

TAM Universe Update from AMPS 2014A to AMPS 2014B

1). Background

- The TAM Universe is updated at regular intervals to correspond with the latest household and population figures of the All Media and Products Survey (AMPS).
- The next Universe update is scheduled for the 31 August 2015, where the TAM Universe will be updated from the AMPS 2014A to the AMPS 2014B Universe.
- The last TAM Universe update occurred on the 2nd February 2015.

2). Review of population changes for the 2014A Universe

- The TAM Household Universe (defined as the Meter Universe in AMPS) increases substantially by 2.2% (288 398 households), and the Individual Universe grows by 3.1% (1 353 453 individuals).
- With over 1.3 Million additional viewers in the 2014B TAM Universe, TVR 000's will increase.
- Overall, TVR %'s remain relatively constant, with Children ages 4-14 years showing increases in both TVR 000's and TVR %'s.
- There are 1.4 Million more Female viewers in the 2014B TAM Universe, and the growth in the Female population is higher than in the Male population.
- Provinces with larger Rural populations (E.g. Eastern Cape, Kwazulu-Natal, and Limpopo) show significant growth, reflecting the overall growth of 7.4% within the Rural population.

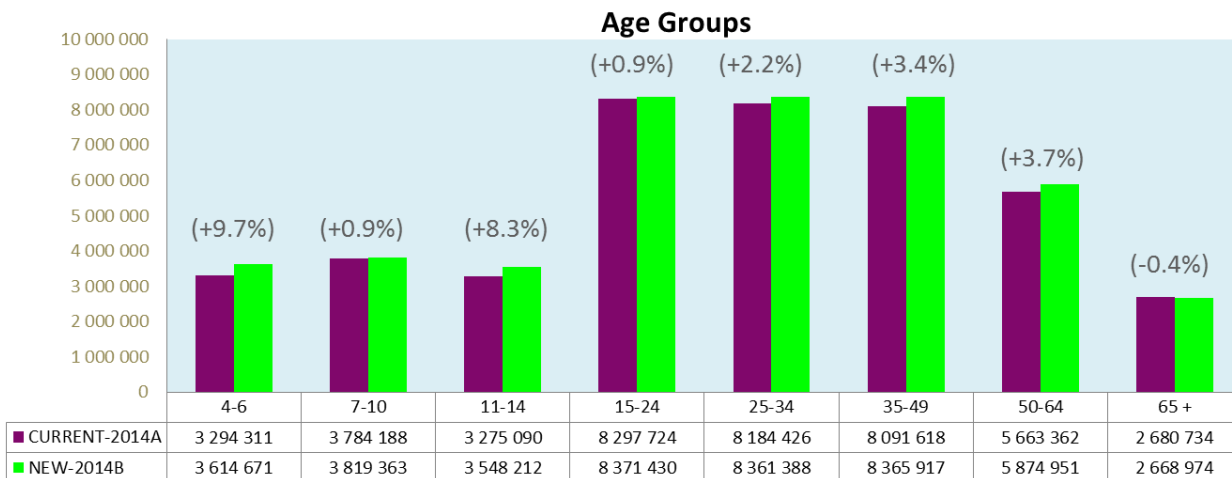
		CURRENT: 2014A	NEW: 2014B	% Difference	
Gender					
Males	POP	21 001 266	21 606 247	2.88%	↑
Females	POP	22 270 187	23 018 659	3.36%	↑
TOTAL	POP	43 271 453	44 624 906	3.13%	
Province					
Western Cape	POP	5 358 634	5 379 583	0.39%	↑
Northern Cape	POP	989 314	970 823	-1.87%	↓
Free State	POP	2 282 641	2 368 186	3.75%	↑
Eastern Cape	POP	4 596 605	4 894 801	6.49%	↑
Kwazulu-Natal	POP	7 880 135	8 212 954	4.22%	↑
Mpumalanga	POP	3 431 714	3 408 249	-0.68%	↓
Limpopo	POP	4 359 727	4 600 704	5.53%	↑
Gauteng	POP	11 394 018	11 793 522	3.51%	↑
North-West	POP	2 978 666	2 996 087	0.58%	↑
TOTAL	POP	43 271 453	44 624 906	3.13%	↑

- Corresponding with the growth in the Rural populations, LSM1 - 4 increases.
- LSM 6 is the largest LSM population and grows by 2.9%.
- Notable growth occurs in the LSM 9 – 10.
- Access to Star Sat continues to decline.

		CURRENT: 2014A	NEW: 2014B	% Difference	
LSM Group					
LSM 1 - 4	POP	7 096 426	7 405 312	4.35%	↑
LSM 5	POP	7 545 978	7 332 238	-2.83%	↓
LSM 6	POP	11 268 949	11 592 270	2.87%	↑
LSM 7	POP	5 973 602	6 380 326	6.81%	↑
LSM 8	POP	4 140 441	4 120 735	-0.48%	↓
LSM 9	POP	4 453 012	4 771 077	7.14%	↑
LSM 10	POP	2 793 046	3 022 950	8.23%	↑
TOTAL	POP	43 271 453	44 624 906	3.13%	

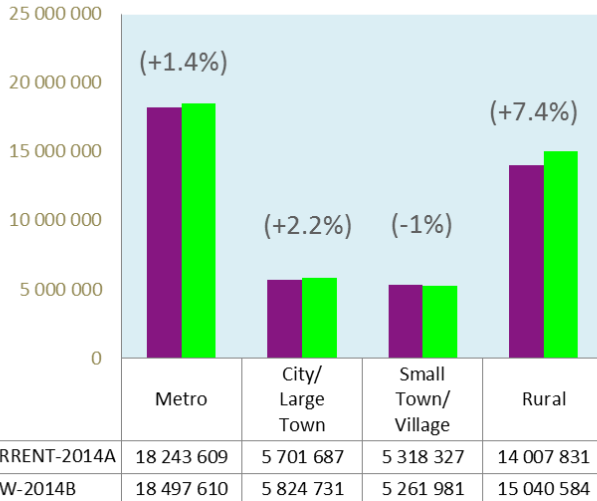
Access to Star Sat					
Non Star Sat	POP	42 892 920	44 323 658	3.34%	↑
Star Sat	POP	378 533	301 249	-20.42%	↓
TOTAL	POP	43 271 453	44 624 906	3.13%	

- Overall, there are 10 982 246 Children (Ages 4 to 14) and 33 642 660 Adults (Ages 15+) in the 2014B Universe.
- In total, the Children’s Universe has grown by 6%; Adults has increased by 2.2%.

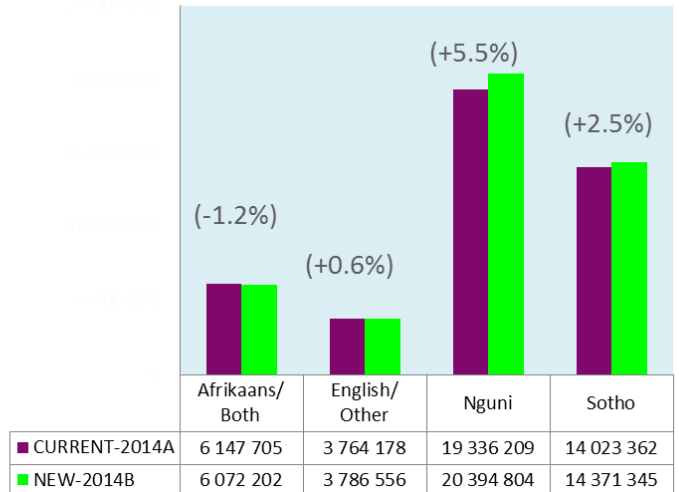


- Almost 18.5 Million viewers reside in the Metropolitan areas, the largest Community Size.
- However, Rural populations have shown significant growth over the last 2 Universe updates.
- The language groups which are categorized under the Nguni home language continue to show increases.

Community Size

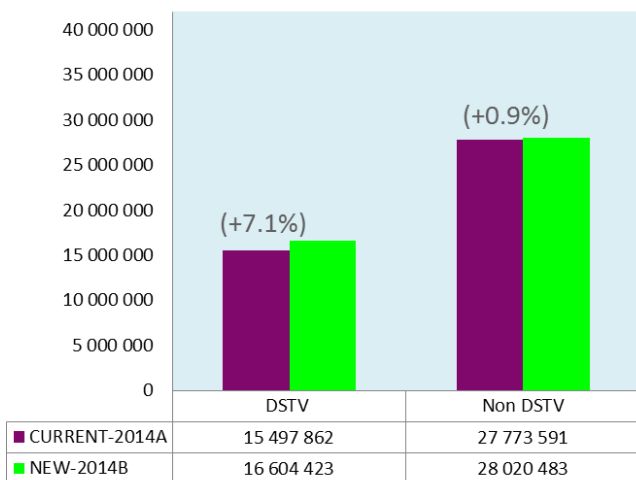


Home Language

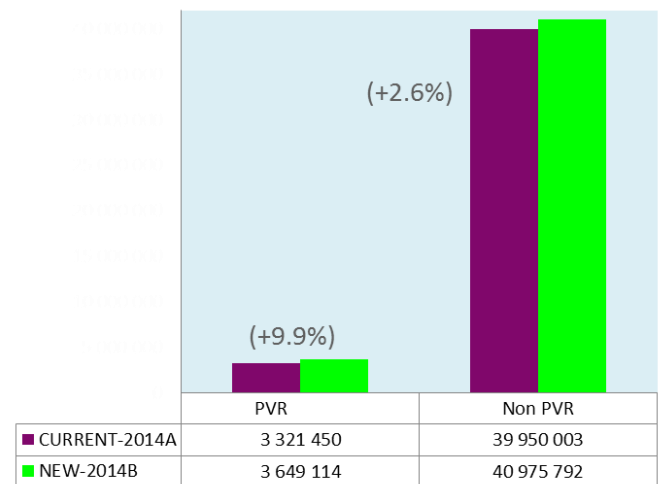


- The DSTV Universe continues to grow, and access to PVR has increased by almost 10%.
- September 2014 DSTV subscriber figures are used for the 2014B Universe update.

Access to DSTV



Access to PVR



3). Methodology and Weighting Efficiency

Method

- Test data based on the new Universe (AMPS 2014B) is compared to the current live data (AMPS 2014A).
- The test period covers the 4th May to 17th May; which is two full weeks, Monday to Sunday.
- Two day parts are examined: Full day: 6h00 – 23h00 and Prime time: 17h00 – 23h00.

Weighting Efficiency

- The average Weighting Efficiency for Individuals drops from 80.4% to 78.2 %, which is still well above global standards.
- The average Household Weighting Efficiency drops from 64% to 62.5%. Work to improve this efficiency will be conducted with the TAMS external auditor in the second half of 2015.

4). Impact on Viewing (Viewing Tests)

TOTAL TV

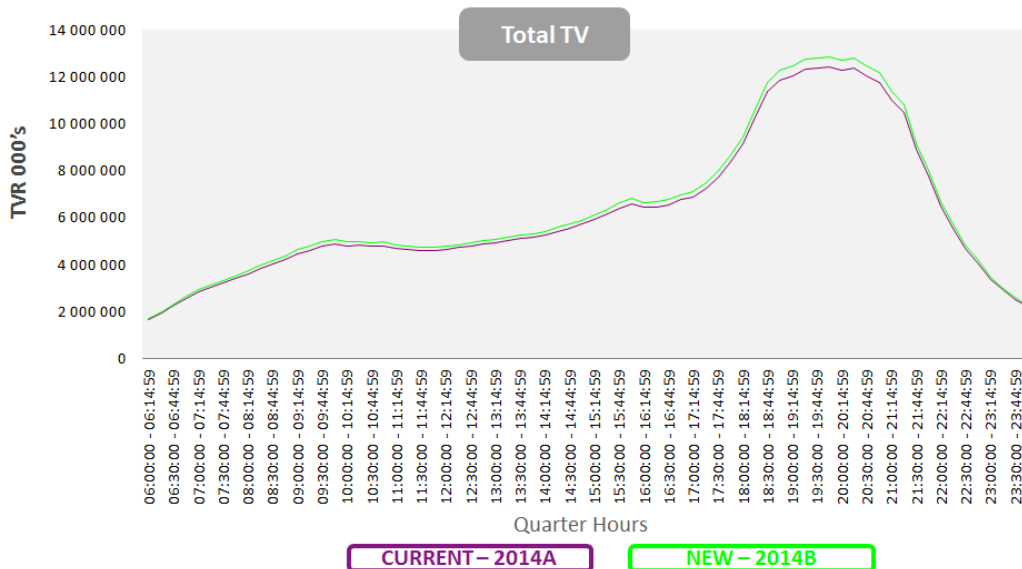
TVR Numbers (TVR 000's)

- As expected, the **shape of day** viewing tests for Total Individuals, shows an increase in TVR numbers (thousands) especially during prime-time, with viewing up by almost 3% per average TVR (274 261 additional viewers per average minute in prime-time).
- Notable growth in TVR numbers can be seen particularly in Children's viewing.
- Increases in viewing numbers also occur in LSM 8 -10, as well as viewers who have access to DSTV.
- Viewing in thousands, for those viewers who do not have access to Pay TV, remain stable.

TVR Percentages (TVR %'s)

- Viewing levels based on TVR%'s remain constant for all target groups, when the new 2014B Universe is applied.

Shape of Day 6h00 to 24h00, Total Individuals



Full-Day and Prime-Time by Target Market

		CURRENT 2014A		NEW 2014B		Diff #		Diff %	
		Live + VOSDAL	TOTAL TV	TOTAL TV					
		Target Group		06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59
TVR #	Total Indv (incl guests)	6 387 345	9 556 955	6 566 785	9 831 216	179 440	274 261	2.8%	2.9%
	Adults Age 15+	5 171 474	7 633 106	5 261 577	7 754 221	90 103	121 115	1.7%	1.6%
	Kids Age 4-14	1 215 871	1 923 849	1 305 208	2 076 995	89 337	153 146	7.3%	8.0%
	Adults LSM 1 - 4	632 415	958 708	633 802	960 411	1 387	1 703	0.2%	0.2%
	Adults: LSM 5-7	3 000 845	4 341 623	3 037 626	4 388 905	36 781	47 282	1.2%	1.1%
	Adults: LSM 8-10	1 538 214	2 332 775	1 590 149	2 404 905	51 935	72 130	3.4%	3.1%
	Adults: FTA	2 995 673	4 543 700	2 987 502	4 526 449	-8 171	-17 251	-0.3%	-0.4%
Adults: DSTV	2 175 801	3 089 406	2 274 075	3 227 772	98 274	138 366	4.5%	4.5%	
TVR %	Total Indv (incl guests)	14.76	22.09	14.72	22.03	0.0	-0.1	-0.3%	-0.3%
	Adults Age 15+	15.71	23.19	15.64	23.05	-0.1	-0.1	-0.4%	-0.6%
	Kids Age 4-14	11.74	18.58	11.88	18.91	0.1	0.3	1.2%	1.8%
	Adults LSM 1 - 4	12.56	19.05	12.44	18.85	-0.1	-0.2	-1.0%	-1.0%
	Adults: LSM 5-7	16.01	23.17	15.92	23.00	-0.1	-0.2	-0.6%	-0.7%
	Adults: LSM 8-10	16.82	25.51	16.80	25.40	0.0	-0.1	-0.1%	-0.4%
	Adults: FTA	14.27	21.64	14.22	21.55	0.0	-0.1	-0.4%	-0.4%
Adults: DSTV	18.25	25.91	17.99	25.54	-0.3	-0.4	-1.4%	-1.4%	

SABC 1

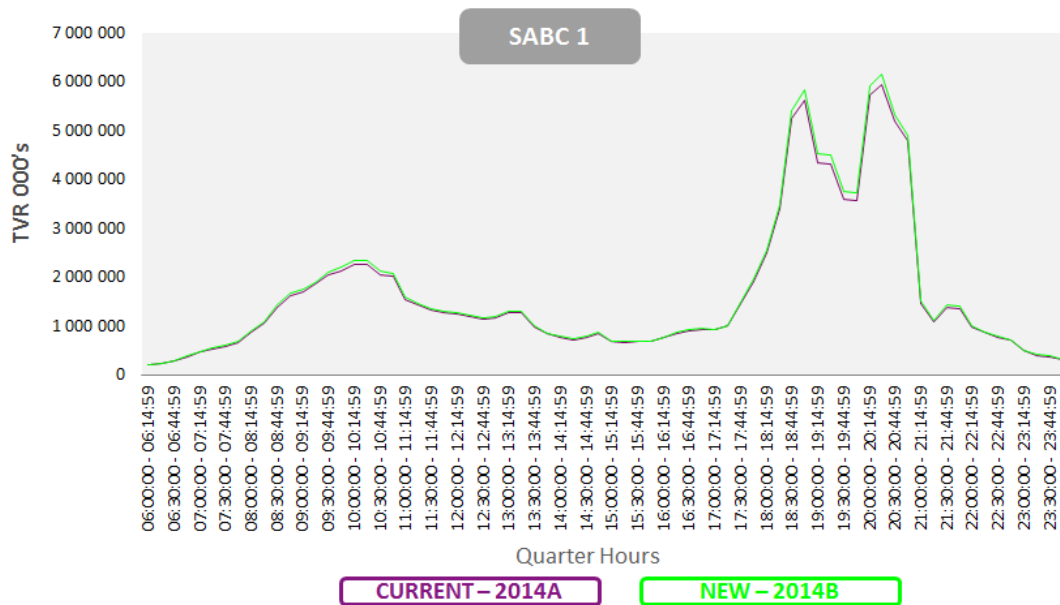
TVR Numbers (TVR 000's)

- For SABC 1, the **shape of day** viewing tests for Total Individuals, also show increases.
- During prime-time, an increase of 88 733 viewers per average minute is seen in the viewership as a result of the population increases in the 2014B Universe update. There are 23 698 additional Adults, and 65 034 more Children, per average minute.
- Interestingly, the growth in viewing numbers is partly driven by LSM 8-10, and also particularly by viewers who have access to DSTV. DSTV subscribers add 37 144 viewers per average minute during prime-time.

TVR Percentages (TVR %'s)

- As is the case with Total TV, viewing levels for SABC 1 TVR%'s remain steady with the new Universe update.

Shape of Day 6h00 to 24h00, Total Individuals



Full-Day and Prime-Time by Target Market

		CURRENT 2014A		NEW 2014B		Diff #		Diff %	
		Live + VOUSDAL		SABC 1					
		SABC 1		SABC 1					
		06:00 - 22:59		06:00 - 22:59		06:00 - 22:59		06:00 - 22:59	
		17:00 - 22:59		17:00 - 22:59		17:00 - 22:59		17:00 - 22:59	
TVR #	Target Group	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59
TVR #	Total Indv (incl guests)	1 722 755	2 847 307	1 772 701	2 936 040	49 946	88 733	2.9%	3.1%
	Adults Age 15+	1 379 270	2 198 720	1 399 788	2 222 418	20 518	23 698	1.5%	1.1%
	Kids Age 4-14	343 485	648 588	372 912	713 622	29 427	65 034	8.6%	10.0%
	Adults LSM 1 - 4	318 193	513 530	320 415	516 602	2 222	3 072	0.7%	0.6%
	Adults: LSM 5-7	909 905	1 445 085	921 586	1 455 443	11 681	10 358	1.3%	0.7%
	Adults: LSM 8-10	151 173	240 104	157 787	250 373	6 614	10 269	4.4%	4.3%
	Adults: FTA	1 131 757	1 765 529	1 131 787	1 752 082	30	-13 447	0.0%	-0.8%
	Adults: DSTV	247 514	433 191	268 001	470 335	20 487	37 144	8.3%	8.6%
TVR %	Total Indv (incl guests)	3.98	6.58	3.97	6.58	0.0	0.0	-0.3%	0.0%
	Adults Age 15+	4.19	6.68	4.16	6.61	0.0	-0.1	-0.7%	-1.0%
	Kids Age 4-14	3.32	6.26	3.40	6.50	0.1	0.2	2.4%	3.8%
	Adults LSM 1 - 4	6.32	10.20	6.29	10.14	0.0	-0.1	-0.5%	-0.6%
	Adults: LSM 5-7	4.86	7.71	4.83	7.63	0.0	-0.1	-0.6%	-1.0%
	Adults: LSM 8-10	1.65	2.63	1.67	2.64	0.0	0.0	1.2%	0.4%
	Adults: FTA	5.39	8.41	5.39	8.34	0.0	-0.1	0.0%	-0.8%
	Adults: DSTV	2.08	3.63	2.12	3.72	0.0	0.1	1.9%	2.5%

SABC 2

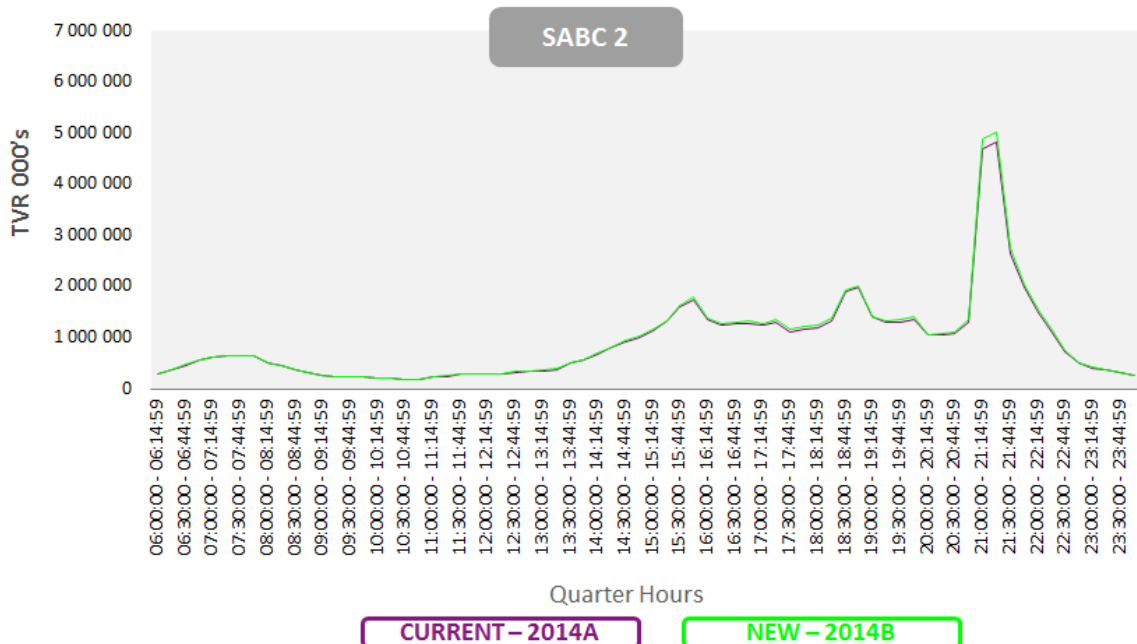
TVR Numbers (TVR 000's)

- For SABC 2, the **shape of day** viewing tests, in thousands, for Total Individuals, again show increases, especially during the prime-time slot.
- Viewing comparisons for prime-time show that viewing for SABC 2 increases by 53 231 viewers overall. Again viewing for Children show bigger increases than seen for Adults.
- As is the case with SABC 1, the growth in viewing numbers is being driven by the higher LSM groups and viewers who have access to DSTV.

TVR Percentages (TVR %'s)

- Again, viewing levels in TVR%'s are stable with the Universe update.

Shape of Day 6h00 to 24h00, Total Individuals



Full-Day and Prime-Time by Target Market

	CURRENT 2014A		NEW 2014B		Diff #		Diff %		
	Live + VOUSDAL	SABC 2	SABC 2		06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	
	Target Group	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59
TVR #	Total Indv (incl guests)	958 693	1 630 320	985 811	1 683 551	27 118	53 231	2.8%	3.3%
	Adults Age 15+	769 402	1 287 423	780 175	1 308 056	10 773	20 633	1.4%	1.6%
	Kids Age 4-14	189 292	342 897	205 636	375 494	16 344	32 597	8.6%	9.5%
	Adults LSM 1 - 4	118 553	186 667	117 882	183 054	-671	-3 613	-0.6%	-1.9%
	Adults: LSM 5-7	487 928	803 154	493 225	815 324	5 297	12 170	1.1%	1.5%
	Adults: LSM 8-10	162 921	297 602	169 068	309 679	6 147	12 077	3.8%	4.1%
	Adults: FTA	614 380	1 001 671	614 373	1 001 112	-7	-559	0.0%	-0.1%
	Adults: DSTV	155 021	285 751	165 802	306 944	10 781	21 193	7.0%	7.4%
TVR %	Total Indv (incl guests)	2.22	3.77	2.21	3.77	0.0	0.0	-0.5%	0.0%
	Adults Age 15+	2.34	3.91	2.32	3.89	0.0	0.0	-0.9%	-0.5%
	Kids Age 4-14	1.83	3.31	1.87	3.42	0.0	0.1	2.2%	3.3%
	Adults LSM 1 - 4	2.36	3.71	2.31	3.59	0.0	-0.1	-2.1%	-3.2%
	Adults: LSM 5-7	2.60	4.29	2.59	4.27	0.0	0.0	-0.4%	-0.5%
	Adults: LSM 8-10	1.78	3.25	1.79	3.27	0.0	0.0	0.6%	0.6%
	Adults: FTA	2.93	4.77	2.93	4.77	0.0	0.0	0.0%	0.0%
	Adults: DSTV	1.30	2.40	1.31	2.43	0.0	0.0	0.8%	1.3%

SABC 3

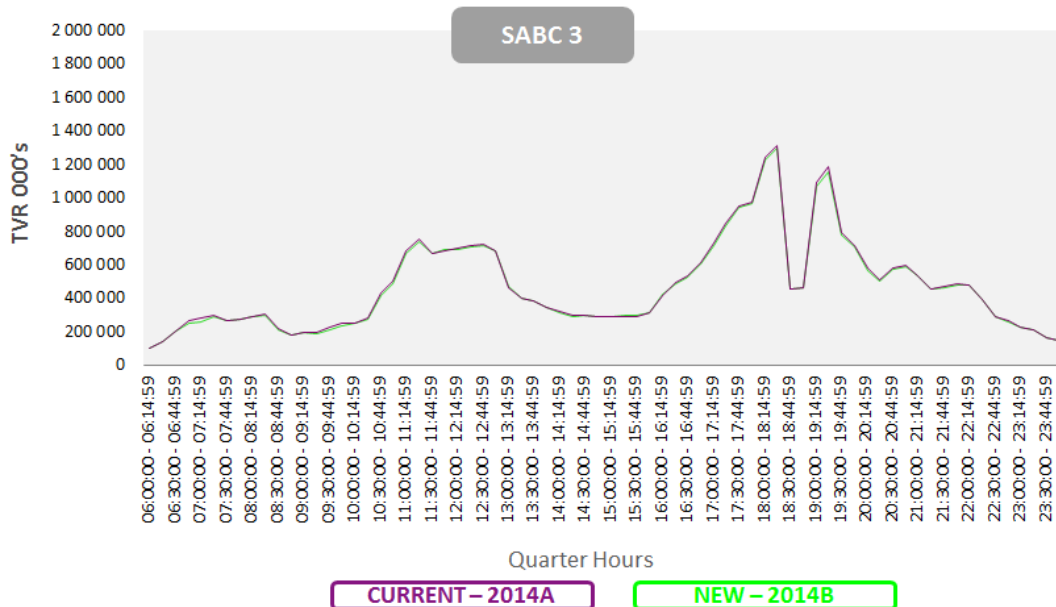
TVR Numbers (TVR 000's)

- Compared to Total TV and the other SABC Channels, the **shape of day** viewing tests for SABC 3 show smaller increases, but increases nonetheless. Viewing for prime-time display increases of just over 8 000 viewers.
- Viewers who have access to DSTV bring an additional 4 792 viewers to SABC 3 during prime-time in an average minute.

TVR Percentages (TVR %'s)

- TVR % viewing levels are generally stable with the Universe update, with potential declines in children's viewing.

Shape of Day 6h00 to 24h00, Total Individuals



Full-Day and Prime-Time by Target Market

		CURRENT 2014A		NEW 2014B		Diff #		Diff %		
		Live + VOSDAL	SABC 3	SABC 3						
		Target Group	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59
TVR #	Total Indv (incl guests)	484 354	676 514	489 944	684 792	5 590	8 278	1.2%	1.2%	
	Adults Age 15+	412 855	580 364	416 522	587 246	3 667	6 882	0.9%	1.2%	
	Kids Age 4-14	71 499	96 150	73 422	97 545	1 923	1 395	2.7%	1.5%	
	Adults LSM 1 - 4	32 445	37 177	32 591	36 564	146	-613	0.4%	-1.6%	
	Adults: LSM 5-7	242 376	311 988	242 048	312 996	-328	1 008	-0.1%	0.3%	
	Adults: LSM 8-10	138 034	231 199	141 883	237 686	3 849	6 487	2.8%	2.8%	
	Adults: FTA	350 659	483 833	351 131	485 923	472	2 090	0.1%	0.4%	
	Adults: DSTV	62 196	96 531	65 391	101 323	3 195	4 792	5.1%	5.0%	
TVR %	Total Indv (incl guests)	1.12	1.56	1.10	1.53	0.0	0.0	-1.8%	-1.9%	
	Adults Age 15+	1.25	1.76	1.24	1.75	0.0	0.0	-0.8%	-0.6%	
	Kids Age 4-14	0.69	0.93	0.67	0.89	0.0	0.0	-2.9%	-4.3%	
	Adults LSM 1 - 4	0.64	0.74	0.64	0.72	0.0	0.0	0.0%	-2.7%	
	Adults: LSM 5-7	1.29	1.66	1.27	1.64	0.0	0.0	-1.6%	-1.2%	
	Adults: LSM 8-10	1.51	2.53	1.50	2.51	0.0	0.0	-0.7%	-0.8%	
	Adults: FTA	1.67	2.30	1.67	2.31	0.0	0.0	0.0%	0.4%	
	Adults: DSTV	0.52	0.81	0.52	0.80	0.0	0.0	0.0%	-1.2%	

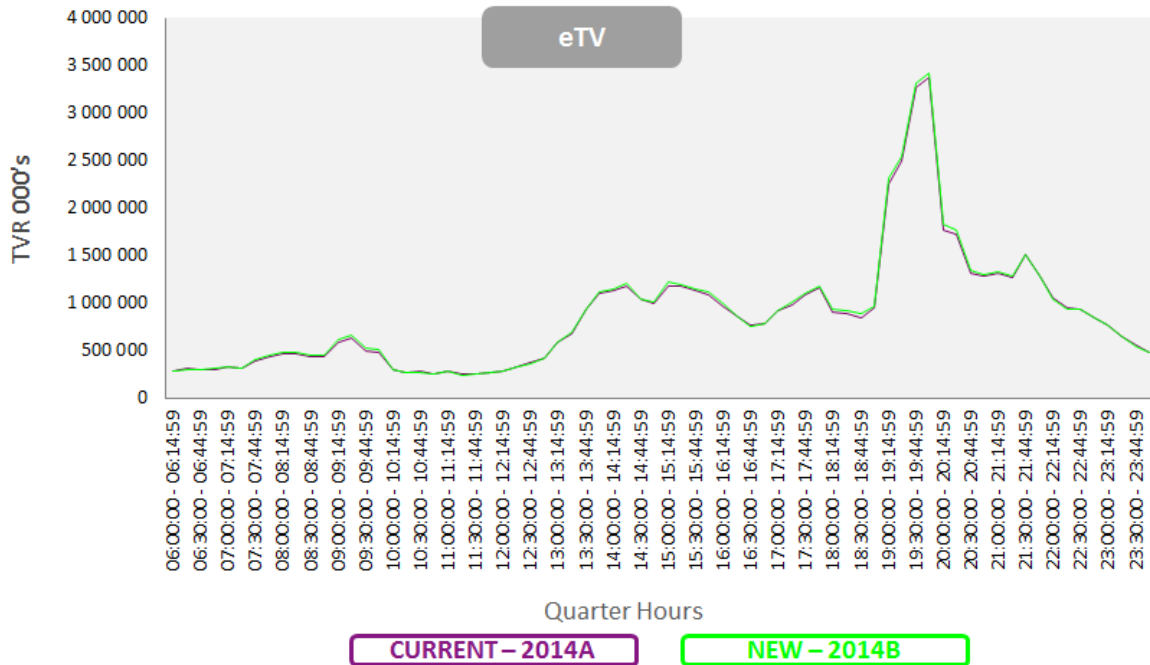
TVR Numbers (TVR 000's)

- The **shape of day** viewing tests for eTV, Total Individuals, increase. Children's viewing is the biggest driver behind the growth in viewing levels, with 13 660 Children per average minute during prime-time. For Adults, 9 477 additional viewers come through in the prime-time slot, due to the changes in the 2014B Universe.
- Viewers who have access to DSTV bring an additional 15 609 viewers to eTV during prime-time in an average minute.

TVR Percentages (TVR %'s)

- TVR % viewing levels are generally stable with the Universe update.

Shape of Day 6h00 to 24h00, Total Individuals



Full-Day and Prime-Time by Target Market

	CURRENT 2014A			NEW 2014B		Diff #		Diff %	
	Live + VOSDAL	ETV		ETV		06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59
	Target Group	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59				
TVR #	Total Indv (incl guests)	891 028	1 438 274	905 153	1 461 411	14 125	23 137	1.6%	1.6%
	Adults Age 15+	698 852	1 129 954	704 128	1 139 431	5 276	9 477	0.8%	0.8%
	Kids Age 4-14	192 176	308 320	201 025	321 980	8 849	13 660	4.6%	4.4%
	Adults LSM 1 - 4	101 321	152 220	100 861	152 863	-460	643	-0.5%	0.4%
	Adults: LSM 5-7	479 273	771 026	481 081	772 634	1 808	1 608	0.4%	0.2%
	Adults: LSM 8-10	118 258	206 707	122 186	213 933	3 928	7 226	3.3%	3.5%
	Adults: FTA	578 652	909 778	574 960	903 646	-3 692	-6 132	-0.6%	-0.7%
	Adults: DSTV	120 200	220 176	129 168	235 785	8 968	15 609	7.5%	7.1%
TVR %	Total Indv (incl guests)	2.06	3.32	2.03	3.27	0.0	0.0	-1.5%	-1.5%
	Adults Age 15+	2.12	3.43	2.09	3.39	0.0	0.0	-1.4%	-1.2%
	Kids Age 4-14	1.86	2.98	1.83	2.93	0.0	0.0	-1.6%	-1.7%
	Adults LSM 1 - 4	2.01	3.02	1.98	3.00	0.0	0.0	-1.5%	-0.7%
	Adults: LSM 5-7	2.56	4.11	2.52	4.05	0.0	-0.1	-1.6%	-1.5%
	Adults: LSM 8-10	1.29	2.26	1.29	2.26	0.0	0.0	0.0%	0.0%
	Adults: FTA	2.76	4.33	2.74	4.30	0.0	0.0	-0.7%	-0.7%
	Adults: DSTV	1.01	1.85	1.02	1.87	0.0	0.0	1.0%	1.1%

Total DSTV

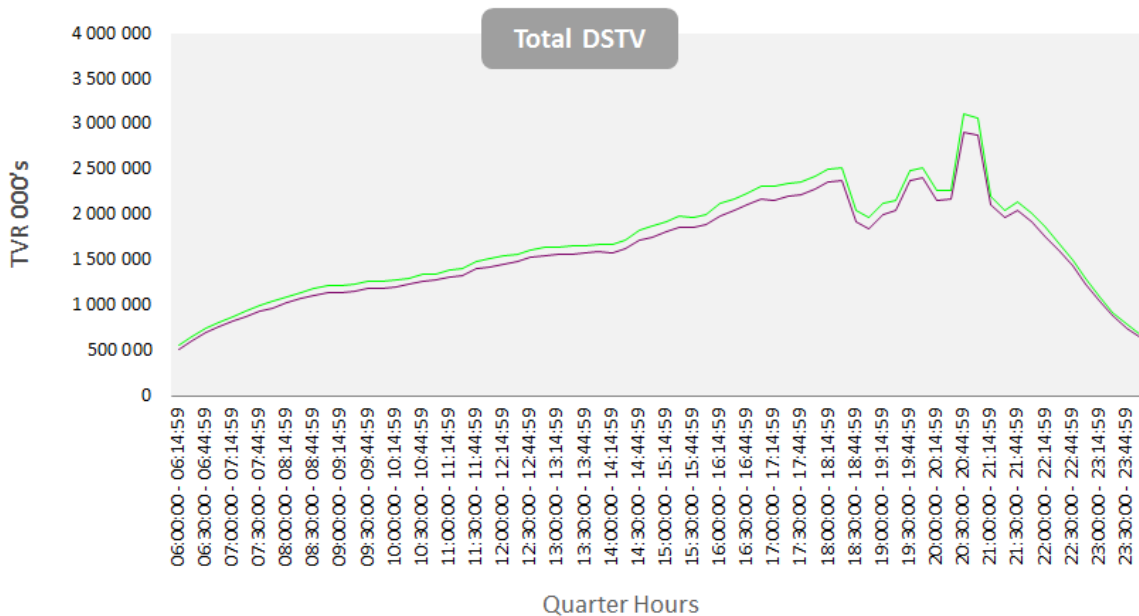
TVR Numbers (TVR 000's)

- With a 7% growth in DSTV penetration, the **shape of day** viewing tests for DSTV, show increases as expected.
- All target markets covered in the tests show increases. For Total Individuals, viewing increases during prime-time by 81 483 viewers. And for full day, 72 781 additional viewers can be seen per average minute.

TVR Percentages (TVR %'s)

- TVR%'s viewing levels are generally stable when the new Universe is applied.
- Not all DSTv channels will reflect the same levels of viewing in TVR%'s.
- Generally TVR%'s performance is stable with some growth coming through for the Mzansi Group of channels and SuperSport 4.

Shape of Day 6h00 to 24h00, Total Individuals



CURRENT - 2014 NEW - 2014B

Full Day and Prime-Time by Target Market

	CURRENT 2014A		NEW 2014B		Diff #		Diff %		
	Live + VOSDAL	TOTAL DSTV	TOTAL DSTV		06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	
Target Group	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	06:00 - 22:59	17:00 - 22:59	
TVR #	Total Indv (incl guests)	1 628 033	2 099 441	1 700 814	2 180 924	72 781	81 483	4.5%	3.9%
	Adults Age 15+	1 330 062	1 729 649	1 374 006	1 777 496	43 944	47 847	3.3%	2.8%
	Kids Age 4-14	297 971	369 792	326 809	403 428	28 838	33 636	9.7%	9.1%
	Adults: LSM 5-7	539 571	616 303	558 326	637 846	18 755	21 543	3.5%	3.5%
	Adults: LSM 8-10	776 852	1 096 921	797 973	1 117 380	21 121	20 459	2.7%	1.9%
	Adults: DSTV	1 316 836	1 713 648	1 360 626	1 760 171	43 790	46 523	3.3%	2.7%
TVR %	Total Indv (incl guests)	3.76	4.85	3.81	4.89	0.1	0.0	1.3%	0.8%
	Adults Age 15+	4.04	5.25	4.08	5.28	0.0	0.0	1.0%	0.6%
	Kids Age 4-14	2.88	3.57	2.98	3.67	0.1	0.1	3.5%	2.8%
	Adults: LSM 5-7	2.88	3.29	2.93	3.34	0.1	0.0	1.7%	1.5%
	Adults: LSM 8-10	8.49	11.99	8.43	11.80	-0.1	-0.2	-0.7%	-1.6%
	Adults: DSTV	11.05	14.37	10.76	13.93	-0.3	-0.4	-2.6%	-3.1%

5). Conclusion

- There is a substantial increase of the Individual Universe by 3.1 % (1 353 453 individuals).
- With over 1.3 Million additional viewers in the 2014B TAM Universe, TVR 000's increase as expected.
- Overall, viewing levels in TVR%'s remain stable.