



BRC TAMS UPDATE APRIL 2018



P7D TV VIEWERS GEOGRAPHIC LANDSCAPE...



PROVINCE % and population figures



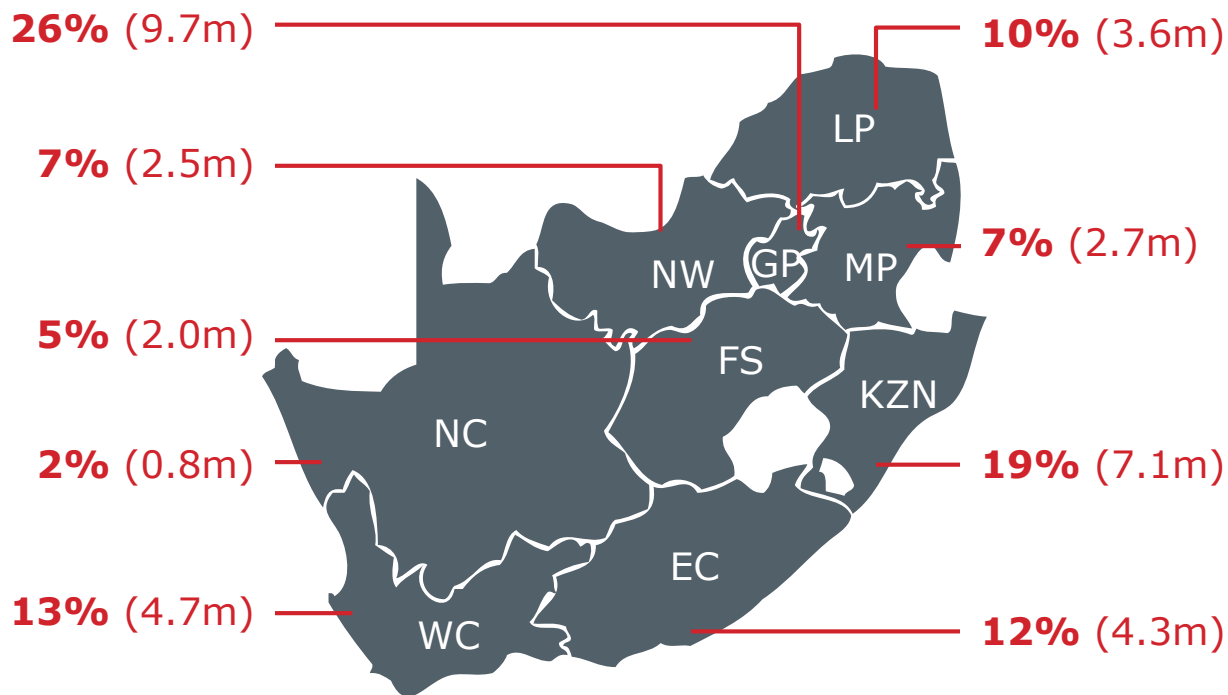
42%
METRO



29%
URBAN



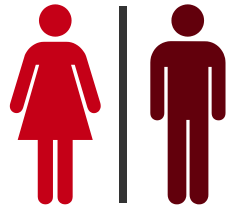
29%
RURAL



FREE TO AIR VIEWERS DEMOGRAPHIC LANDSCAPE...

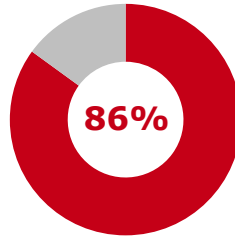


16.8 million
ADULTS 15 YEARS+

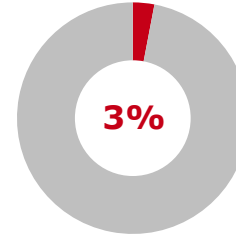


52% **48%**

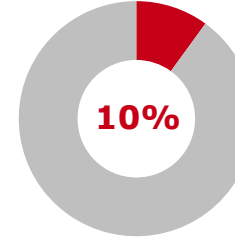
BLACK



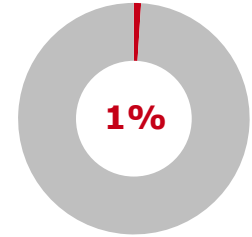
WHITE



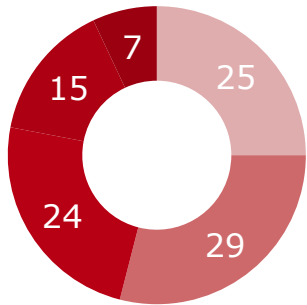
COLOURED



INDIAN



AGE %

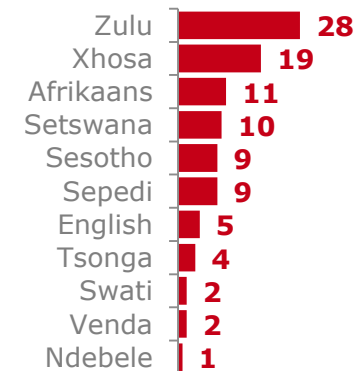


- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

**MONTHLY
HOUSEHOLD INCOME
AVERAGE: R6,409**



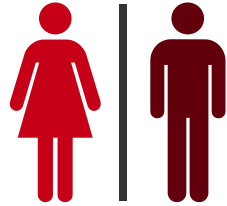
HOME LANGUAGE %



PAY TV SUBSCRIBERS DEMOGRAPHIC LANDSCAPE...

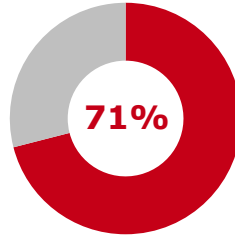


17.2 million
ADULTS 15 YEARS+

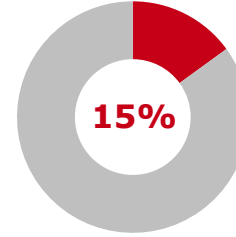


51% **49%**

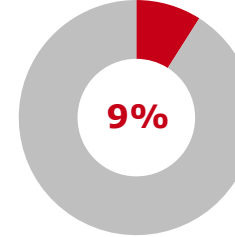
BLACK



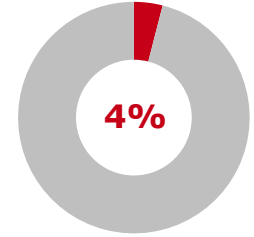
WHITE



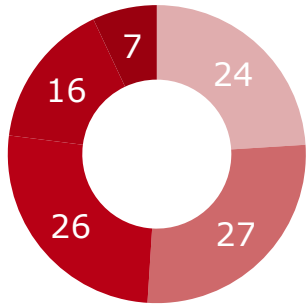
COLOURED



INDIAN



AGE %

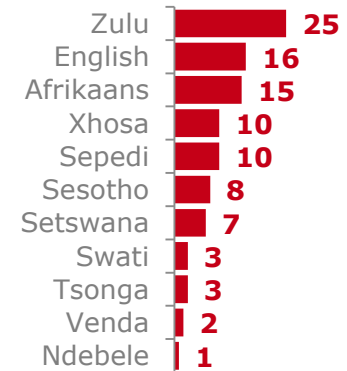


- 15 - 24
- 25 - 34
- 35 - 49
- 50 - 64
- 65 +

**MONTHLY
HOUSEHOLD INCOME
AVERAGE: R17,442**



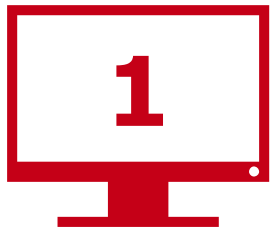
HOME LANGUAGE %



TV SETS IN HH...



Average of 1.1 working TV sets in household



94%

Have 1 working TV set



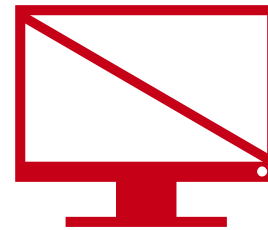
5%

Have 2 working TV sets



1%

Have 3+ working TV sets



3%

Also have a non-working TV set in home



EQUIPMENT IN HH...



FLAT SCREEN/HD VS STANDARD BOX TELEVISION SETS IN HH



57%

Standard box



44%

Flat screen/HD

PLUG-IN EQUIPMENT



53%

DVD player



4%

Media player



2%

VHS recorder



1%

Games console



TECHNOLOGY IN HH...



51%
Satellite dish



9%
PVR decoder



49%
Antenna/Aerial



41%
Standard decoder



TV & INTERNET PLATFORMS...



50%

showmax



1%

OPENVIEW HD

NETFLIX



0.4%



36,450 individuals

0.09%

**** very small base**



VIEWING BEHAVIOUR...



96%
Live TV



11%
Recorded TV



8%
Automatically
stored on decoder



13%
DVD box set



3%
Online

9% have internet enabled TV sets
3% claim internet usage on TV set



TAMS UNIVERSE UPDATE

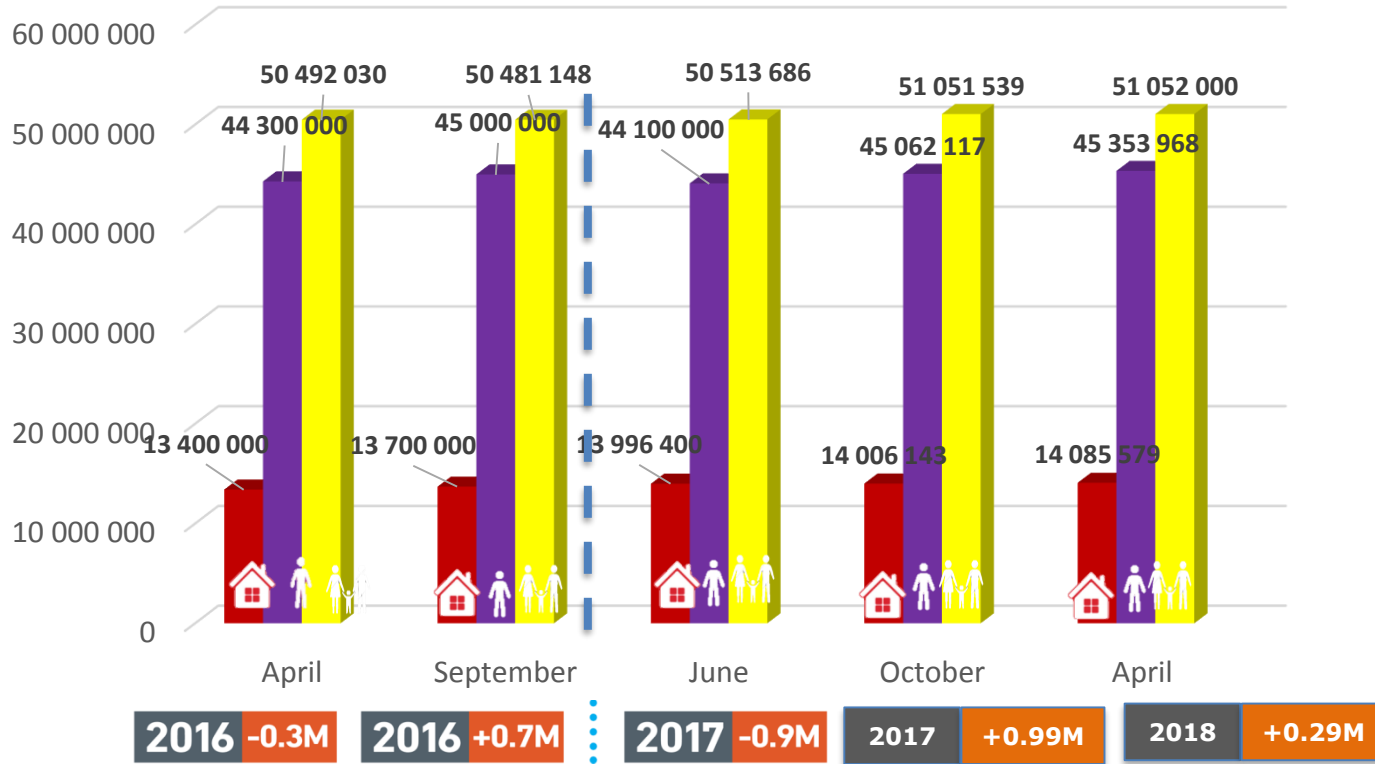




TV UNIVERSE UPDATES

(from the ES)

ES SURVEY



● HOUSEHOLDS ● INDIVIDUALS ● HOUSEHOLDS ● INDIVIDUALS

● SA POPULATION



BRC TAMS INSTALLED PANEL LOOKS LIKE THE ES TV UNIVERSE...


BRC TAMS PANEL (installed H/H)



BLACK	79%
COLOURED	7%
ASIAN/INDIAN	3%
WHITE	11%

ES TV Universe



BLACK	 80%
COLOURED	 9%
ASIAN/INDIAN	 3%
WHITE	 8%

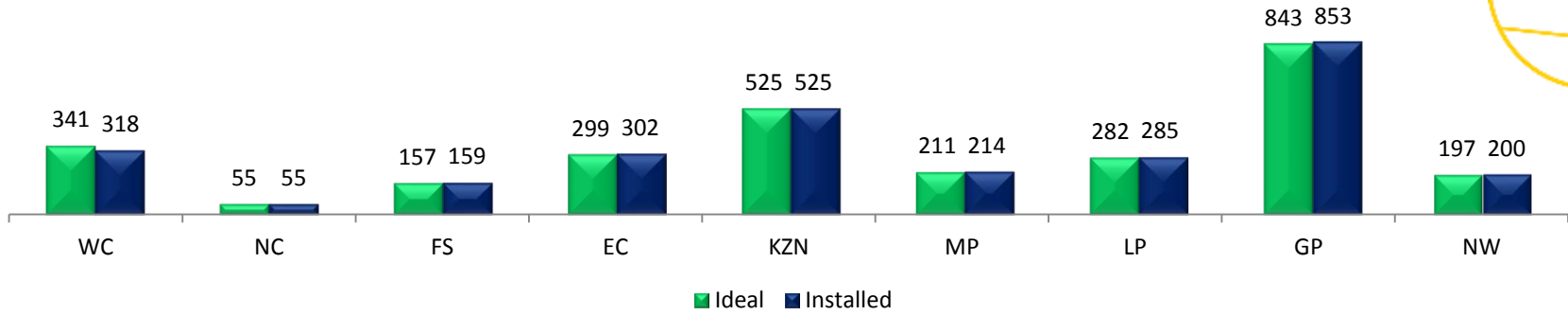


PANEL BALANCE BY PROVINCE...

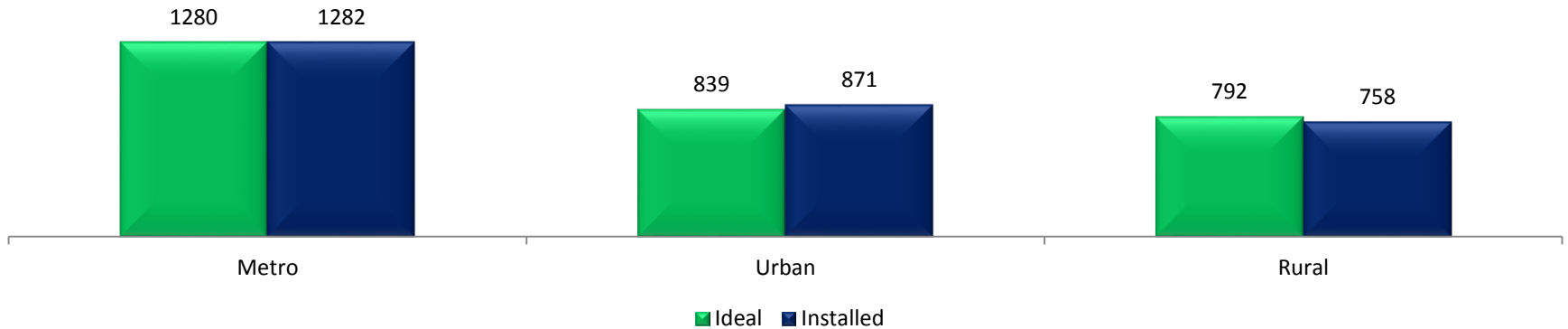
New Universe Update



PROVINCE

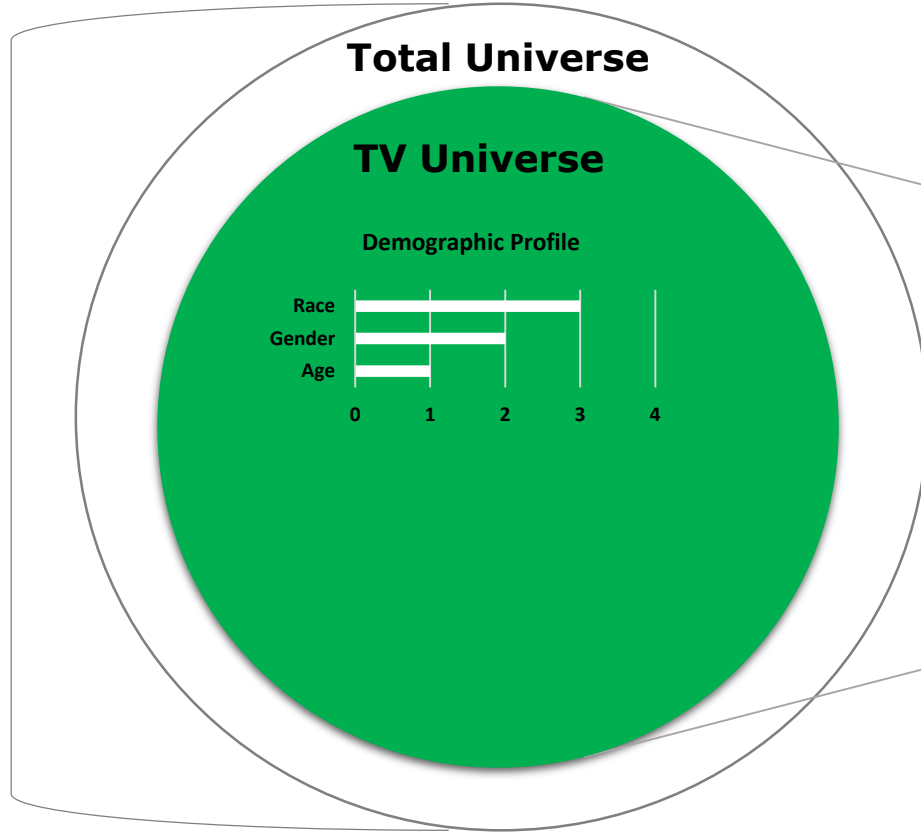


AREA

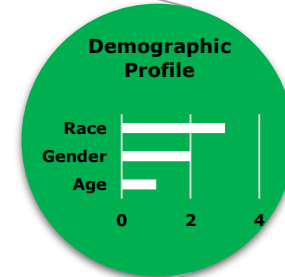




THE PANEL DEMOGRAPHICS ARE WEIGHTED UP TO THE TV UNIVERSE DEMOGRAPHICS



TAMS Panel



IHS
Universe



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 represent the TV Universe, **the panel demos are weighted to the TV Universe demos – DAILY**





RIM Weights changed

**2015
AMPS**

**2016
AMPS**

**2017
ES**

**2018
ES**

Total Universe

Total Universe

Total Universe

Total Universe

TV
Universe

TV
Universe

TV
Universe

TV
Universe

IHS
Universe

TAMS
PANEL

TAMS
PANEL

TAMS
PANEL

TAMS
PANEL



INDIVIDUAL RIM WEIGHTING STRUCTURE...

INDIVIDUAL RIM WEIGHTS

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



HOUSEHOLD RIM WEIGHTING STRUCTURE...

HOUSEHOLD RIM WEIGHTS

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

Total Number of Categories

CATEGORIES

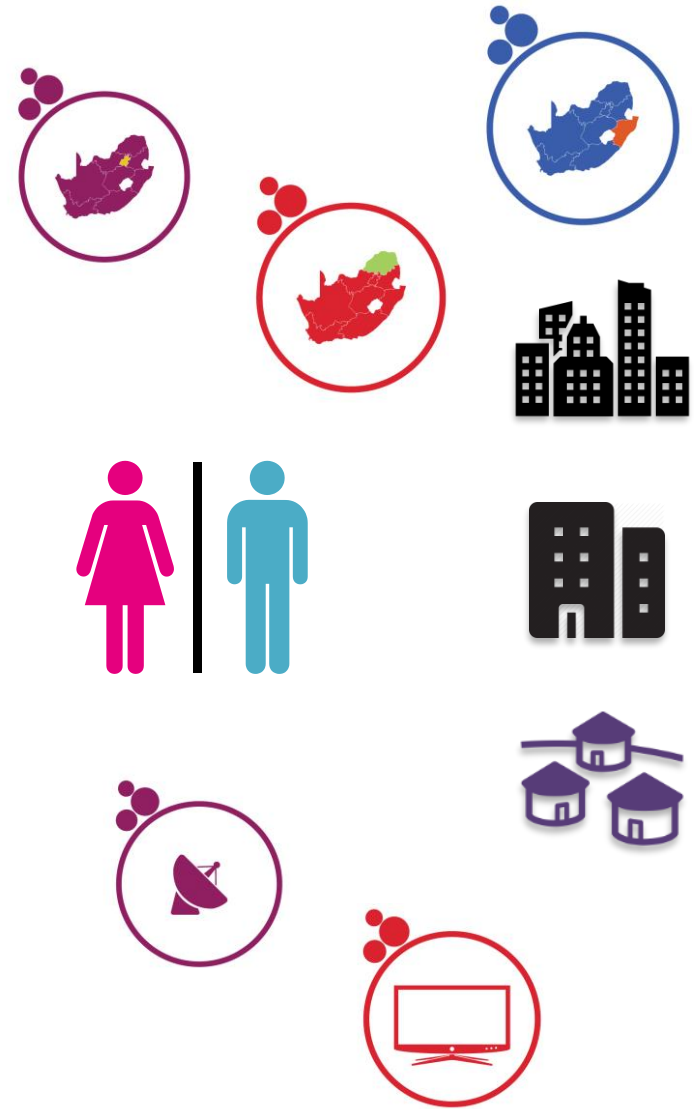
9
4
3
2
2

20



TARGET MARKETS

- Province
- Area (M/U/R)
- Race Group
- Gender
- Age
- Pay TV / FTA TV





THE PANEL, WEIGHTING EFFICIENCIES & PANEL HEALTH

THE PANEL...

KPI Panel Health	August 2014	August 2015	August 2016	August 2017	April 2018
Installed Panel	2658	2667	2899	2935	2919
Polling	95%	94.5%	93%	97.1%	96%
Reporting (Intabs)	90.9%	89.8%	89.7%	91.0%	92.0%
Coverage of TV sets	89.3%	92.8%	91%	94%	93.4%

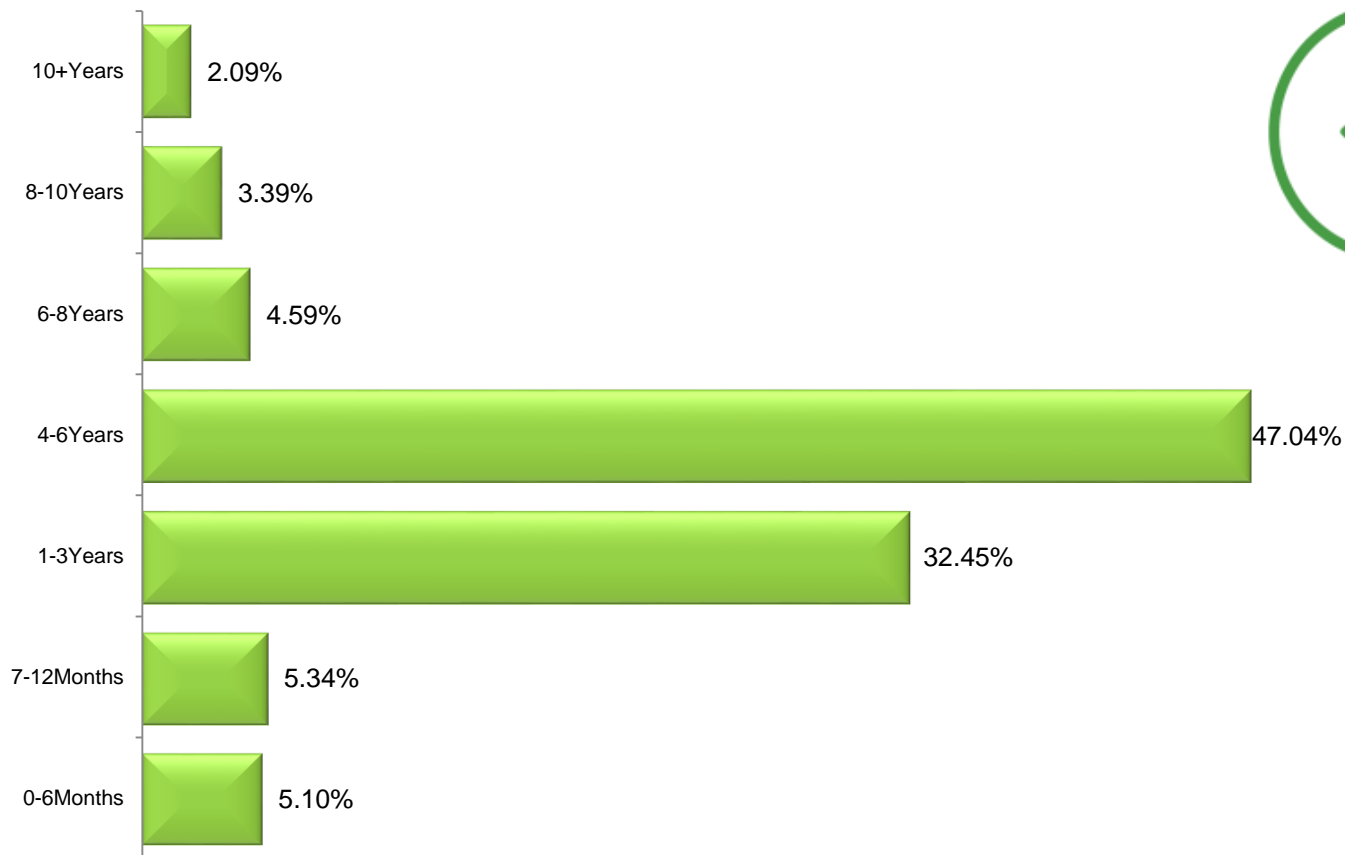


WEIGHTING EFFICIENCIES...

KPI Panel Health	August 2014	August 2015	August 2016	August 2017	April 2018
Ind. weighting efficiency	64.9%	79.5%	75%	93%	91.4%
H/H weighting efficiency	54.5%	65%	65%	74%	76%
Ind. maximum weight	40 860	22 618	22 618	18 634	20 704



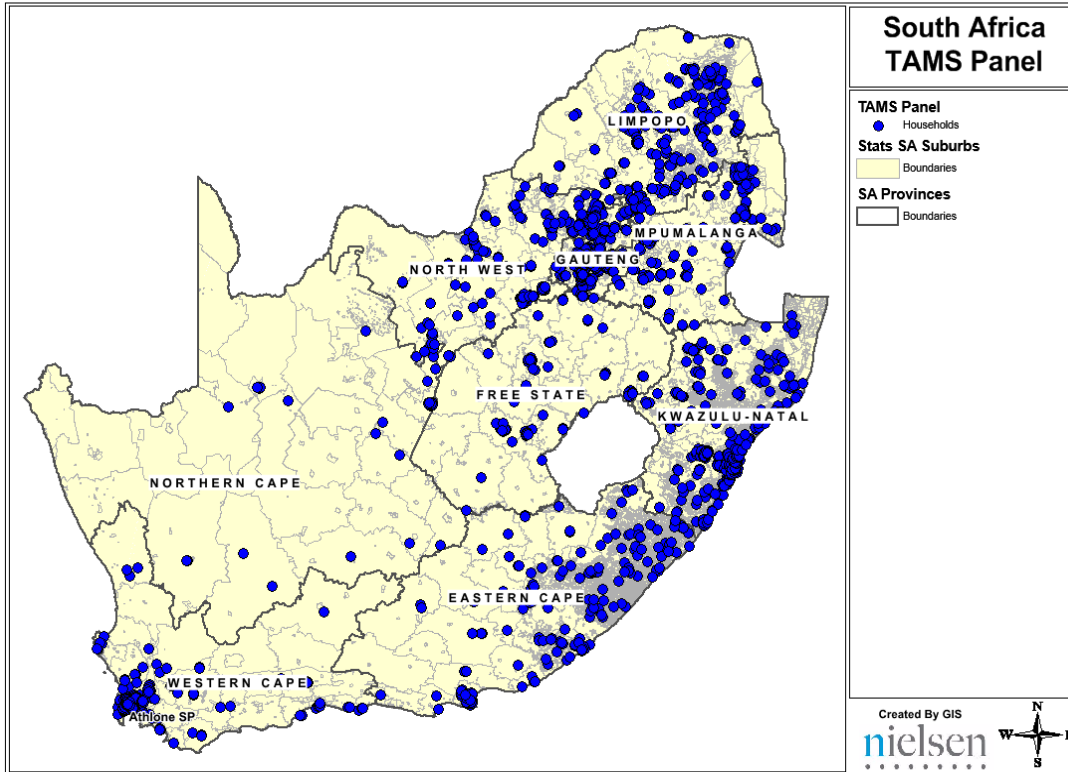
PANEL TENURE



BRC TAMS VITAL SIGNS...

Universe:
Population age 4+
45 million

13 975 Sample
APRIL 2018



44%

METRO



29%

URBAN



27%

RURAL



BRC TAMS SNAPSHOTS...



TOTAL TV HOUSEHOLDS H/H

14 085 579



FREE TO AIR (FTA)

7 928 834



DSTV

6 156 745



OVHD

811 000



TOTAL TV HOUSEHOLDS H/H

14.09 MILLION



No, of TV CHANNELS

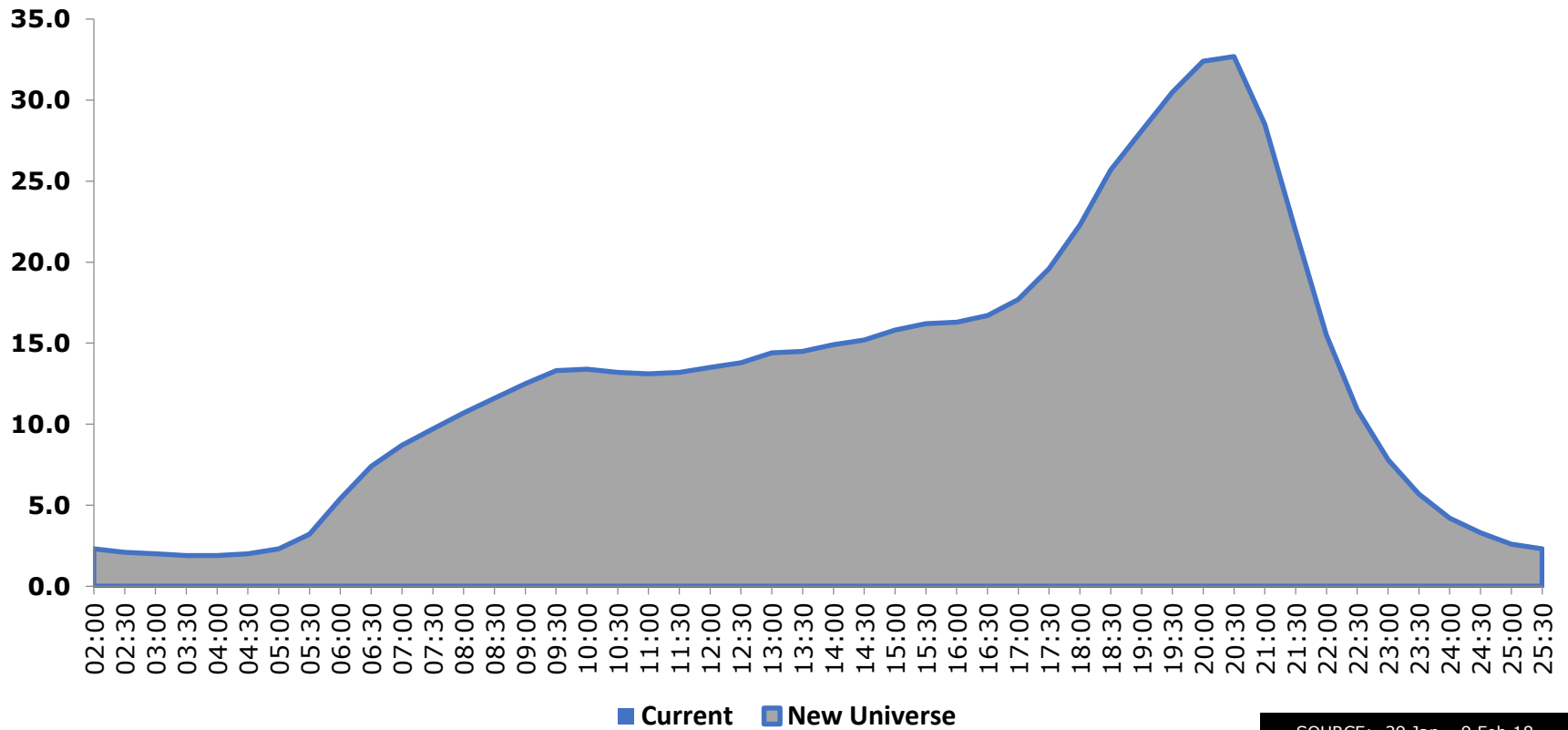
107





VIEWING BEHAVIOUR

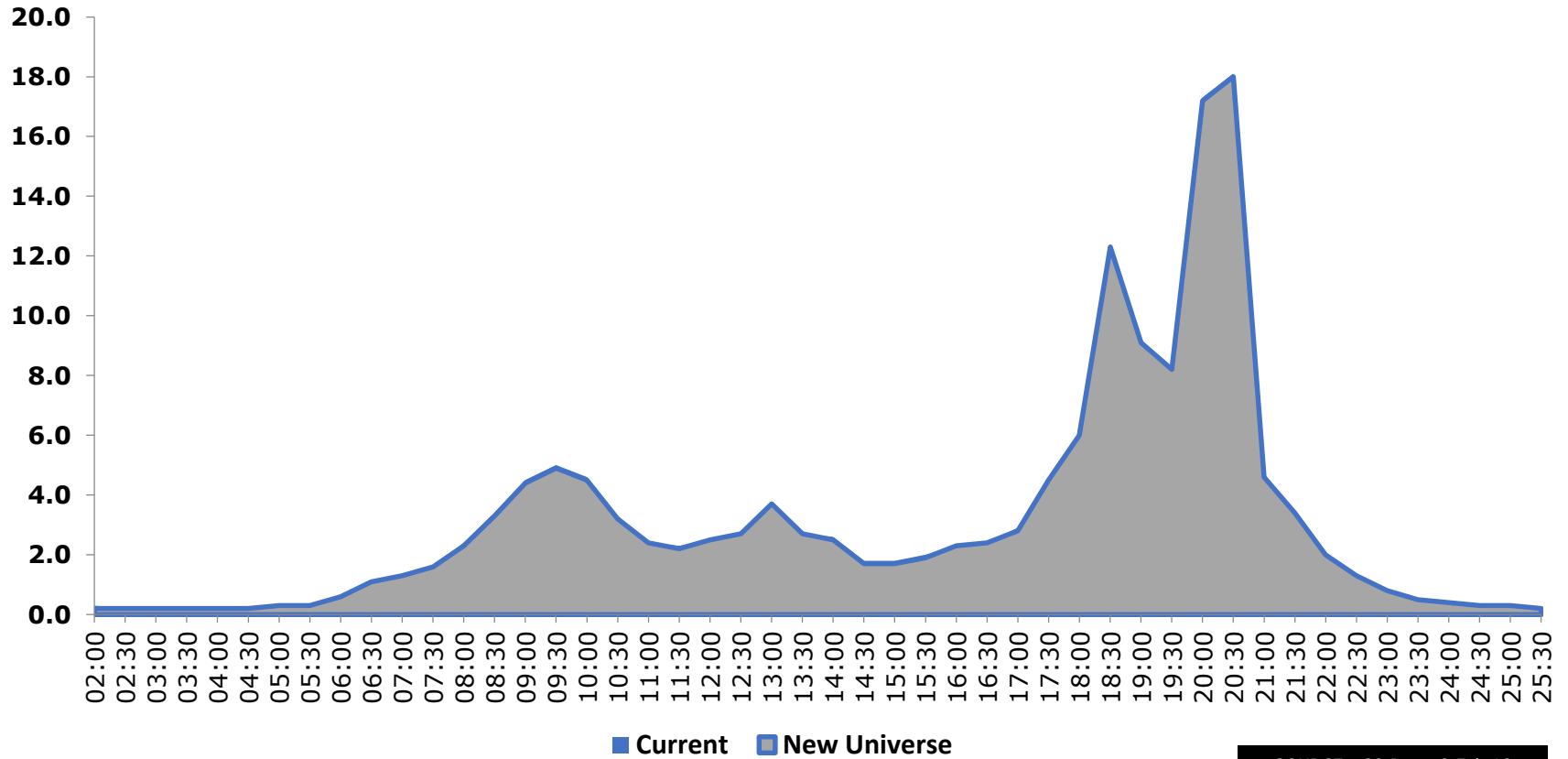
TOTAL TELEVISION



SOURCE: 29 Jan – 9 Feb 18



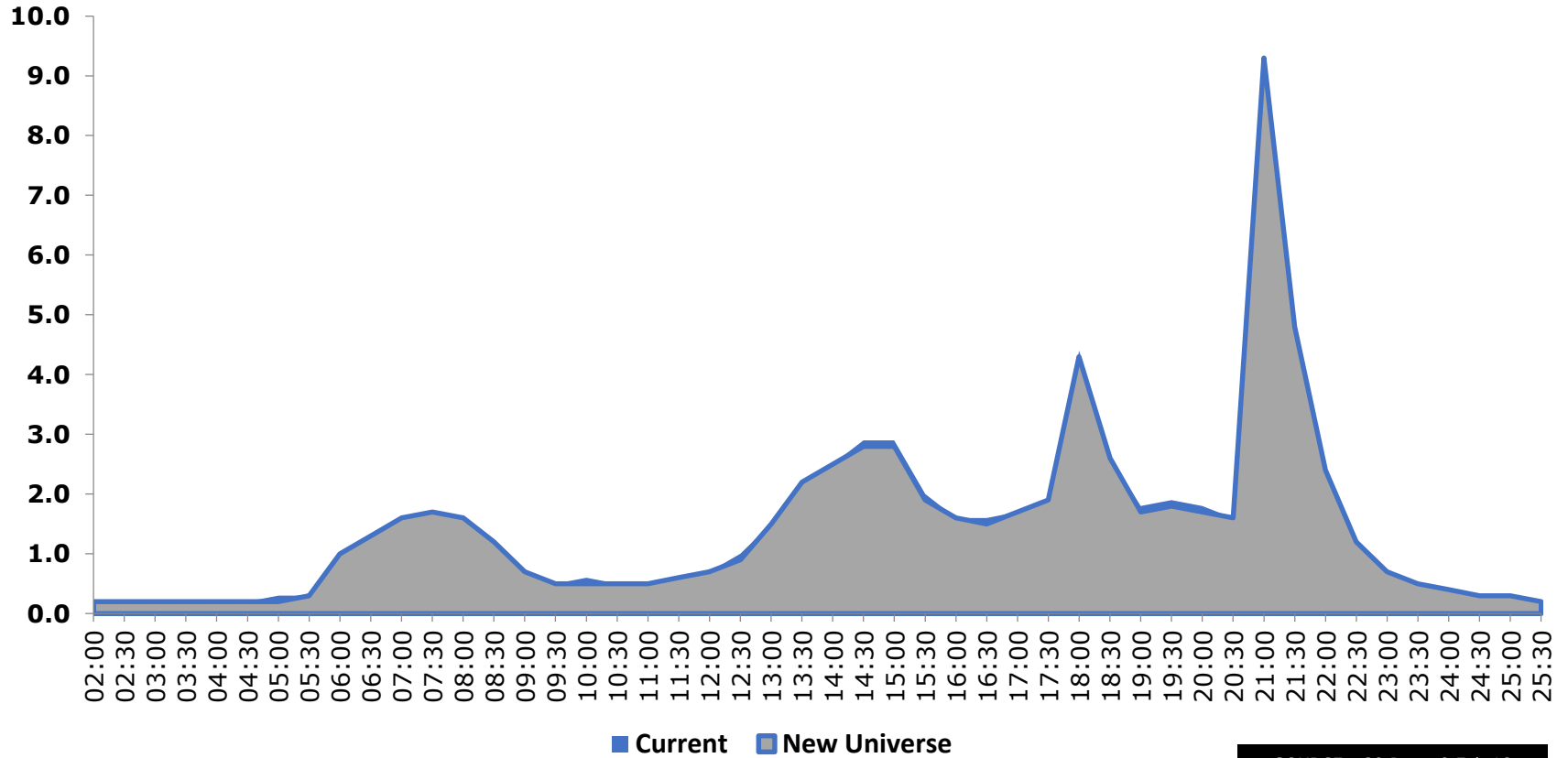
SABC 1



SOURCE: 29 Jan – 9 Feb 18



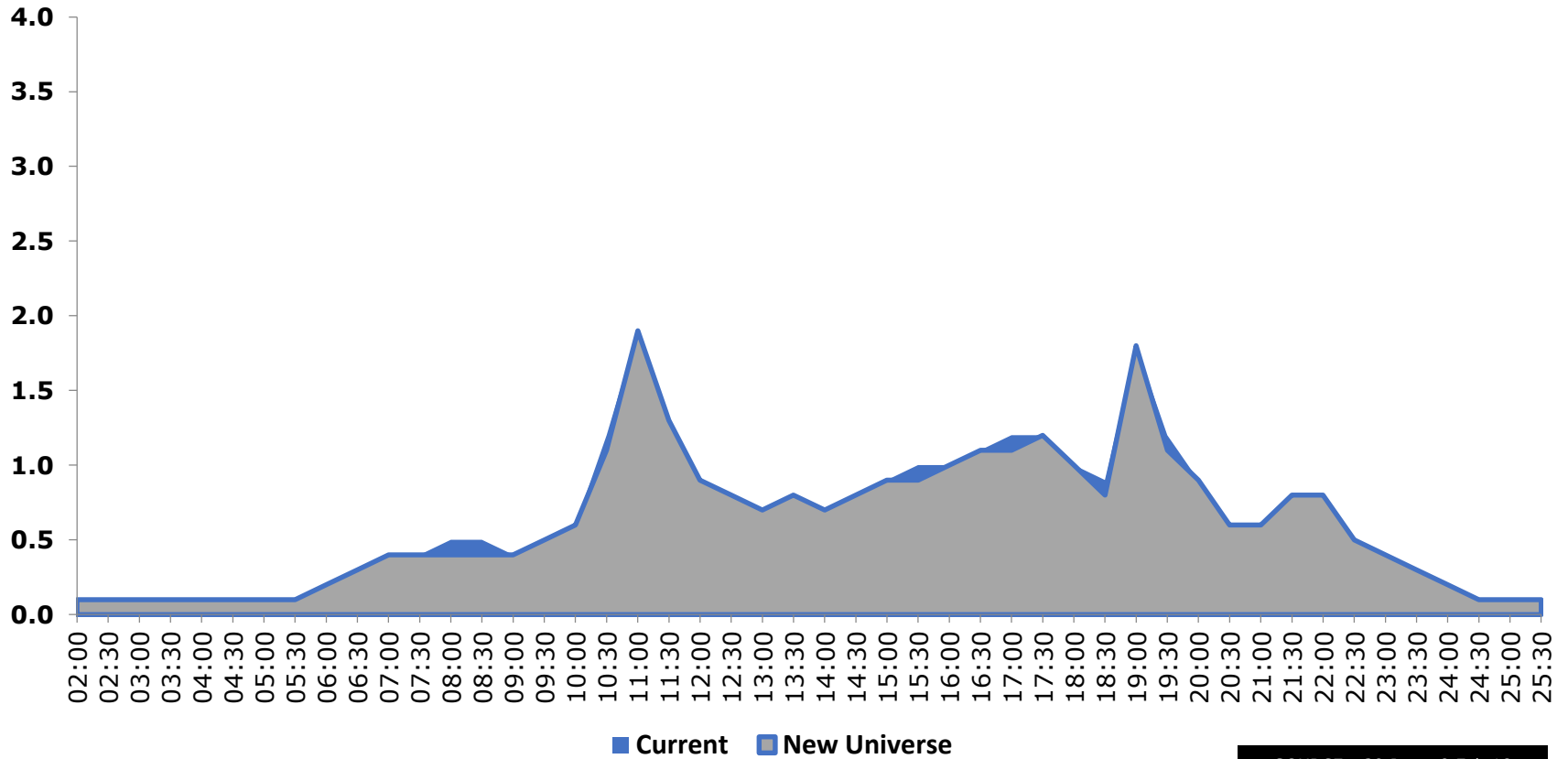
SABC 2



SOURCE: 29 Jan – 9 Feb 18



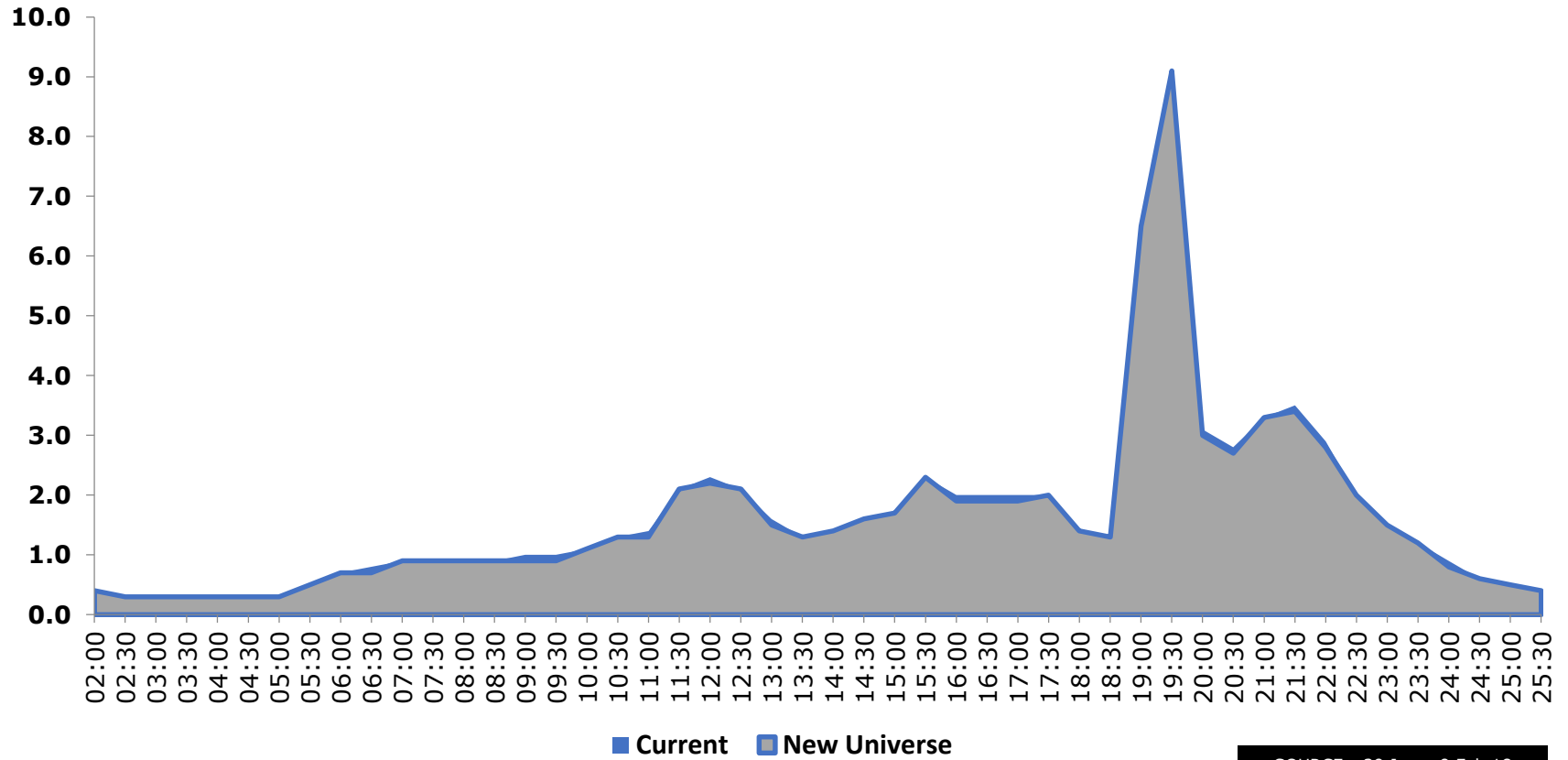
SABC 3



SOURCE: 29 Jan – 9 Feb 18



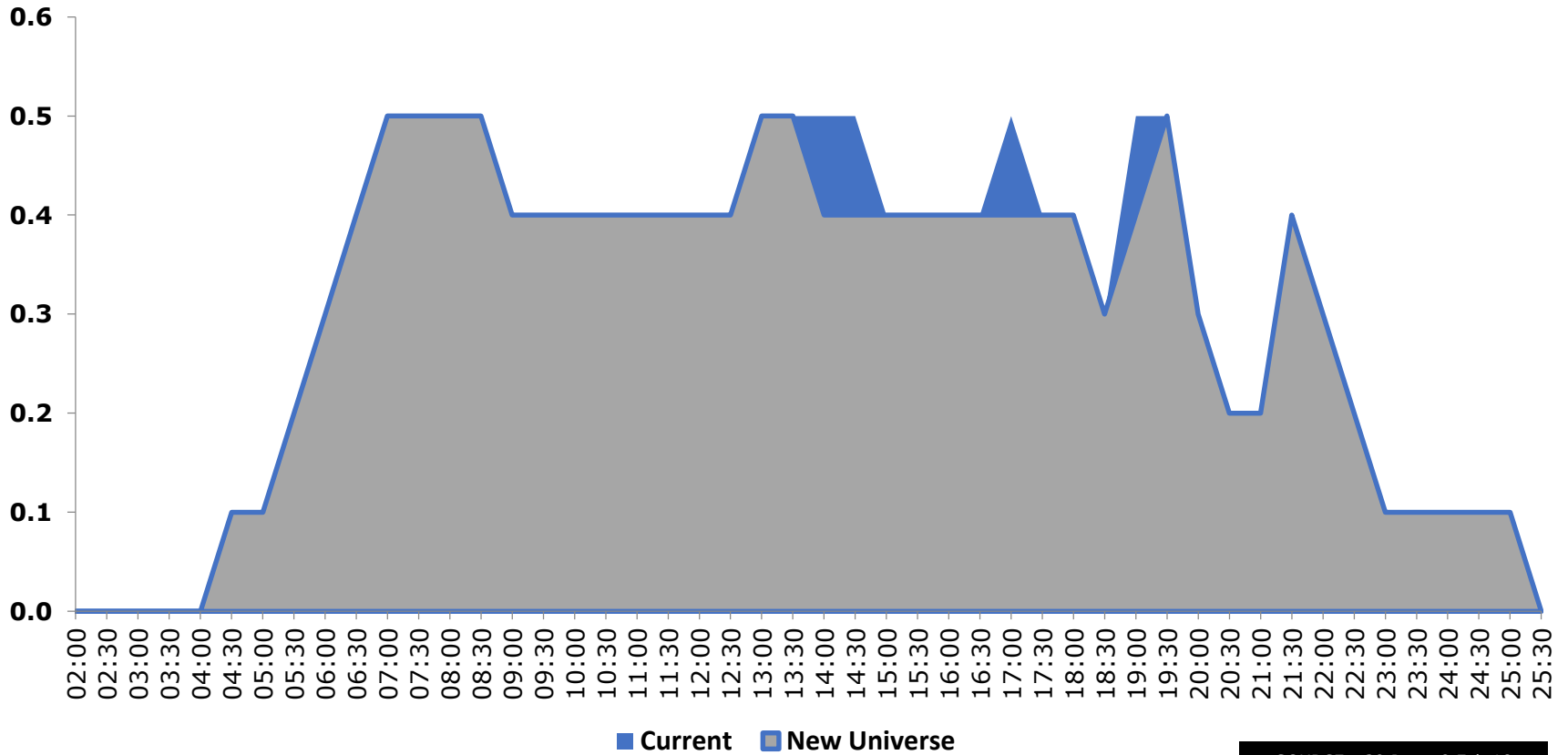
eTV



SOURCE: 29 Jan - 9 Feb 18



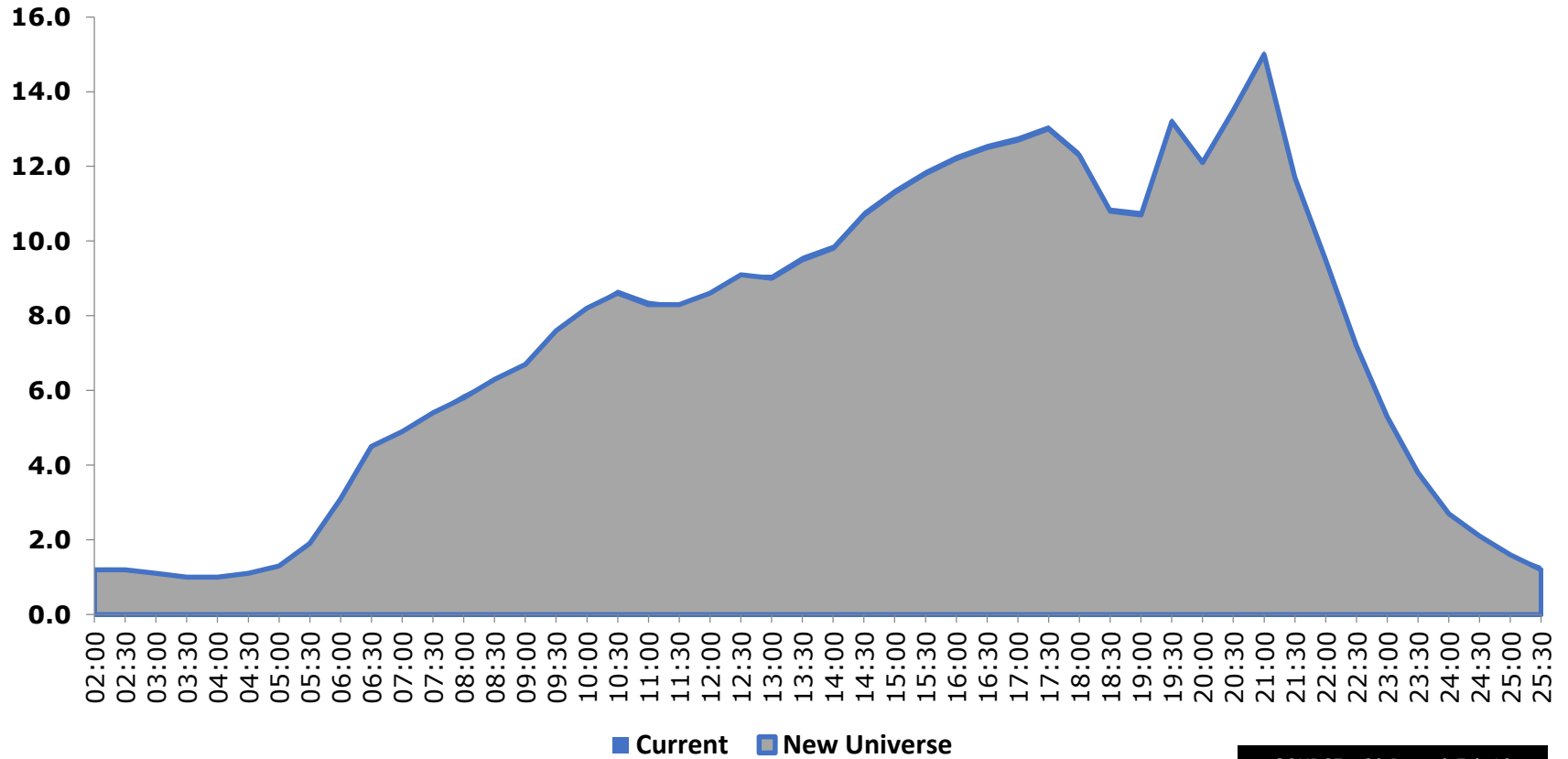
eNCA



SOURCE: 29 Jan – 9 Feb 18



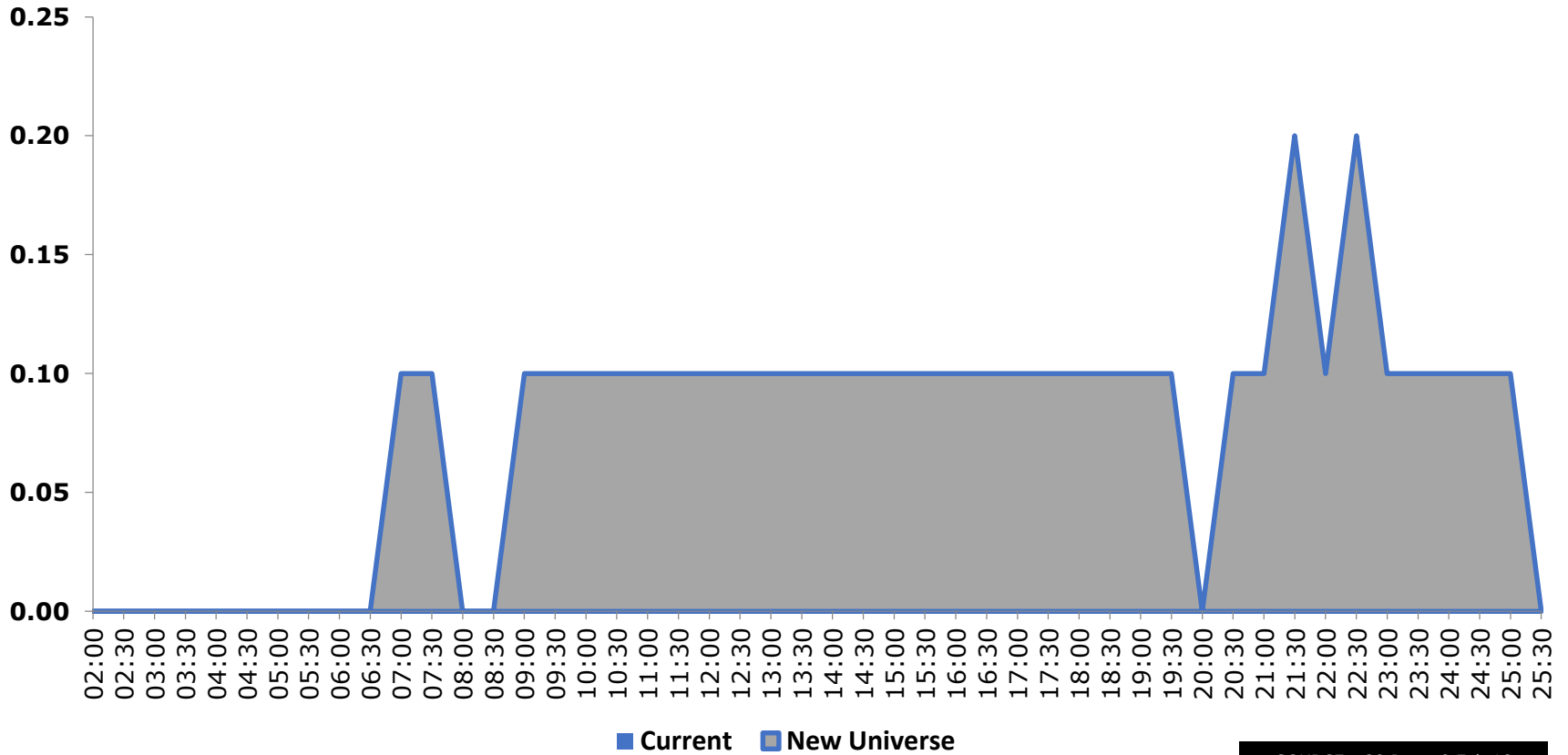
DStv



SOURCE: 29 Jan – 9 Feb 18



MTV

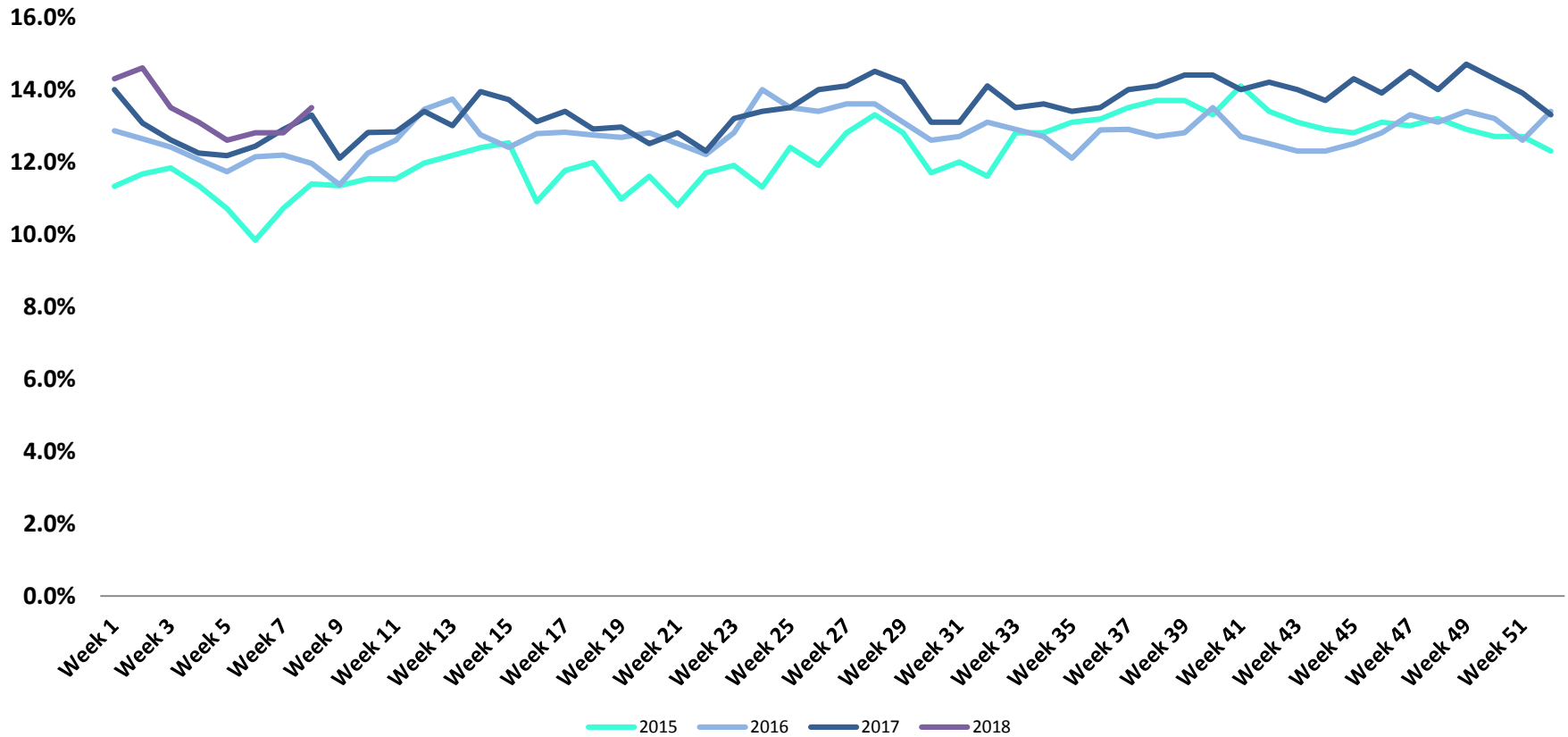


SOURCE: 29 Jan – 9 Feb 18



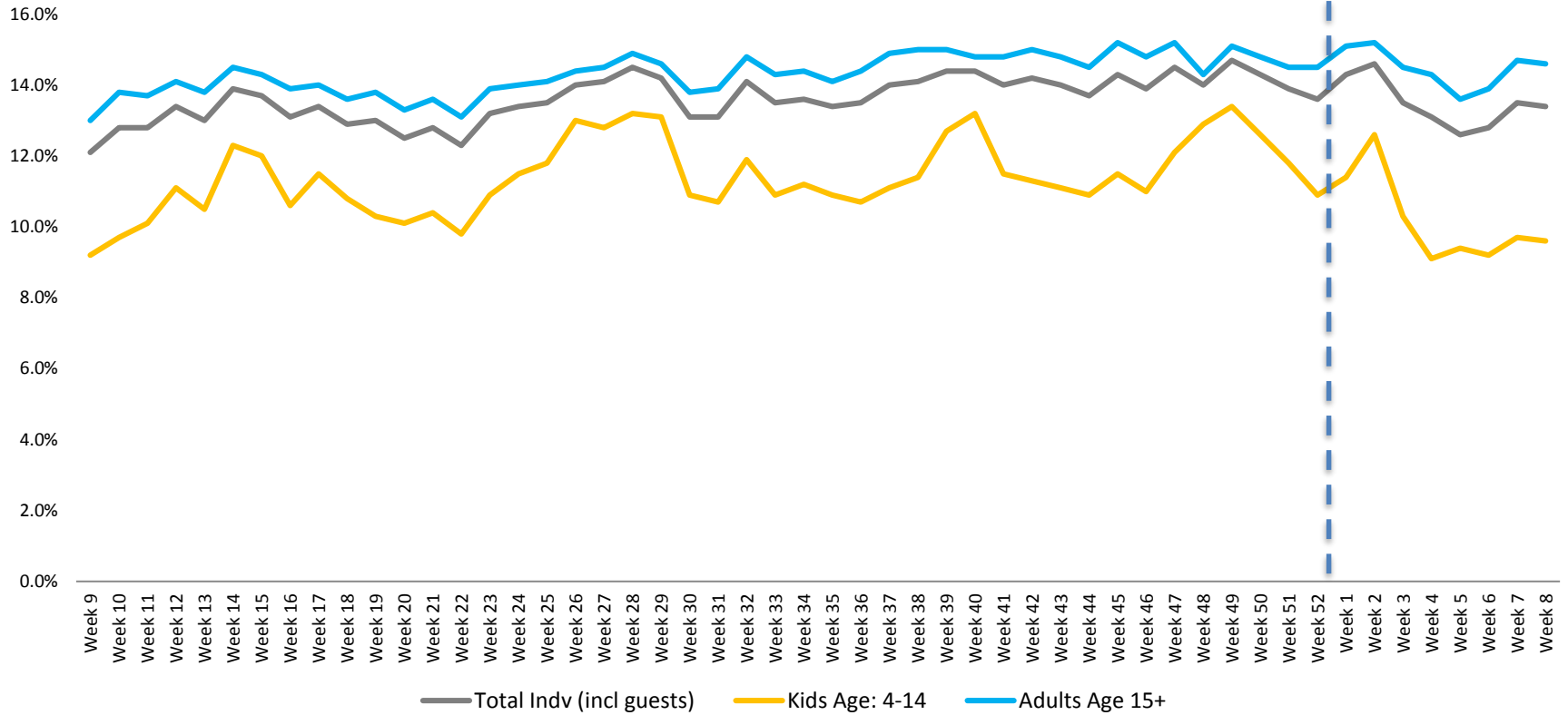
TOTAL TV- ALL DAY

TOTAL TV: ALL DAY - ALL INDIVIDUALS



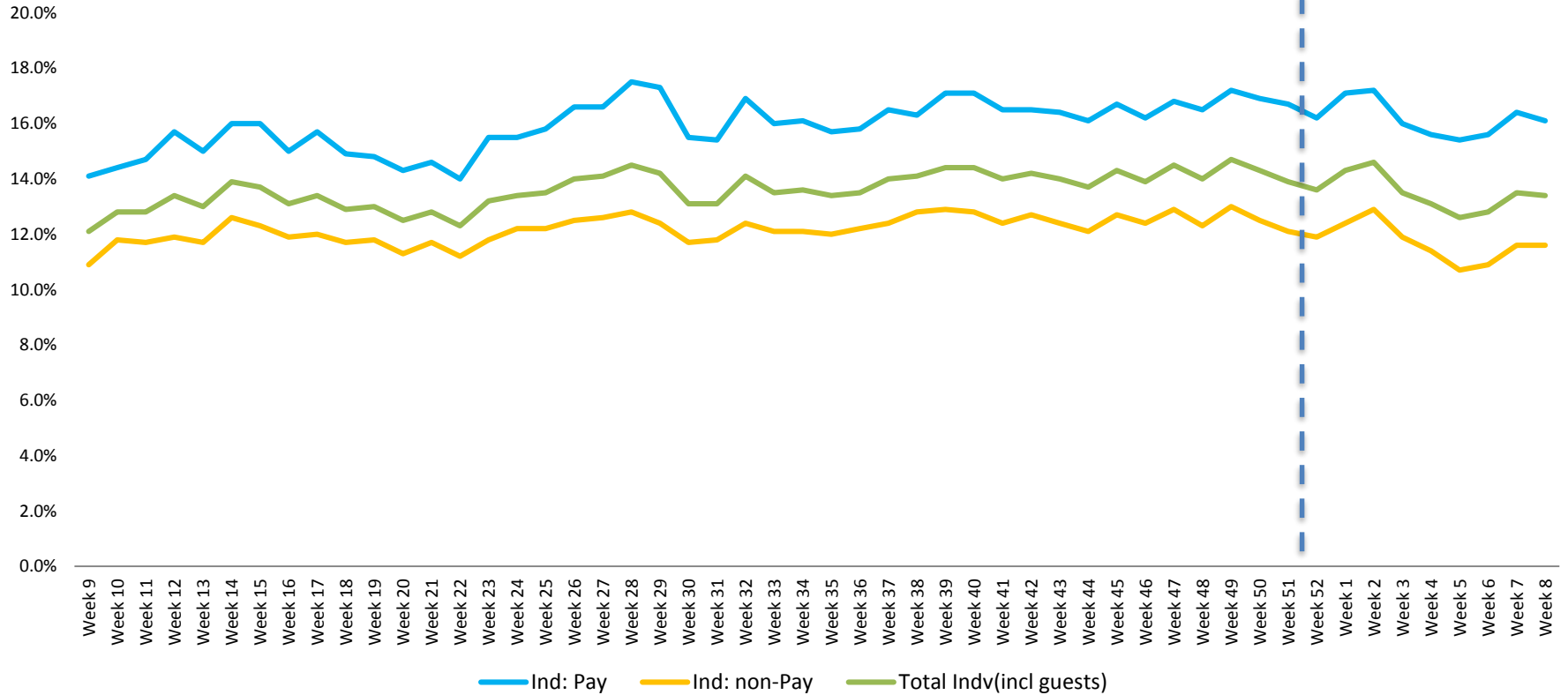
TOTAL TV-ALL DAY

TOTAL TV: ALL DAY BY ADULTS/KIDS



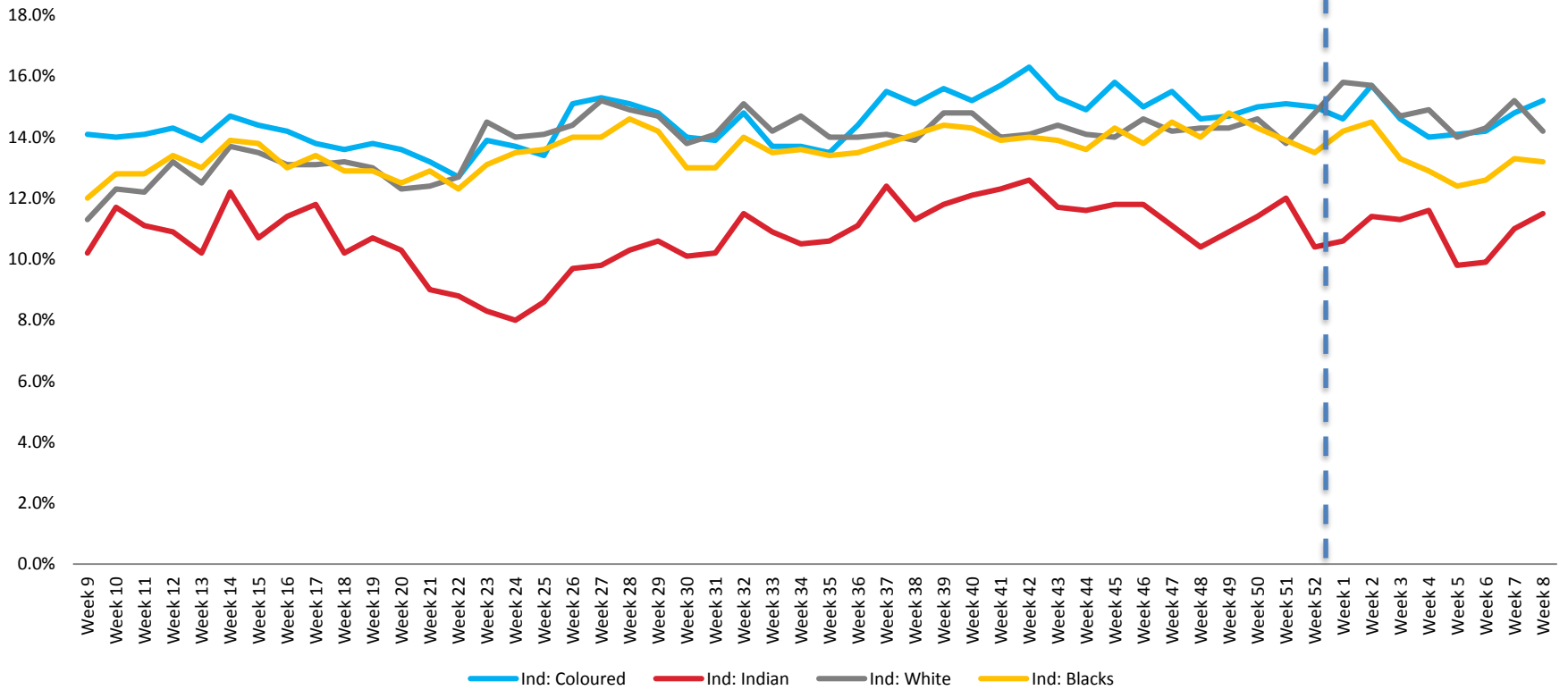
TOTAL TV-ALL DAY

TOTAL IND: ALL DAY PAY VS NO PAY



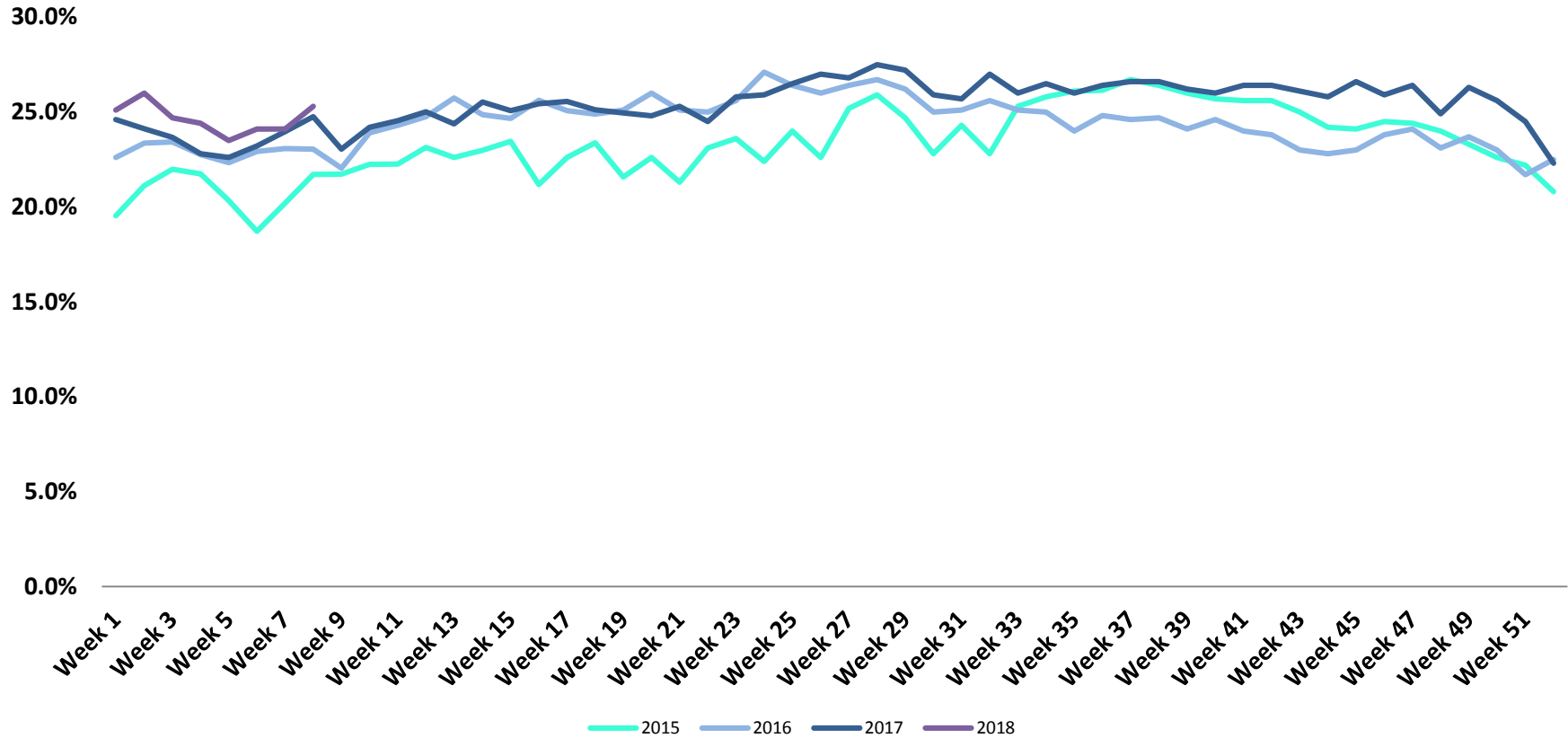
TOTAL TV-ALL DAY

TOTAL TV: ALL DAY BY RACE



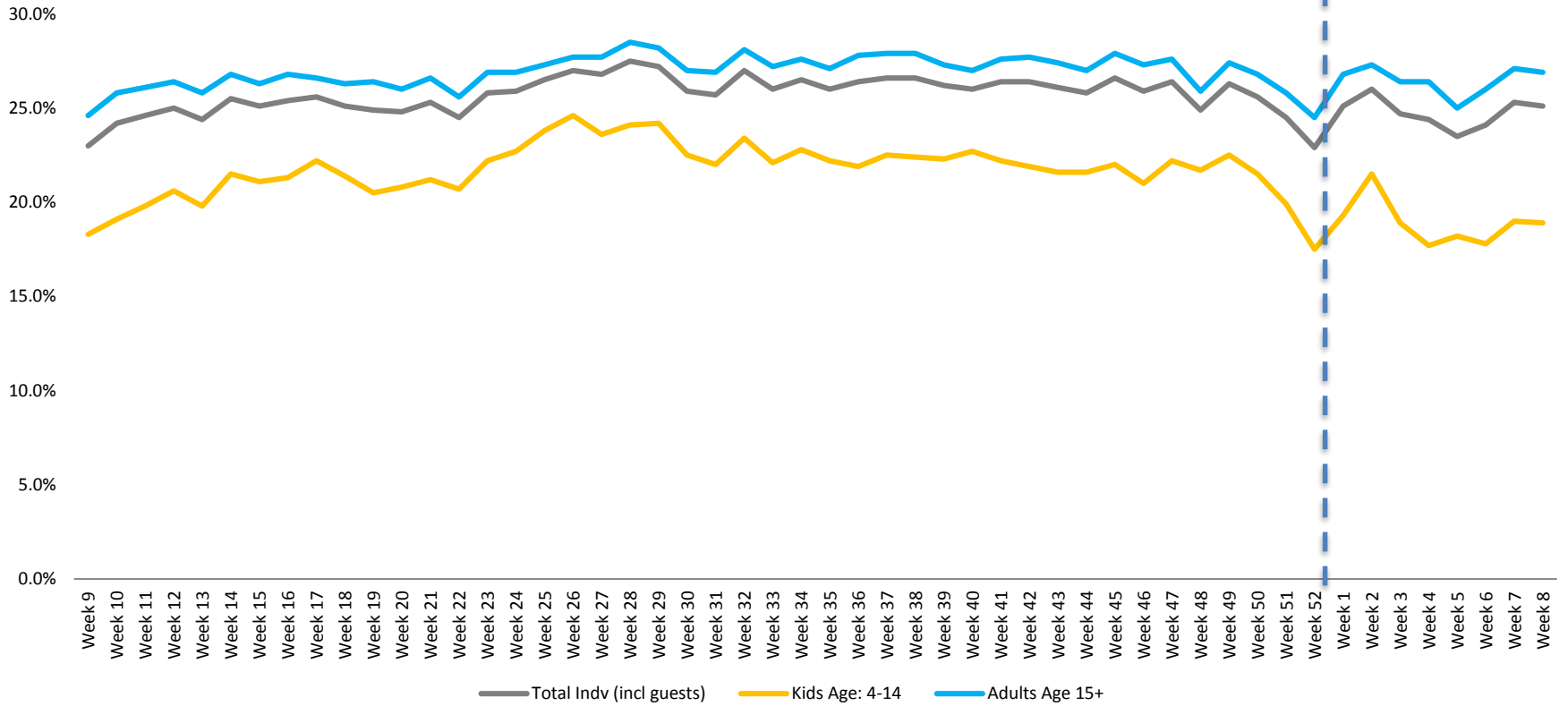
TOTAL TV- PRIME TIME

TOTAL TV: PRIME TIME - ALL INDIVIDUALS



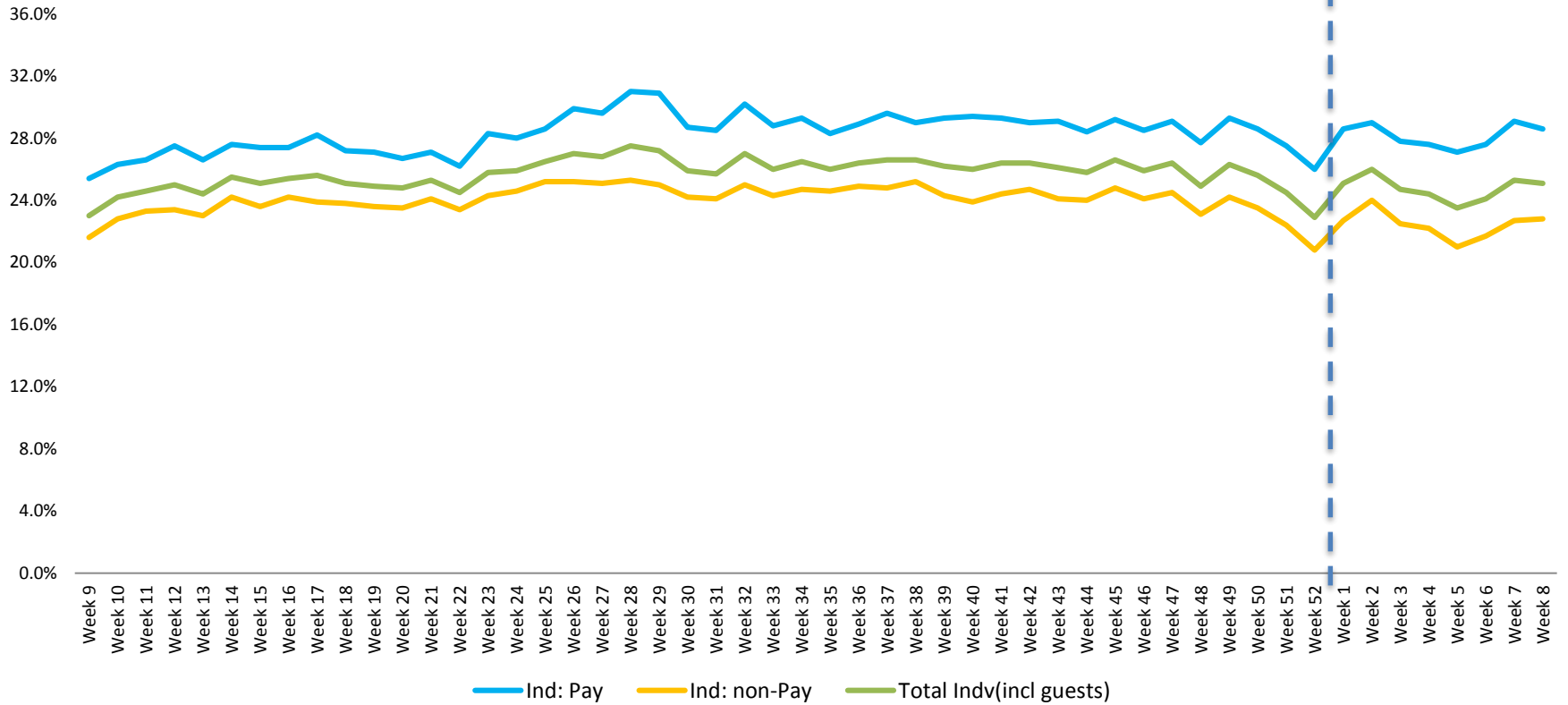
TOTAL TV- PRIME TIME

TOTAL TV: PRIME TIME ADULTS/KIDS



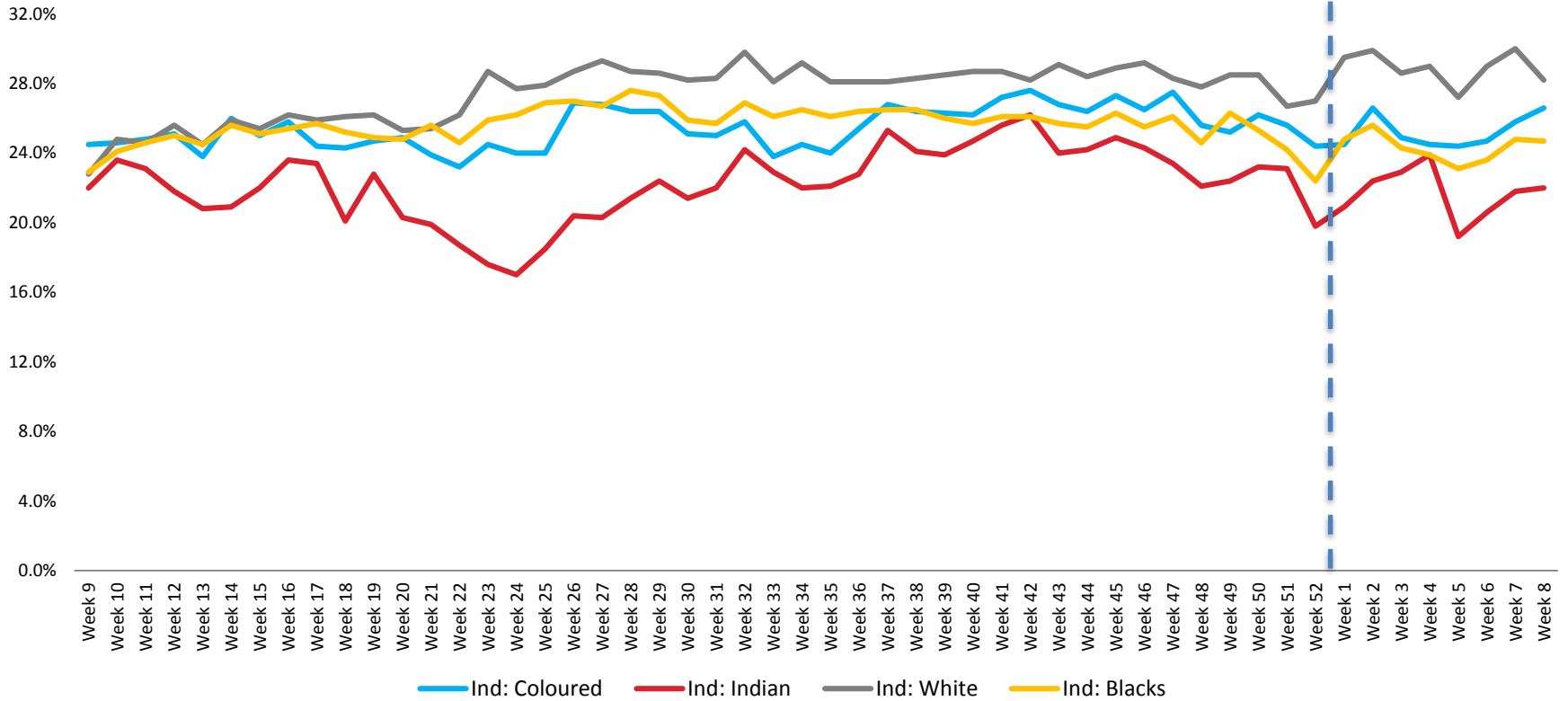
TOTAL TV- PRIME TIME

TOTAL IND: PRIME TIME PAY VS NO PAY



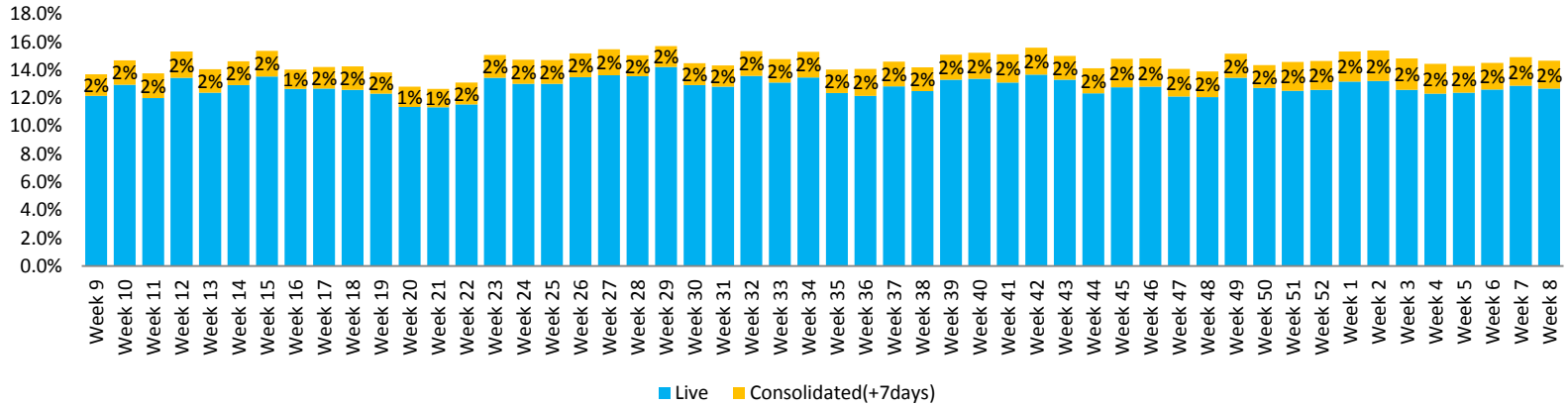
TOTAL TV- PRIME TIME

TOTAL TV: PRIME TIME BY RACE

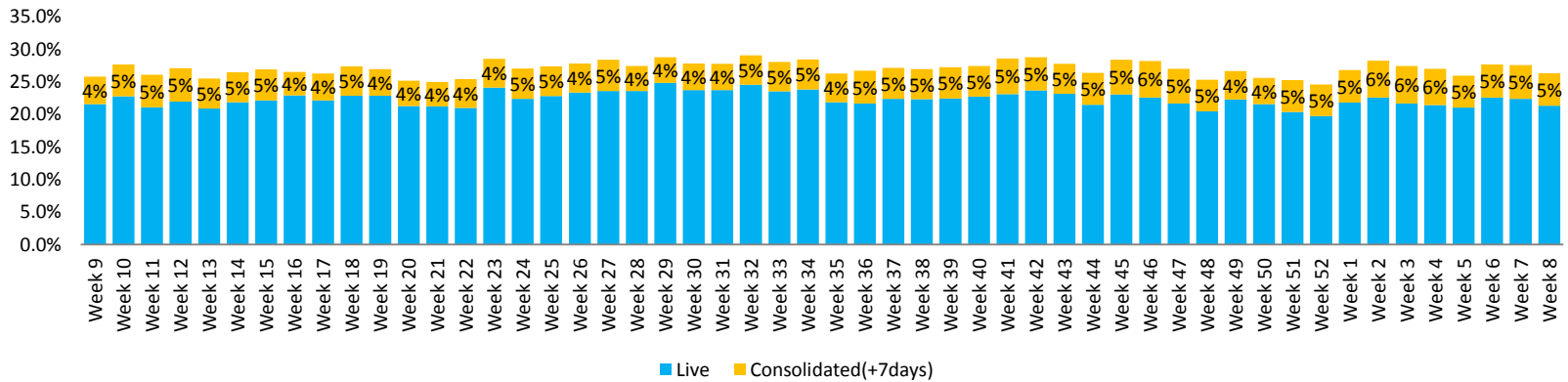


TVR% TIME SHIFTED VIEWING

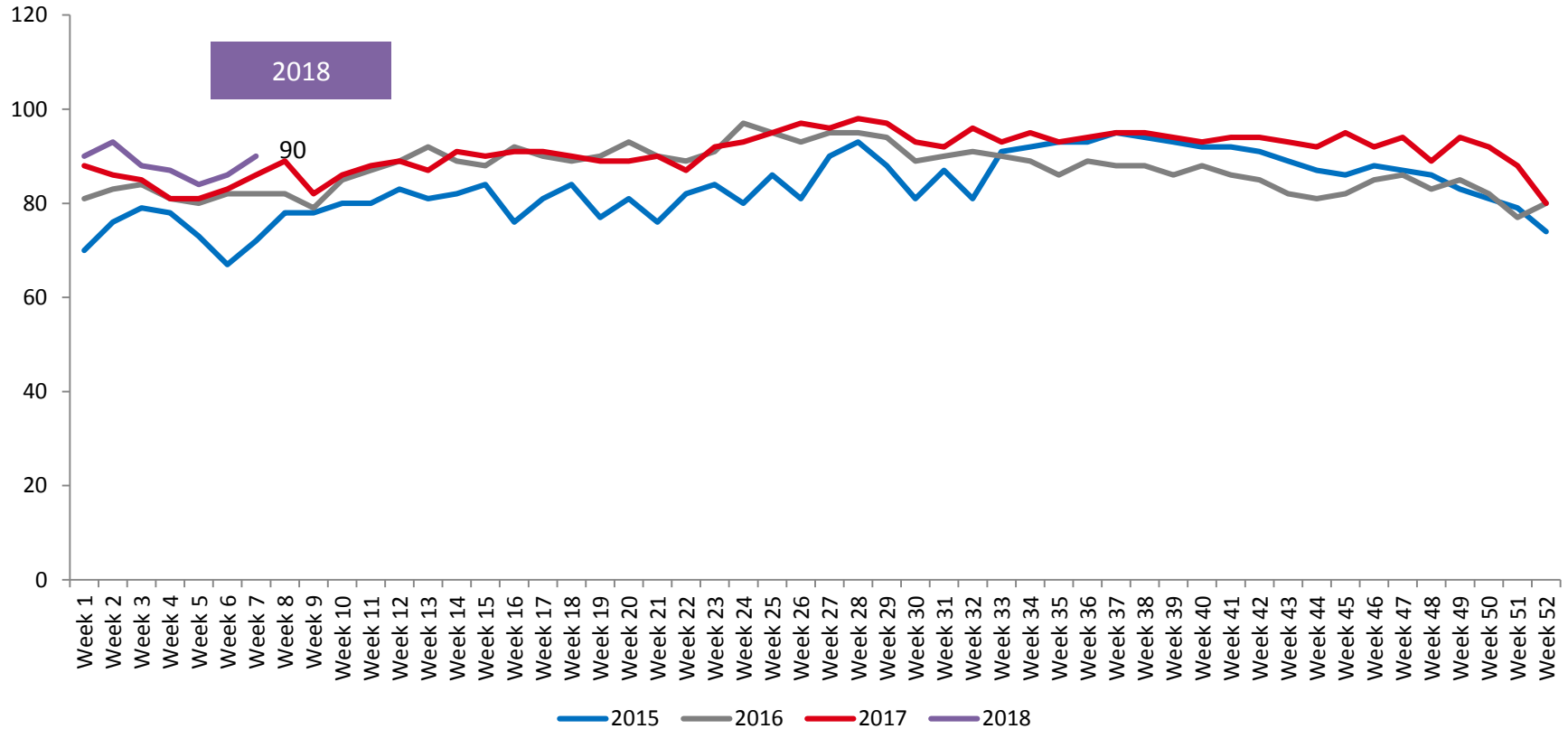
PVR: ALL DAY



PVR: PRIME TIME

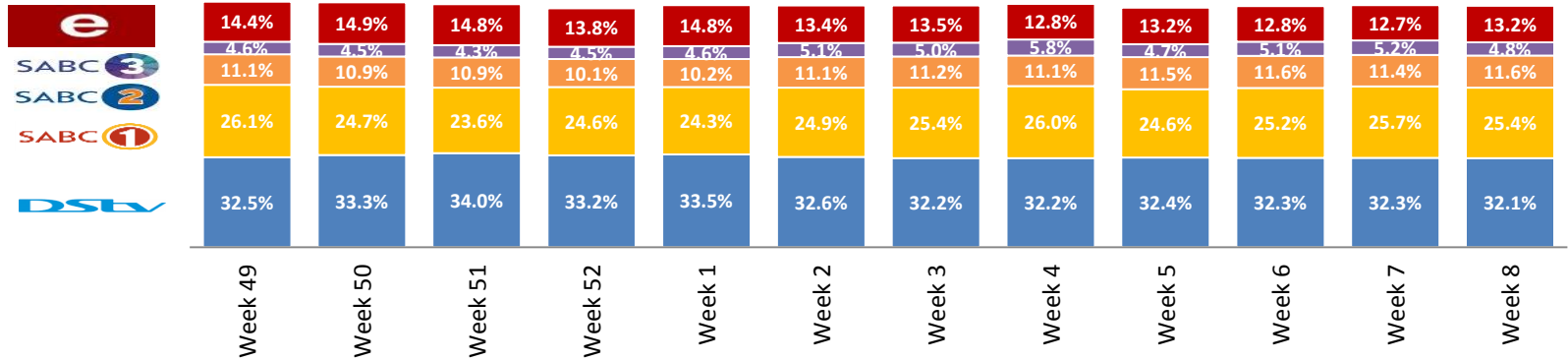


AVERAGE TIME VIEWED- ATV (MINUTES)

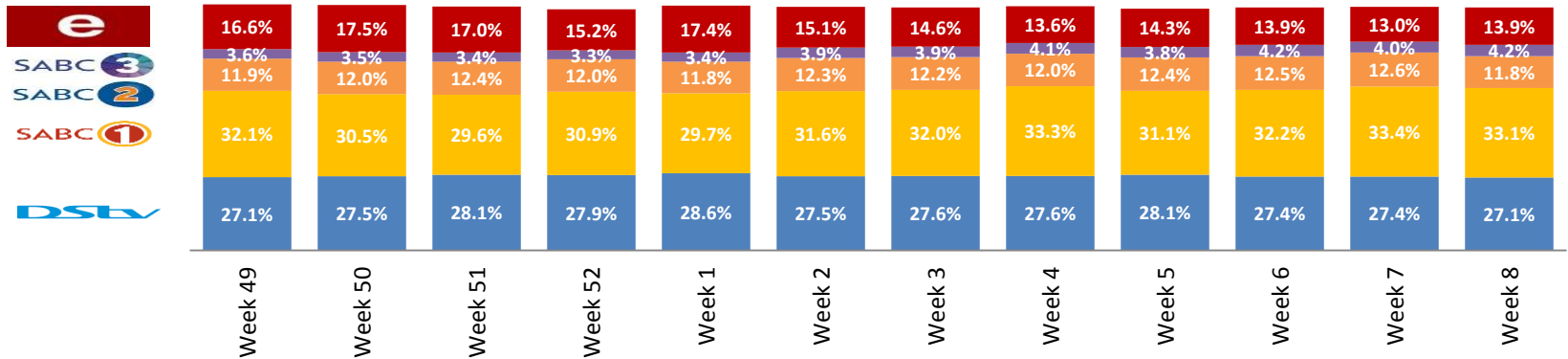


CHANNEL SHARE

ALL DAY - ALL INDIVIDUALS

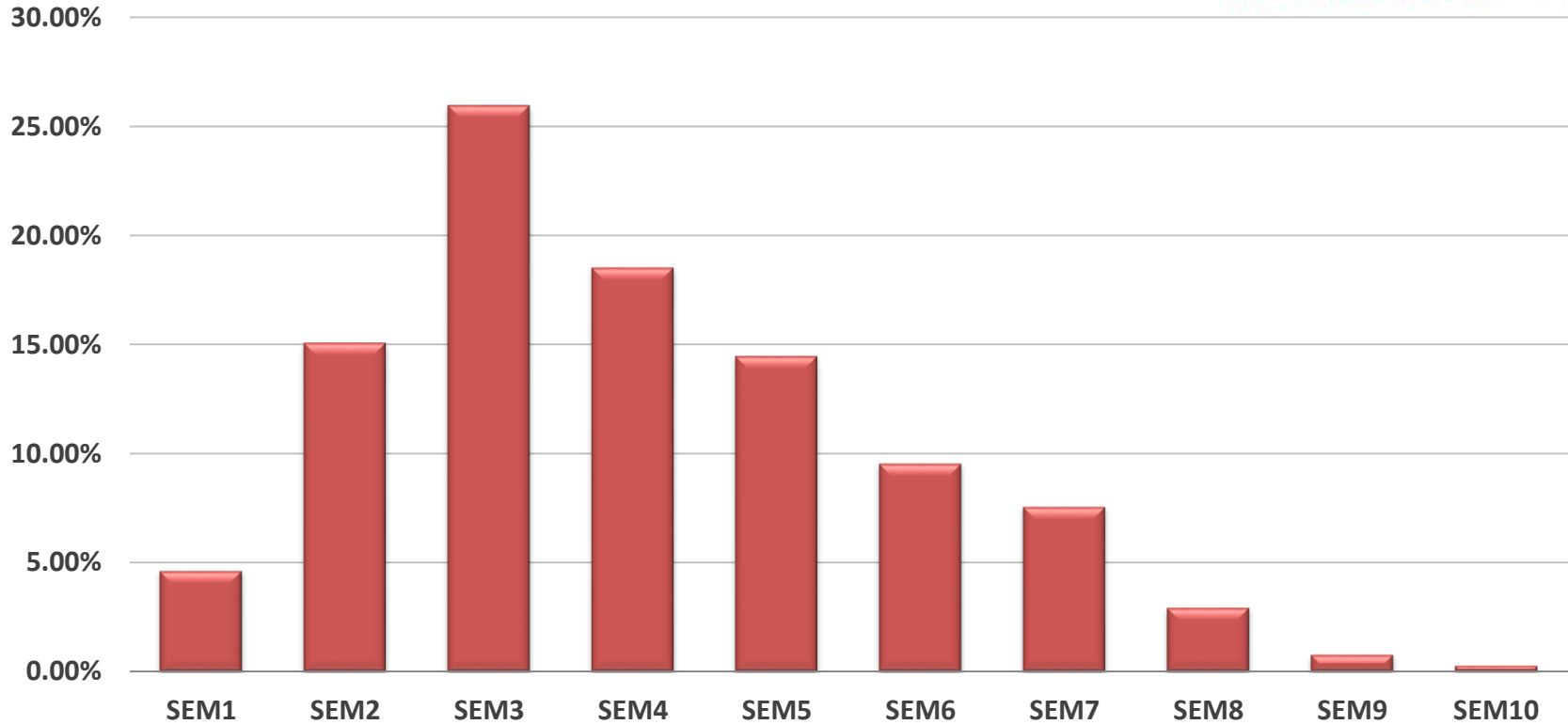


PRIME TIME - ALL INDIVIDUALS



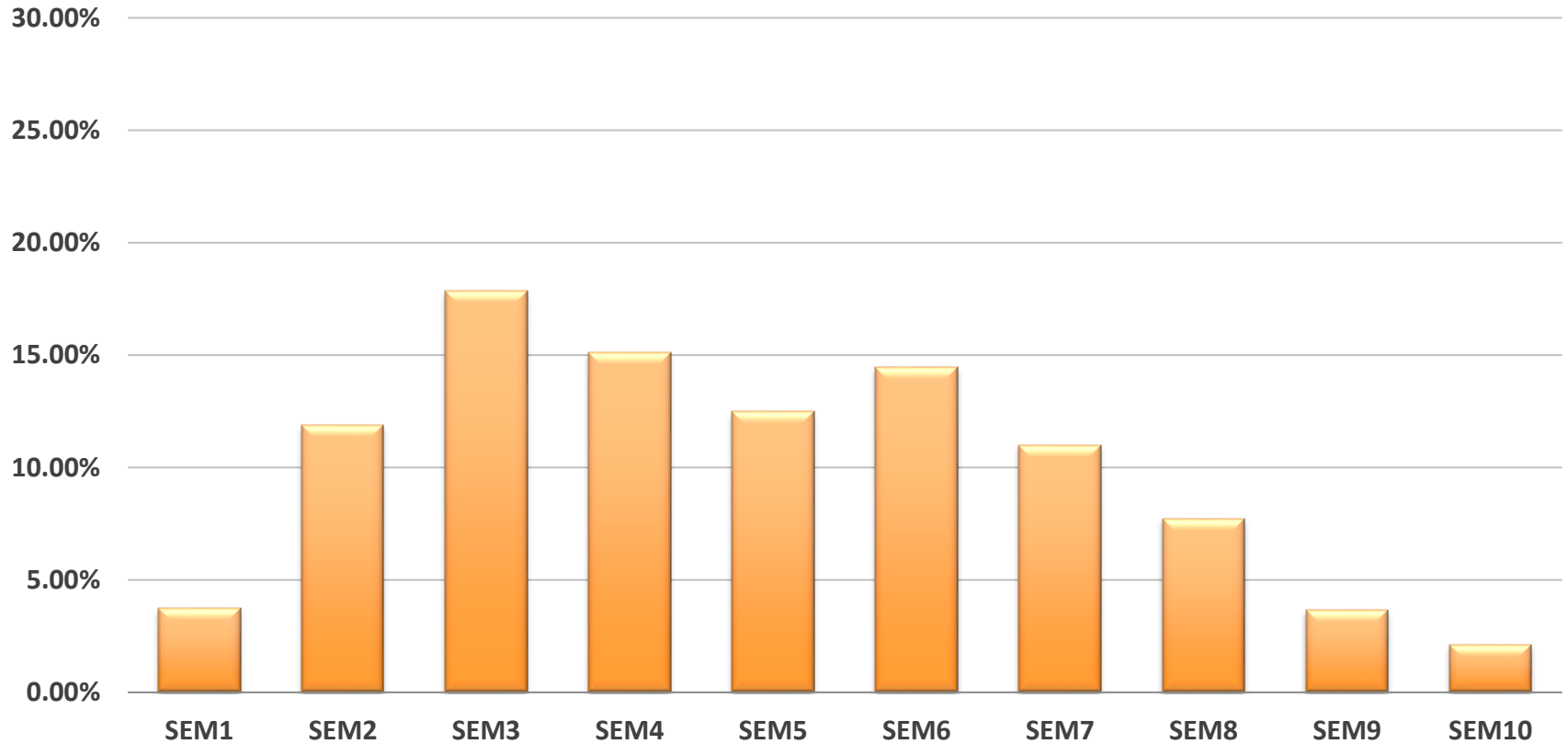
SEM VIEWING PROFILE...

SABC1



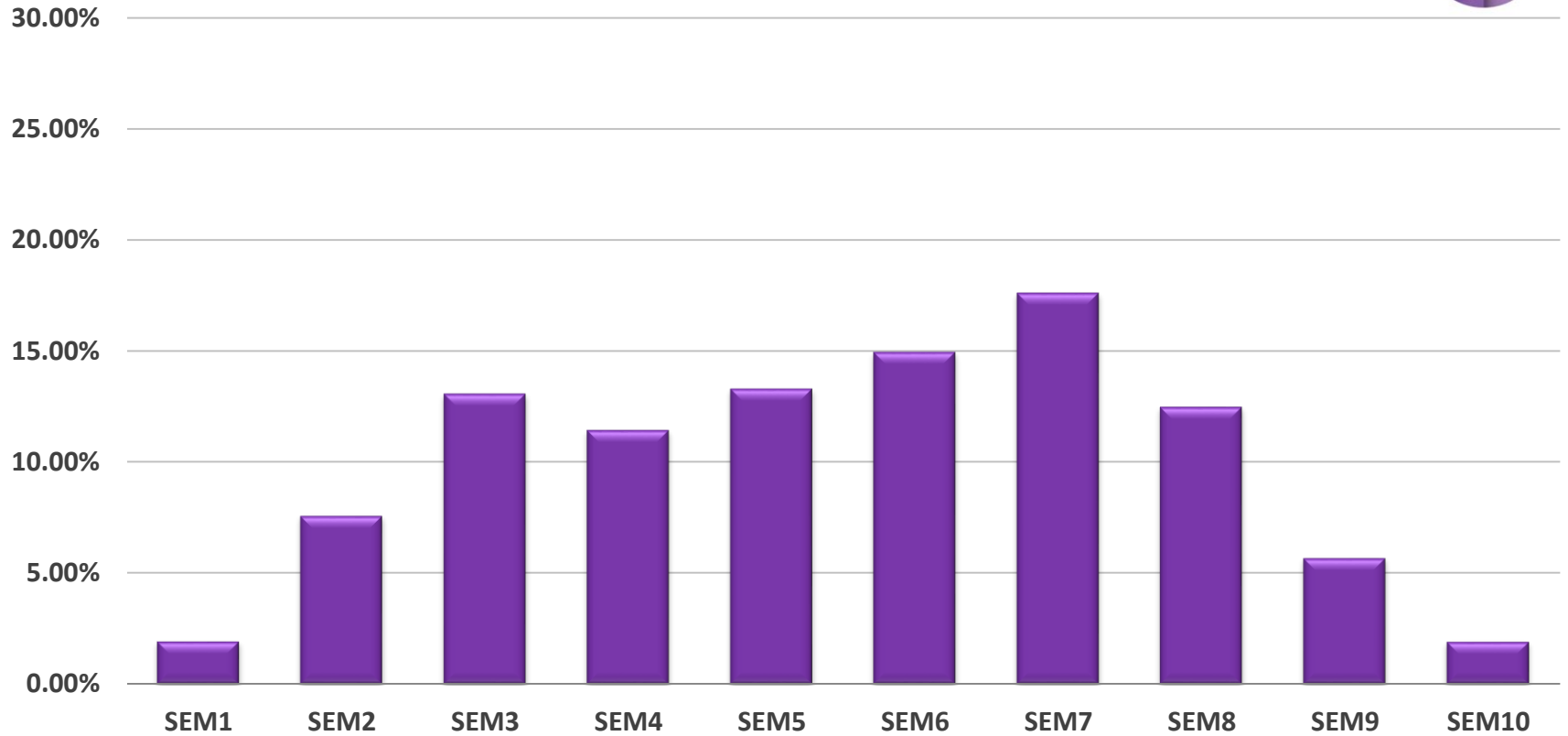
SEM VIEWING PROFILE...

SABC 2

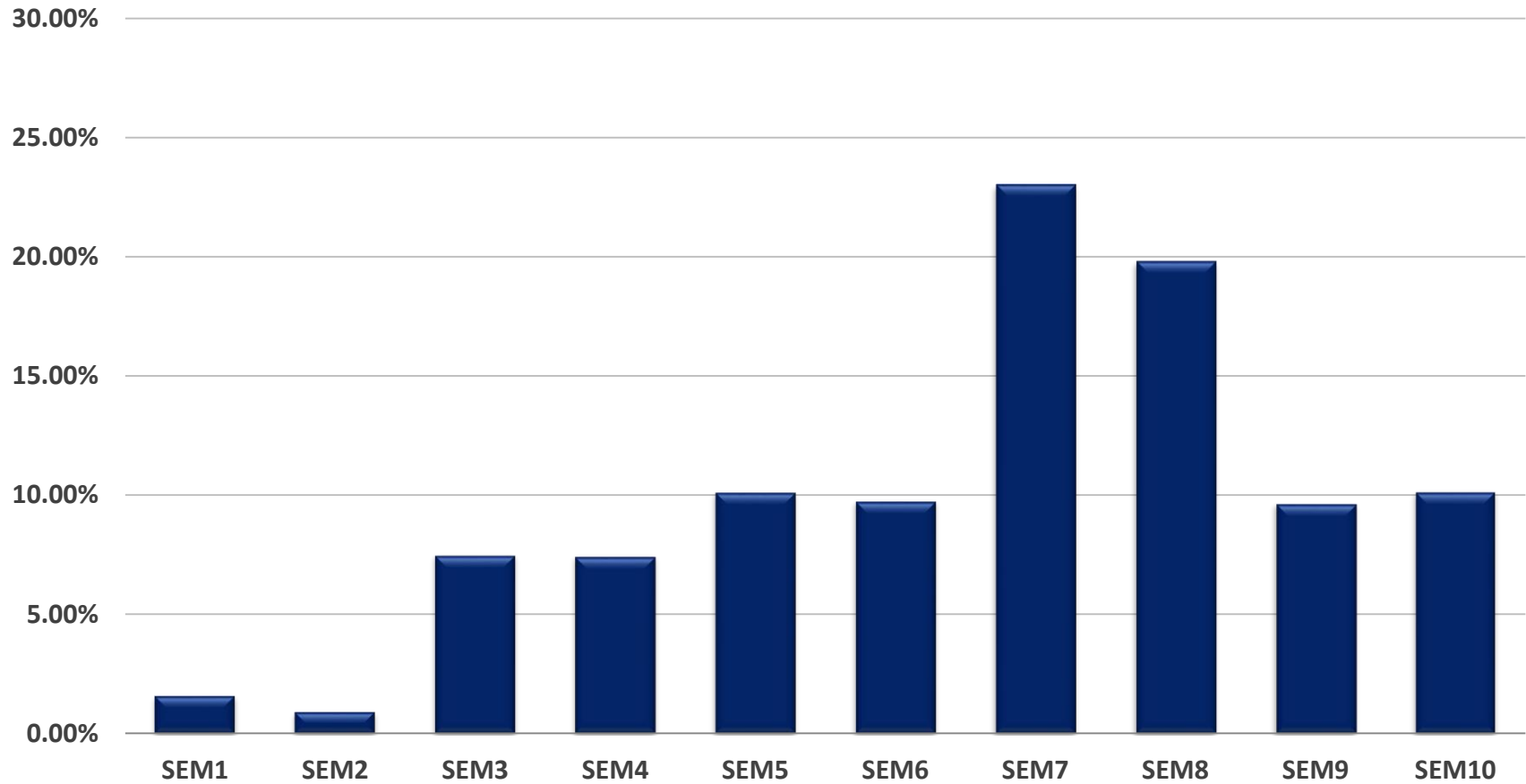


SEM VIEWING PROFILE...

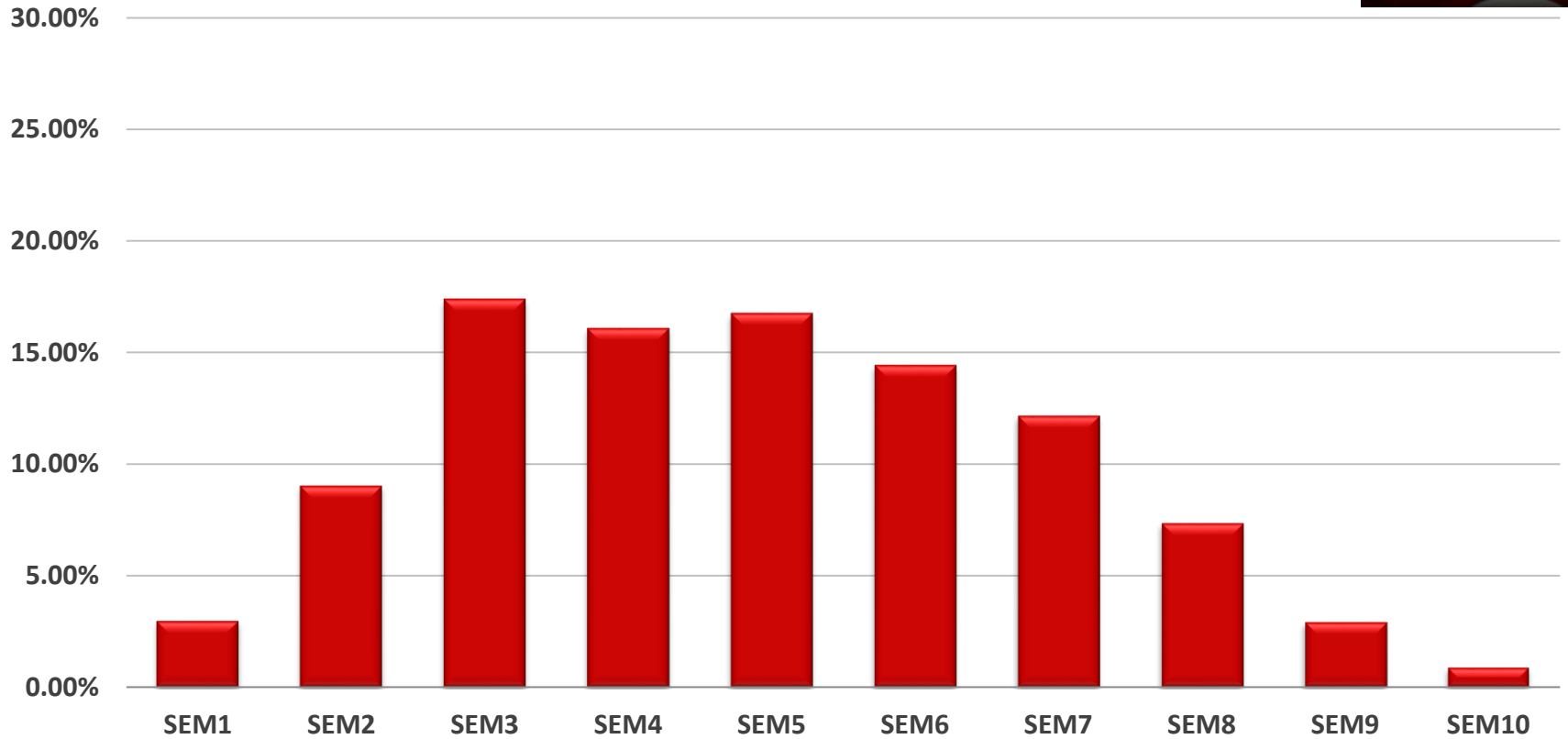
SABC 3



SEM VIEWING PROFILE... SABC NEWS INTERNATIONAL

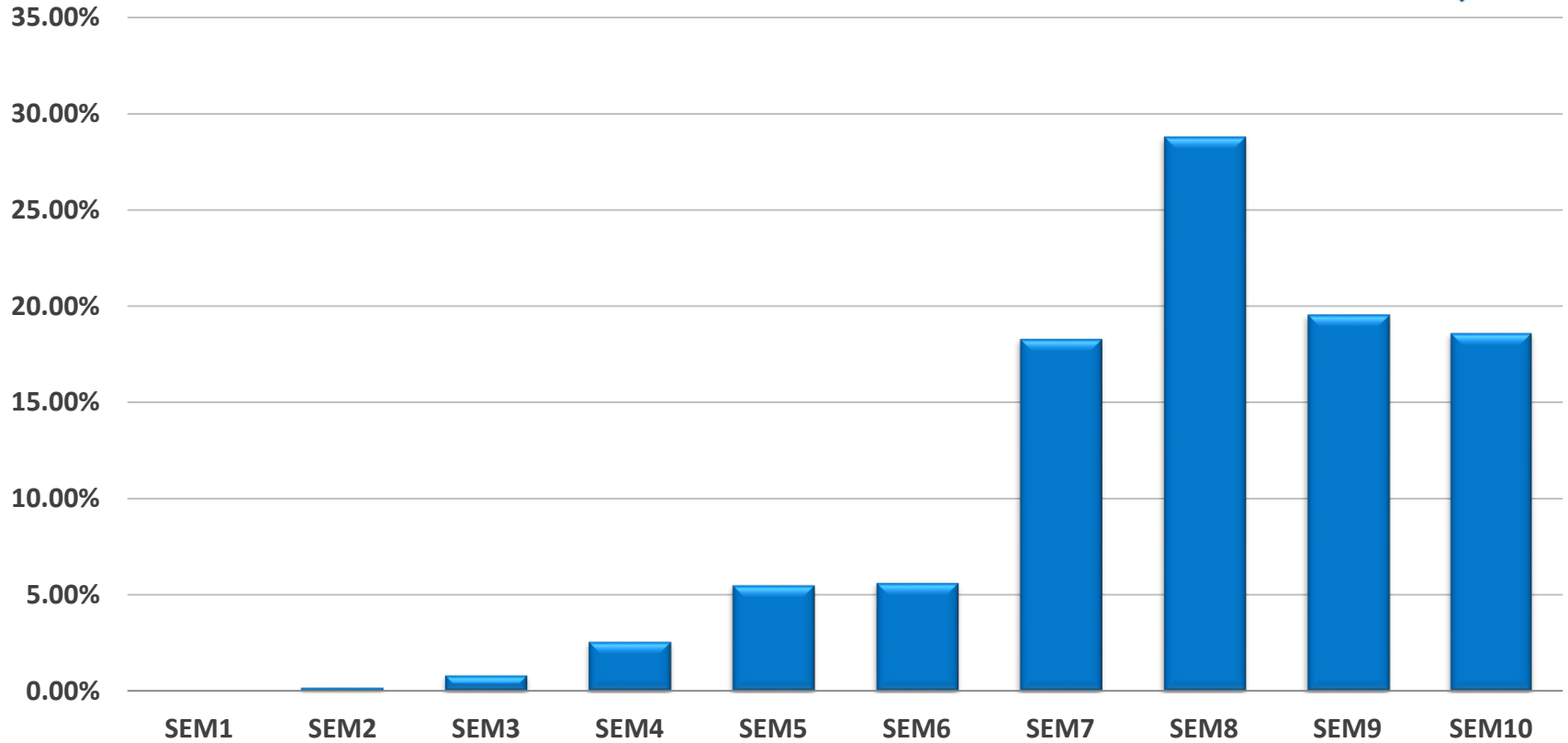


SEM VIEWING PROFILE... ETV

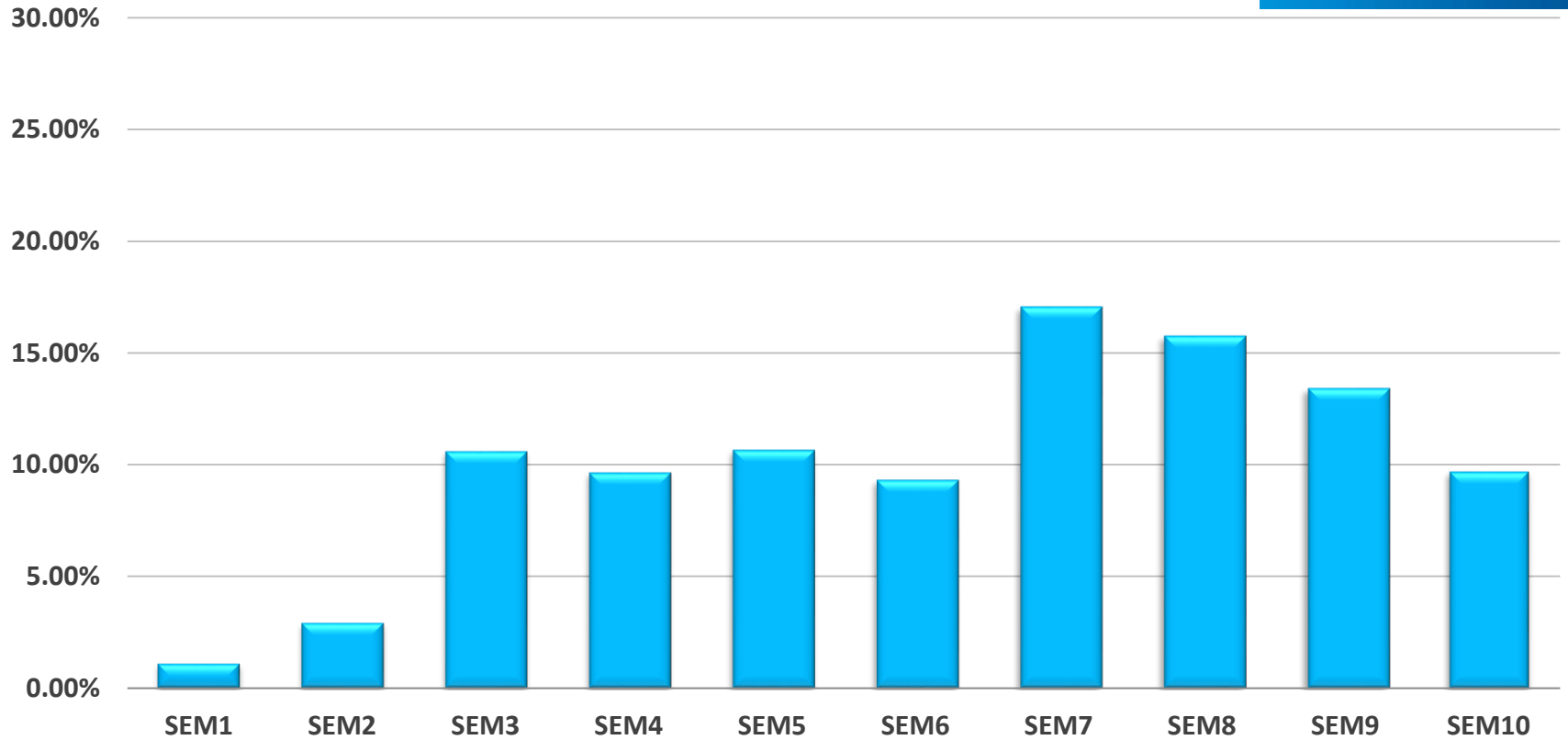


SEM VIEWING PROFILE...

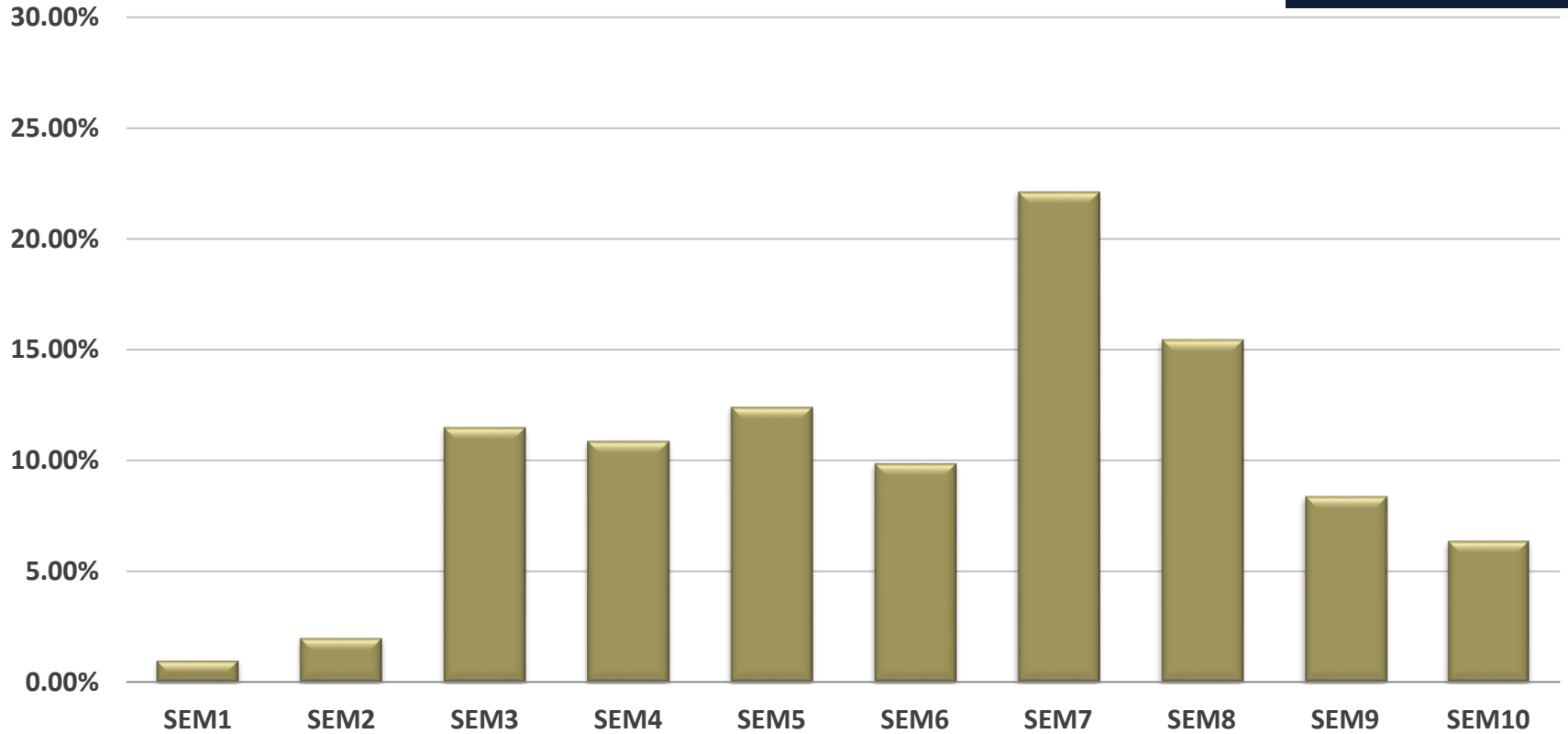
eNCA



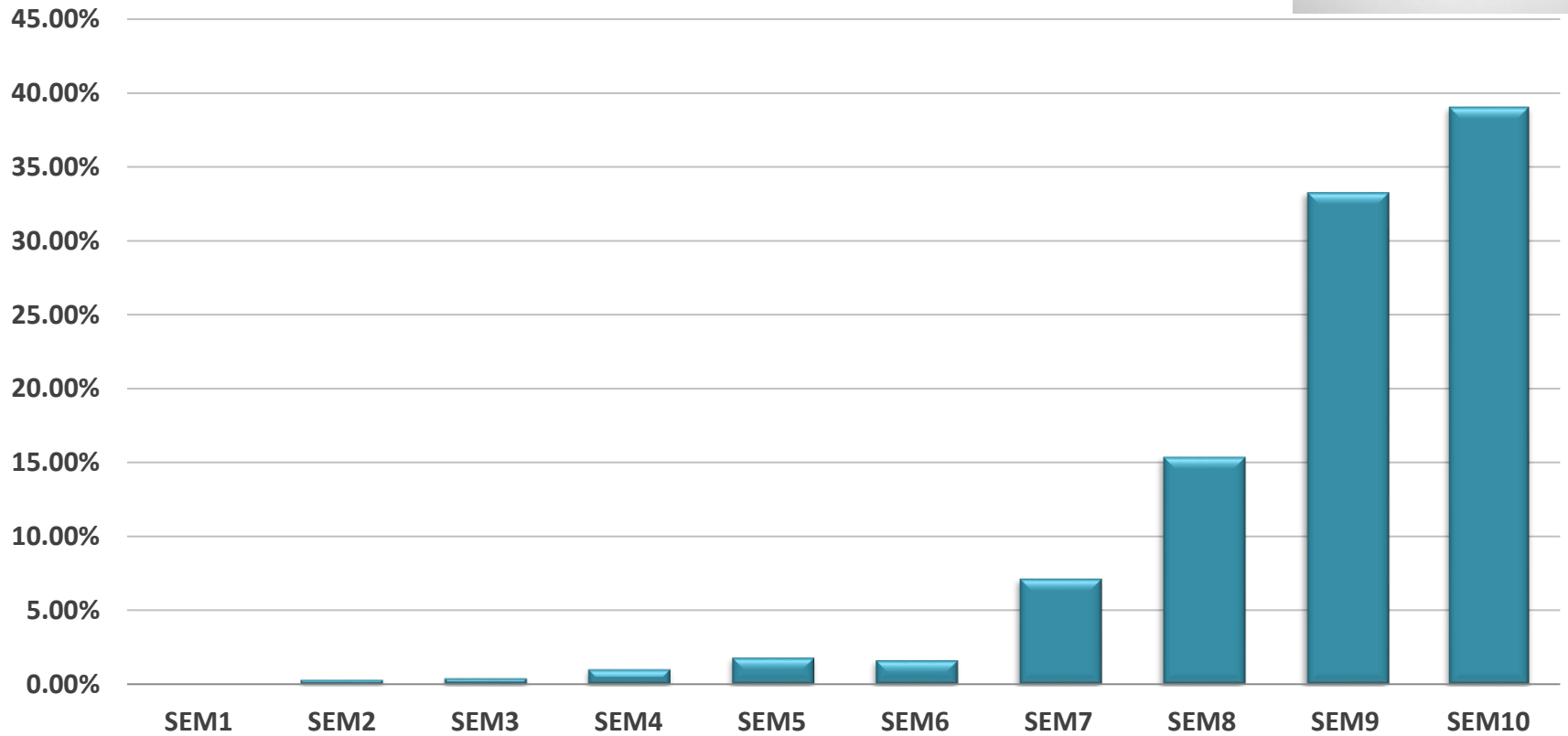
SEM VIEWING PROFILE... DSTV COMMERCIAL



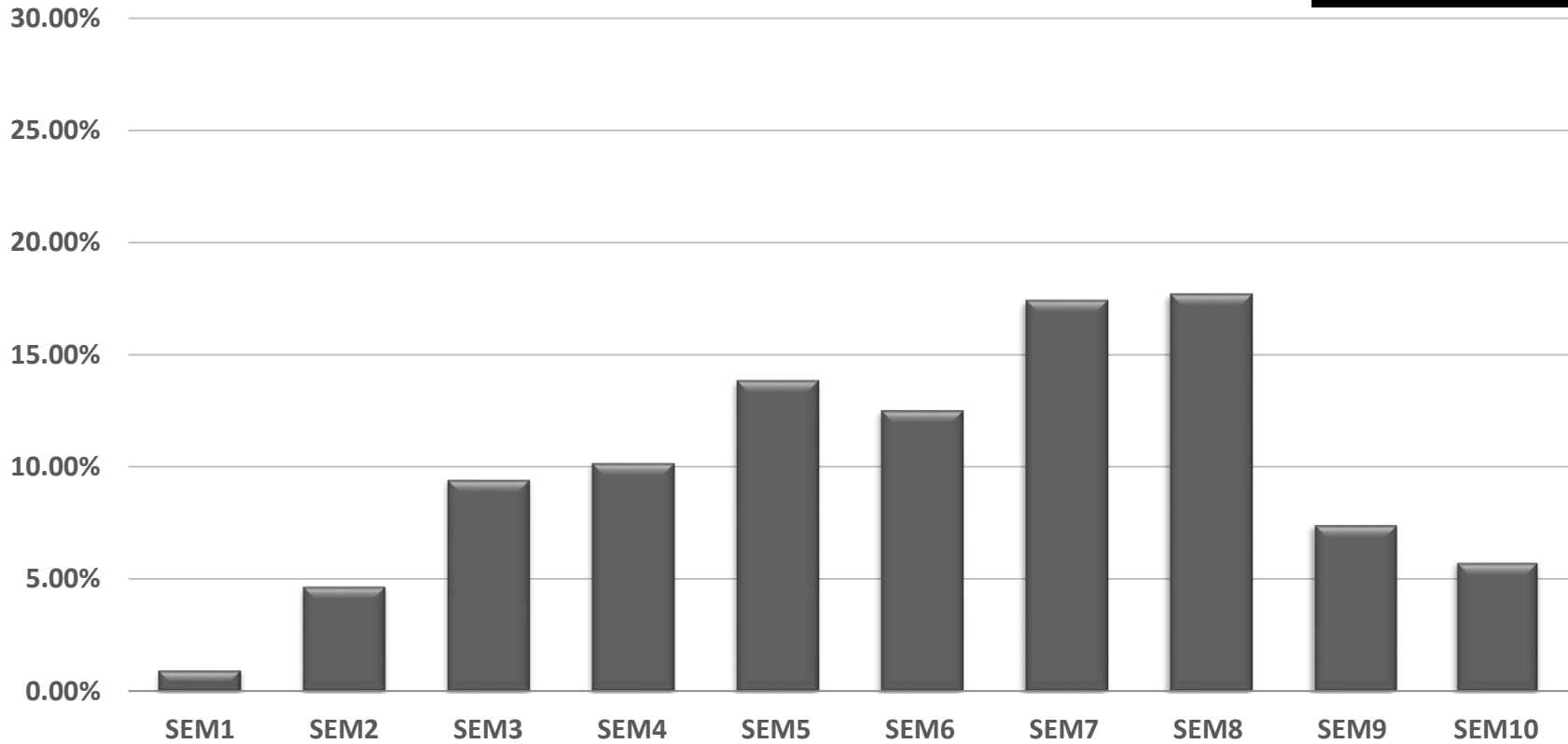
SEM VIEWING PROFILE... MZANZI MAGIC



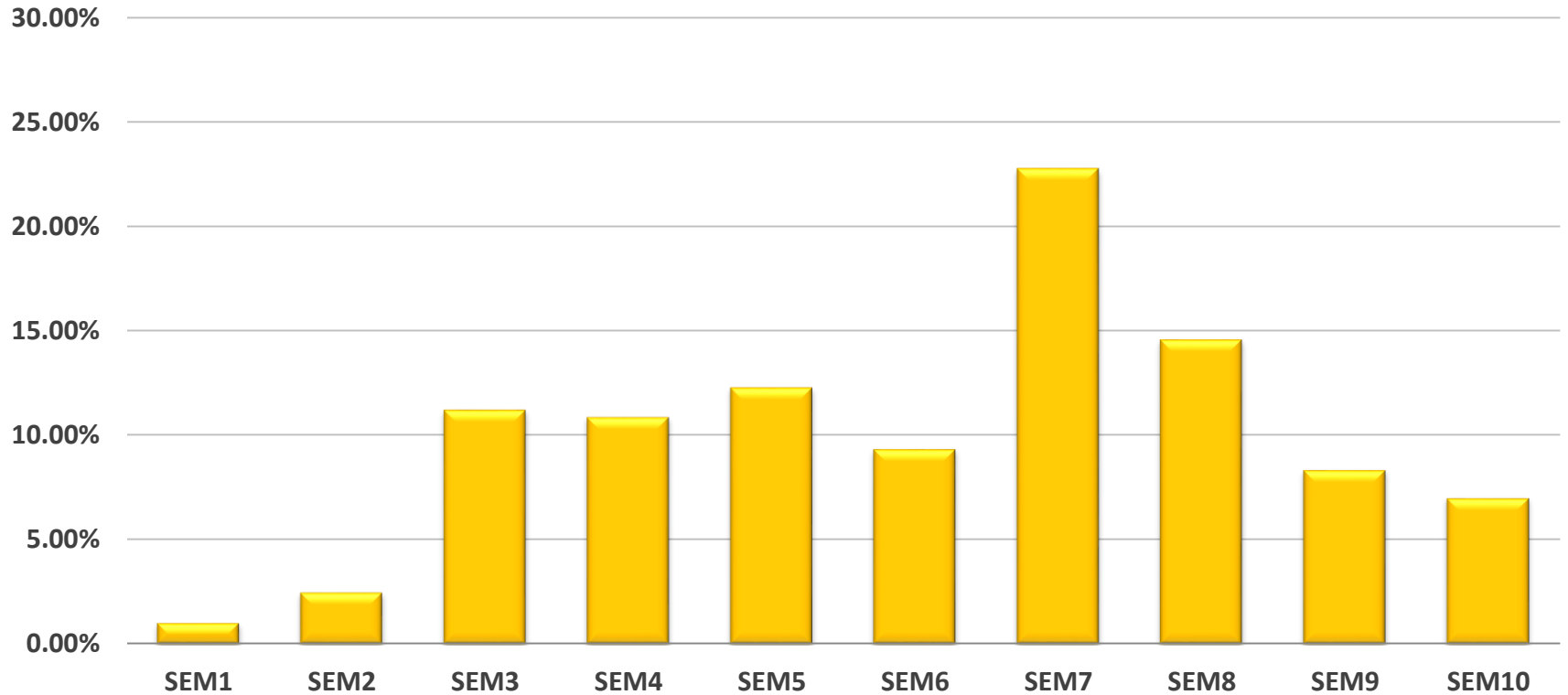
SEM VIEWING PROFILE... M-NET



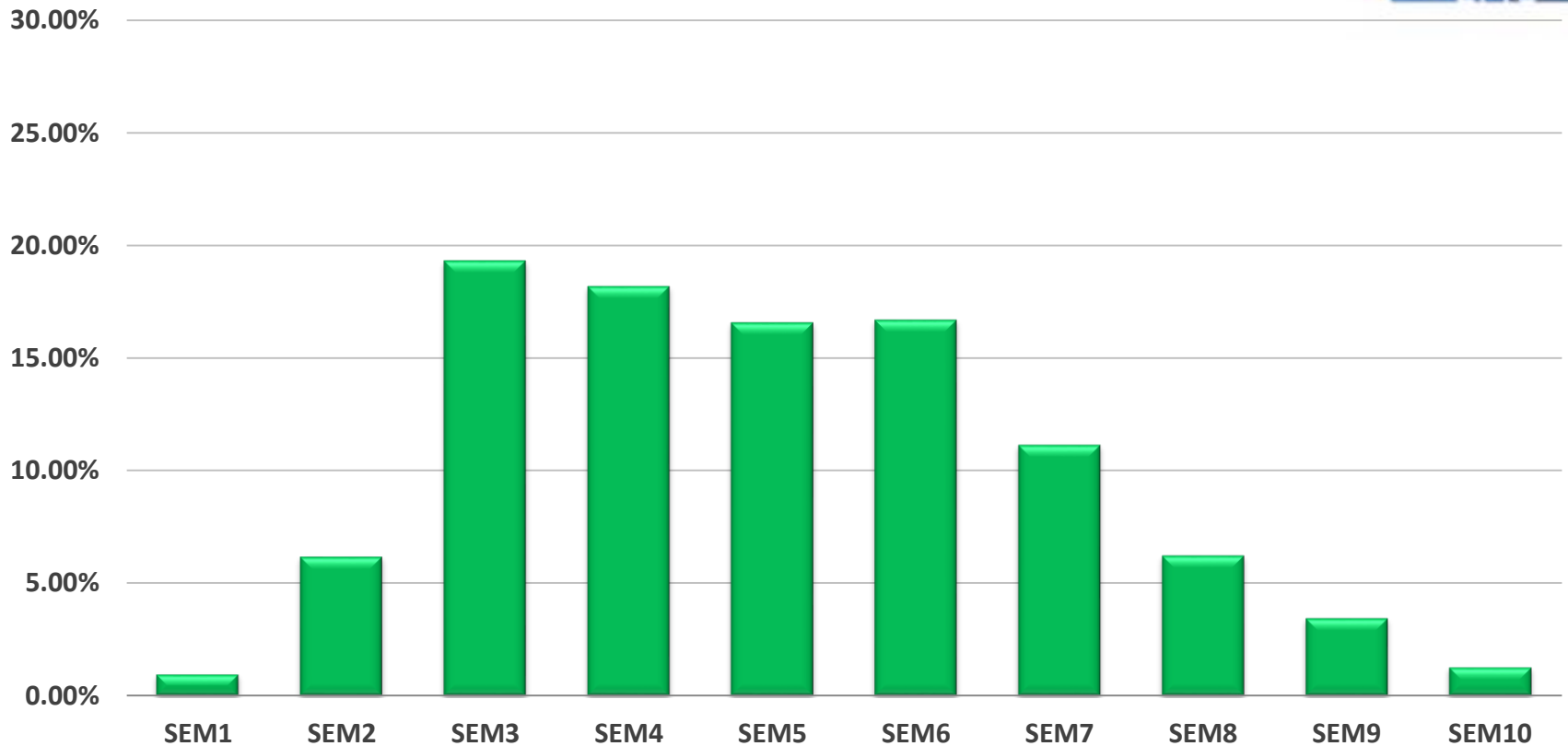
SEM VIEWING PROFILE... CARTOON NETWORK



SEM VIEWING PROFILE... NAT GEO WILD

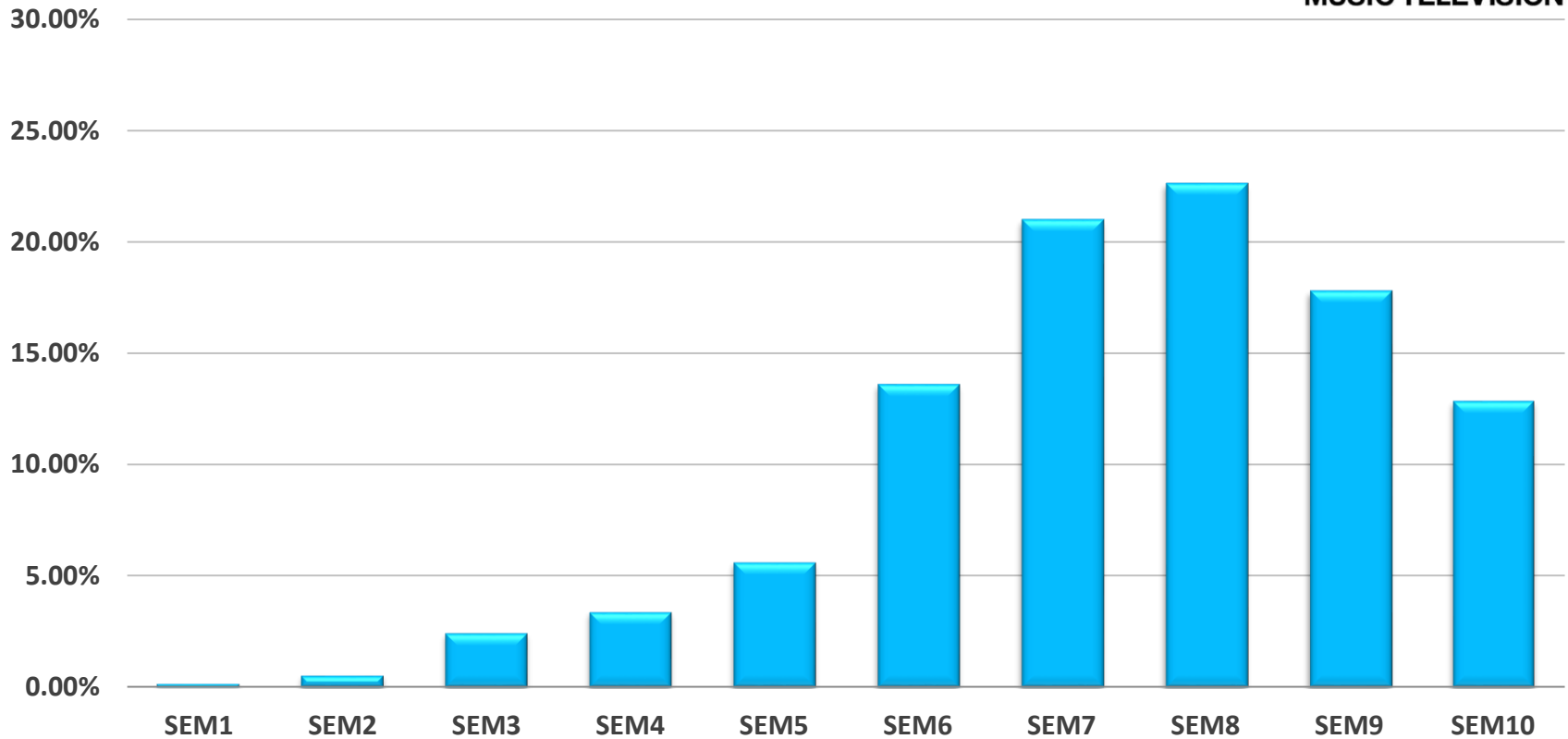


SEM VIEWING PROFILE... AFRICA MAGIC EPIC

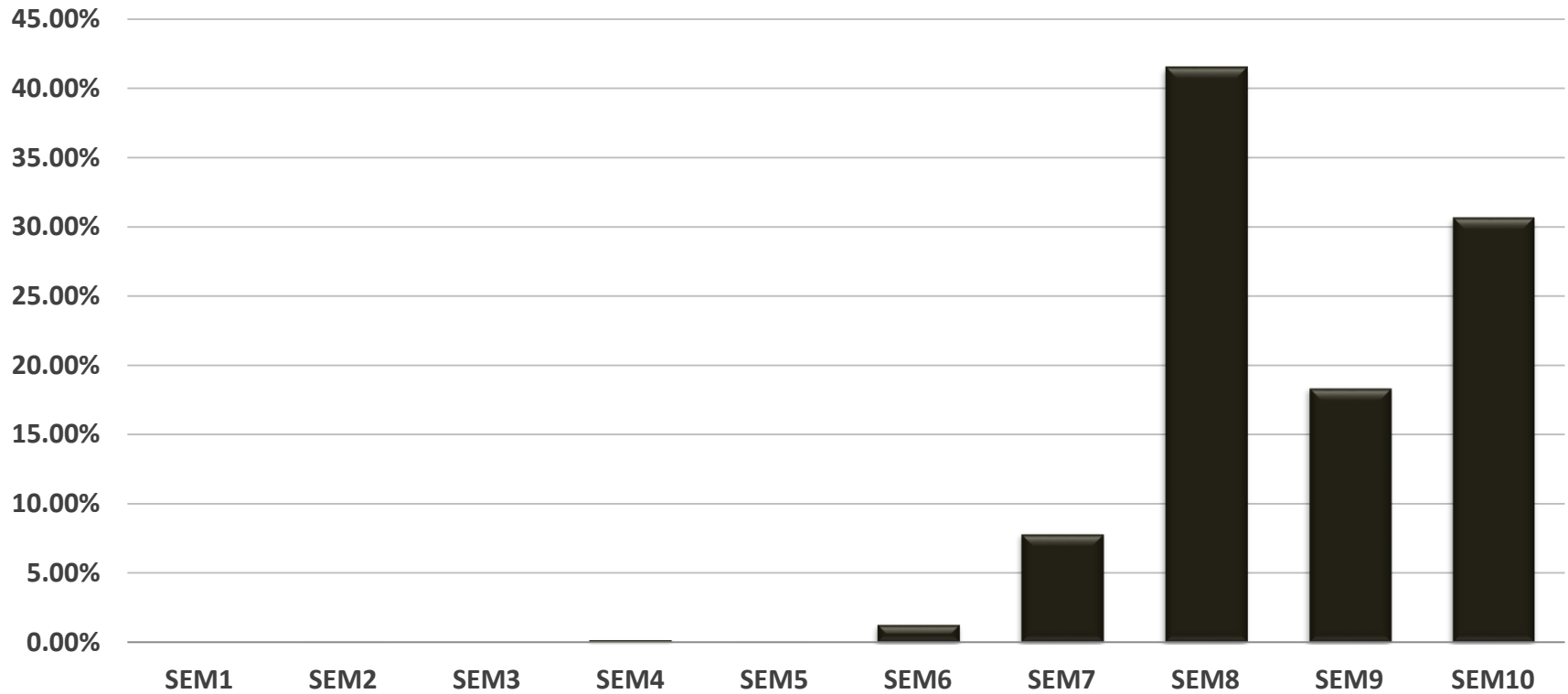


SEM VIEWING PROFILE...

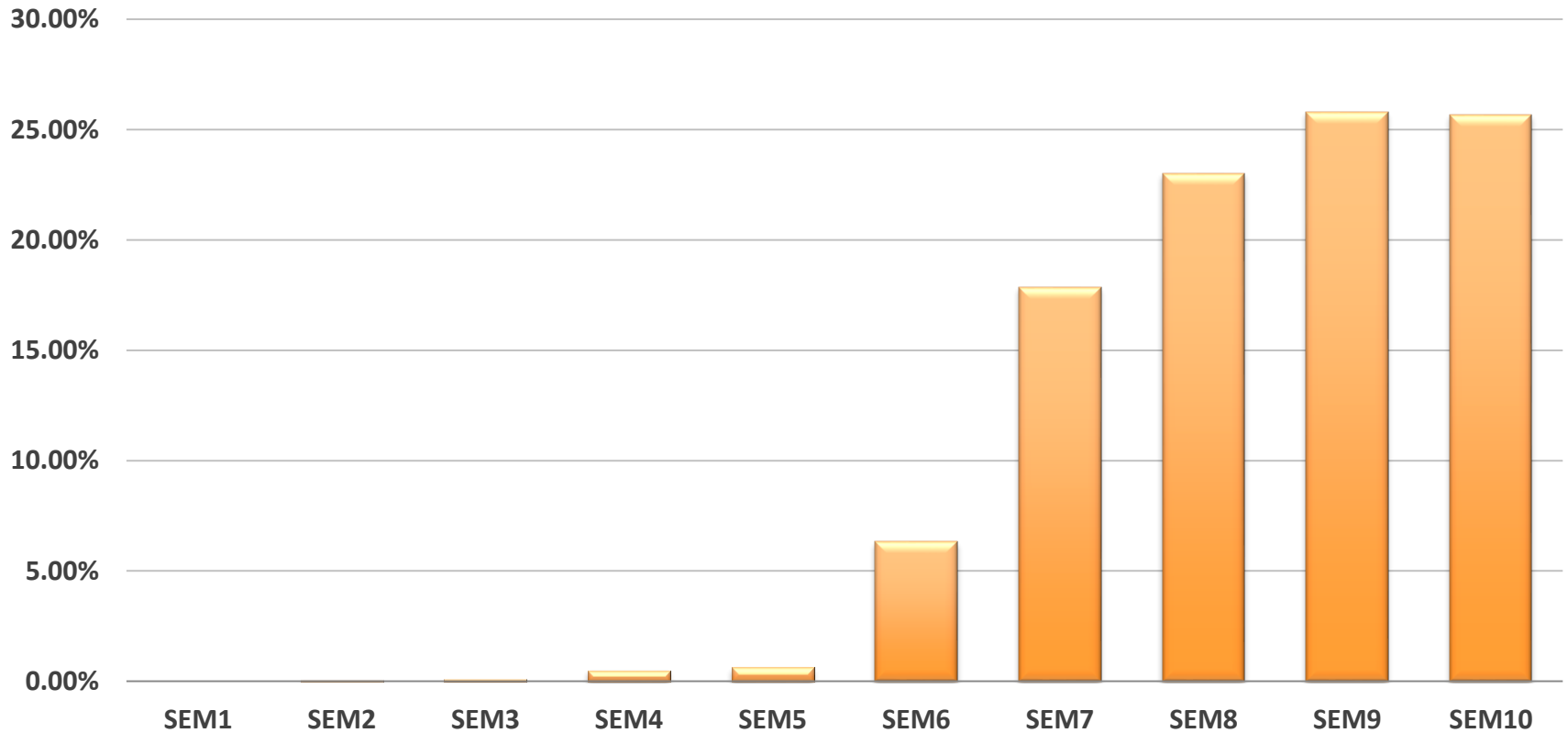
MTV



SEM VIEWING PROFILE... COMEDY CENTRAL

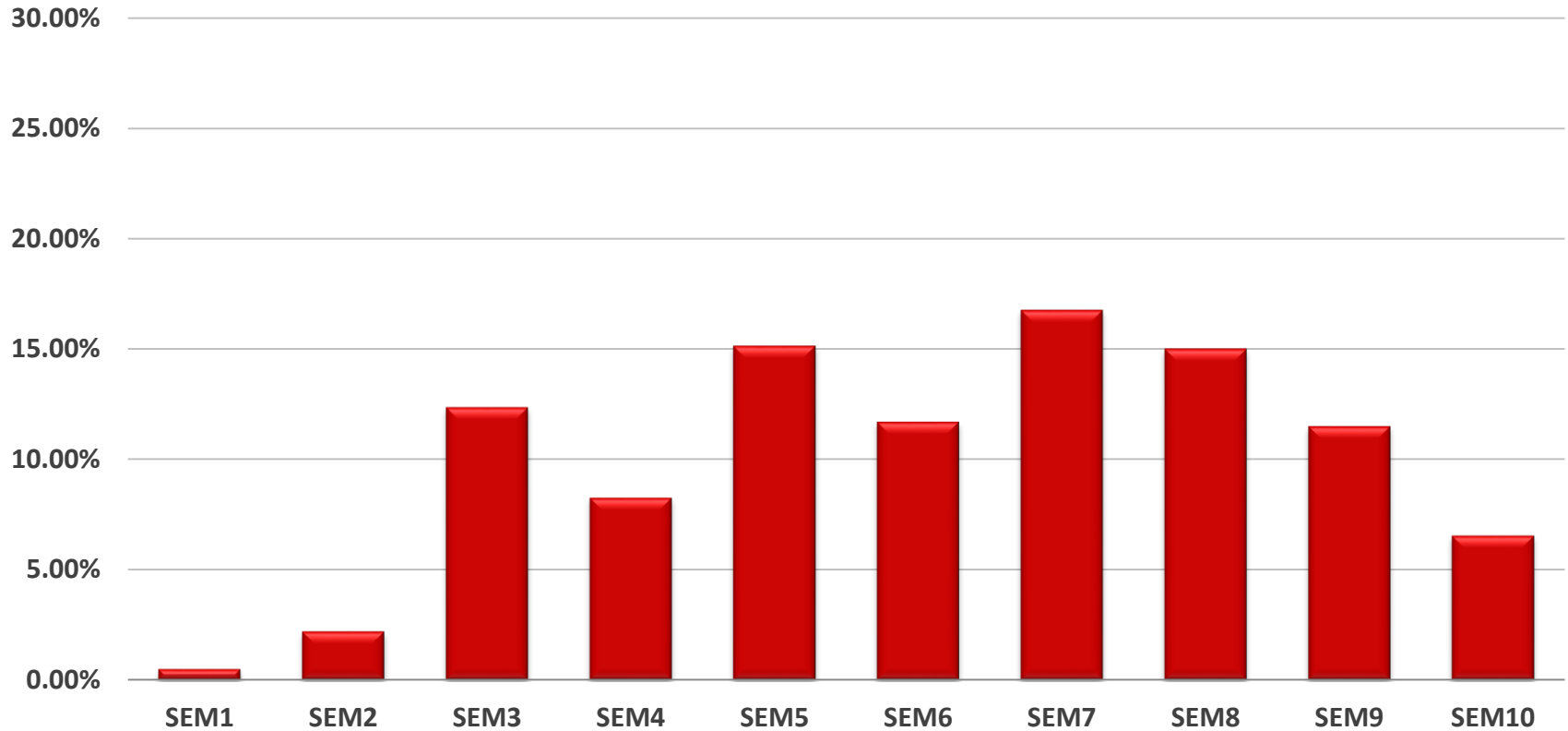


SEM VIEWING PROFILE... NICKELODEON



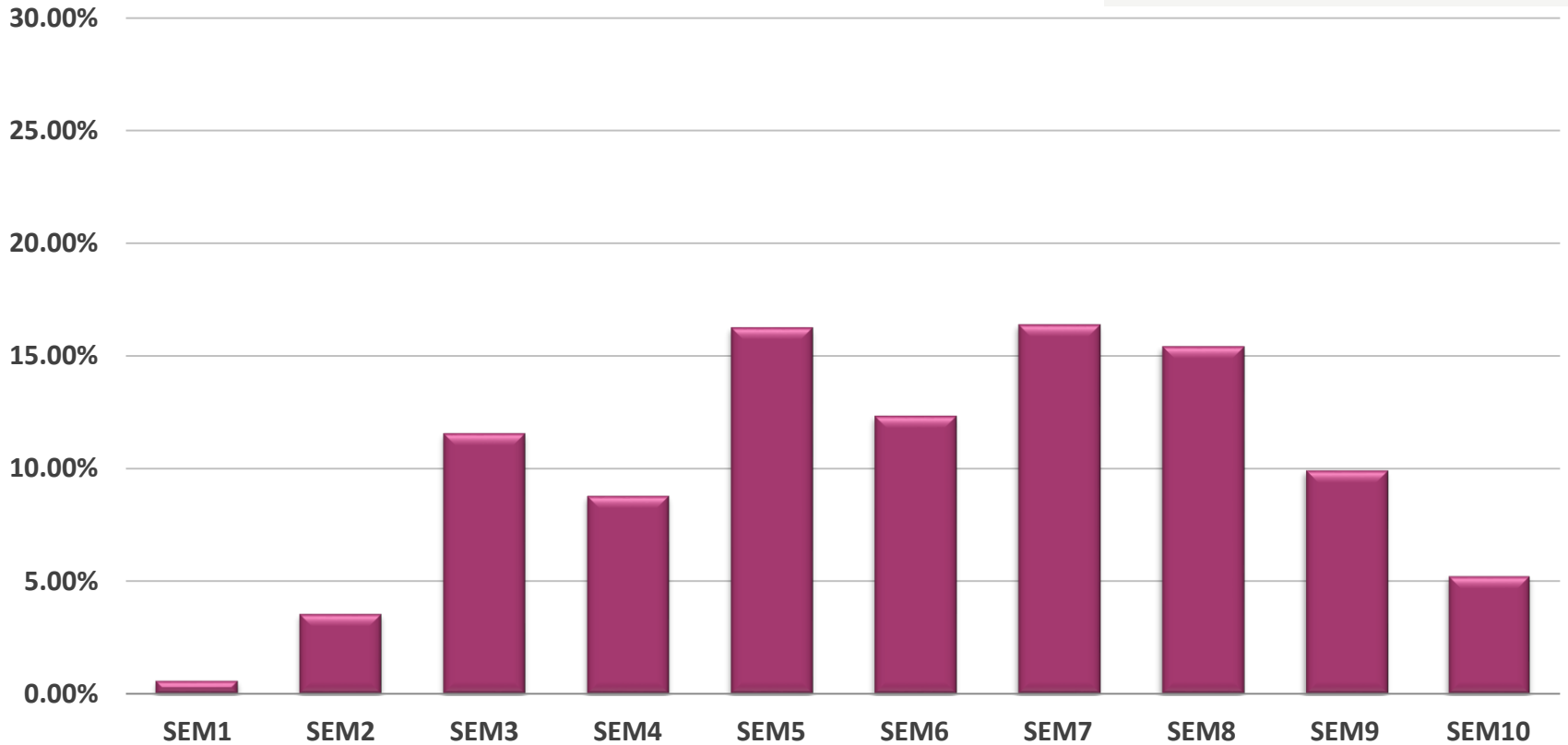
SEM VIEWING PROFILE...

eMOVIES EXTRA



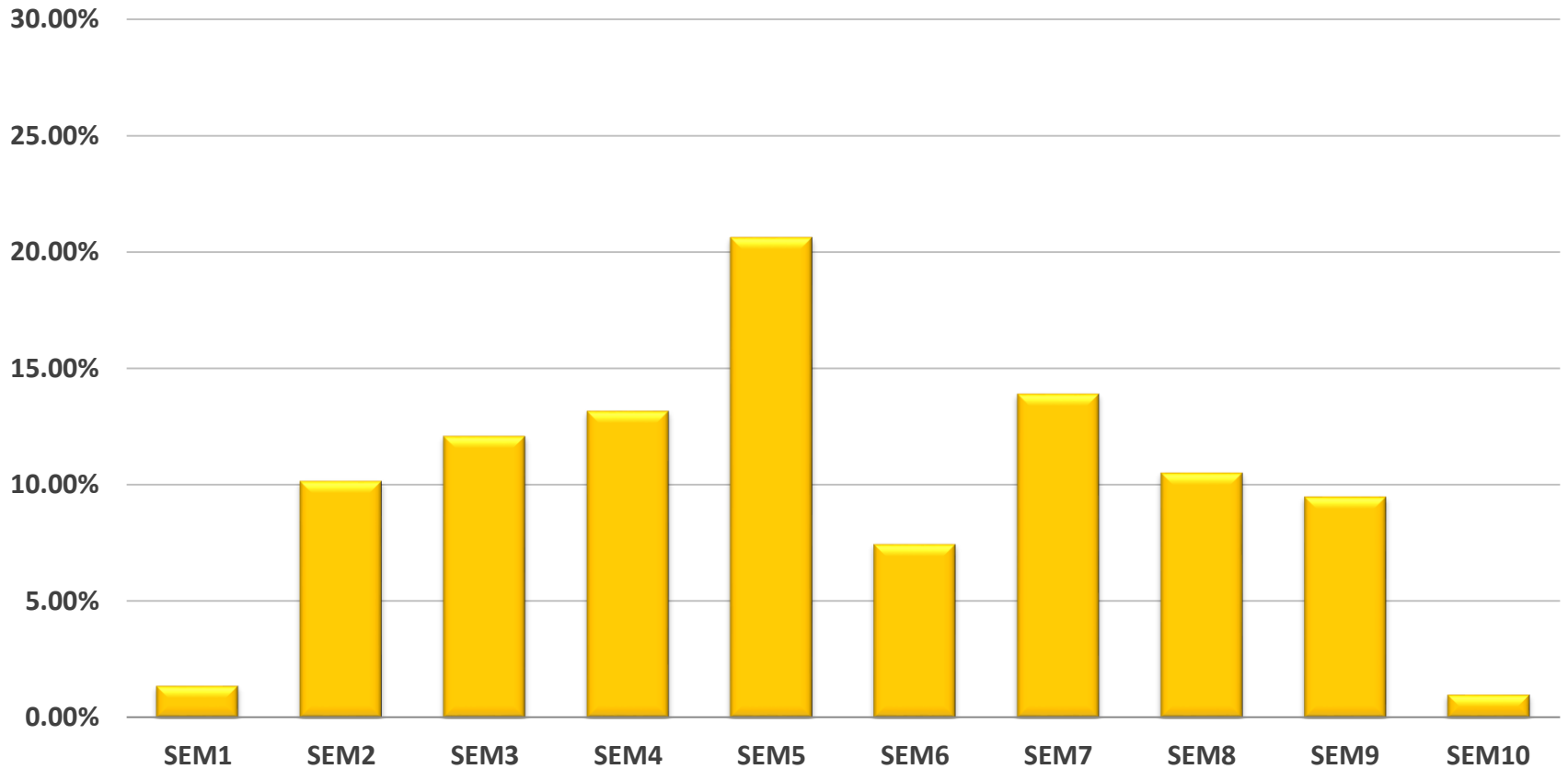
SEM VIEWING PROFILE...

eMOVIES+



SEM VIEWING PROFILE...

eTOONZ





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