



# TAMS TV Market Overview

26 February 2021



# Content

- TV viewing trends and TV screen usage  
(source: TAMS)
- OTT and equipment tracker  
(source: TAMS panel questionnaire)
- Video consumption on all devices across the online universe  
(source: DCS and Fusion)



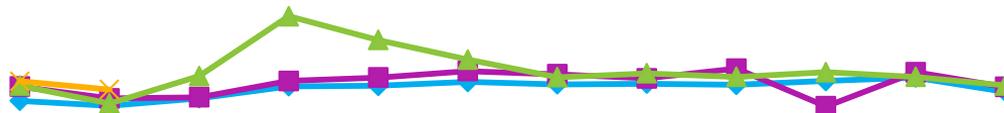
# TV viewing trends and TV screen usage (source: TAMS)

# Trend: Time spent viewing

# Time spent viewing: A 3 year trend

## Average hours spent per day by month

Total TV Screen Usage (including non-broadcast activity)  
*All Day*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018	2:59	2:53	3:02	3:15	3:15	3:19	3:17	3:17	3:16	3:20	3:24	3:09
■ 2019	3:14	3:01	3:03	3:20	3:24	3:31	3:27	3:23	3:33	2:53	3:30	3:14
▲ 2020	3:15	2:56	3:25	4:30	4:04	3:43	3:24	3:28	3:24	3:30	3:25	3:15
✕ 2021	3:20	3:11										

◆ 2018   ■ 2019   ▲ 2020   ✕ 2021

# Time spent viewing: A 3 year trend

## Average hours spent per day by month

Total TV Screen Usage (including non-broadcast activity)  
*Prime Time*



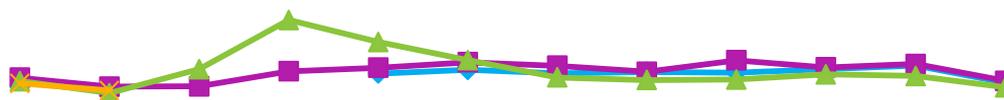
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018	1:13	1:14	1:17	1:23	1:26	1:26	1:24	1:25	1:22	1:22	1:21	1:10
■ 2019	1:16	1:14	1:13	1:24	1:27	1:29	1:29	1:26	1:26	1:14	1:22	1:11
▲ 2020	1:16	1:12	1:21	1:45	1:38	1:31	1:23	1:23	1:20	1:21	1:19	1:12
✕ 2021	1:15	1:13										

◆ 2018   ■ 2019   ▲ 2020   ✕ 2021

# Time spent viewing: A 3 year trend

## Average hours spent per day by month

**Broadcast TV only (excluding non-broadcast activity)**  
*All Day*



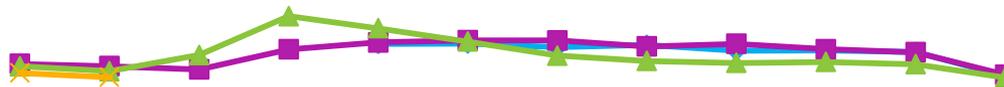
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018					2:47	2:50	2:47	2:48	2:47	2:51	2:55	2:38
■ 2019	2:43	2:34	2:34	2:49	2:53	2:58	2:54	2:48	3:00	2:53	2:56	2:39
▲ 2020	2:39	2:27	2:51	3:40	3:18	3:00	2:43	2:40	2:41	2:46	2:44	2:33
✕ 2021	2:37	2:30										

◆ 2018   ■ 2019   ▲ 2020   ✕ 2021

# Time spent viewing: A 3 year trend

## Average hours spent per day by month

Broadcast TV only (excluding non-broadcast activity)  
*Prime Time*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018					1:17	1:17	1:15	1:16	1:14	1:14	1:13	1:01
■ 2019	1:07	1:06	1:04	1:14	1:18	1:19	1:19	1:16	1:17	1:14	1:13	1:02
▲ 2020	1:06	1:03	1:11	1:31	1:25	1:18	1:11	1:08	1:08	1:08	1:07	1:00
✕ 2021	1:02	1:00										

◆ 2018   ■ 2019   ▲ 2020   ✕ 2021

# Time spent viewing: A 3 year trend

## Average hours spent per day by month

Non-broadcast TV only (excluding broadcast TV)  
*All Day*



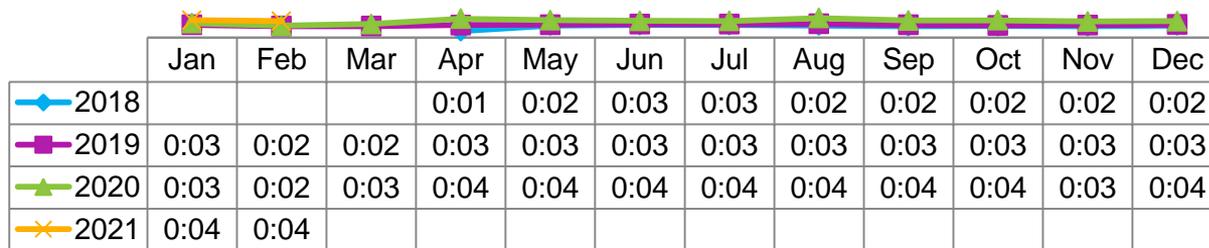
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018					0:09	0:09	0:09	0:09	0:09	0:09	0:09	0:10
■ 2019	0:10	0:09	0:09	0:10	0:10	0:10	0:11	0:11	0:11	0:10	0:11	0:11
▲ 2020	0:11	0:09	0:11	0:16	0:15	0:14	0:13	0:16	0:14	0:14	0:13	0:14
✕ 2021	0:14	0:13										

◆ 2018 ■ 2019 ▲ 2020 ✕ 2021

# Time spent viewing: A 3 year trend

## Average hours spent per day by month

Non-broadcast TV only (excluding broadcast TV)  
*Prime Time*



2018 2019 2020 2021

# Trend: Viewing ratings

# Total TV Screen Ratings (including non-broadcast activity)

Avg All Day	AMR%	AMR	Universe	Sample
2018	13.4	6 087 016	45 062 118	10 729
2019	14.0	6 476 383	46 280 042	10 974
2020	14.7	6 992 478	46 635 618	10 444
2021*	13.8	6 881 288	49 995 282	9 886

Jan 2018	12.5
Jan 2019	13.5
Jan 2020	13.6
Jan 2021	13.9

## Broadcast TV only ratings

Avg AD	AMR%	AMR
2018	11.7	5 341 100
2019	11.7	5 446 379
2020	11.9	5 624 209
2021*	10.8	5 402 157

## Non-broadcast activity only ratings

Avg AD	AMR%	AMR
2018	0.7	308 524
2019	0.7	343 544
2020	1.0	455 514
2021*	1.0	498 403

\* 1.5 months only

# Total TV Screen Ratings (including non-broadcast activity)

Avg PT	AMR%	AMR	Universe	Sample
2018	27.0	12 262 846	45 062 118	10 729
2019	27.4	12 725 035	46 280 042	10 974
2020	28.0	13 265 159	46 635 618	10 444
2021*	25.1	12 526 556	49 995 282	9 886

Jan 2018	24.4
Jan 2019	25.7
Jan 2020	25.6
Jan 2021	25.3

## Broadcast TV only ratings

Avg PT	AMR%	AMR
2018	24.6	11 240 221
2019	24.3	11 278 874
2020	23.9	11 353 438
2021*	20.8	10 408 156

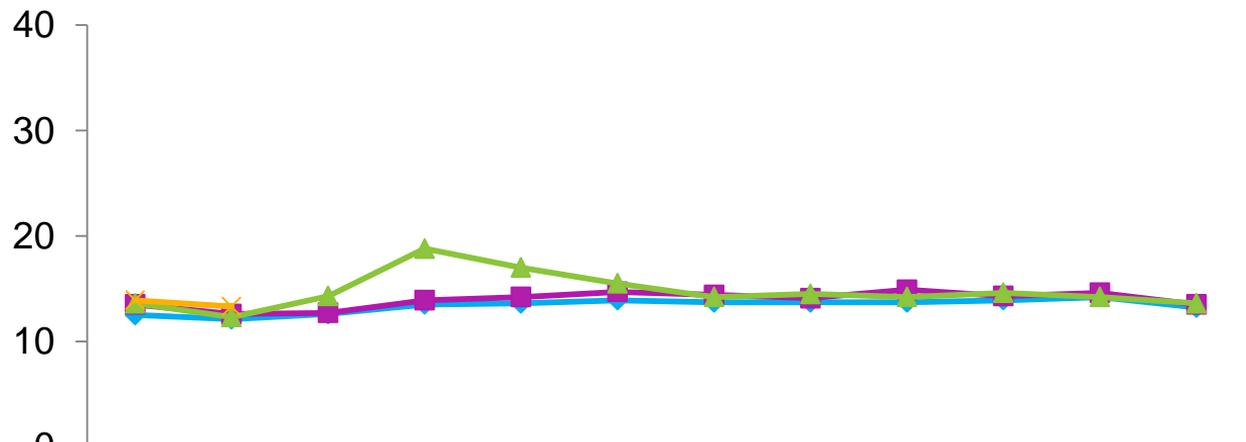
## Non-broadcast activity only ratings

Avg PT	AMR%	AMR
2018	1.0	446 789
2019	1.0	482 271
2020	1.3	636 486
2021*	1.4	716 498

\* 1.5 months only

# Total TV Screen Ratings (including non-broadcast activity)

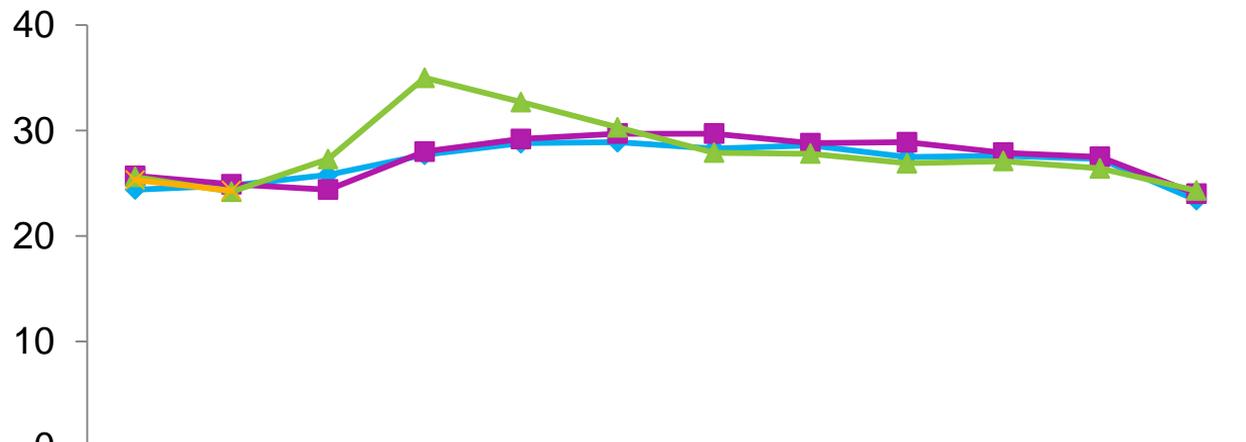
AMR%: All Day



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018	12.5	12.1	12.6	13.5	13.6	13.9	13.7	13.7	13.7	13.9	14.2	13.2
■ 2019	13.5	12.6	12.7	13.9	14.2	14.7	14.4	14.1	14.9	14.3	14.6	13.5
▲ 2020	13.6	12.3	14.3	18.8	17	15.5	14.2	14.5	14.2	14.6	14.2	13.6
✕ 2021	13.9	13.3										

# Total TV Screen Ratings (including non-broadcast activity)

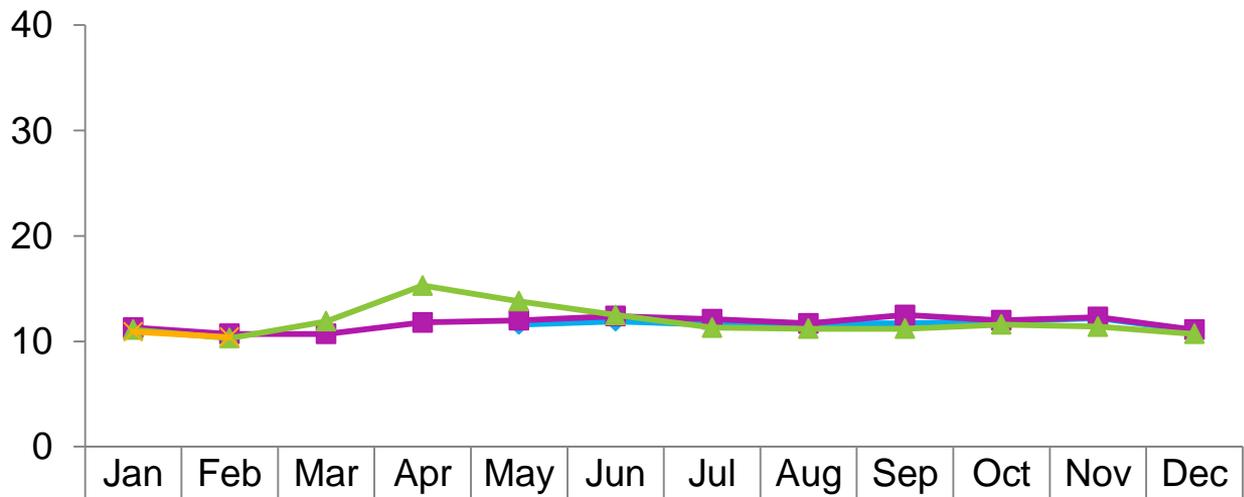
AMR%: Prime Time



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
◆ 2018	24.4	24.8	25.8	27.7	28.8	28.9	28.3	28.6	27.5	27.6	27.3	23.4
■ 2019	25.7	24.9	24.4	28	29.2	29.7	29.7	28.8	28.9	27.9	27.5	24
▲ 2020	25.6	24.2	27.3	35	32.7	30.3	27.9	27.8	26.9	27.1	26.4	24.3
✕ 2021	25.3	24.3										

# Broadcast TV only Ratings (excl. non-broadcast activity)

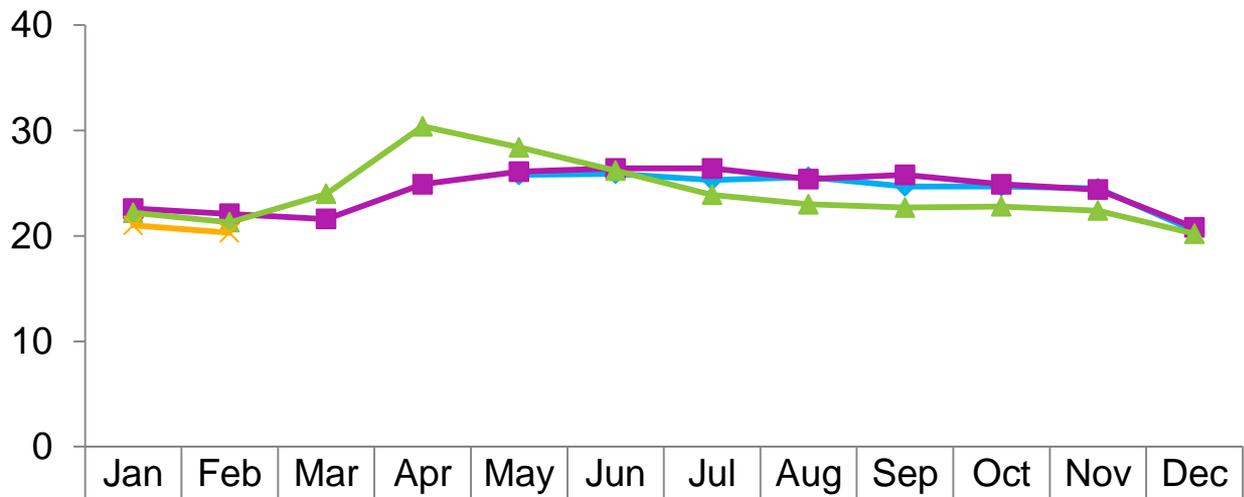
AMR%: All Day



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018					11.6	11.9	11.6	11.7	11.7	11.9	12.2	11
2019	11.3	10.7	10.7	11.8	12	12.4	12.1	11.7	12.5	12	12.3	11.1
2020	11.1	10.3	11.9	15.3	13.8	12.5	11.3	11.2	11.2	11.6	11.4	10.7
2021	10.9	10.4										

# Broadcast TV only Ratings (excl. non-broadcast activity)

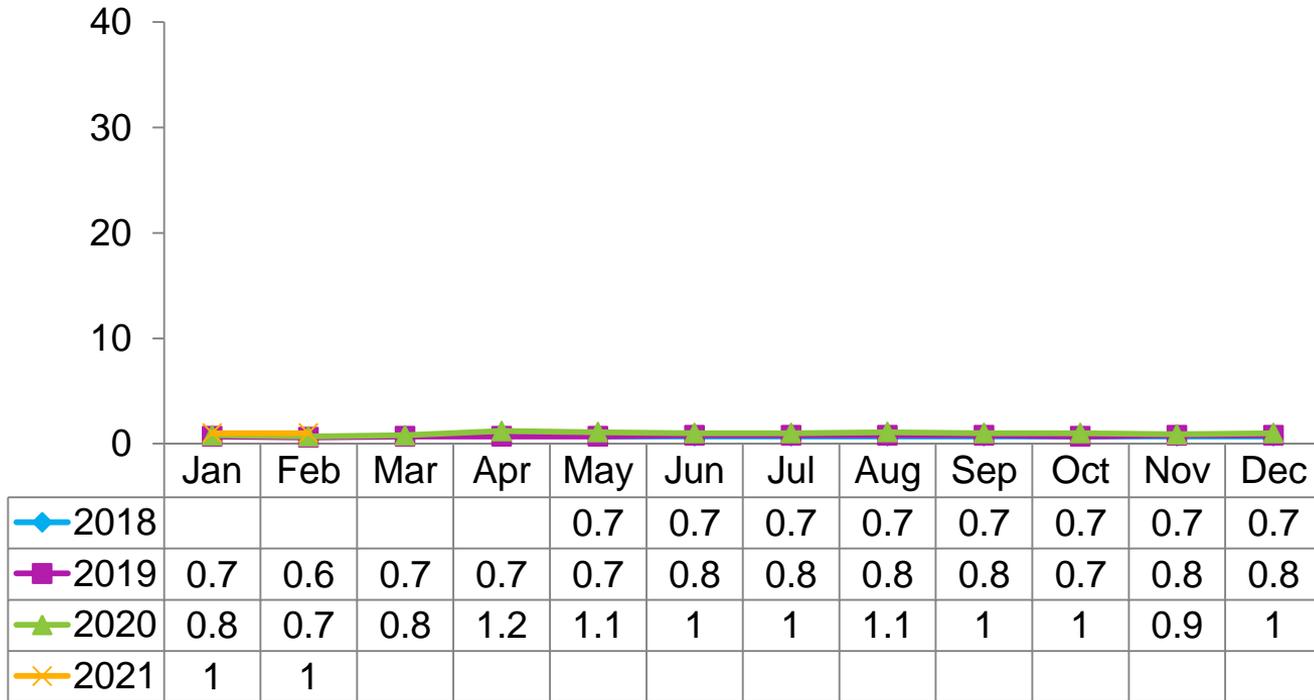
## AMR%: Prime Time



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018					25.8	25.9	25.3	25.6	24.7	24.7	24.5	20.5
2019	22.6	22.1	21.6	24.9	26.1	26.4	26.4	25.4	25.8	24.9	24.4	20.8
2020	22.2	21.3	24	30.4	28.4	26.2	23.9	23	22.7	22.8	22.4	20.2
2021	21	20.3										

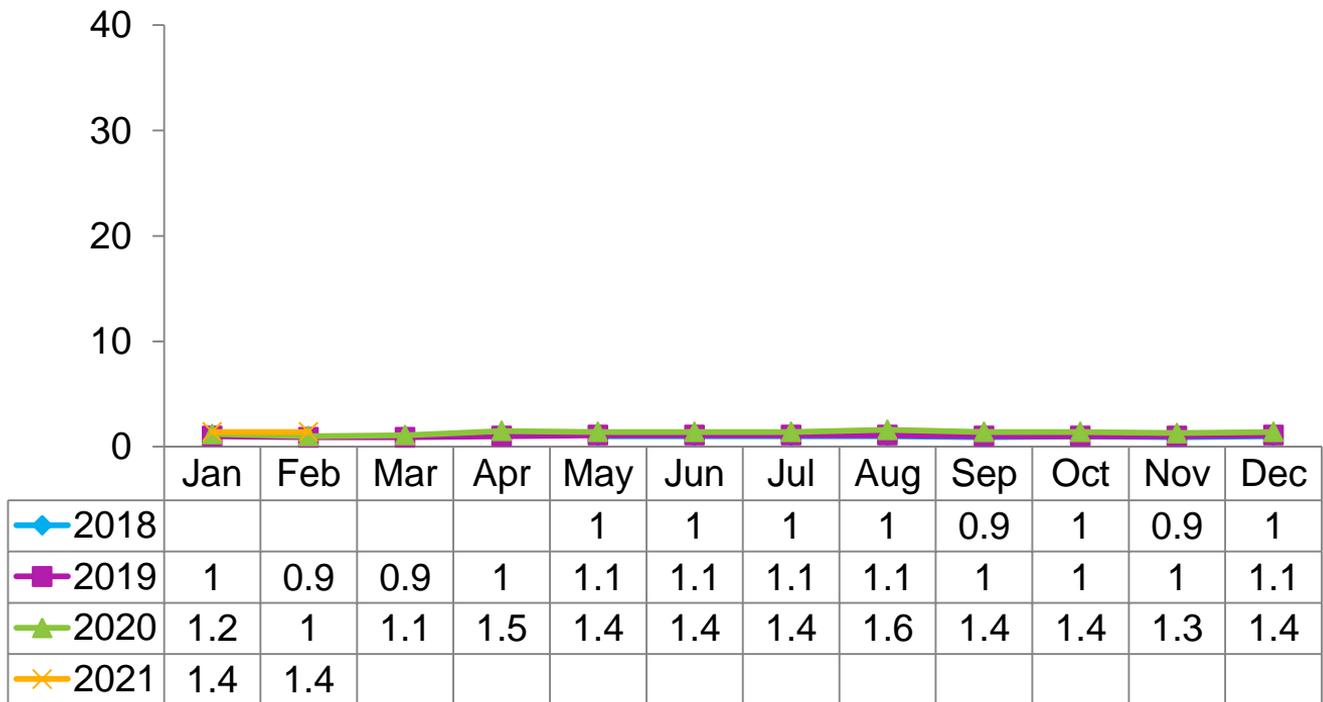
# Non-broadcast activity ratings

AMR%: All Day



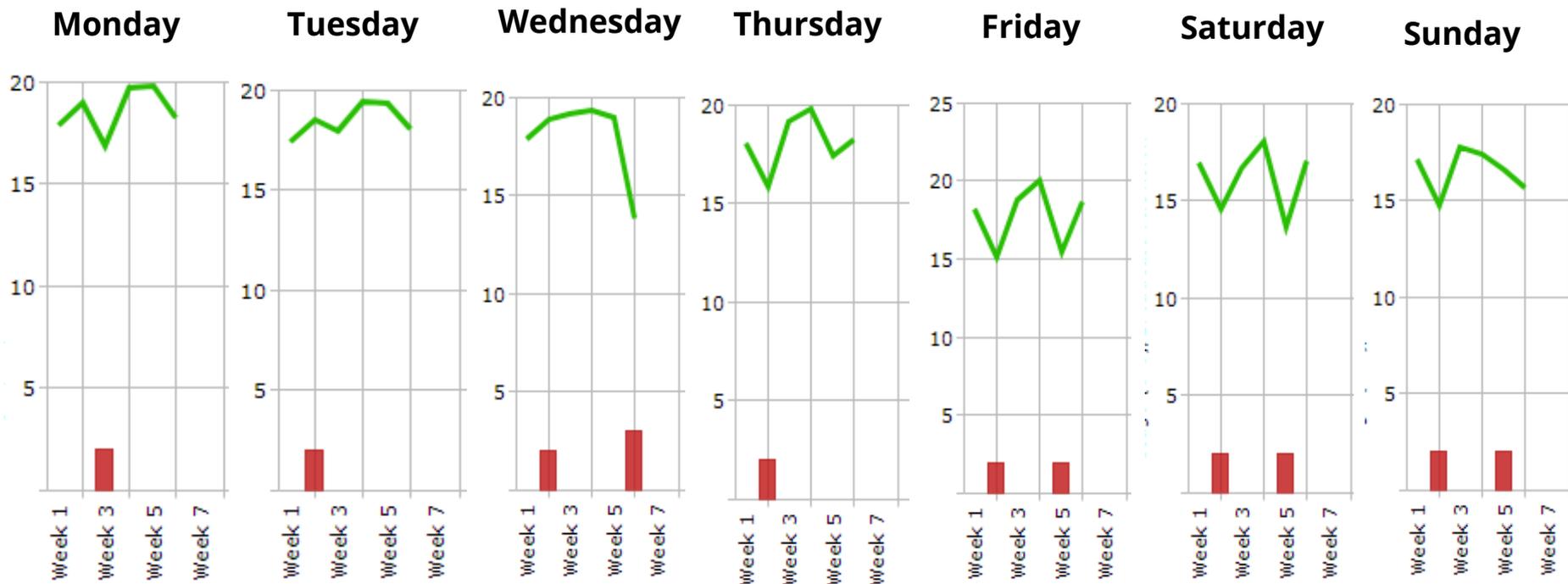
# Non-broadcast activity ratings

## AMR%: Prime Time



# Load shedding impact on AMR%

Load shedding weeks 1-6 2021



# Channel ratings (ranked on 2020)

All Day Avg AMR%	2018	2019	2020
DStv commercial total*	2.53	2.46	2.67
SABC 1	3.09	2.84	2.62
e.tv	1.75	1.97	1.82
OpenView total	0.66	0.82	1.03
SABC 2	1.42	1.15	0.98
Viacom Group	0.41	0.48	0.61
SABC 3	0.62	0.51	0.36

\*excluding Viacom channels

# Channel ratings (ranked on 2020)

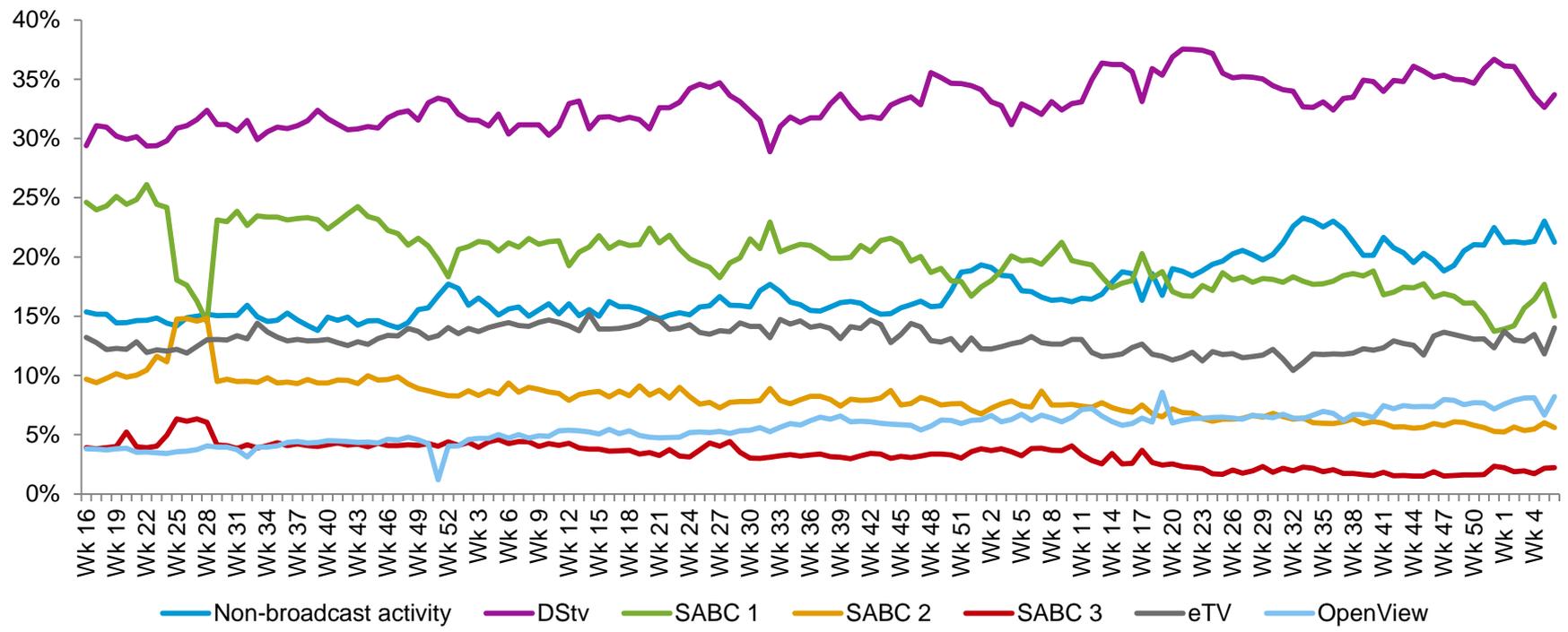
Prime Time Avg AMR%	2018	2019	2020
SABC 1	8.37	7.93	7.28
DStv commercial total*	4.76	4.58	4.82
e.tv	3.80	4.35	4.19
SABC 2	3.27	2.57	2.19
OpenView total	1.15	1.39	1.66
Viacom Group	0.54	0.60	0.69
SABC 3	0.99	0.70	0.55

\*excluding Viacom channels

# 3 year trend total screen share (2018-2021)

## All Day

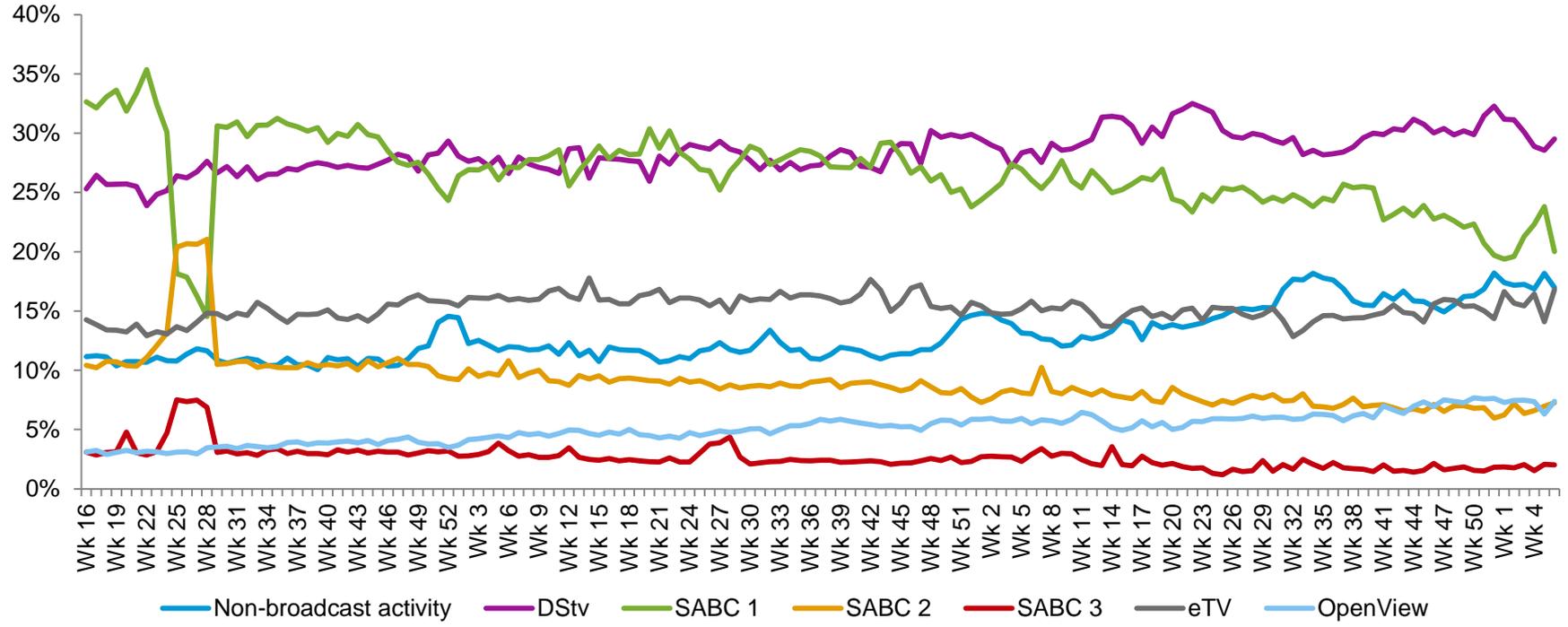
2018 ----- 2021



# 3 year trend total screen share (2018-2021)

## Prime Time

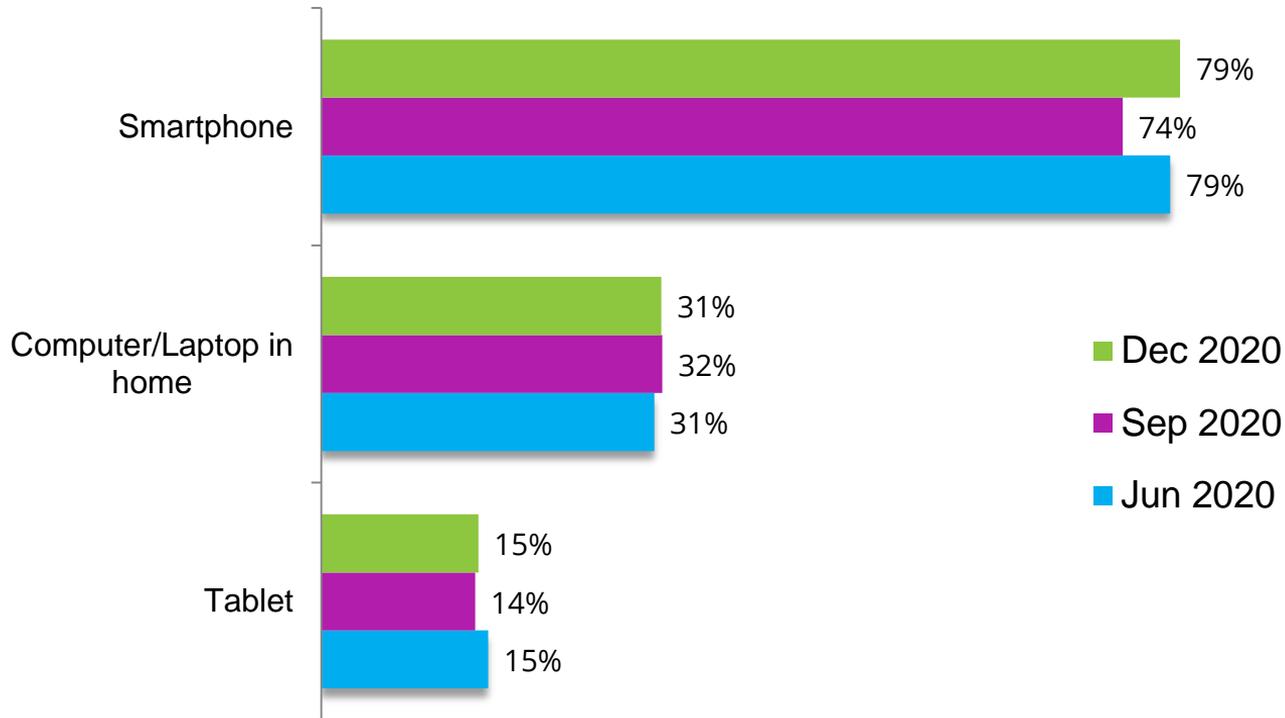
2018 ----- 2021



# **OTT and equipment tracker (source: TAMS panel questionnaire)**

# Incidence of OTT on TAMS panel

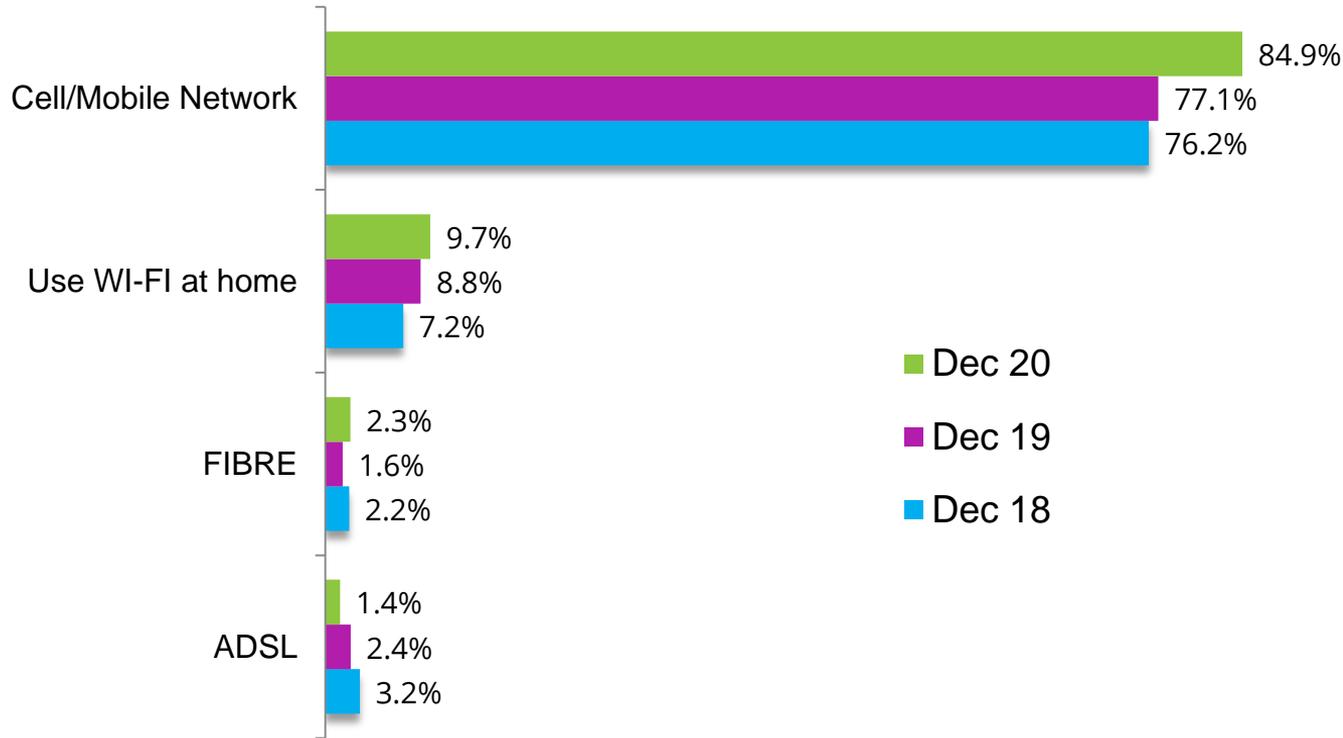
## Devices in household



Source: OTT Tracker

# Incidence of OTT on TAMS panel

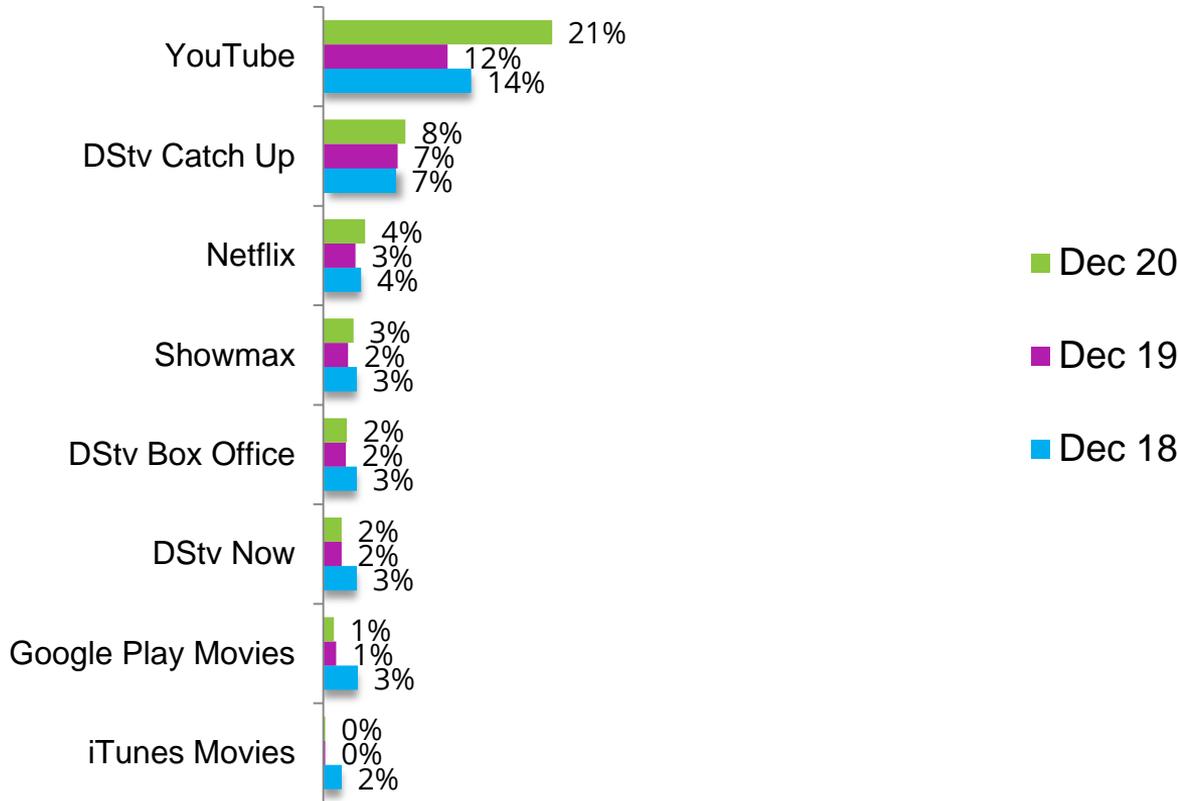
Internet connection used at home



Source: OTT Tracker

# Incidence of OTT on TAMS panel

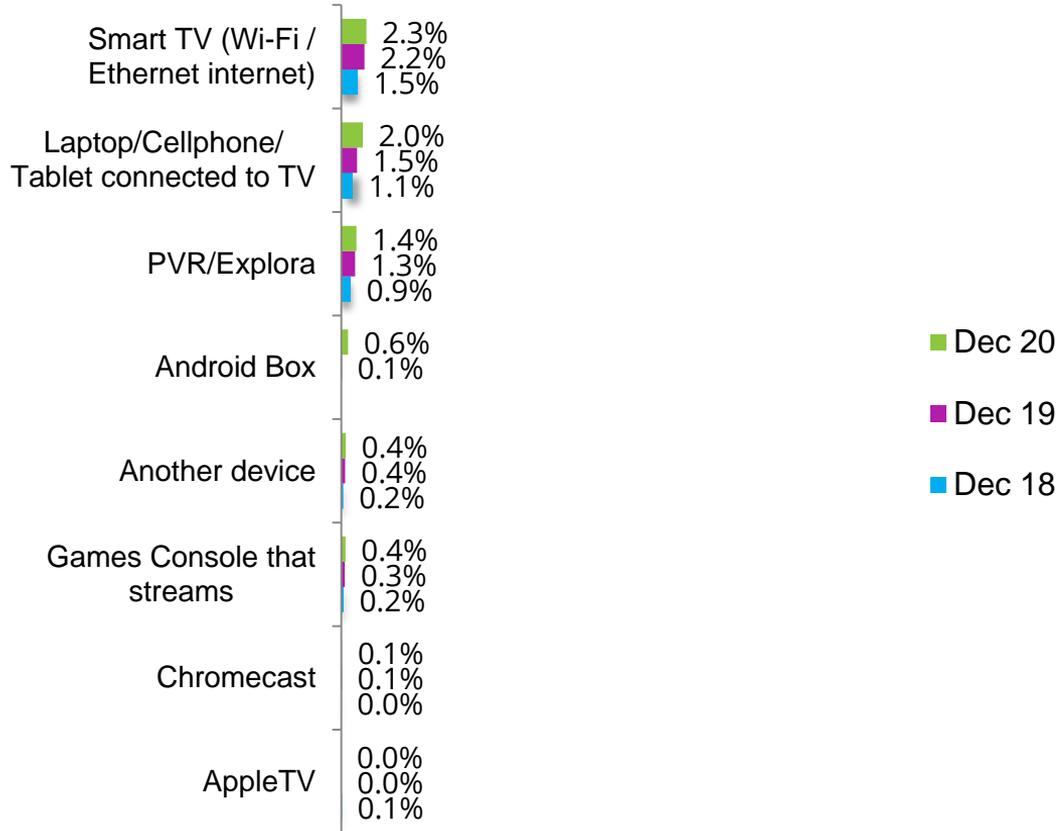
HHs viewing OTT and VOD



Source: OTT Tracker

# Incidence of OTT on TAMS panel

## Online Connection to TV-set

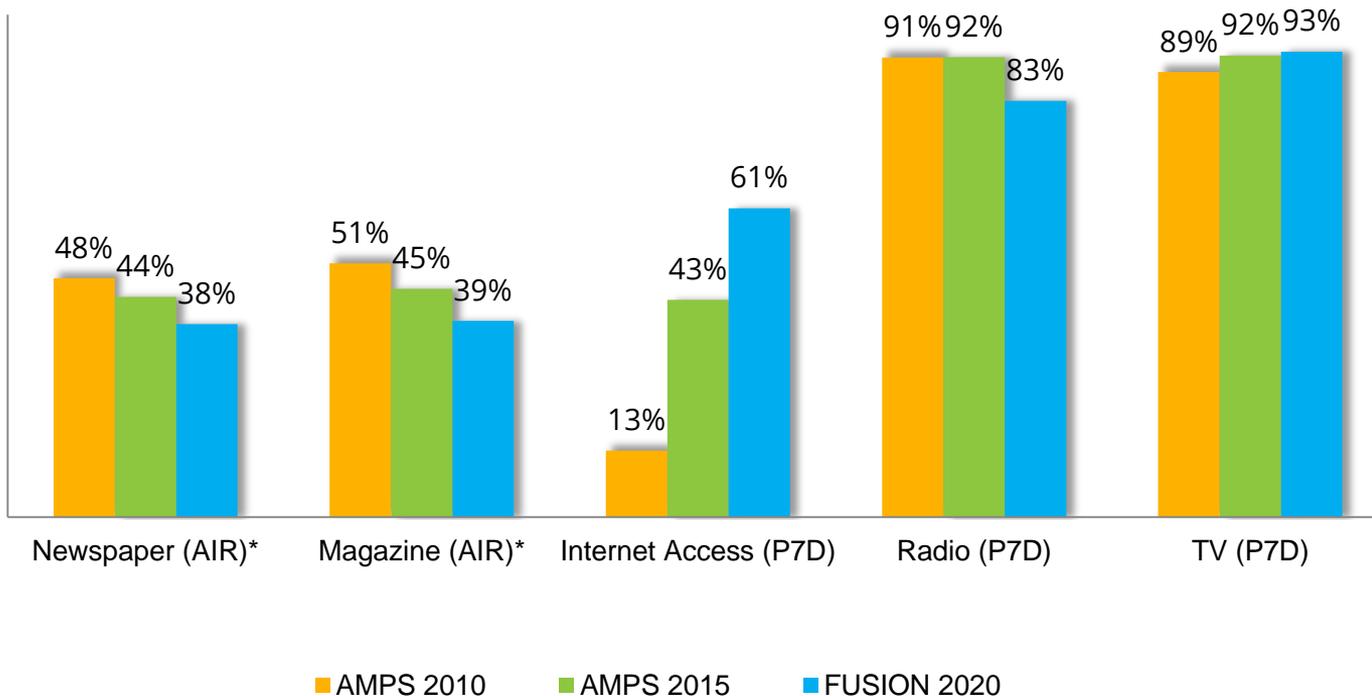


Source: OTT Tracker

# Video consumption on all devices across the online universe (source: DCS and Fusion)

# Media Consumption

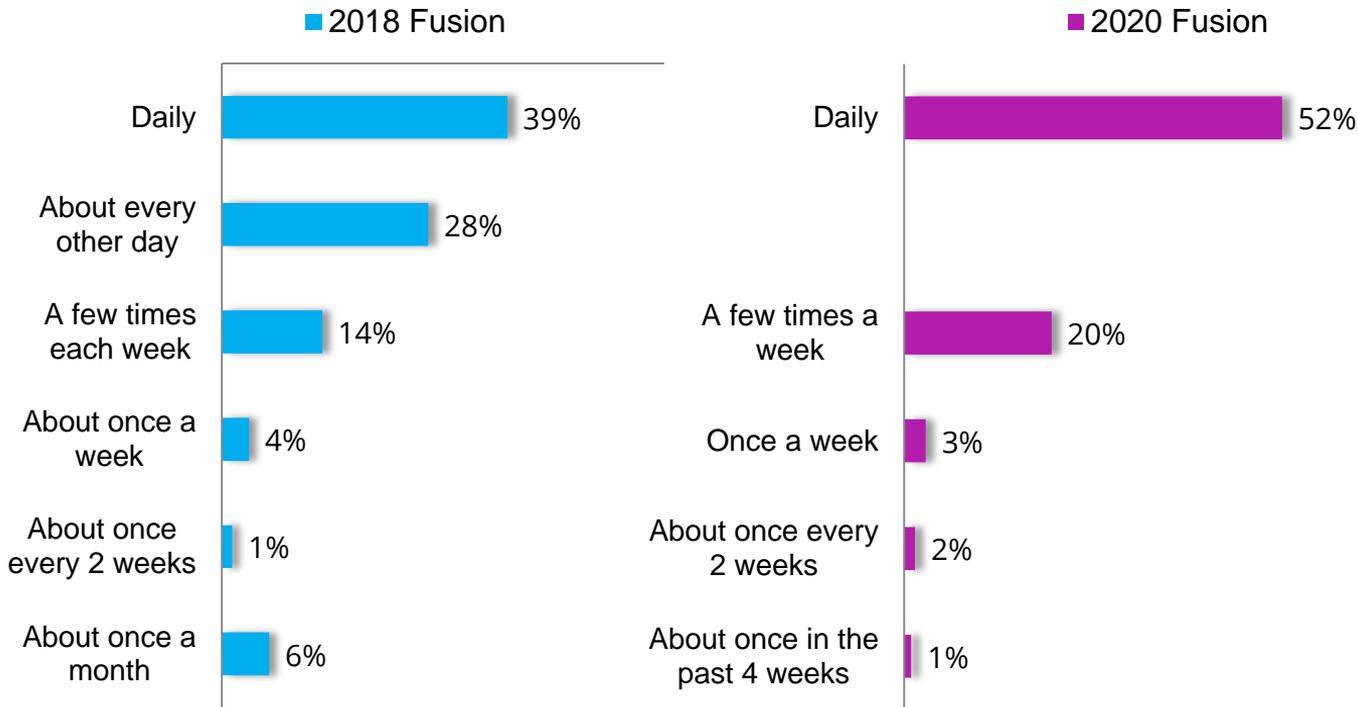
Base: total 15+ population



\* Includes paper and online in 2020

# Watch TV and access the internet at the same time

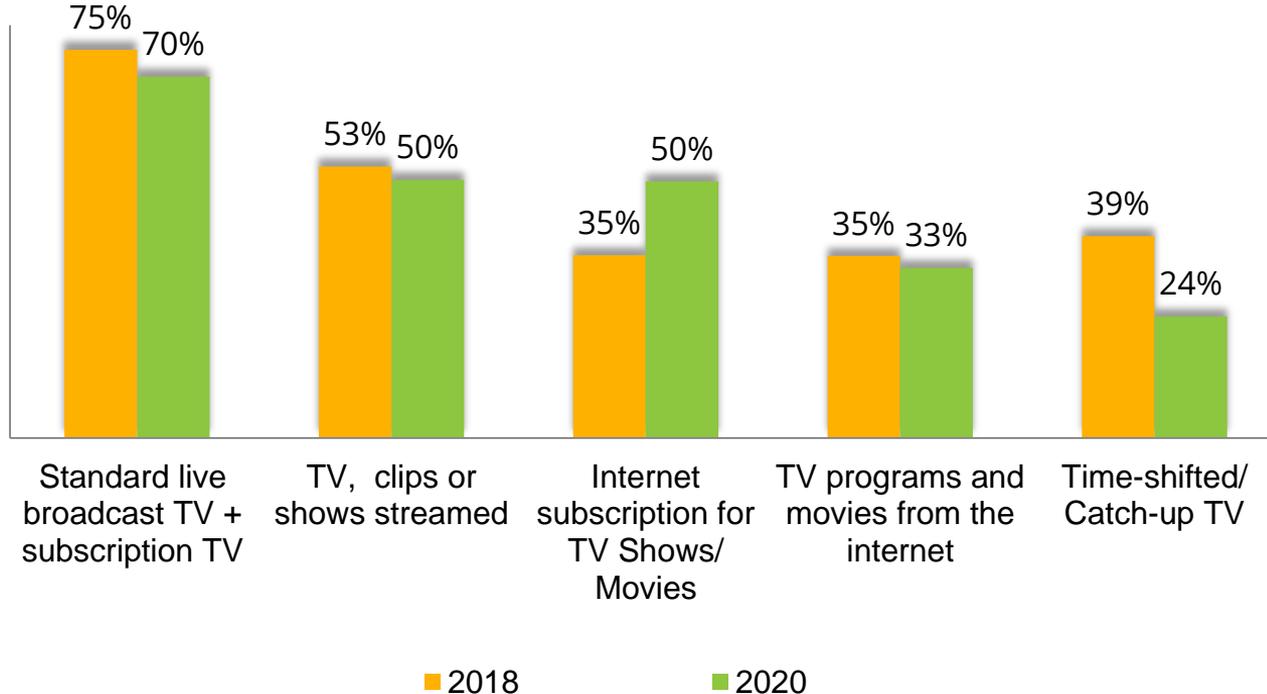
## Base: online past 4 week universe



Online past 4 weeks universe  
2018 20.7m  
2020 26.5m

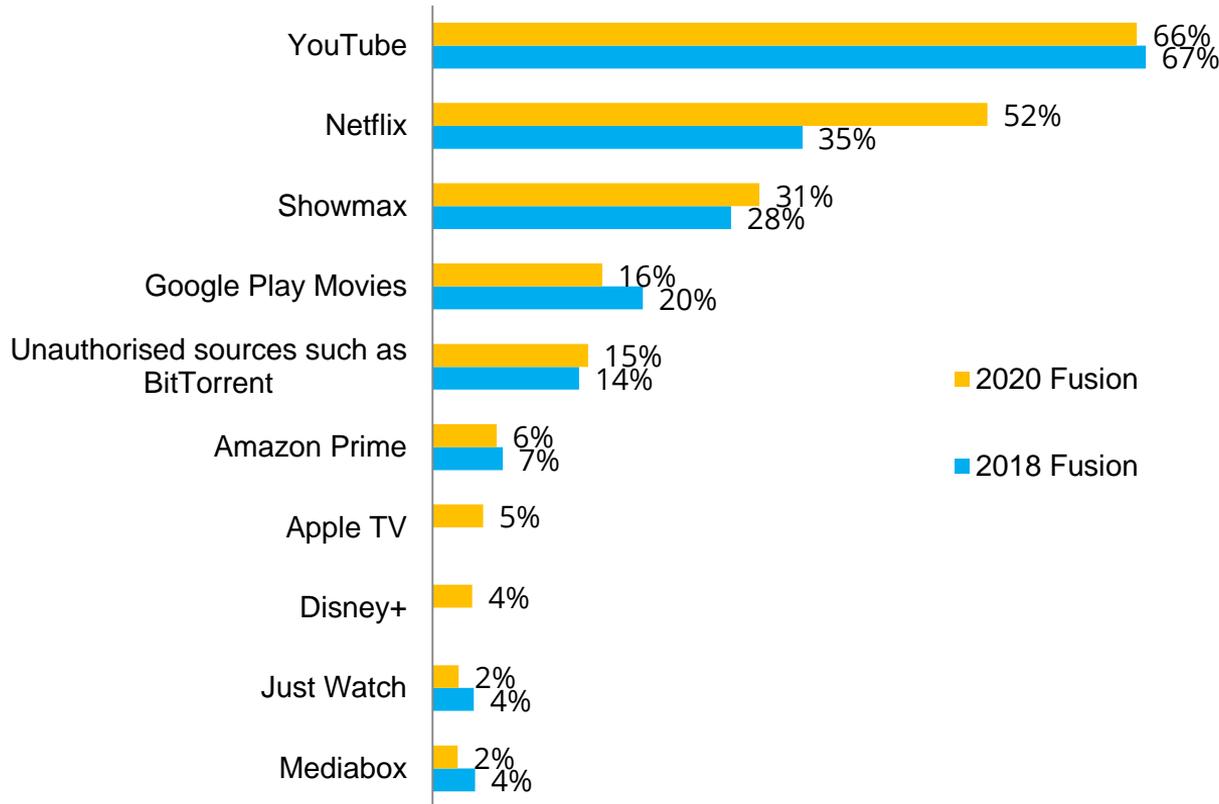
# Ways of watching TV/movies

Base: online past 4 weeks universe



# Internet TV/VOD – personally viewed

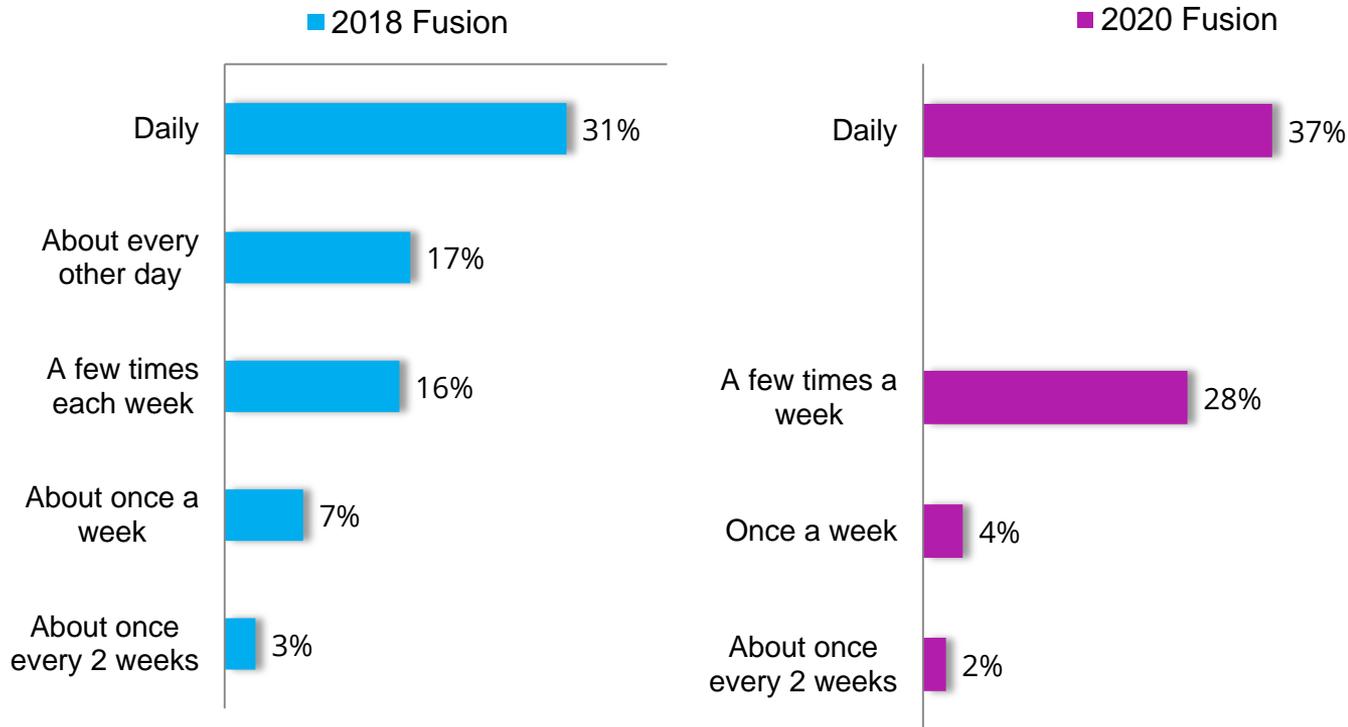
Base: online past 4 weeks universe



Any VOD viewing  
74.6%

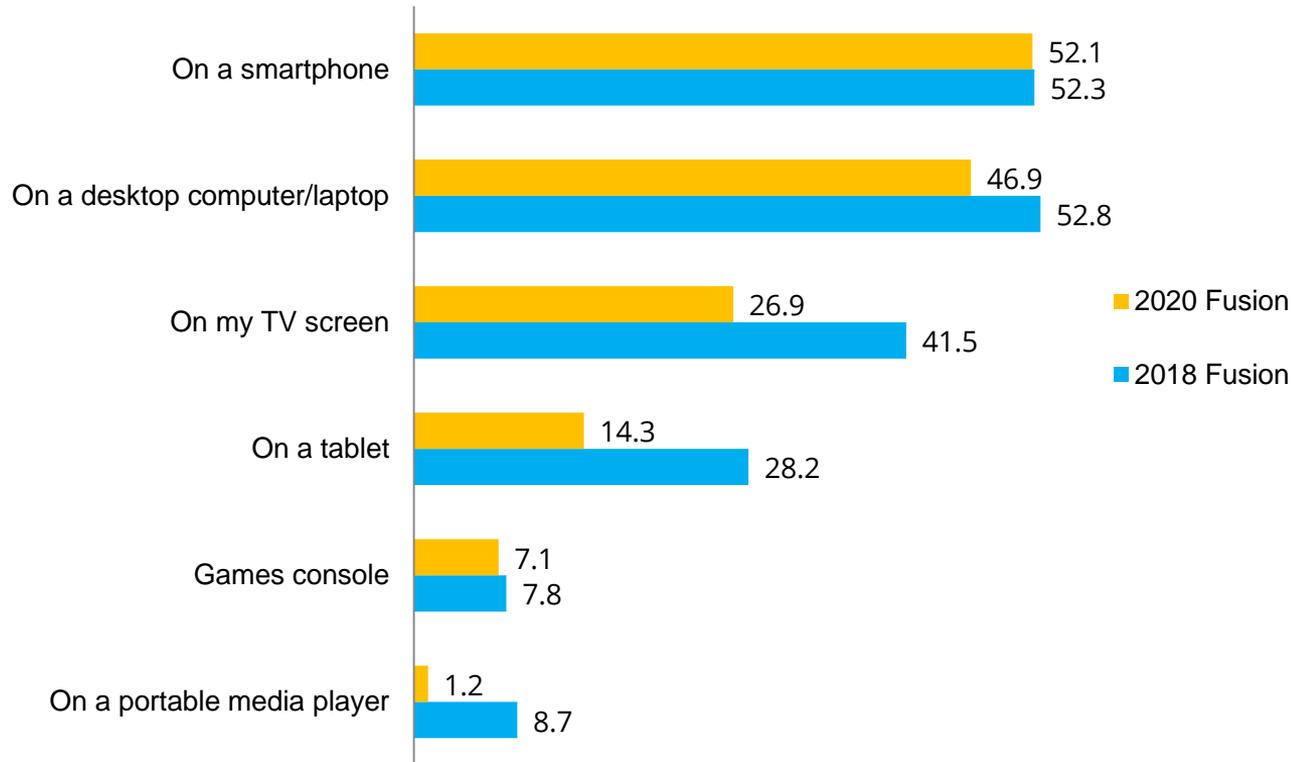
# Internet TV/VOD viewers – frequency of viewing

Base: online past 4 weeks universe



# Internet TV/VOD viewing – fewer devices are being used

Base: online past 4 weeks universe



Average number of devices used

2018 2.5

2020 2.0



**Thank you**