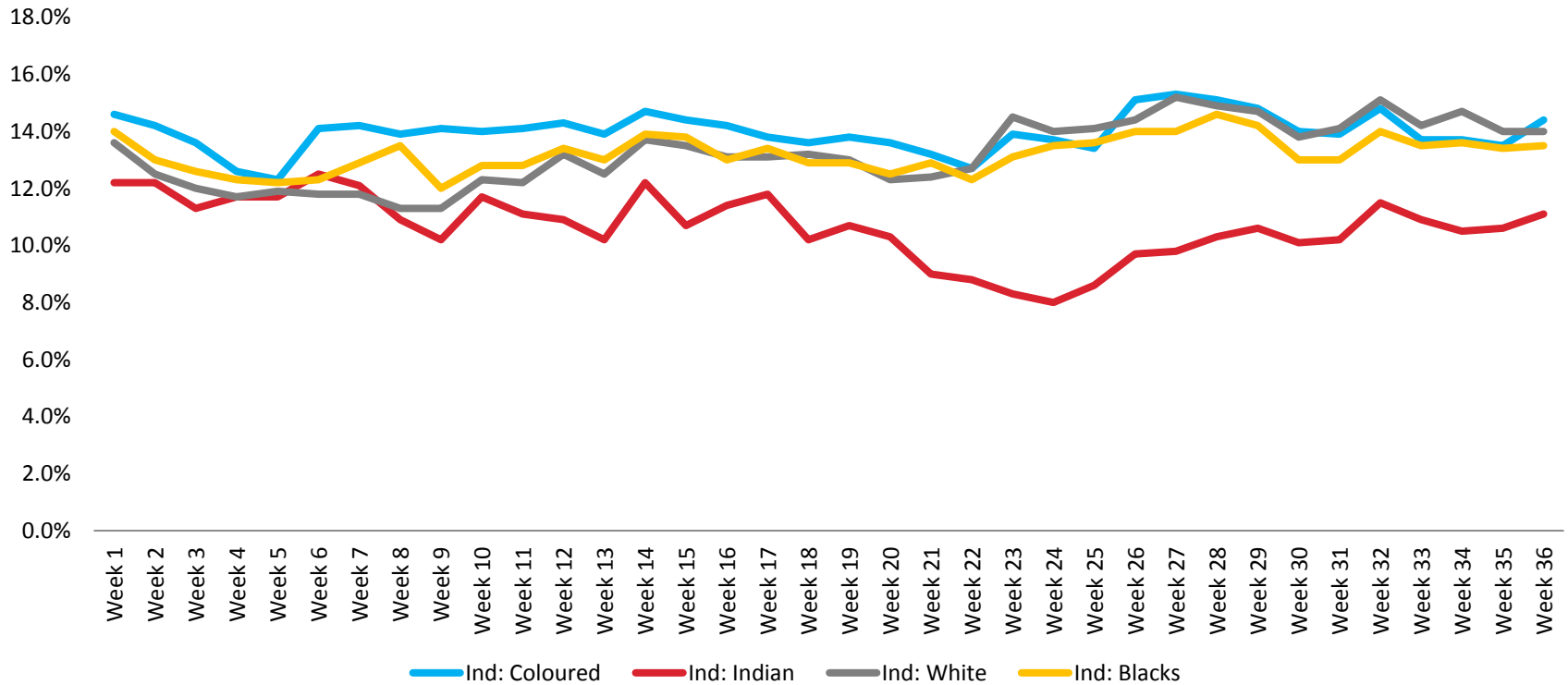
# TOTAL TV-ALL DAY

TOTAL IND: ALL DAY PAY VS NO PAY



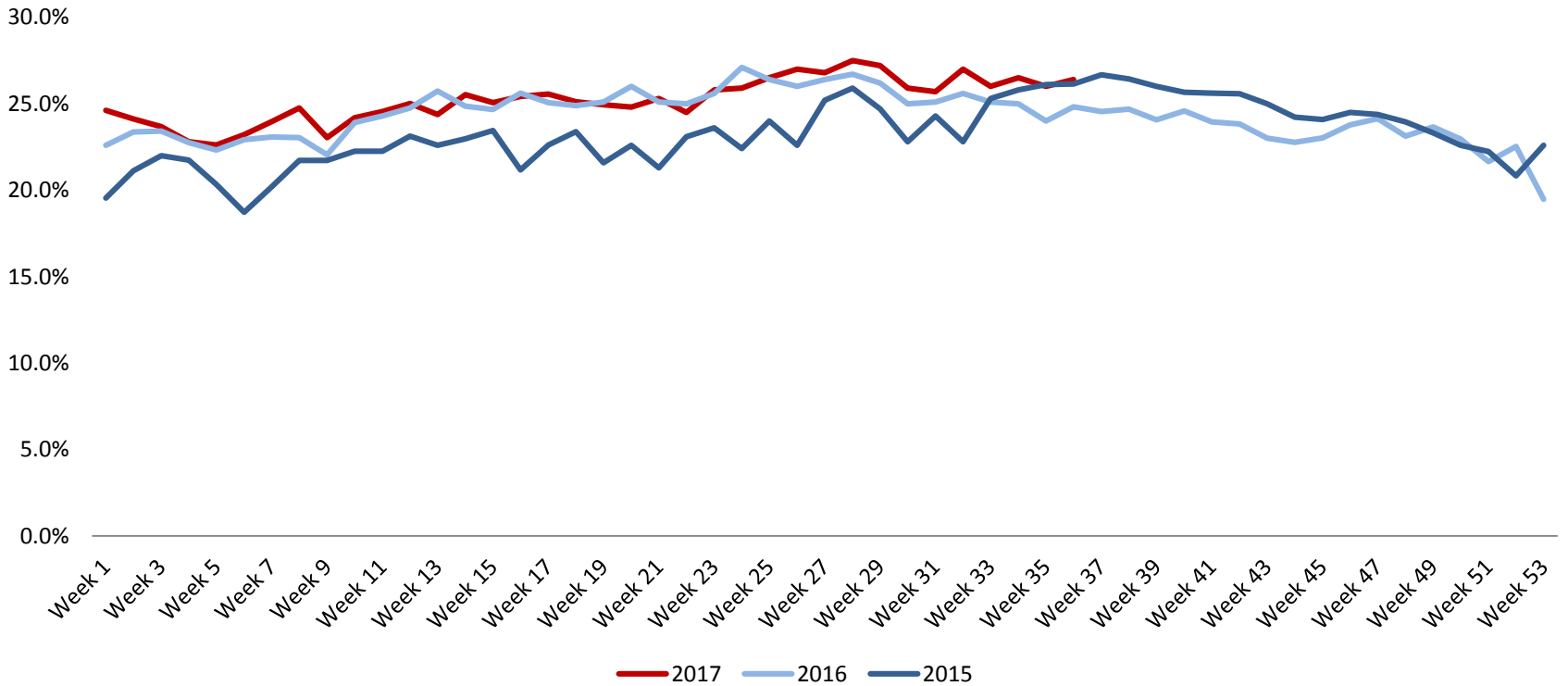
# TOTAL TV-ALL DAY

TOTAL TV: ALL DAY BY RACE



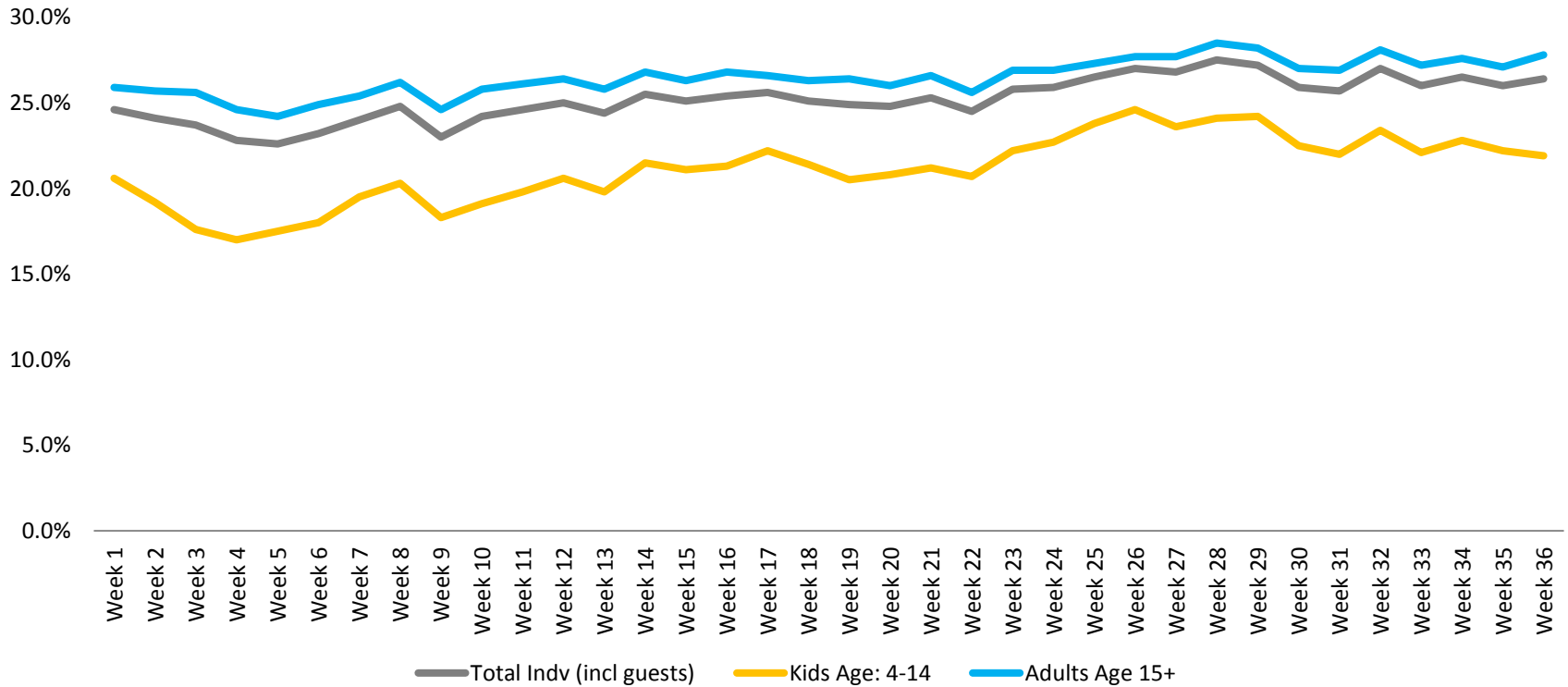
# TOTAL TV- PRIME TIME

TOTAL TV: PRIME TIME - ALL INDIVIDUALS



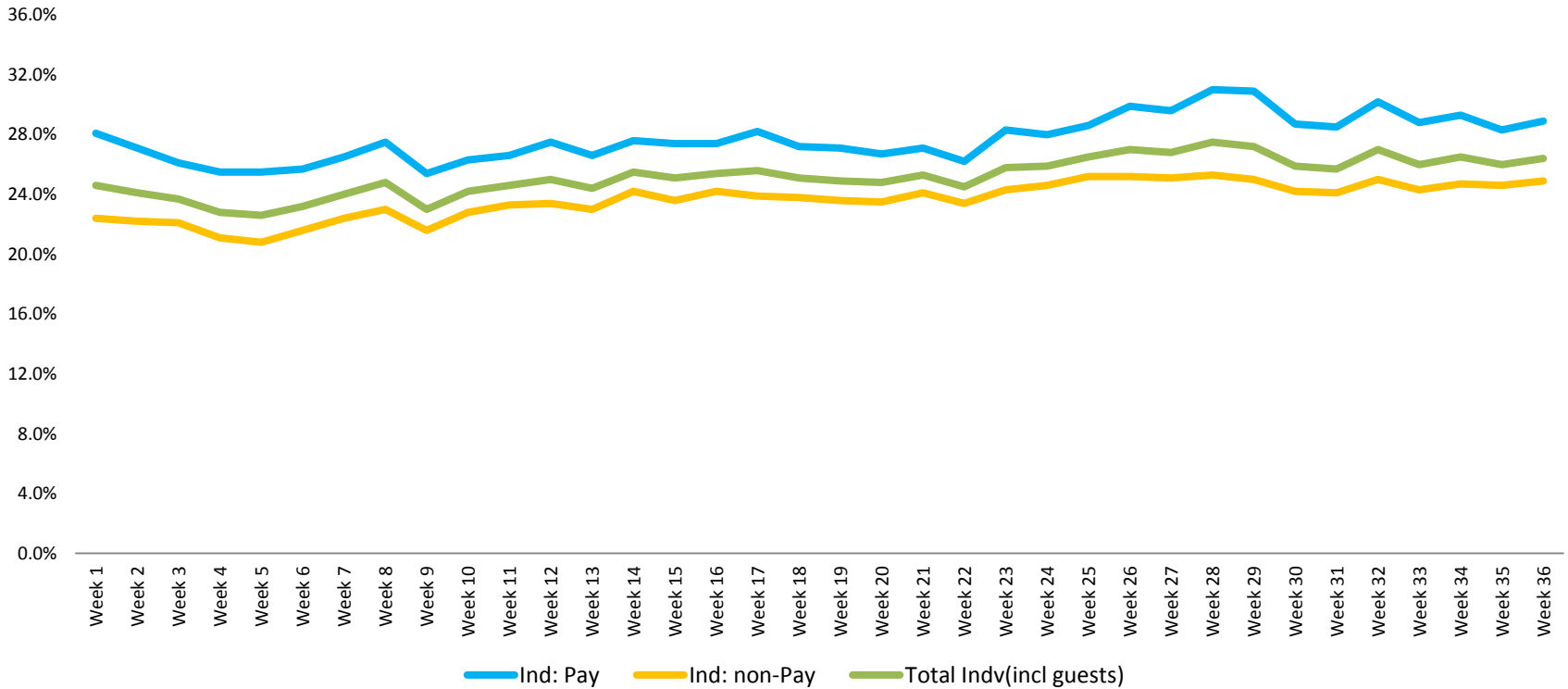
# TOTAL TV- PRIME TIME

TOTAL TV: PRIME TIME ADULTS/KIDS



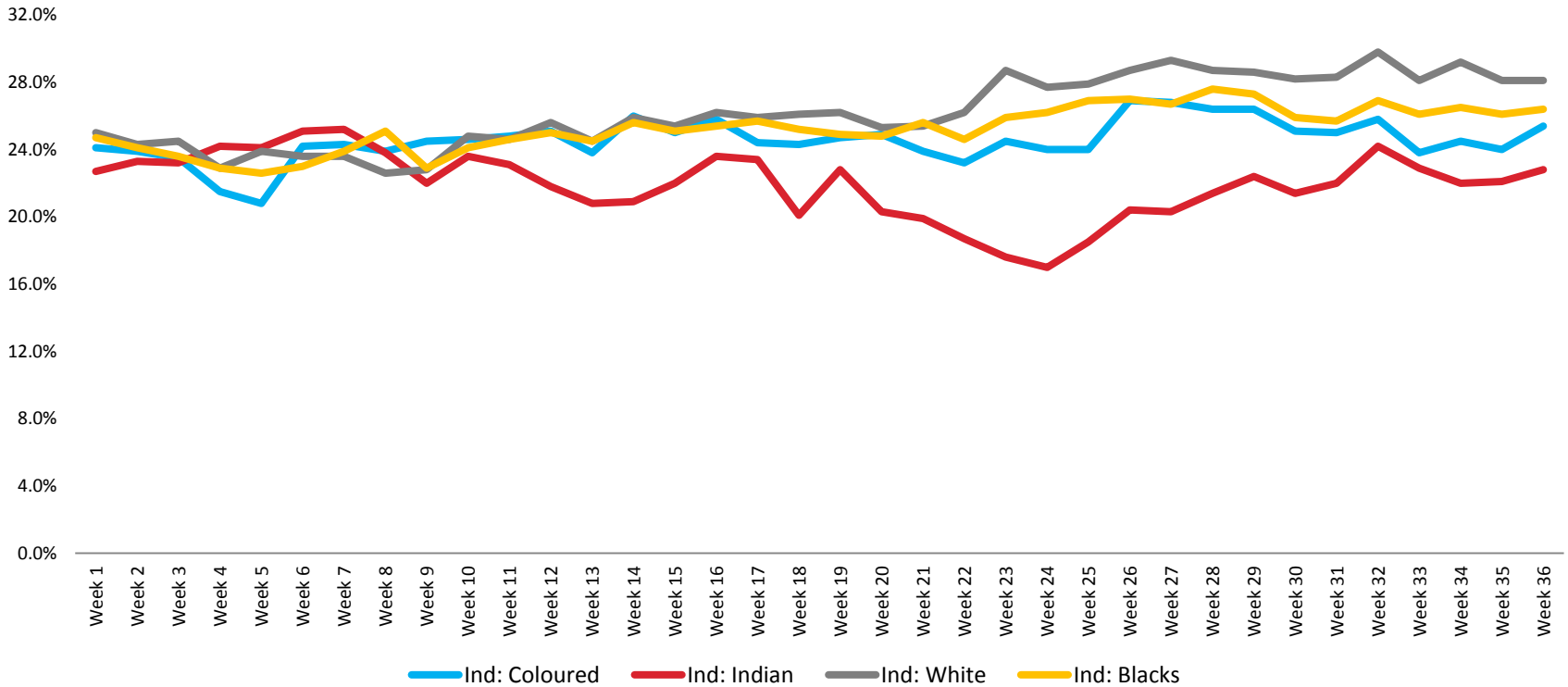
# TOTAL TV- PRIME TIME

TOTAL IND: PRIME TIME PAY VS NO PAY



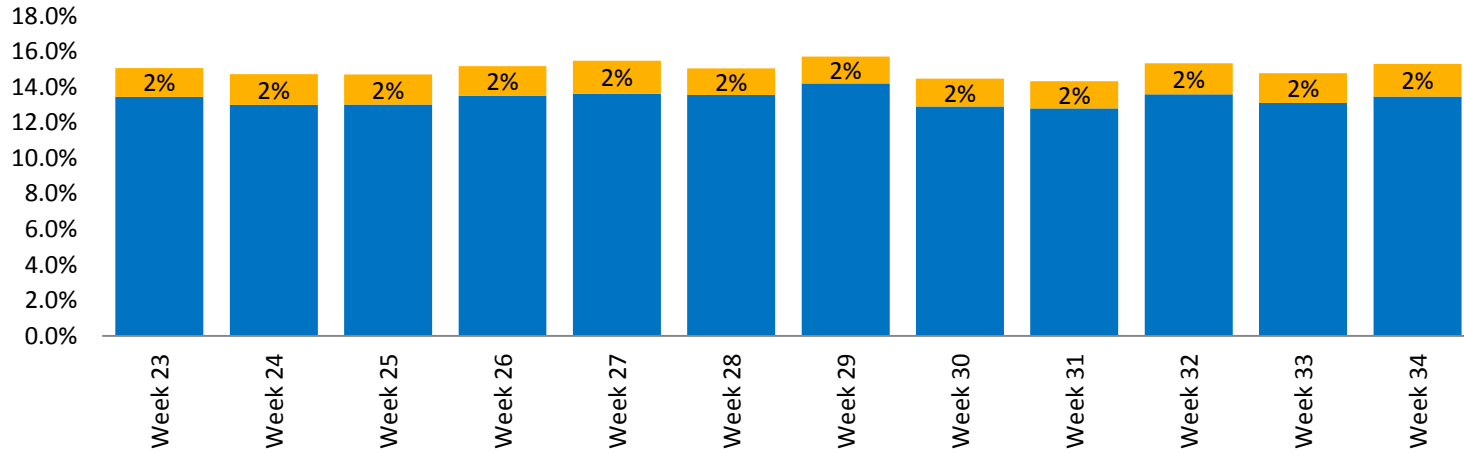
# TOTAL TV- PRIME TIME

TOTAL TV: PRIME TIME BY RACE

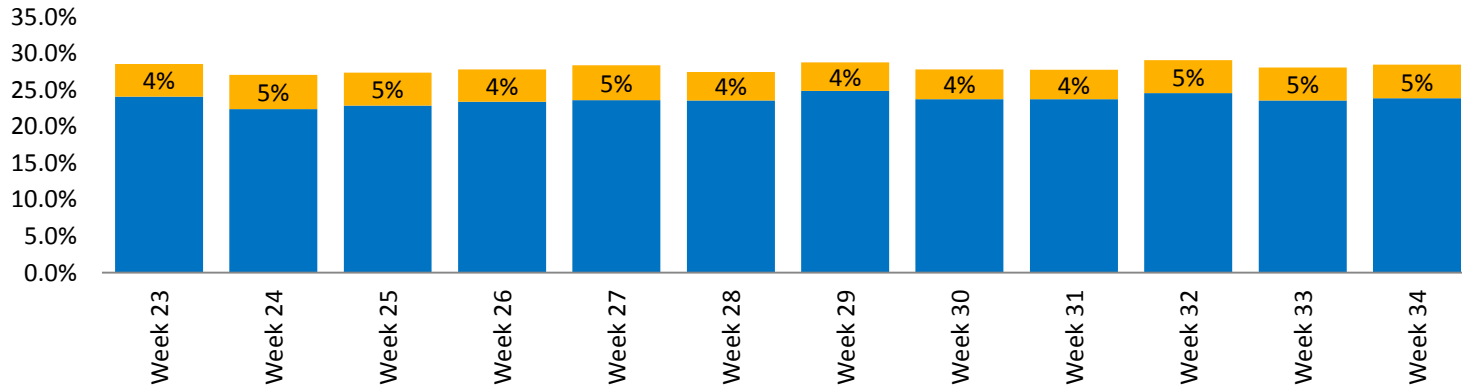


# TVR% TIME SHIFTED VIEWING

PVR: ALL DAY



PVR: PRIME TIME



■ Live ■ Consolidated(+7days)

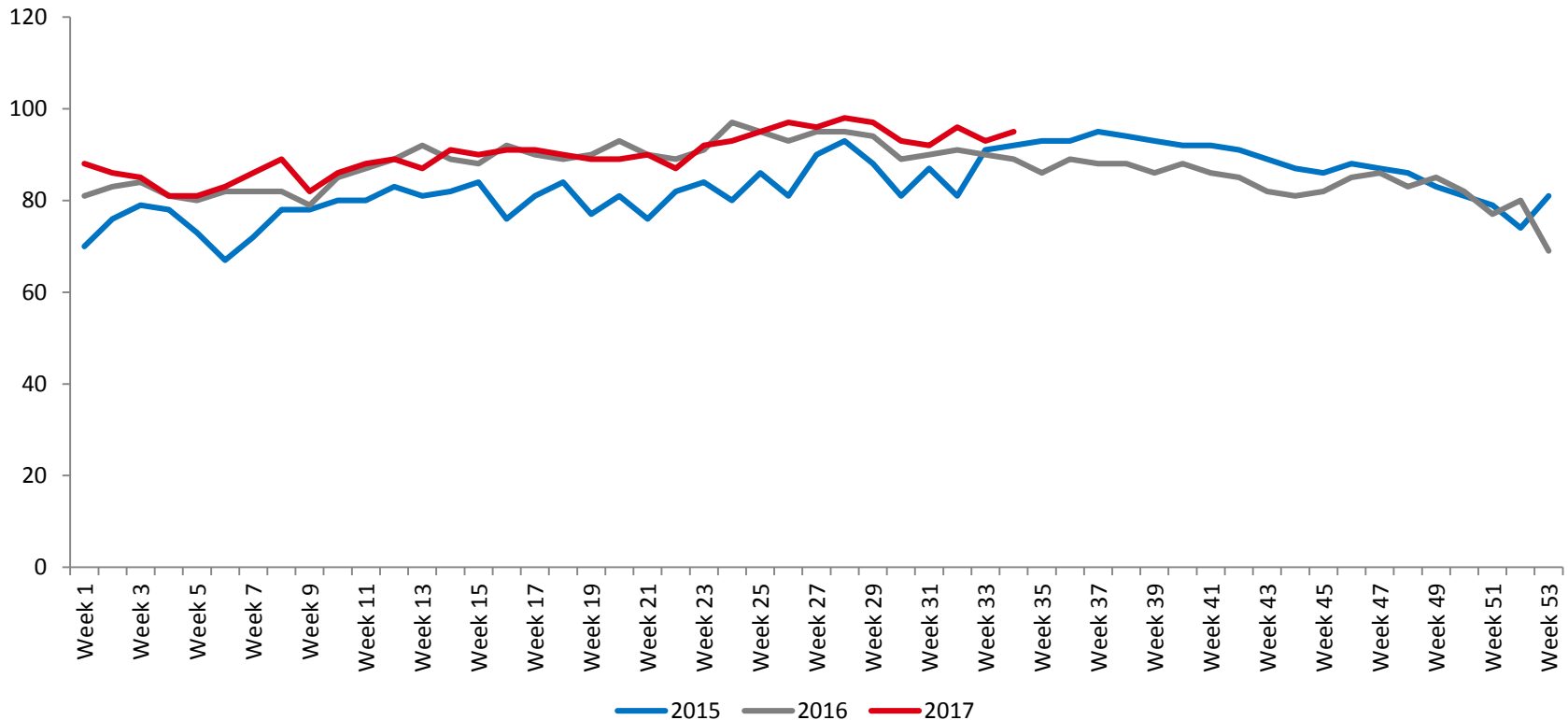


# AVERAGE TIME VIEWED- ATV (MINUTES)

- 53 Weeks



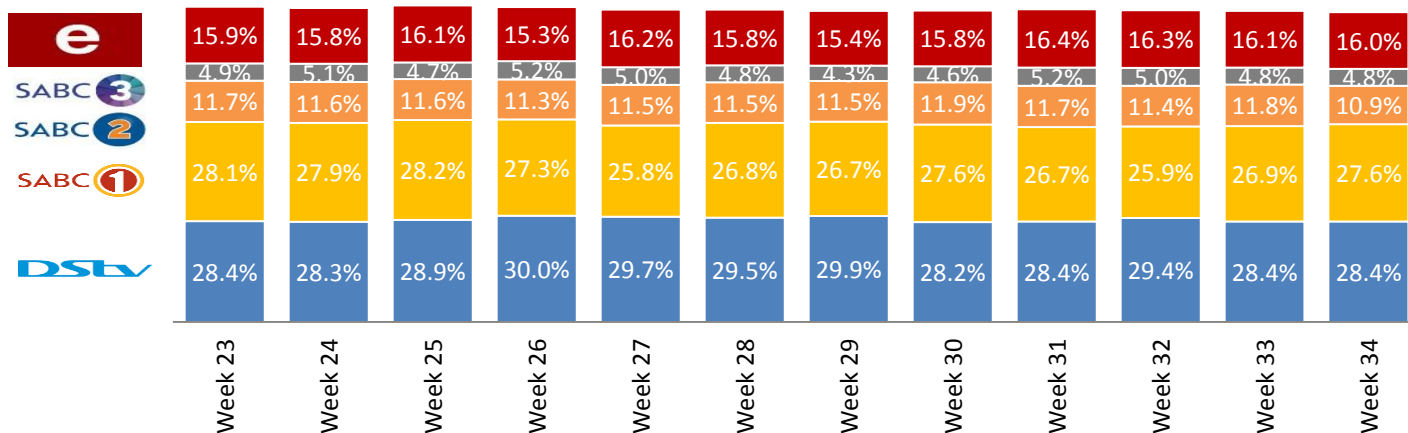
AVERAGE TIME VIEWED PRIME TIME



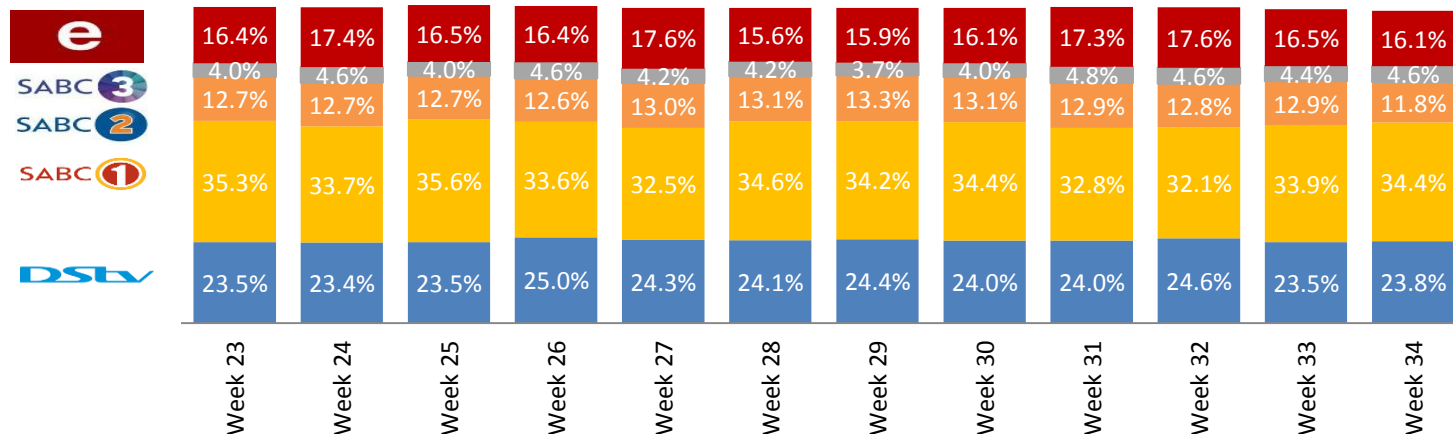


# CHANNEL SHARE

## ALL DAY - ALL INDIVIDUALS



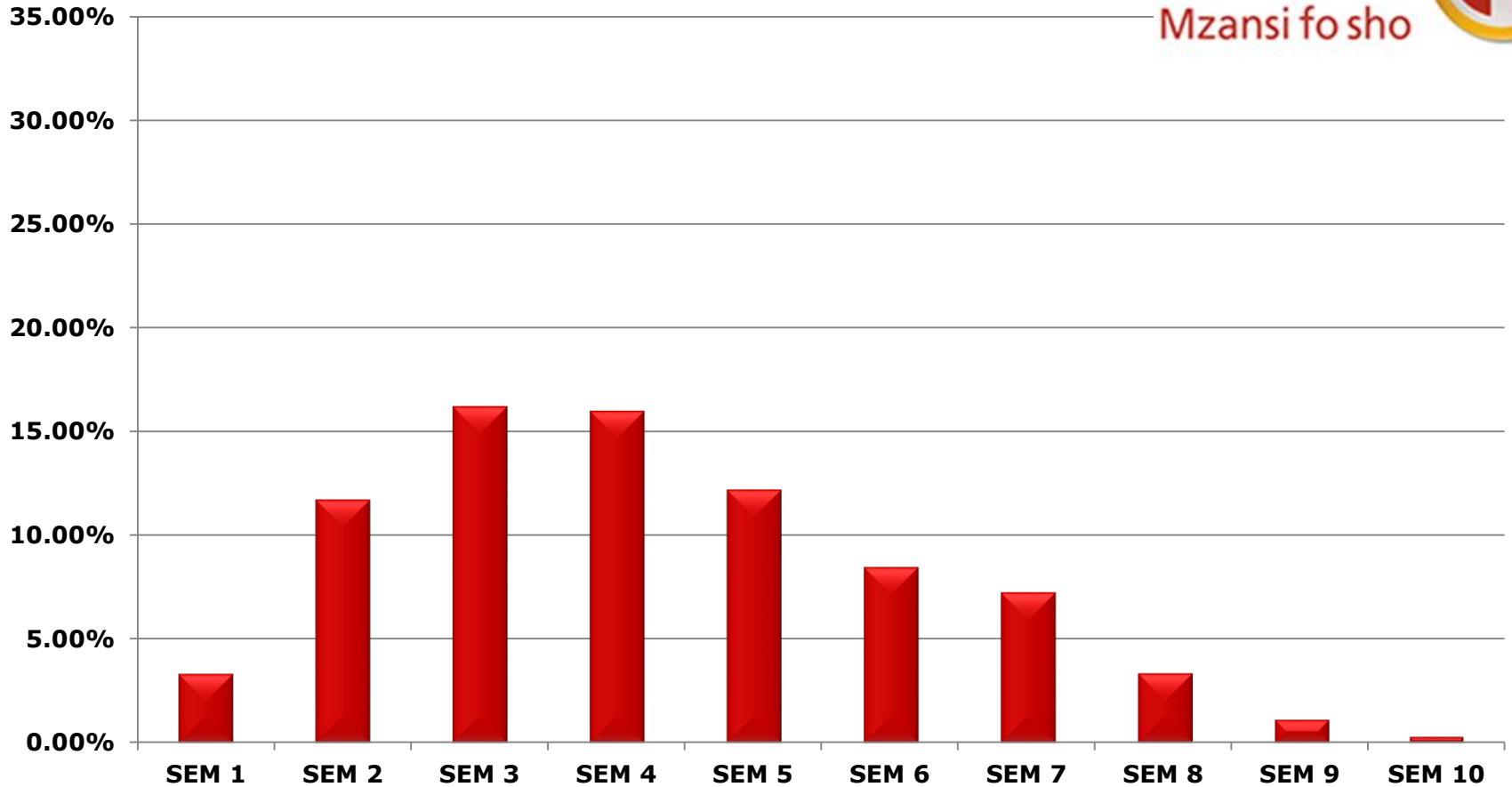
## PRIME TIME - ALL INDIVIDUALS





# SEM VIEWING PROFILE...

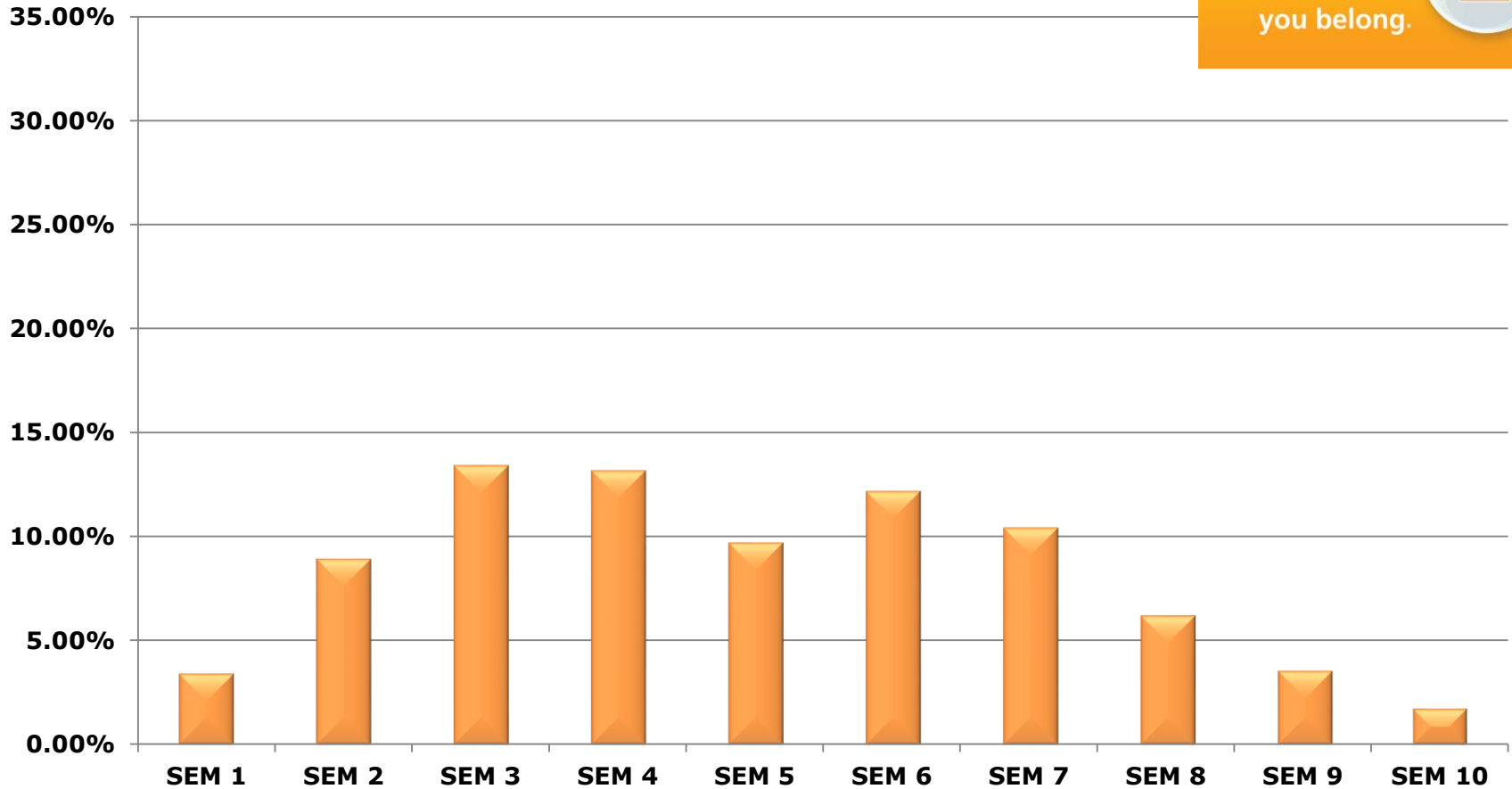
## SABC1



# SEM VIEWING PROFILE...

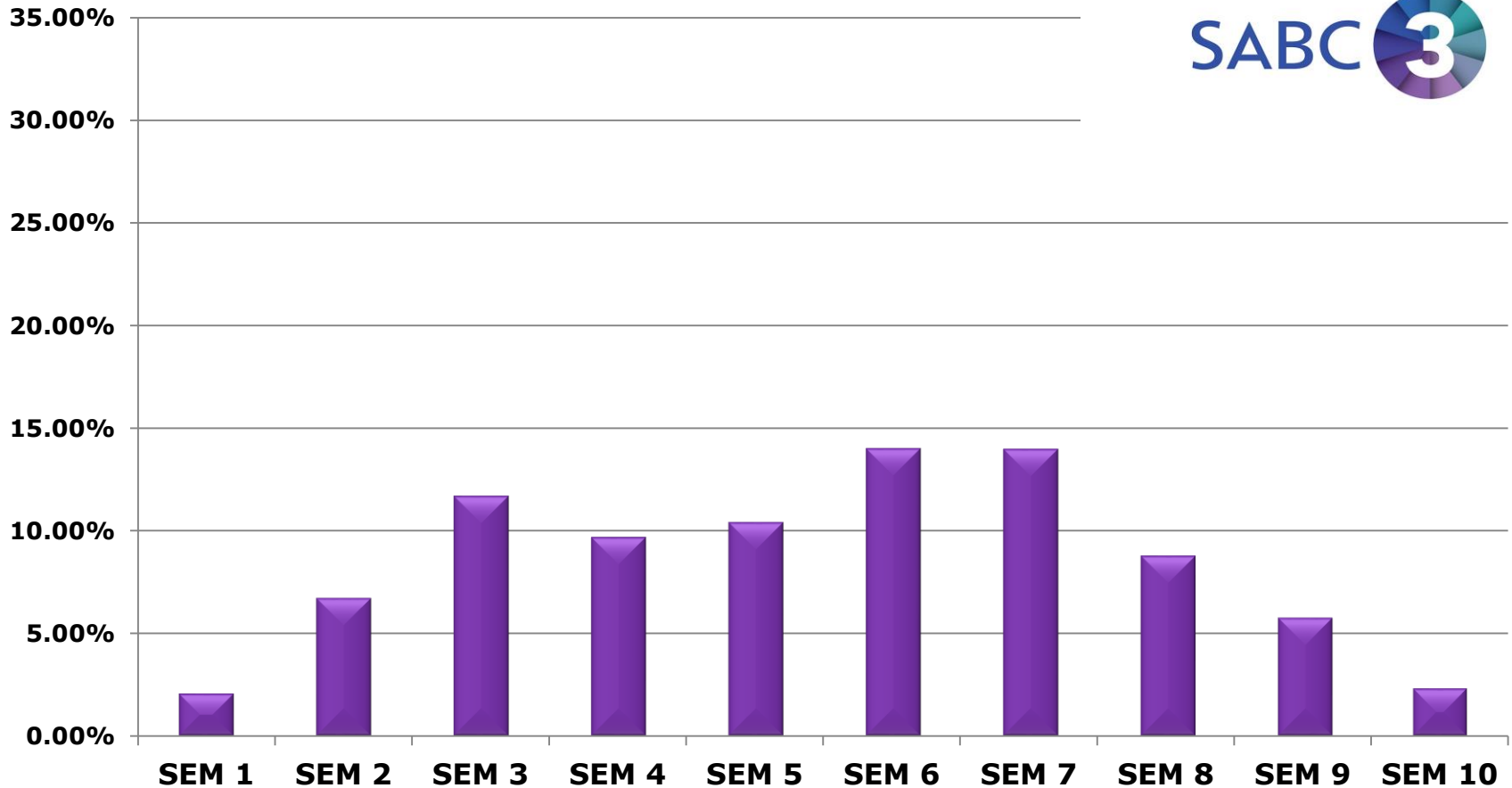
## SABC 2

SABC 2  
you belong.

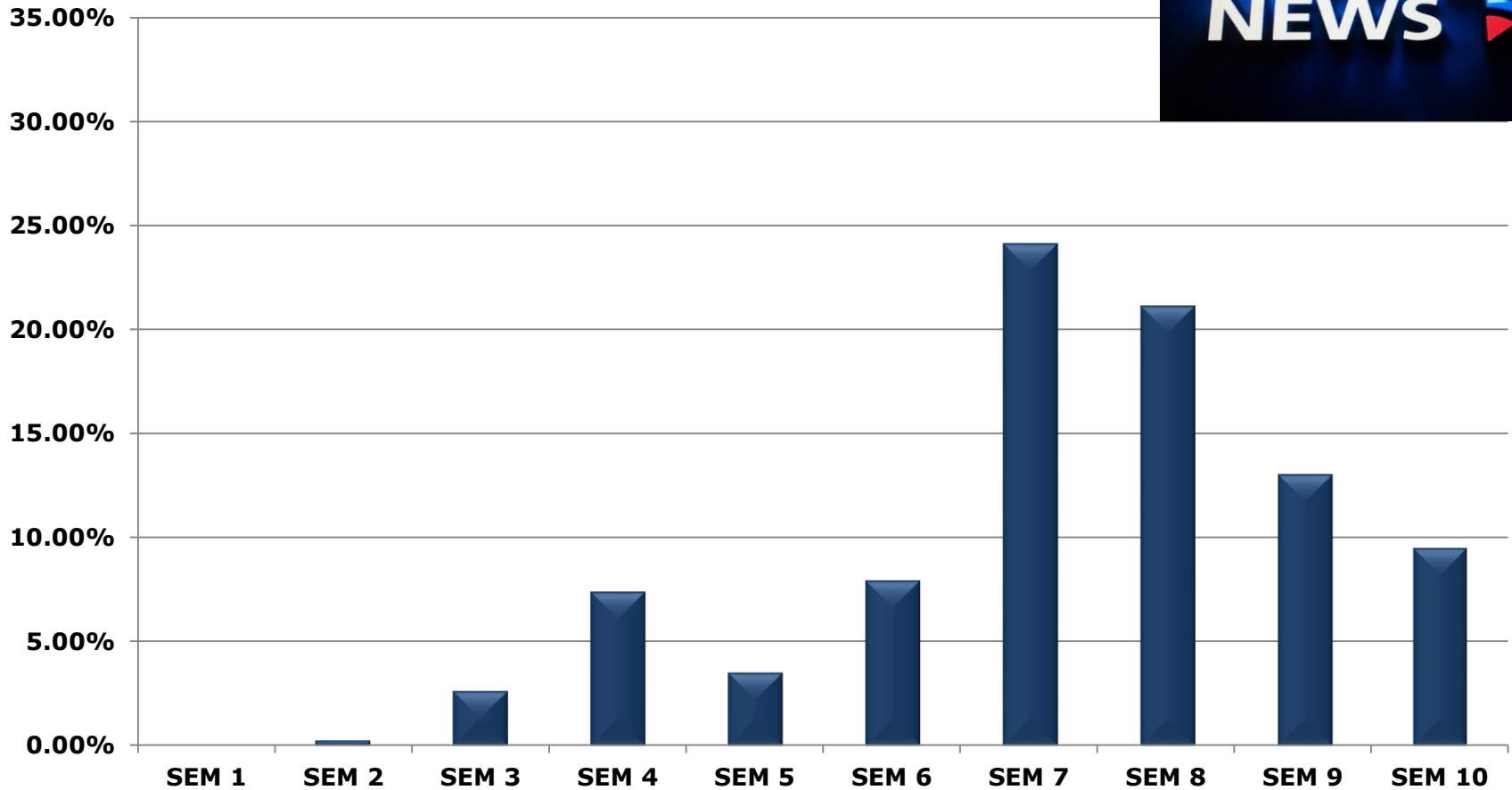


# SEM VIEWING PROFILE...

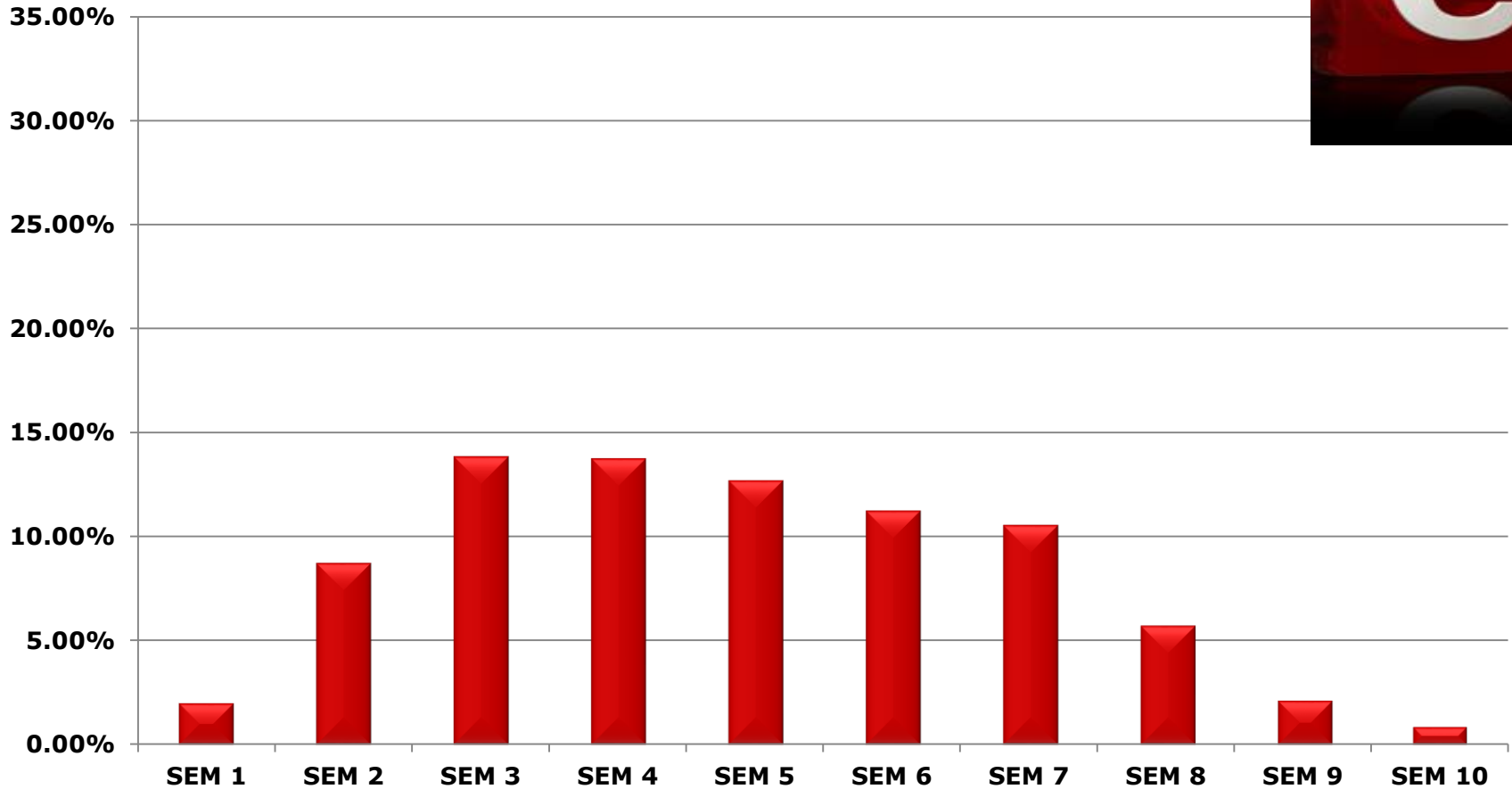
## SABC 3



# SEM VIEWING PROFILE... SABC NEWS INTERNATIONAL

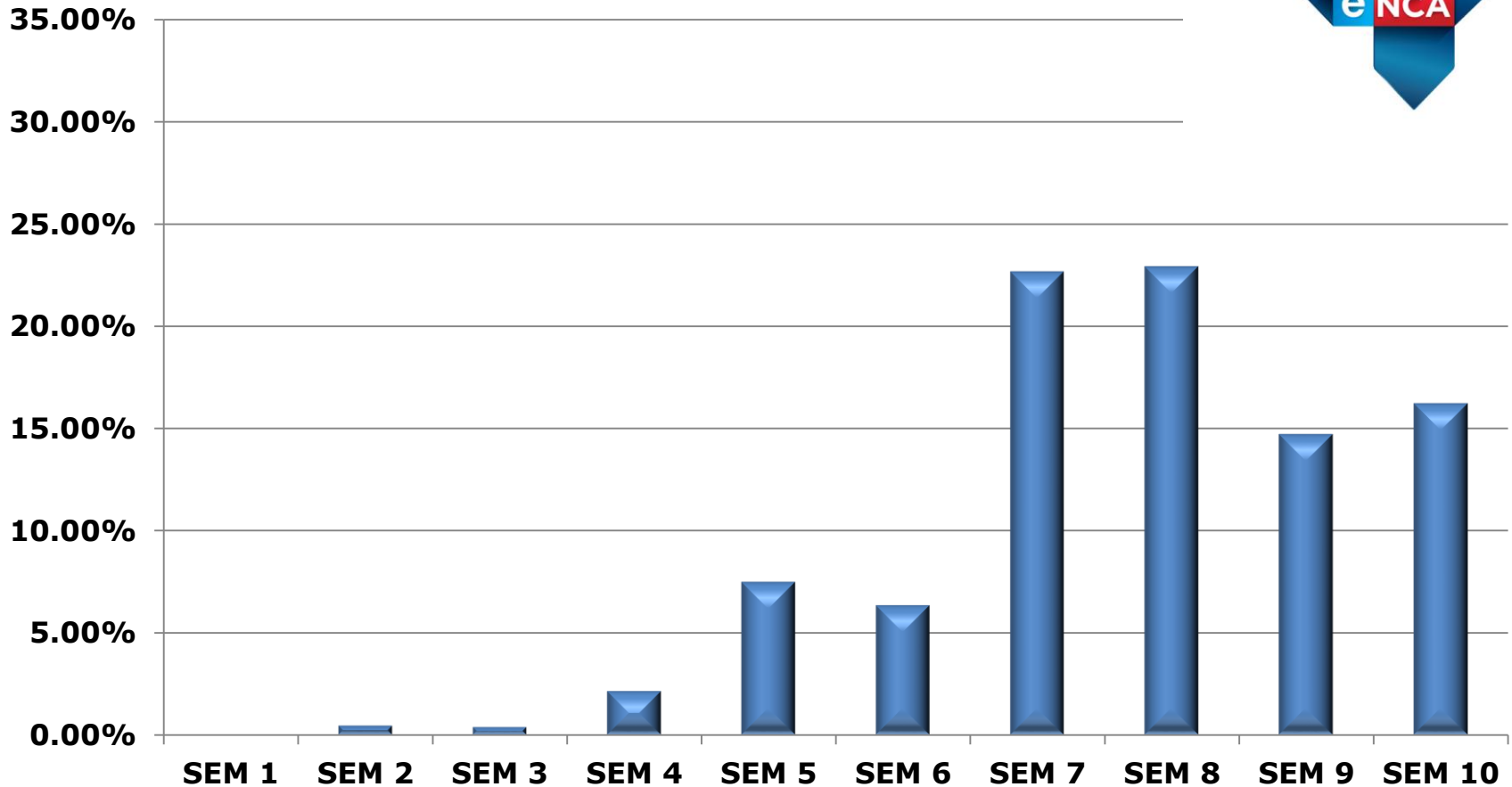


# SEM VIEWING PROFILE... ETV



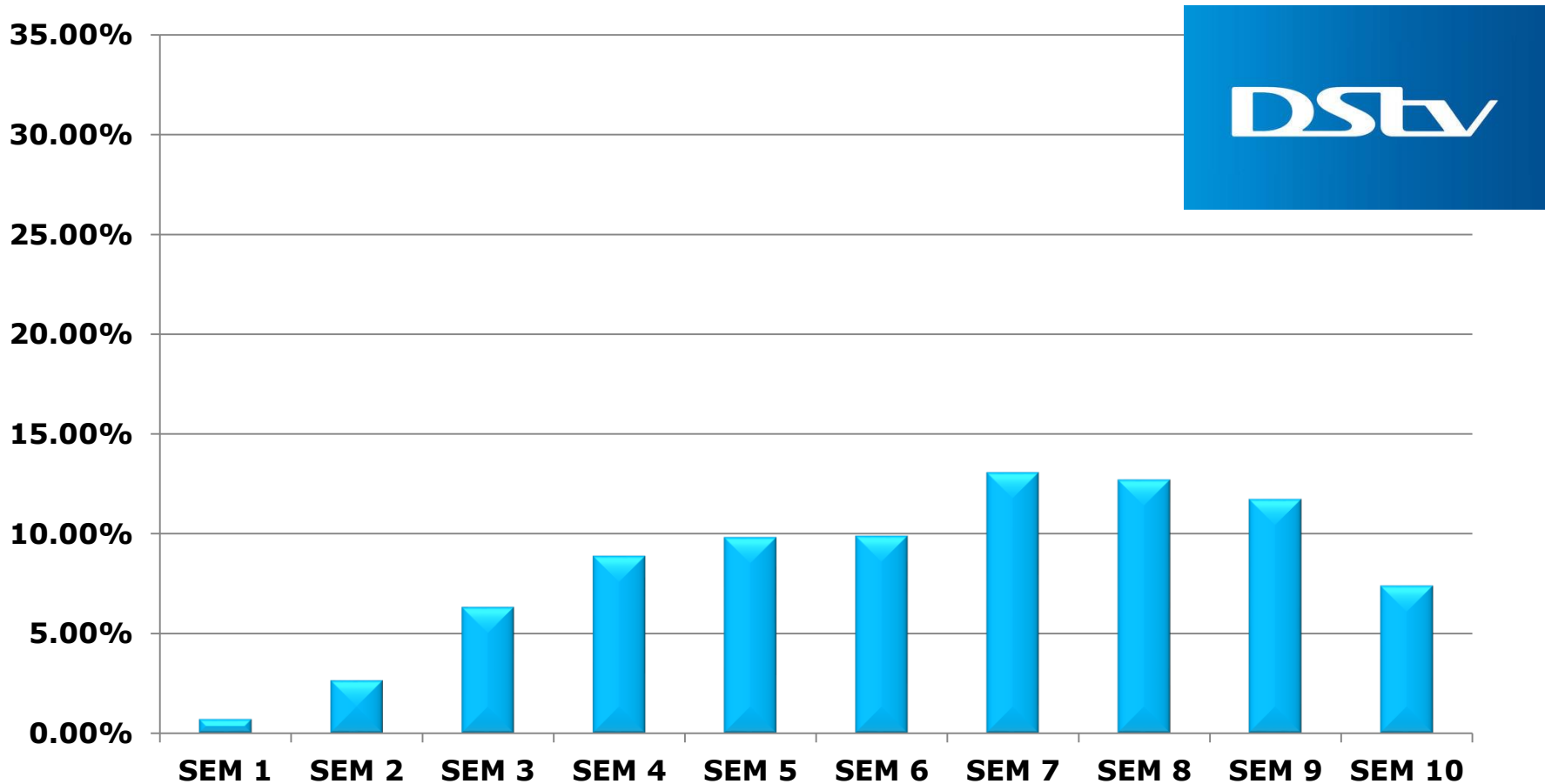
# SEM VIEWING PROFILE...

## eNCA

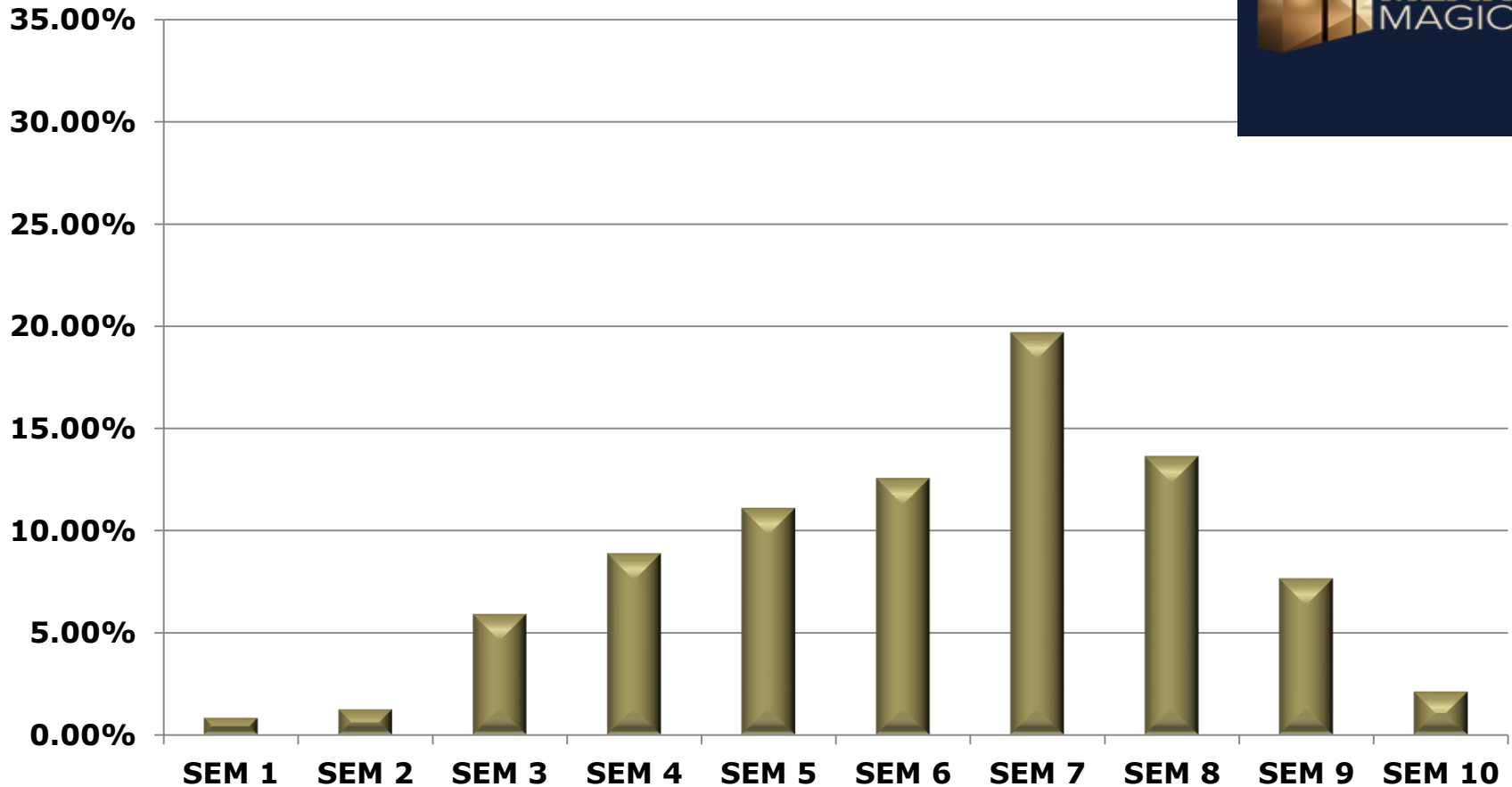




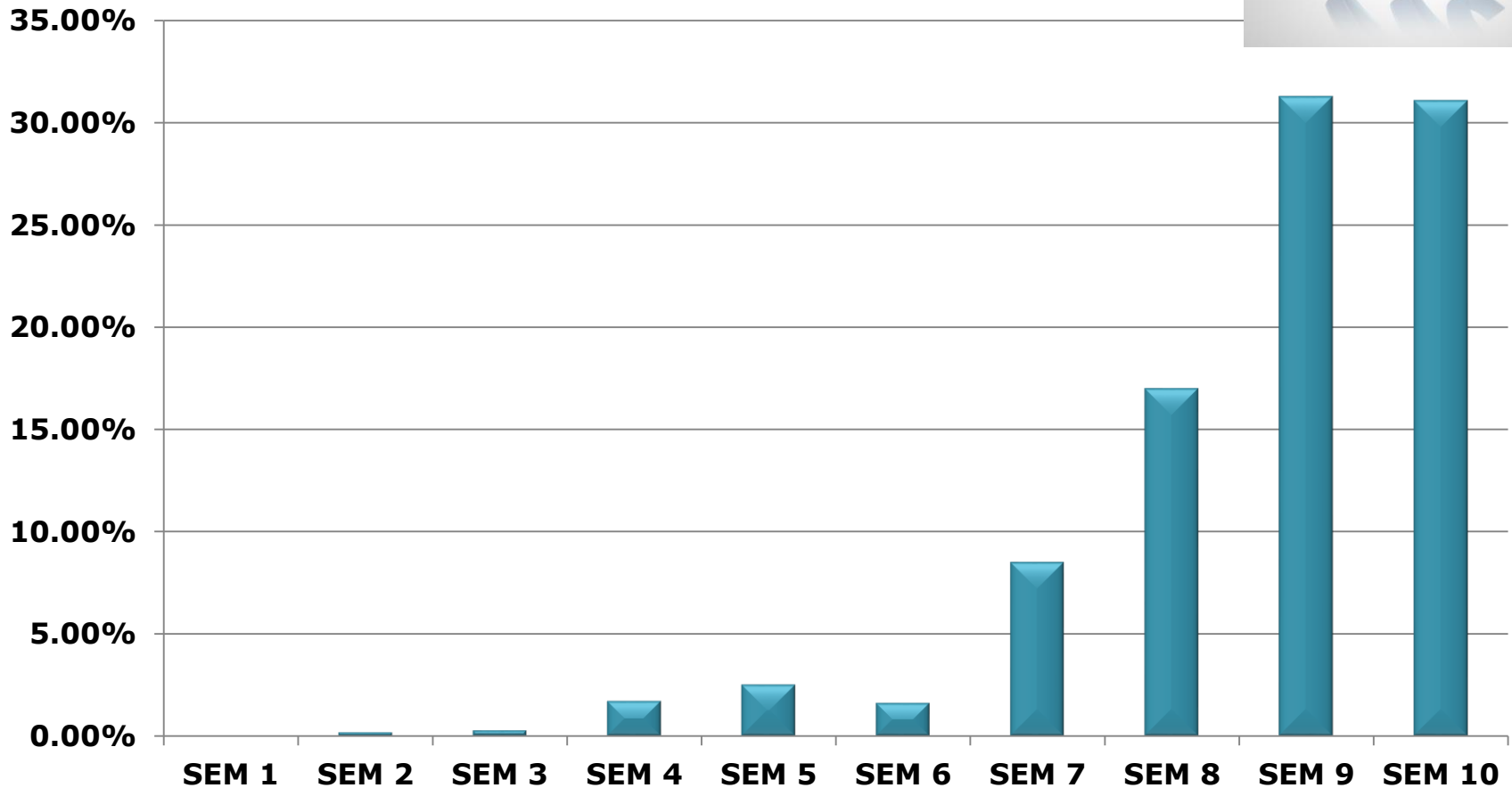
# SEM VIEWING PROFILE... DSTV COMMERCIAL



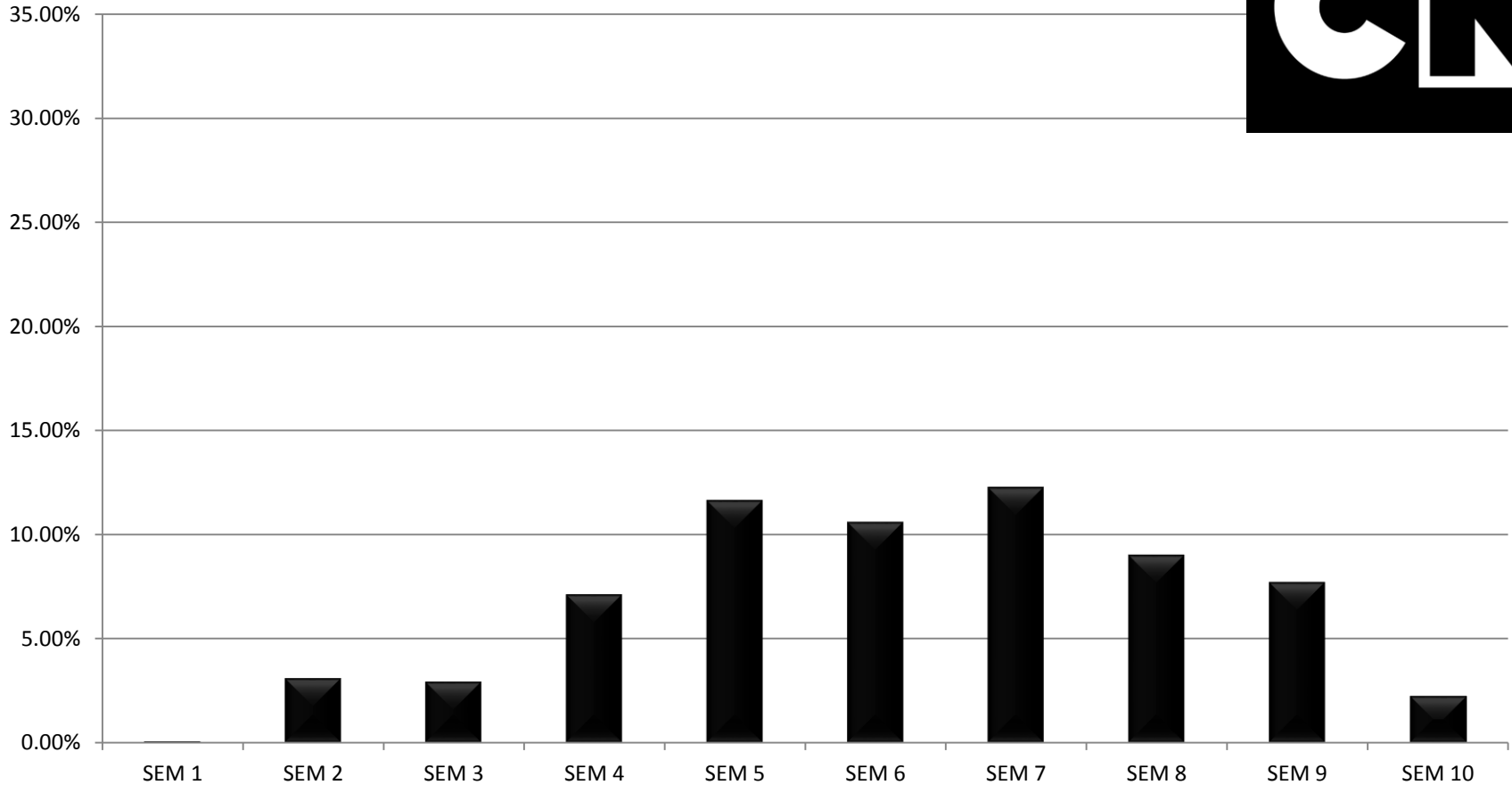
# SEM VIEWING PROFILE... MZANZI MAGIC



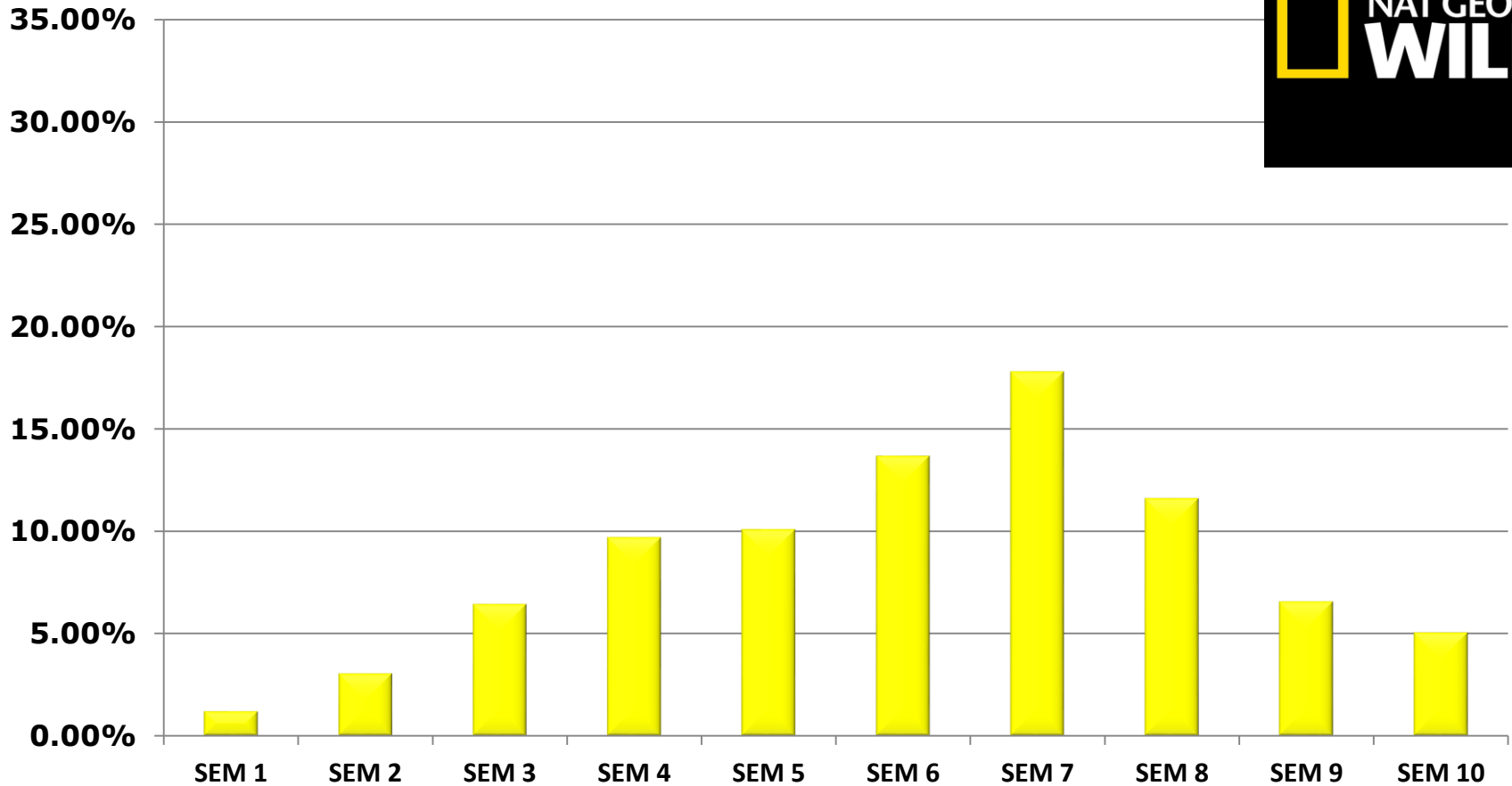
# SEM VIEWING PROFILE... M-NET



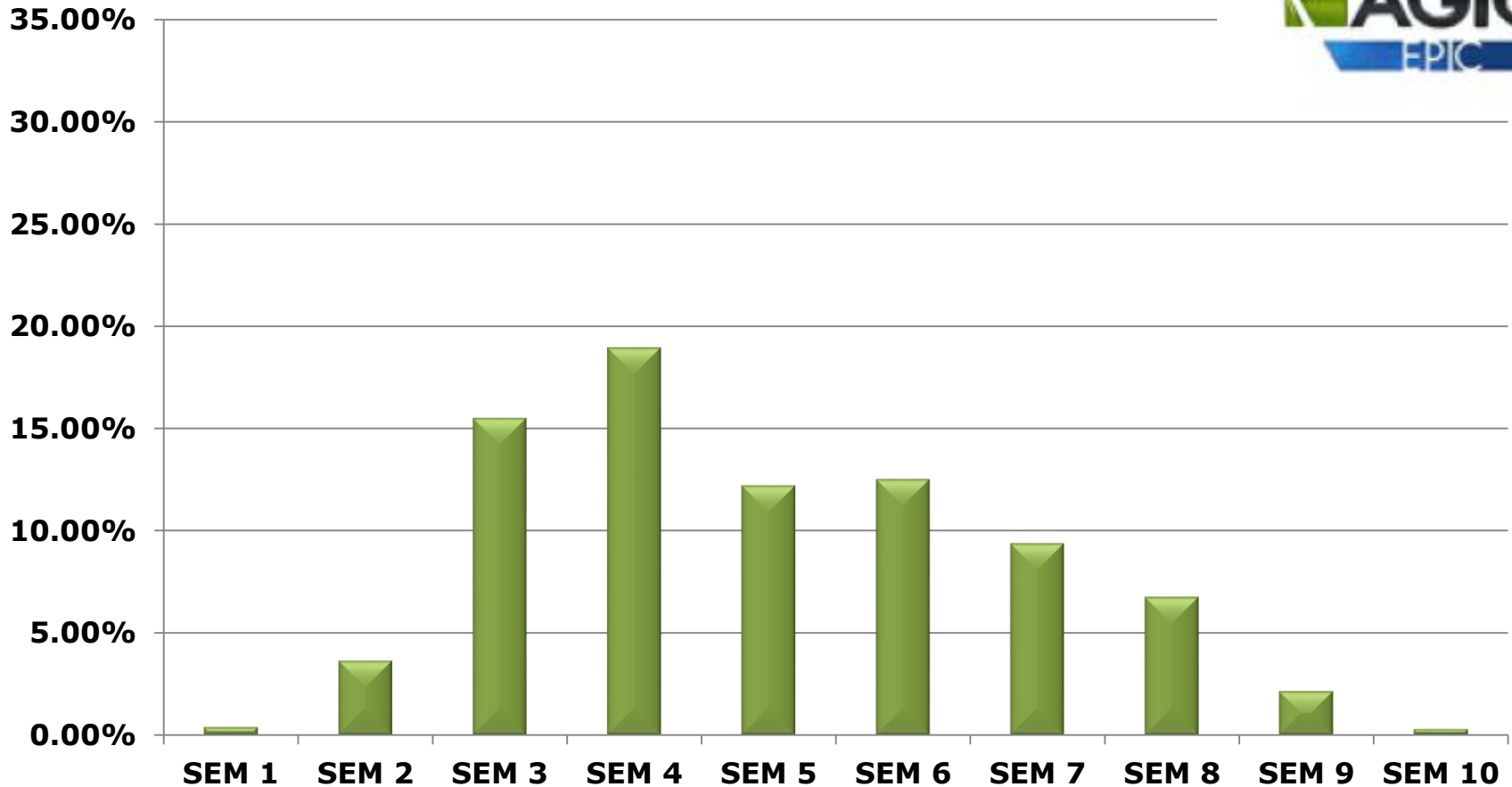
# SEM VIEWING PROFILE... CARTOON NETWORK



# SEM VIEWING PROFILE... NAT GEO WILD

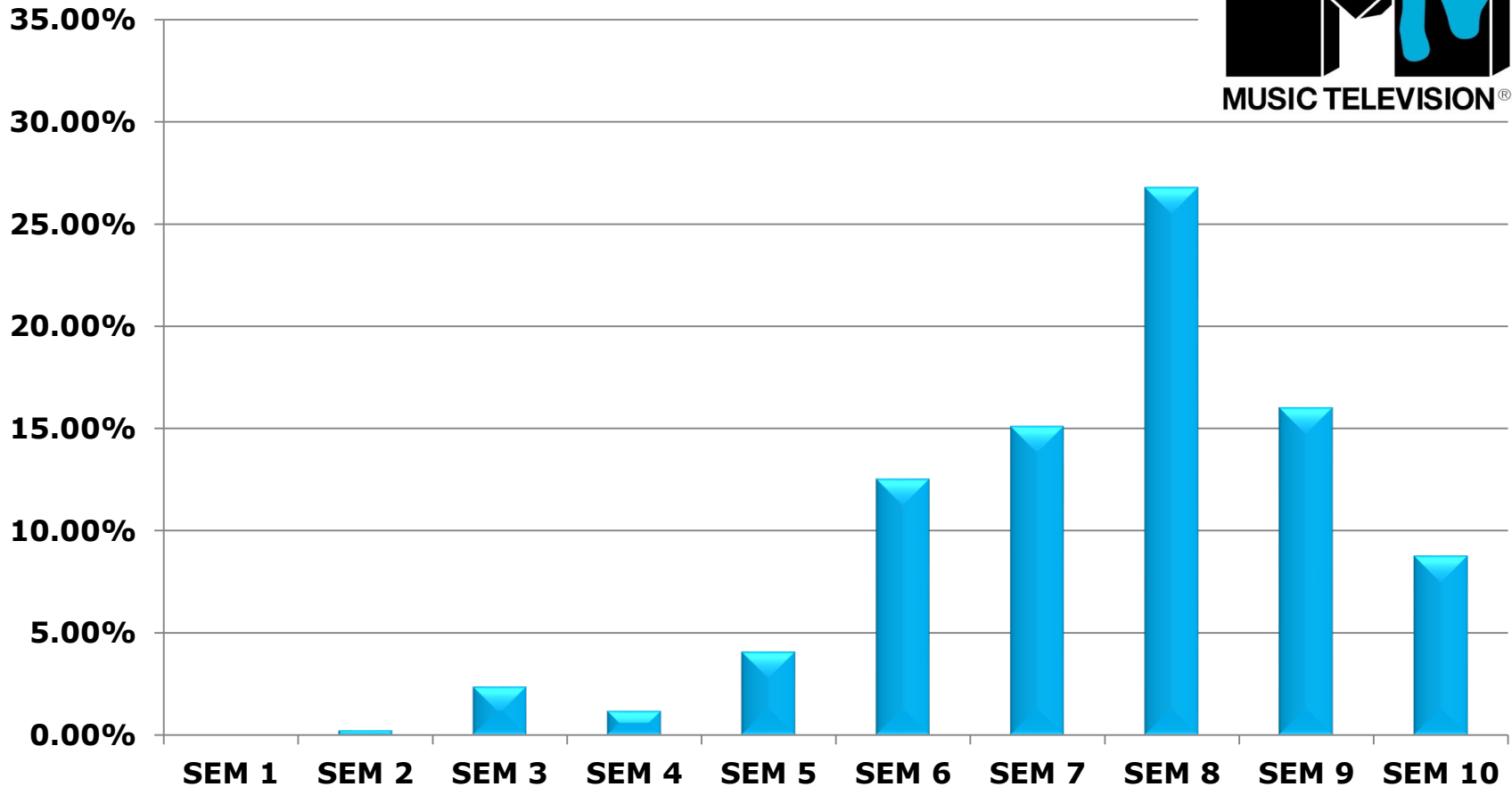


# SEM VIEWING PROFILE... AFRICA MAGIC EPIC

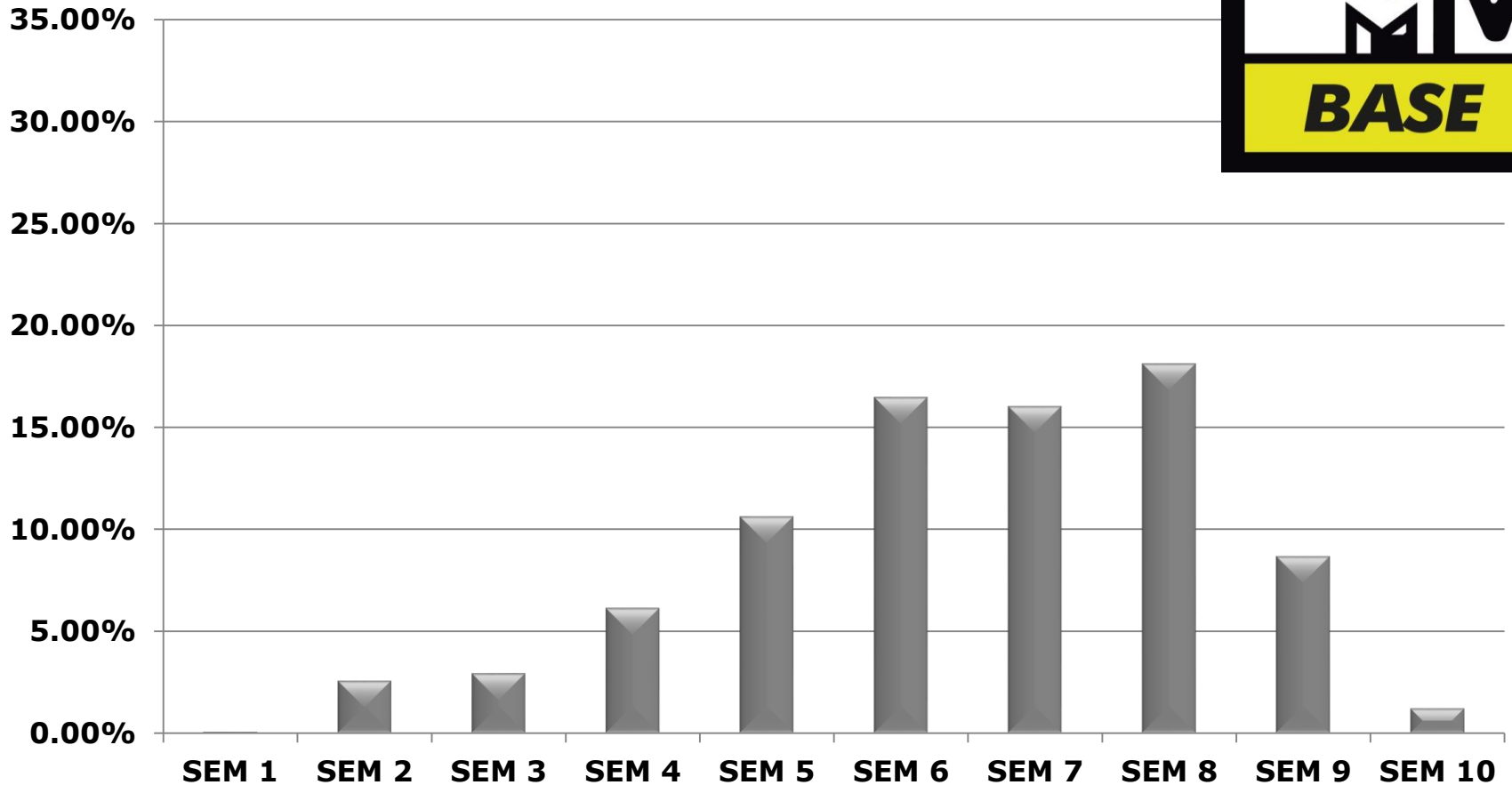


# SEM VIEWING PROFILE...

## MTV

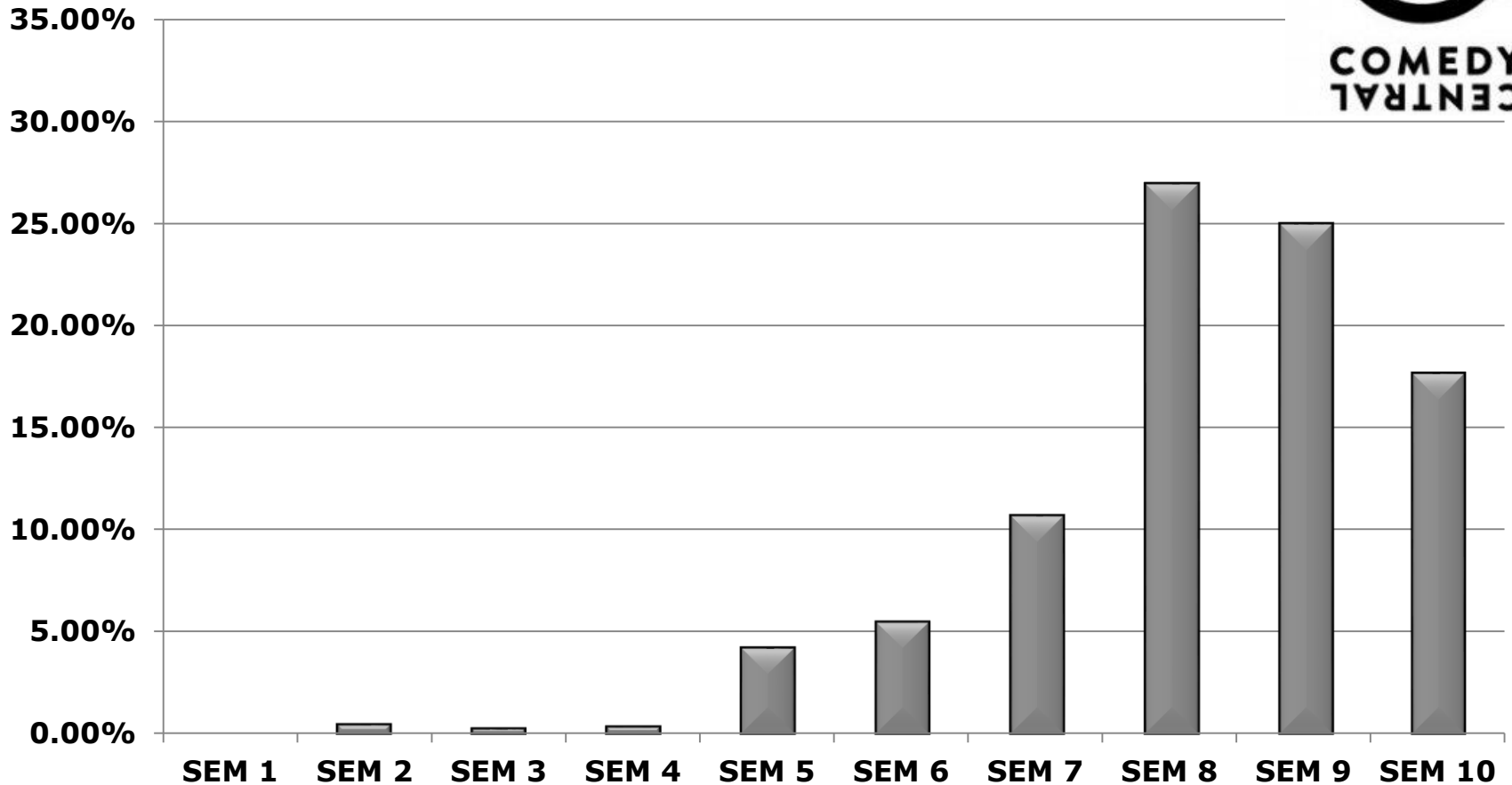


# SEM VIEWING PROFILE... MTV BASE

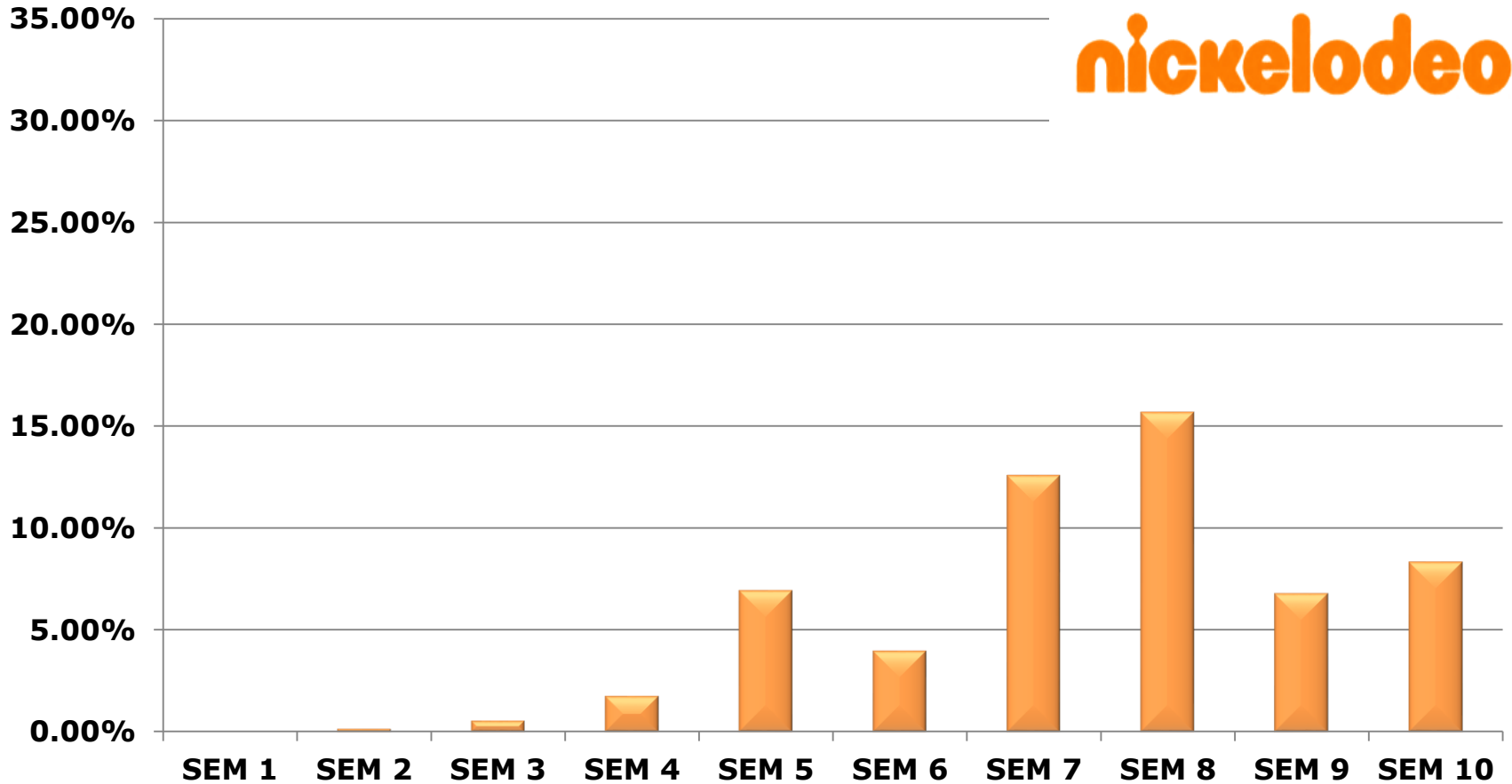




# SEM VIEWING PROFILE... COMEDY CENTRAL



# SEM VIEWING PROFILE... NICKELODEON

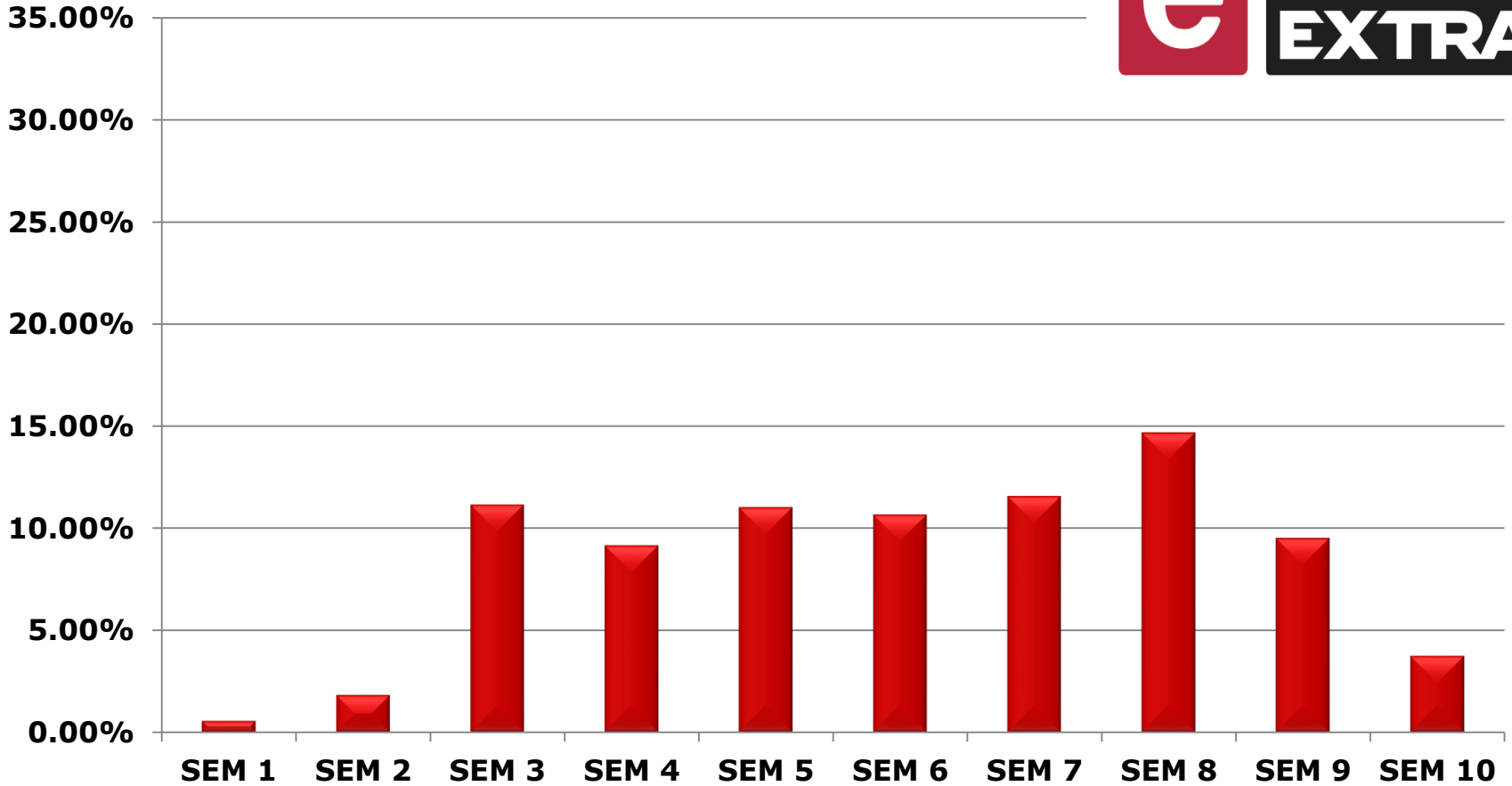


**nickelodeon**<sup>®</sup>



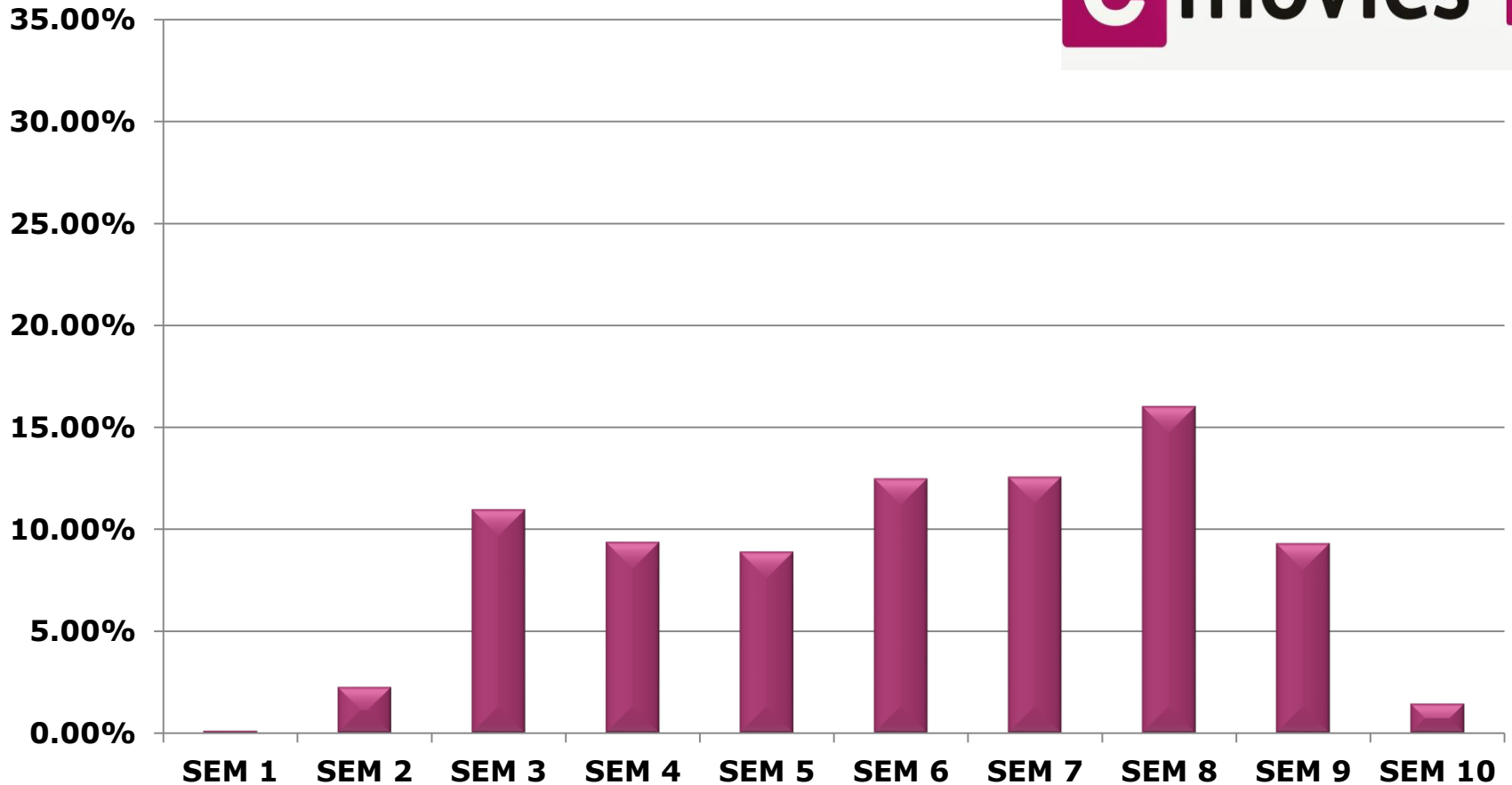
# SEM VIEWING PROFILE...

## eMOVIES EXTRA



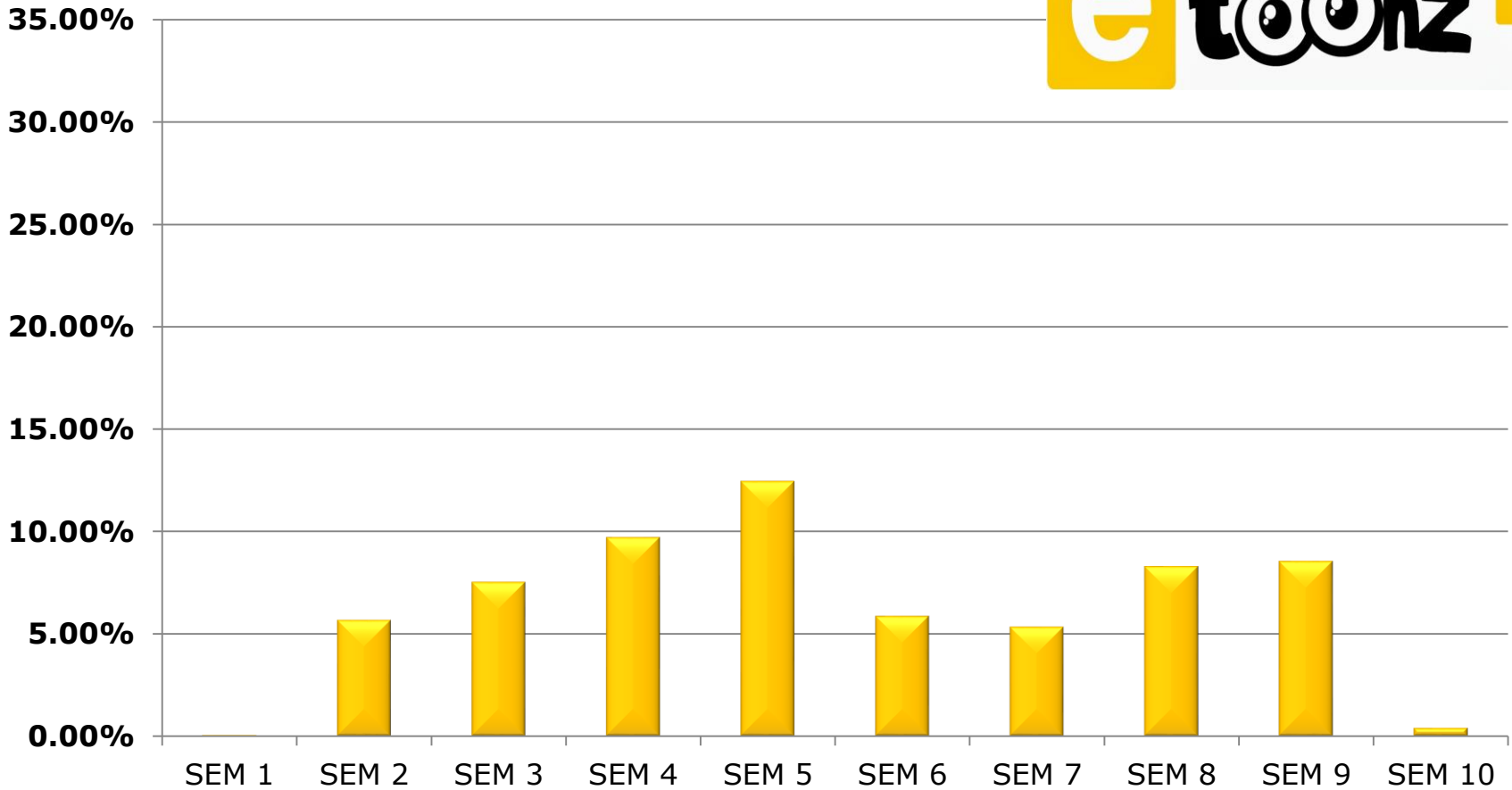
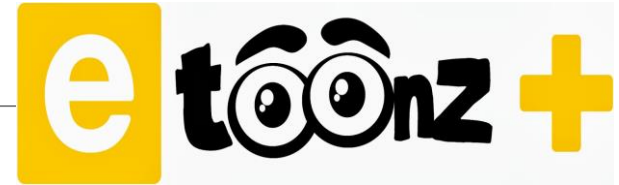
# SEM VIEWING PROFILE...

## eMOVIES+



# SEM VIEWING PROFILE...

## eTOONZ



# BRC TAMS DASHBOARD

TOTAL TV

SABC

eTV

DStv





# TOTAL TV

[BACK TO HOME PAGE](#)

2015A Universe  
01 March to 04 June

2016 Jul -Dec Universe  
05 June to 31 August

