AGENDA

01	**RAMS Amplify Measurement Approach**
02	**P7D Listenership**
03	**Listening Patterns**
04	**Regional Ranking**
05	**Modelling Update**
06	**Way Forward**

01
RAMS Amplify Measurement Approach

SETTING THE SCENE

South African Radio Industry

- 41 Commercial and Public Service Stations

- 293 Community Radio Stations

- 11 Official Languages

- 4 Worlds in One

- ~ZAR 4-Billion (~25% of commercial media industry)

Audience Measurement

- F2F manual 7-day diary had been used for roughly 45 years

- Move to new IPSOS survey in 2021

- CATI based Day-After-Recall service

- Rolling annual surveys (~36,000 annual respondents)

- Importantly we needed to develop a model without the MediaCell input

Republic of South Africa

South Africa's Former Provinces

REASONS FOR CHANGE

COVID-19 was the catalyst

- Transition to more advanced and technology-driven methods
- Reach the more affluent population
- Increase the frequency of data release to the market
- Greater accuracy

Capturing additional data/insights

- Quarter hour listening (day after)
- Total listening (last seven days, volumetric, frequency)
- Device usage
- Other media usage
- Listening location
- Reasons why (e.g., stop listening & switching)
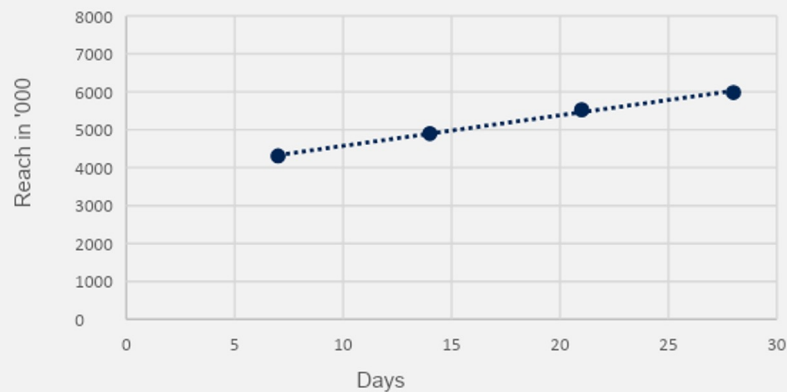
MARKET DYNAMICS – MEDIACELL* DEPLOYMENT
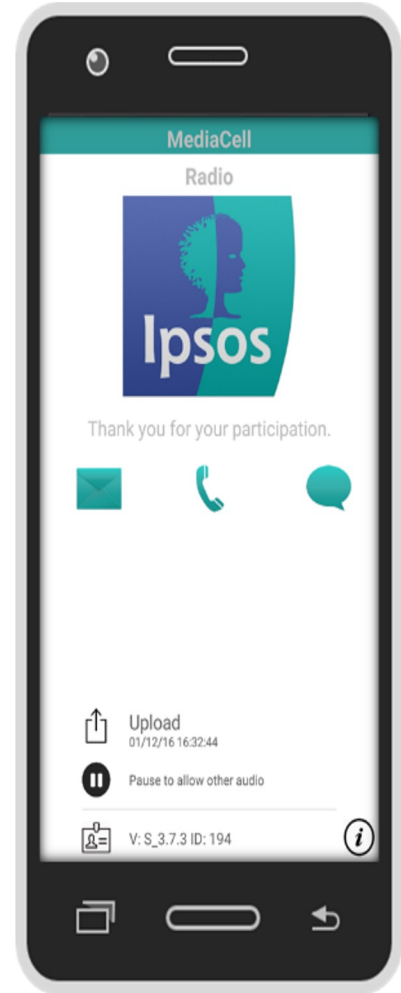
mediacell

- App based passive meter
- Single source radio and TV
- Out-of-home and In-home consumption

MEDIACELL REACH CURVE

Radio Cume Reach for July 2023 (Common Sample)

DIVERSE MARKET WITH HIGH ECONOMIC INEQUALITY

- Multi-modal recruitment required to access all socio-economic segments
- Panellists were skeptical and not tech savvy, requiring high engagement and assistance
- Multilingual call centre and panel management necessary, panellists tend to respond better to instruction in vernacular, higher trust level
- Over 300 different smartphone models on panel, many lacking the processing power to run apps, high incidence of older phones

DATA COST SCARCITY

- Traditional data costs are high in the SA market, SA'ns prone to purchase customized social media packages e.g. WA or YouTube bundles only
- Audience data best collected through reverse billing, free of charge to panelists
- Airtime works well as an incentive

INFRASTRUCTURE (POOR SIGNAL & LOADSHEDDING)

- Unpredictable load shedding impacts panellist behaviour, oftentimes causing low compliance
- Audience data stored on phone, not uploaded as frequently as required

HYBRID RAMS MEASUREMENT APPROACH

CATI DAR Currency
(Monthly)

Tracks the population's radio listening behaviour to deliver a stable radio trading currency

12 month rolling sample of n= 36 000 respondents providing robust samples for demographic drill downs

Cross tabs plus reach & frequency enables analysis by key station performance metrics

MediaCell Insights Panel
(Weekly – paused Oct'23)

Intended to provide a picture of the radio listener's engagement with other media and allocation of media time

Aimed for longitudinal single-source panel of *n*=2000 respondents showing cross media behaviour

Proven ability to follow the listener across various media types providing aggregated cross media reach

JOURNEY SO FAR – MEDIACELL

1

2021

Setting up MediaCell technology and piloting for PLM and BYO

2

2022

Implemented reverse billing for BYO.
Building a cross media panel with revised sample size and geo coverage

3

2023

As of Oct'23, n=1,300 reporting
BYO: 804
PLM: 406

Bring Your Own Handset (BYO)

Panellist downloads the MediaCell app on own phone. Targeting mid and upper income

Personal Locked Meter (PLM)

Panellist is given a smartphone with the MediaCell app already loaded. Targeting mid and lower income

THE MEASUREMENT SCOPE OF THE MEDIACELL PANEL

The single source MediaCell panel enabled a richer understanding of the radio listener within the context of the evolving media environment
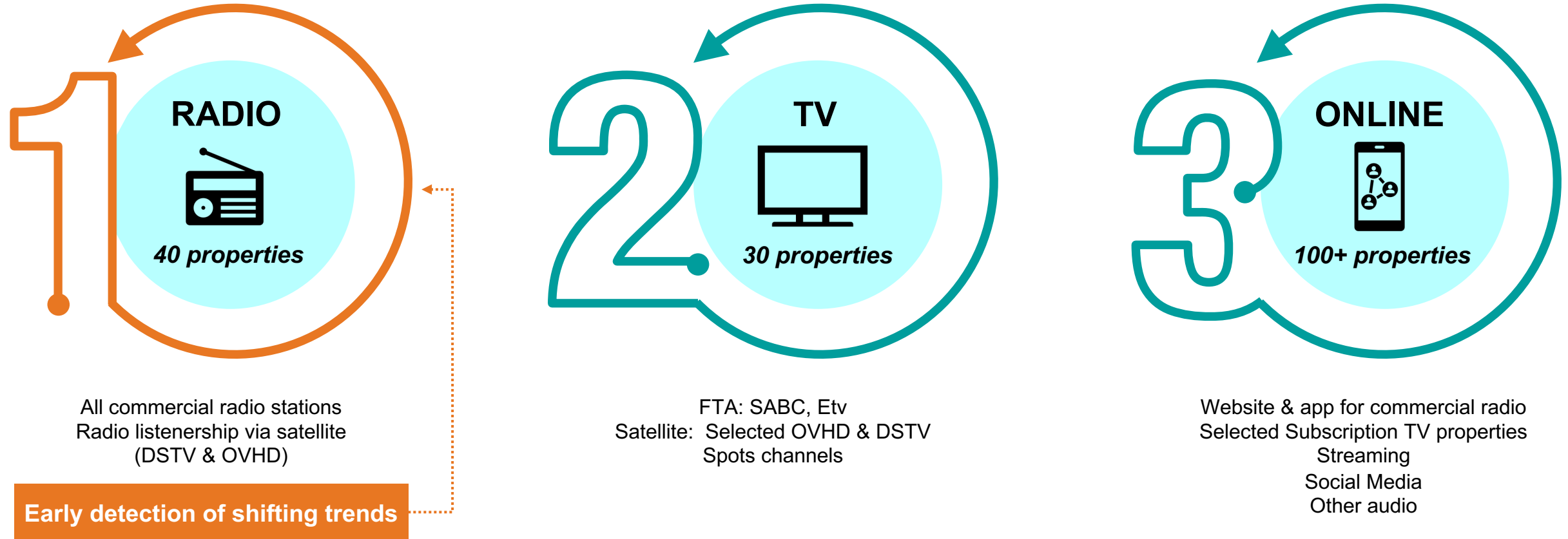
1 RADIO
40 properties

All commercial radio stations
Radio listenership via satellite
(DSTV & OVHD)

Early detection of shifting trends

2 TV
30 properties

FTA: SABC, Etv
Satellite: Selected OVHD & DSTV
Spots channels

3 ONLINE
100+ properties

Website & app for commercial radio
Selected Subscription TV properties
Streaming
Social Media
Other audio

CHALLENGES EXPERIENCED WHEN APPLYING THE MEDIACELL TECHNOLOGY IN A COMPLEX MARKET ENVIRONMENT

Iterative process to promote the success of the panel

Reverse billing

84% of smartphone owners are on a pre-paid service plan and conserve their data by switching it off

---

Reverse billing collected audience files free-of-charge to the panellist.

Also provided them with free access to the RAMS Amplify website

Controlled handsets

Over 300 different smartphone models on panel – many lacking the processing power to run apps, many older phones

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Increase the proportion of Personal Locked Meter devices on panel

Extend placement of PLM to panellists who have older phones, rather than no phone only

Active panel management

Highly skeptical panellists and new methodology demanded very high level of telephonic engagement in their own language

---

Welcome Call with full onboarding briefing – everyday panelllists interact with app, and push data through

Automated messages sent via SMS reinforce participation protocols Multilingual call centre

CHALLENGES EXPERIENCED WHEN APPLYING THE MEDIACELL TECHNOLOGY IN A COMPLEX MARKET ENVIRONMENT

Hot spot download

Powerbanks

Incentives

Many respondents don't have data at the time of recruitment. Some panellists have never downloaded an app and need assistance

At-the-door MediaCell app download

Provide hot spots to those panellists who don't have data

Due to loadshedding and phones that have weaker batteries, panellists switch off phones to preserve power

Placing powerbanks solve battery issues and promote compliance due to tangible gesture of good will

Driving long term panel tenure and commitment

Welcome incentives to drive immediate app download

Frequent prize draws around special events, Woman's Day, Heritage Day

DECISION MADE TO PAUSE MEDIACELL IN SA

JOURNEY SO FAR – CATI DAR

Positive momentum with constant development and improvement

1
Build Stable Sample

RAMS CATI Day-After-Recall study.
Monthly nationally representative sample of 3,000
to yield rolling annual sample of n=36,000 interviews
and 24-month sample of 72,000 unique respondents.

2
Boost Sample

Boost segments of the sample where natural fallout does not yield a good weight efficiency – Cape Provinces initially, moving on to Youth and Upper Income – whilst maintaining random probability base sample.

3
Questionnaire Revision

User input to remove unused questions and replace with new, to be repeated.

4
Data Bureaus Interface

Restructure data tree for RAMS cross tab, adding in required variables. Weight automation.

5
Reach and Frequency Fusion

Iterative Fusion process to model Day-After-Recall to develop weekly diaries for planning, test, calibrate, repeat and validate to finalise model.

12

RAMS METHODOLOGY

DAY AFTER RECALL

- Respondents are contacted telephonically
- Asked to recall their yesterday listenership
- Quarter hour listening is collected for the full day (96 quarter hours)
- Listening metrics derived using reach and time segments

SAMPLE

- Random Digit Dialing (RDD) approach (random probability
- Numbers generated using all available cell phone prefixes (80% of the population)
- Booster lists for "difficult to reach" groups

WEIGHTING

- Universe defined as All Adults, Ages 15 years +
- Projected population figures are supplied by GeoTerra (GTI)
- Weighting variables are gender, age, race, province, geotype and day of week
- The latest population estimate equals 43,592,206 (previously 42,571,405)

QUESTIONNAIRE

- Scripted questionnaire
- 25 minutes to administer
- All interviews are recorded
- Stringent quality control processes in place, monitoring and retraining of interviewers
- Listenership for over 330 stations collected

THE PROCESS OF CATI RANDOM DIGIT DIALLING

Generate Numbers

All cellphone prefixes in SA

Random numbers generated

Numbers loaded onto CATI system

Interviewing Procedure

Determine language of choice up-front

Interview – week-days and weekend days

Geographical Distribution

Province recorded

Filtered routing to district municipality level

Record respondent suburb of residence and match municipality

Proportion Check

Check geographical fall-out periodically and adjust targets as necessary

CATI DATA COLLECTION PROCESS

1 — CALL CENTRE

The CATI call center provides cost effective methodologies for collecting high-quality telephonic data

It is responsible for recruiting and training agents on data collection and quality control best practices

2 — INTERVIEWERS

Interviewers are recruited based on demonstrating characteristics associated with strong linguistic/ communicative skills, integrity, discipline and critical thinking etc.

Interviewers are firstly thoroughly trained on the interview process, quality expectations and then briefed on the project requirement

Interviewers are expected to remain neutral, reading the script word for word without influencing, anticipating or interpreting the responses

3 — INTERVIEWS

Interviews are strictly confidential for both the respondent and clients

Interviews are supervised and quality controlled in real time

Interview ID is captured against claimed location

IBM Dimensions and Ipsos Geolink App are simultaneously used during the interview process

4 — GEOLINK APP

Interviewer types claimed location area in text box

App pulls a list of closest verified locations

Interviewer selects location from the list

At the end of each dialing month locations are matched with interview IDs

Geolink data is downloaded as validated location data

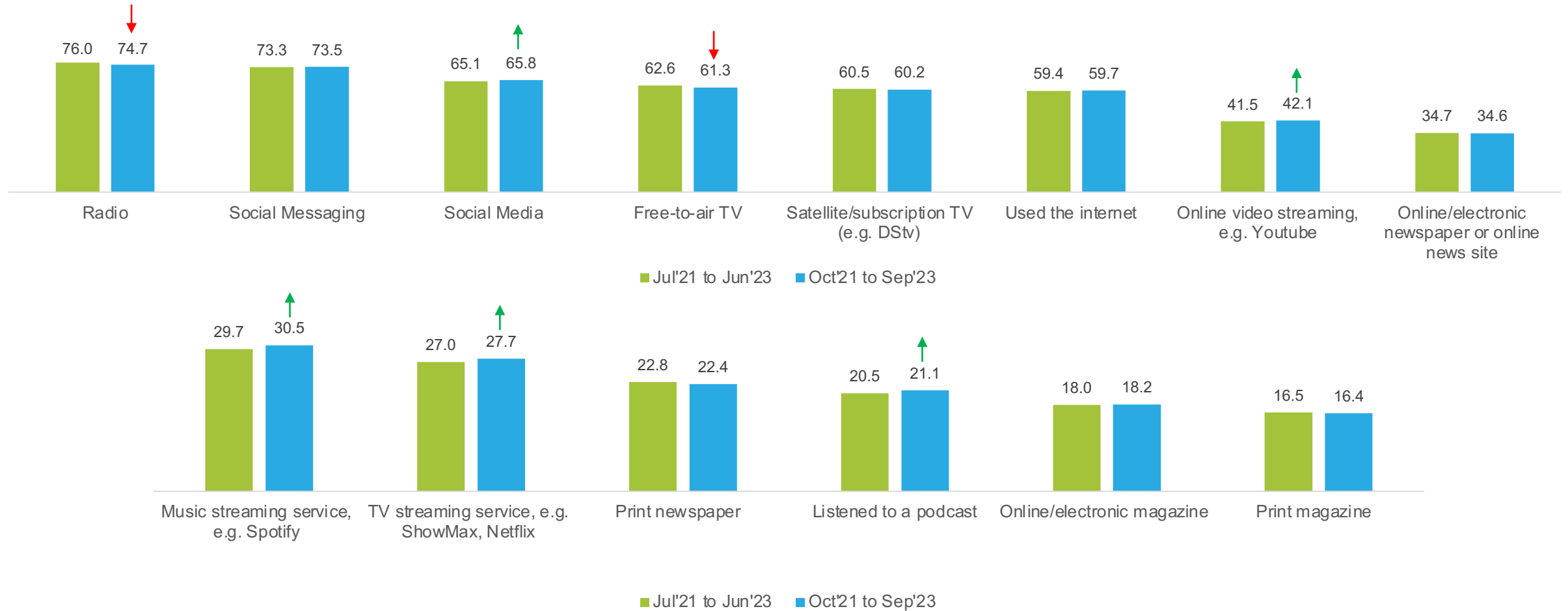Geolink data is further processed by Marketing Science

02
P7D LISTENERSHIP

CHANGES IN P7D MEDIA BEHAVIOUR (WTD %)

Traditional broadcast media loses out to new media this quarter. Radio declines in favour of music streaming and podcast consumption, FTA TV declines in favour of SVOD. Reading media remains stable.

Chart 1 (top row):
- Radio: 76.0 / 74.7 ↓
- Social Messaging: 73.3 / 73.5
- Social Media: 65.1 / 65.8 ↑
- Free-to-air TV: 62.6 / 61.3 ↓
- Satellite/subscription TV (e.g. DStv): 60.5 / 60.2
- Used the internet: 59.4 / 59.7
- Online video streaming, e.g. Youtube: 41.5 / 42.1 ↑
- Online/electronic newspaper or online news site: 34.7 / 34.6

Legend: ■ Jul'21 to Jun'23 ■ Oct'21 to Sep'23

Chart 2 (bottom row):
- Music streaming service, e.g. Spotify: 29.7 / 30.5 ↑
- TV streaming service, e.g. ShowMax, Netflix: 27.0 / 27.7 ↑
- Print newspaper: 22.8 / 22.4
- Listened to a podcast: 20.5 / 21.1 ↑
- Online/electronic magazine: 18.0 / 18.2
- Print magazine: 16.5 / 16.4

Legend: ■ Jul'21 to Jun'23 ■ Oct'21 to Sep'23

↓ Significant decrease; 95% conf. Jul'21 to Jun'23 vs Oct'21 to Sep'23

↑ Significant increase; 95% conf. Jul'21 to Jun'23 vs Oct'21 to Sep'23

Source: CATI DAR (24M: Jul'21 to Jun'23 / Oct'21 to Sep'23)

brc Ipsos [MILTON DATA]

17

THE CURRENT STATE OF RADIO

People are Listening

3 in 4

(75%) South Africans

15 years and older

listen to the radio

on a weekly basis

Engagement is High

5 hours 12 minutes

average daily listening time

Radio Reach Extends Well into Mid-Upper SEM

SEM SUPER GROUPS		
LOW (1-30)	MEDIUM (31-65)	HIGH (66-100)
29%	40%	31%

Radio Plays Well with Other Media

WEEK CUME RADIO LISTENERS				
ANY WATCHING	ANY READING	SOCIAL MEDIA	MESSAGING	BROWSING
88%	56%	68%	76%	63%

Brand Decision Makers are Tuning In

83%

of radio listeners are responsible for day-to-day household purchasing

Gen Z is also listening

28%

of radio listeners are 15-27 years old

brc
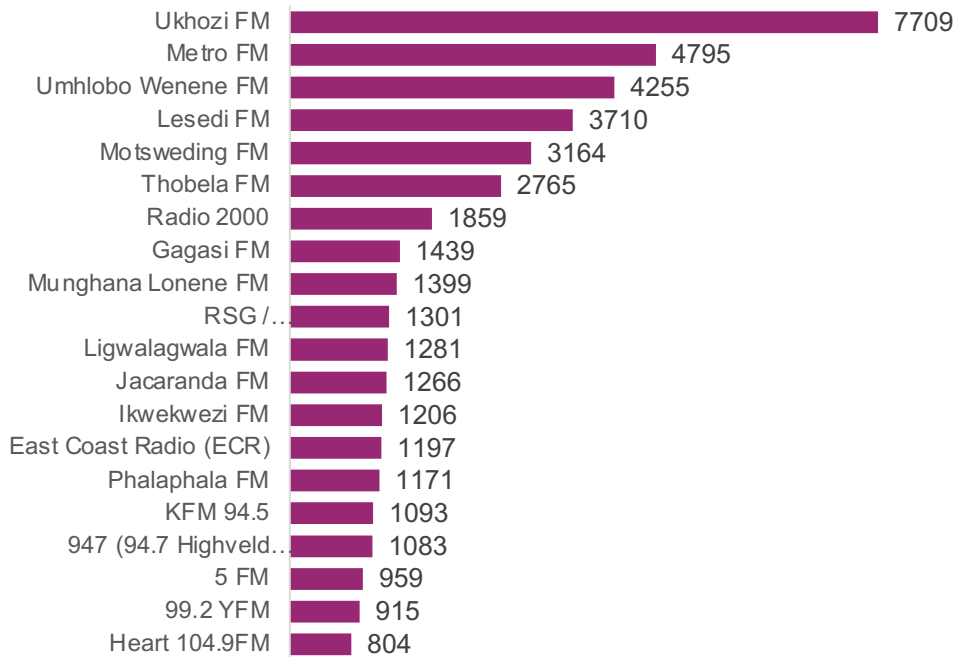THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA
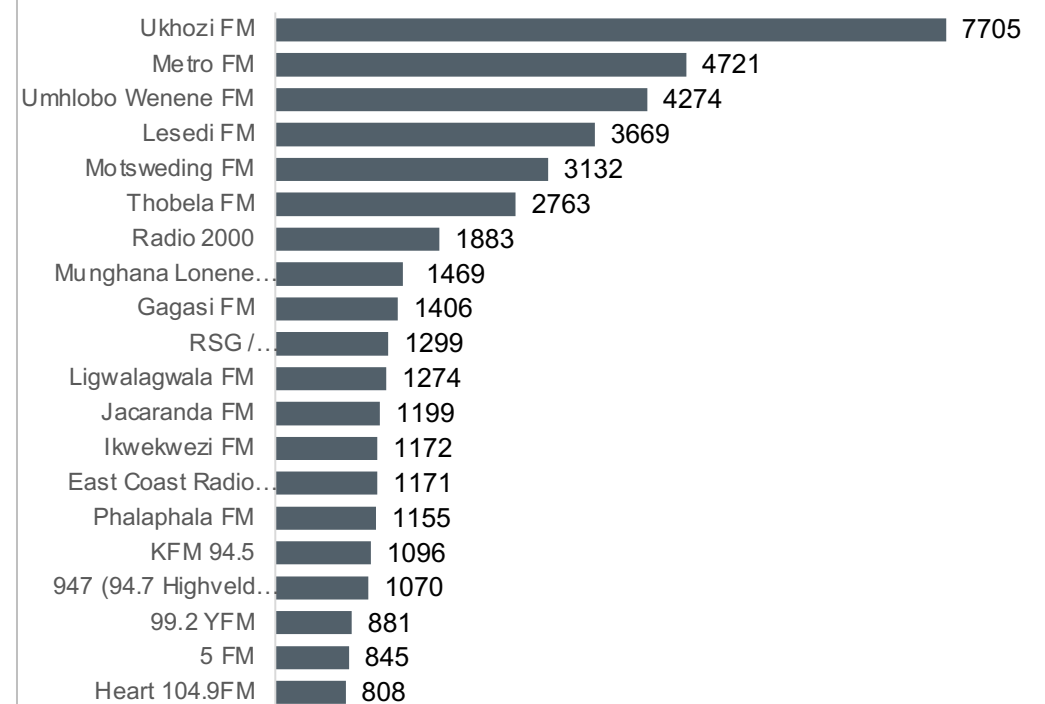
Ipsos

[MILTON DATA]

Top Twenty

TOP 20 COMMERCIAL RADIO STATIONS

24 month data is sensitive enough to track trends.

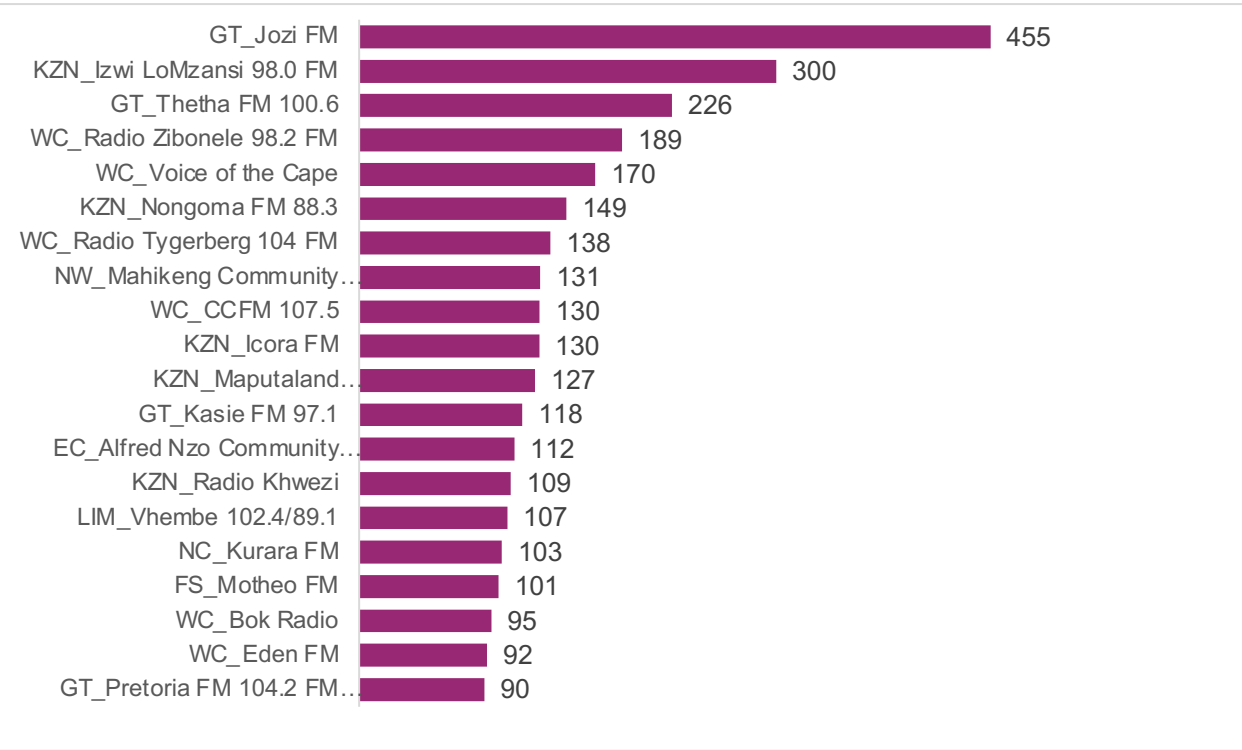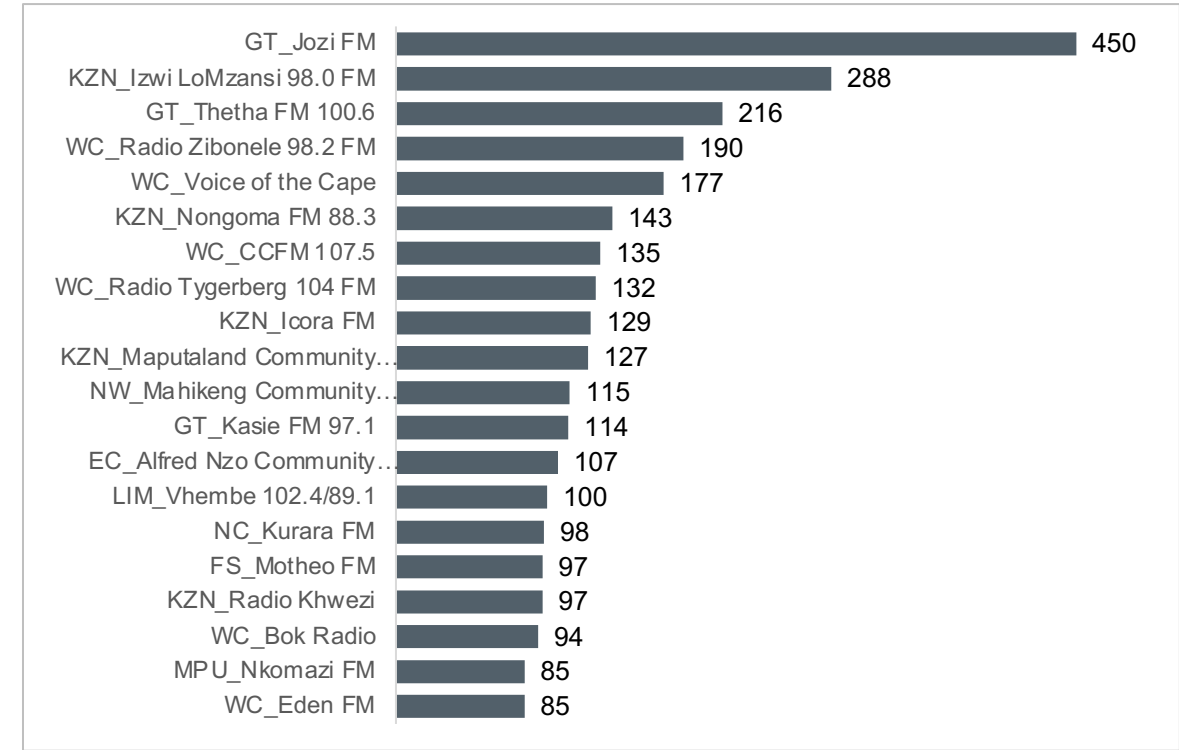## P7D Top 20
Total Population 42,571
Jun'23 database n=73,877

Station	Value
Ukhozi FM	7709
Metro FM	4795
Umhlobo Wenene FM	4255
Lesedi FM	3710
Motsweding FM	3164
Thobela FM	2765
Radio 2000	1859
Gagasi FM	1439
Munghana Lonene FM	1399
RSG /…	1301
Ligwalagwala FM	1281
Jacaranda FM	1266
Ikwekwezi FM	1206
East Coast Radio (ECR)	1197
Phalaphala FM	1171
KFM 94.5	1093
947 (94.7 Highveld…	1083
5 FM	959
99.2 YFM	915
Heart 104.9FM	804

P7D Top 20
Total Population 43,592
Sep'23 database n=73,920

Station	Value
Ukhozi FM	7705
Metro FM	4721
Umhlobo Wenene FM	4274
Lesedi FM	3669
Motsweding FM	3132
Thobela FM	2763
Radio 2000	1883
Munghana Lonene…	1469
Gagasi FM	1406
RSG /…	1299
Ligwalagwala FM	1274
Jacaranda FM	1199
Ikwekwezi FM	1172
East Coast Radio…	1171
Phalaphala FM	1155
KFM 94.5	1096
947 (94.7 Highveld…	1070
99.2 YFM	881
5 FM	845
Heart 104.9FM	808

brc — THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA · Ipsos · [MILTON DATA]

TOP 20 COMMUNITY RADIO STATIONS

24 month data is sensitive enough to track trends.

P7D Top 20
Total Population 42,571
Jun'23 database n=73,877

Station	Value
GT_Jozi FM	455
KZN_Izwi LoMzansi 98.0 FM	300
GT_Thetha FM 100.6	226
WC_Radio Zibonele 98.2 FM	189
WC_Voice of the Cape	170
KZN_Nongoma FM 88.3	149
WC_Radio Tygerberg 104 FM	138
NW_Mahikeng Community…	131
WC_CCFM 107.5	130
KZN_Icora FM	130
KZN_Maputaland…	127
GT_Kasie FM 97.1	118
EC_Alfred Nzo Community…	112
KZN_Radio Khwezi	109
LIM_Vhembe 102.4/89.1	107
NC_Kurara FM	103
FS_Motheo FM	101
WC_Bok Radio	95
WC_Eden FM	92
GT_Pretoria FM 104.2 FM…	90

P7D Top 20
Total Population 43,592
Sep'23 database n=73,920

Station	Value
GT_Jozi FM	450
KZN_Izwi LoMzansi 98.0 FM	288
GT_Thetha FM 100.6	216
WC_Radio Zibonele 98.2 FM	190
WC_Voice of the Cape	177
KZN_Nongoma FM 88.3	143
WC_CCFM 107.5	135
WC_Radio Tygerberg 104 FM	132
KZN_Icora FM	129
KZN_Maputaland Community…	127
NW_Mahikeng Community…	115
GT_Kasie FM 97.1	114
EC_Alfred Nzo Community…	107
LIM_Vhembe 102.4/89.1	100
NC_Kurara FM	98
FS_Motheo FM	97
KZN_Radio Khwezi	97
WC_Bok Radio	94
MPU_Nkomazi FM	85
WC_Eden FM	85

Source: CATI DAR (24M: Jul'21 to Jun'23 / Oct'21 to Sep'23)

03
Listening Patterns

AVG. QUARTER-HOUR TREND – WEEK DAY

Listening patterns are stable. The AQH shape of the day is consistent across survey periods.
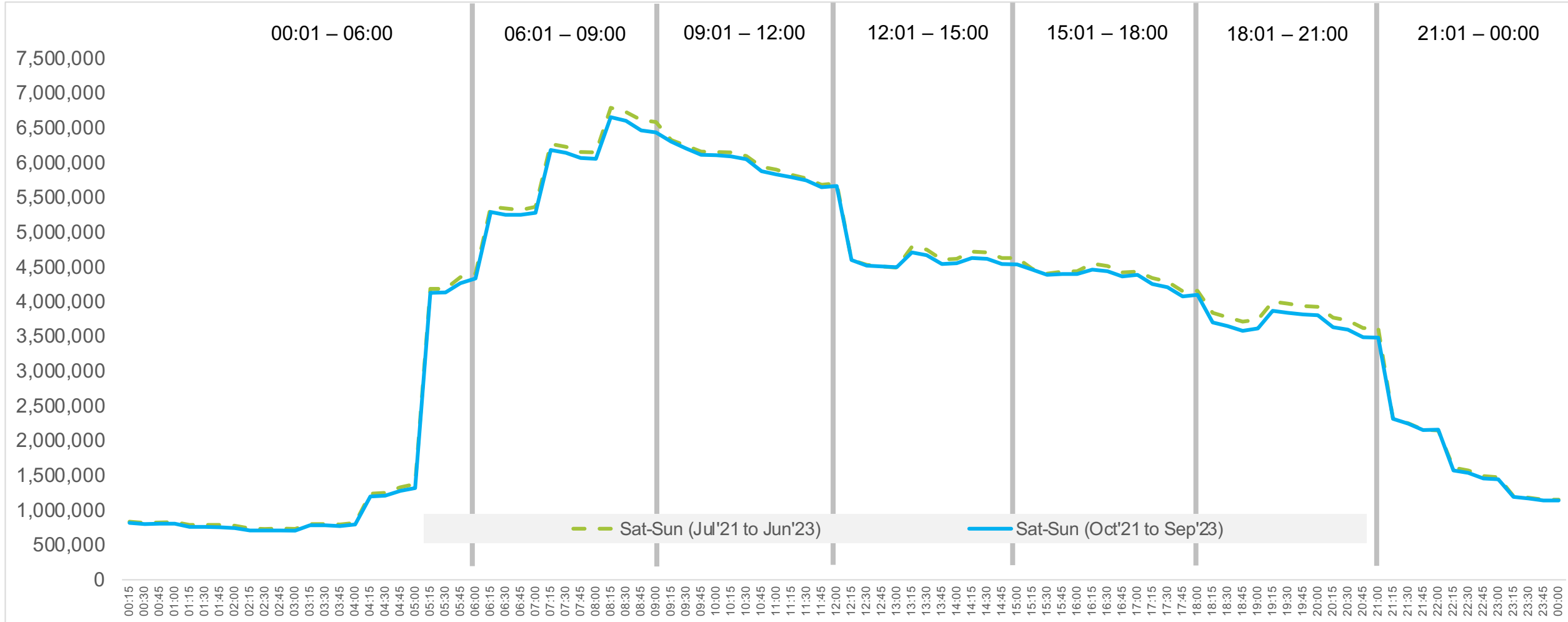
Base: Wt. Yesterday listeners.
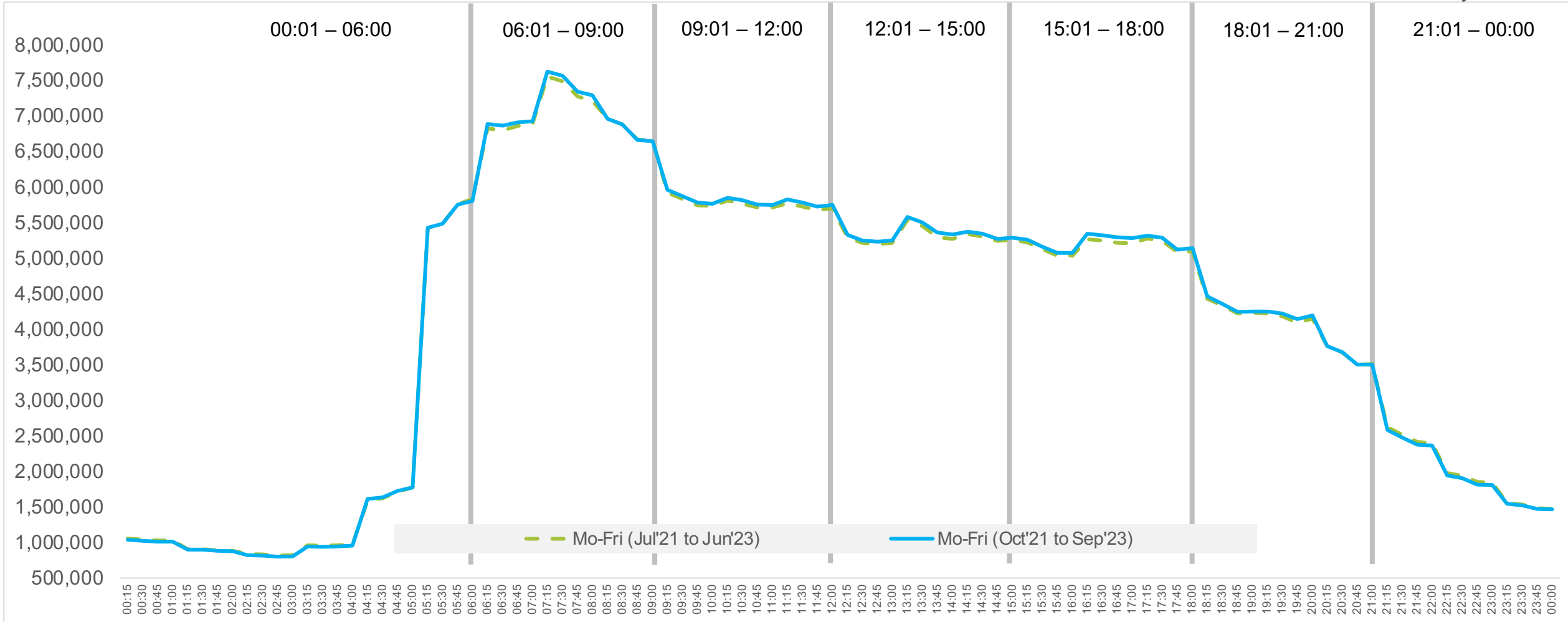
Source: CATI DAR (24M: Jul'21 to Jun'23 / Oct'21 to Sep'23)

23

AVG. QUARTER-HOUR TREND – WEEKEND

Weekend listening patterns remain consistent.

DAY PARTS SHAPE OF DAY

AM Drive time on weekdays garnering the biggest audiences as usual, followed by PM drive. Middays and evening slots hold a sizeable portion as audiences spread almost evenly through the day until the workday draws to a close. Sunday picks up more on weekends from 6:00 to 12:00.

Day parts by DOW
Total Population 43,592
Sep'23 database n=73,920
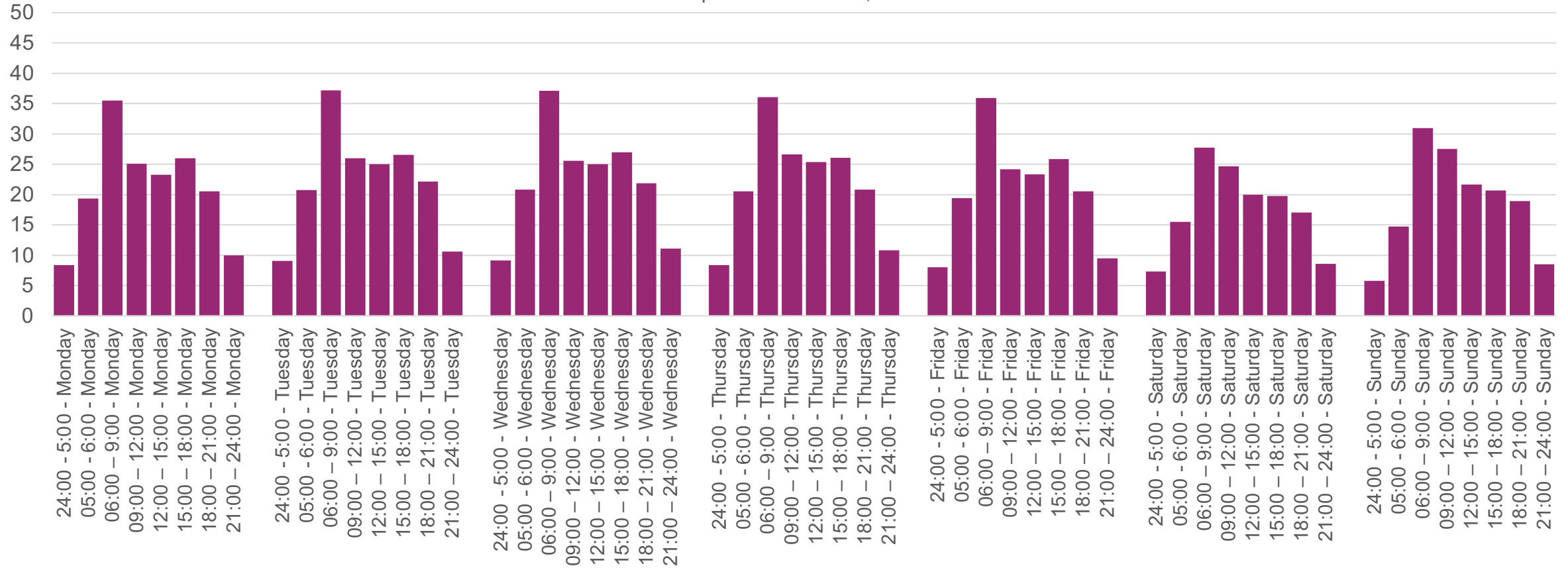
Source: CATI DAR (24M: Oct'21 to Sep'23)

04
Regional Ranking

LISTENERSHIP BY PROVINCE

Although past 7 day listening has declined against the previous reported quarter, AVG TSL has increased for most provinces, except the Northern Cape which has decreased significantly by 7 minutes. Western Cape TSL is unchanged and NorthWest is down by 1 minute.
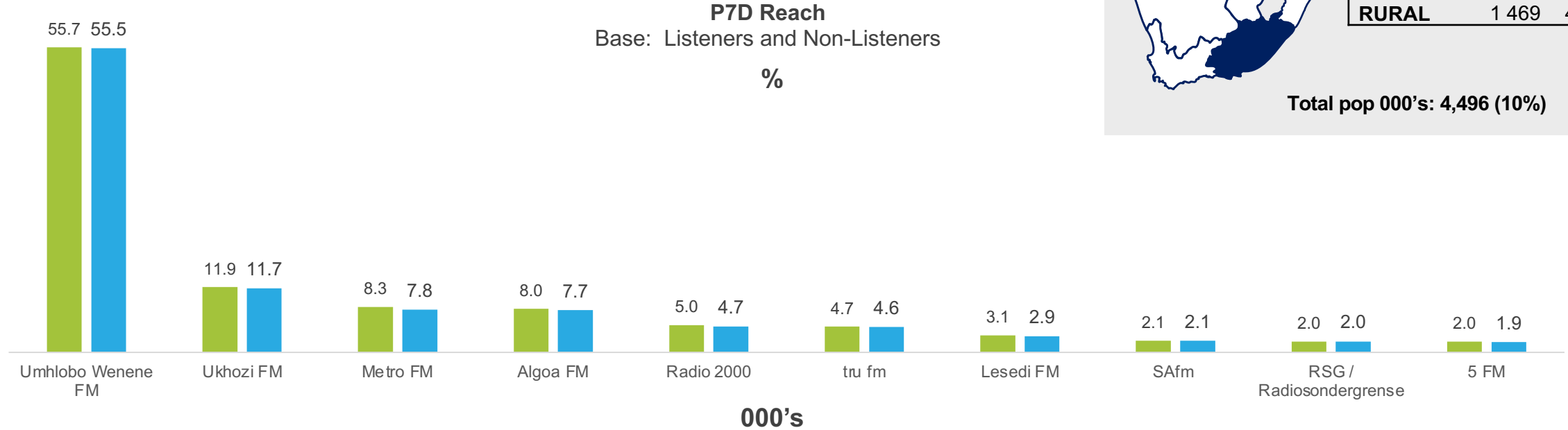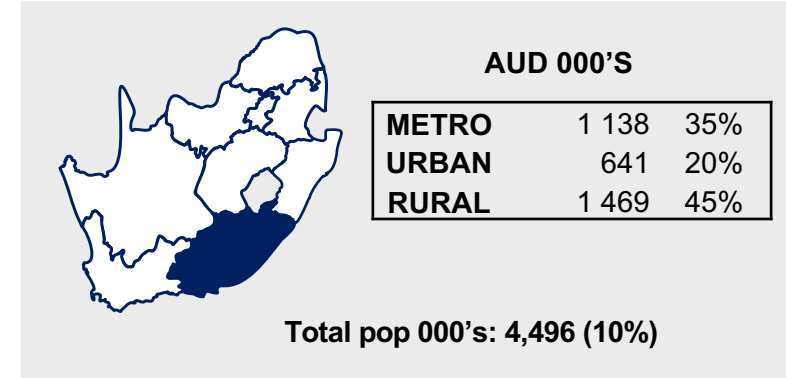
PAST 7 DAY LISTENING

Province	Jun'23	Sep'23
Total Radio	76.0	74.7
Eastern Cape	73.4	72.7
Free State	81.0	79.8
Gauteng	75.9	74.5
KZN	78.0	76.8
Limpopo	74.7	73.2
Mpumalanga	75.8	74.1
Northern Cape	69.6	66.4
North West	78.0	76.6
Western Cape	75.0	73.9

■ Jun'23 ■ Sep'23
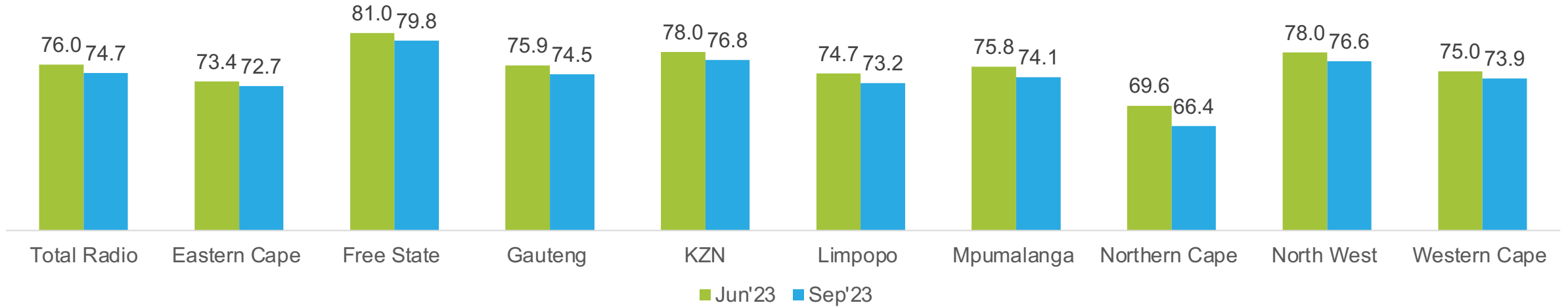
DAILY AVERAGE TIME SPENT LISTENING

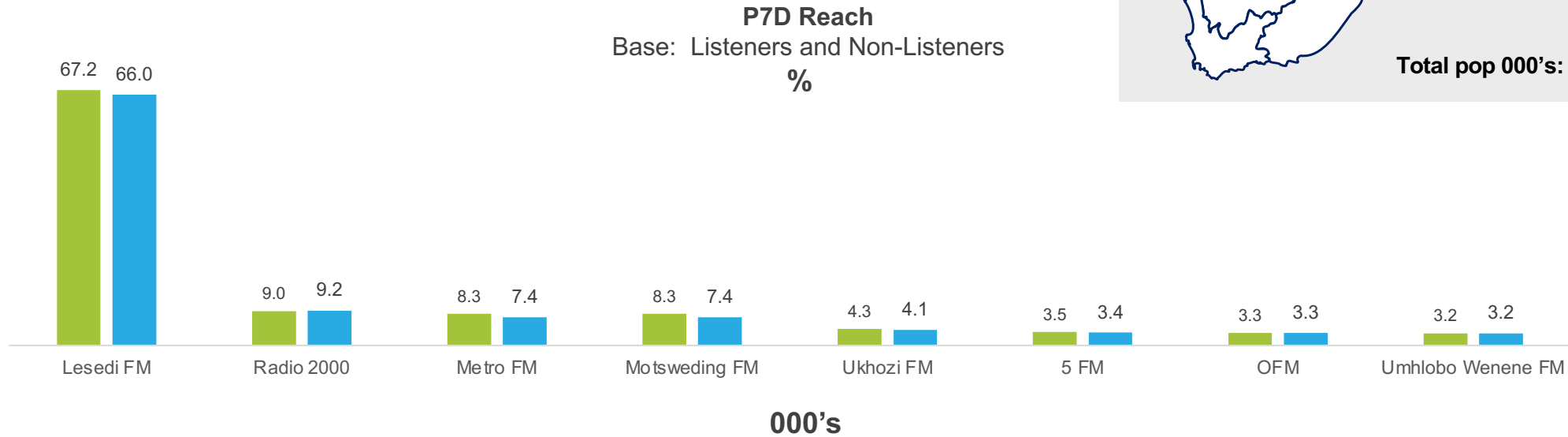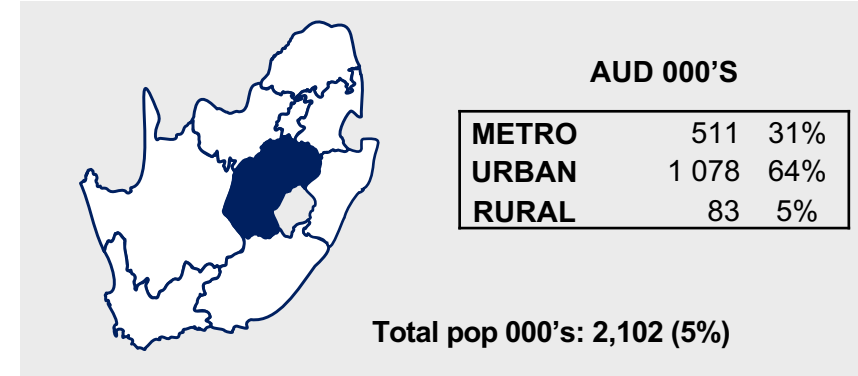| Survey Period	Total	EC	FS	GP	KZN	LP	MP	NC	NW	WC
	+3 min	+4 min	+4 min	+3 min	+2 min	+2 min	+5 min	-7 min	- 1 min	0 min
24M Jun23	5H 09min	5H 28min	5H 41min	5H 01min	5H 23min	4H 50min	5H 02min	4H 49min	5H 08min	5H 01min
24MSep23	5H 12min	5H 32min	5H 45min	5H 04min	5H 25min	4H 52min	5H 07min	4H 42min	5H 07min	5H 01min

EASTERN CAPE P7D AUDIENCE – STATION RANKING

Umhlobo Wenene dominates in this region, reaching 2,4m listeners.
Ukhozi FM, Metro FM and Algoa FM reaching more than 300k.
Algoa FM features as the only non public broadcaster station.

AUD 000'S

METRO	1 138	35%
URBAN	641	20%
RURAL	1 469	45%

Total pop 000's: 4,496 (10%)

P7D Reach
Base: Listeners and Non-Listeners

%

	55.7	55.5	11.9	11.7	8.3	7.8	8.0	7.7	5.0	4.7	4.7	4.6	3.1	2.9	2.1	2.1	2.0	2.0	2.0	1.9

Umhlobo Wenene FM · Ukhozi FM · Metro FM · Algoa FM · Radio 2000 · tru fm · Lesedi FM · SAfm · RSG / Radiosondergrense · 5 FM

000's

	Umhlobo Wenene FM	Ukhozi FM	Metro FM	Algoa FM	Radio 2000	Tru fm	Lesedi FM	SAfm	RSG	5 FM
Jun'23	2,514	538	375	362	224	214	141	94	92	92
Sep'23	2,497	524	349	346	213	206	129	93	90	87

FREE STATE P7D AUDIENCE – STATION RANKING

Two thirds of listeners in the region listen to Lesedi FM.

AUD 000'S

METRO	511	31%
URBAN	1 078	64%
RURAL	83	5%

Total pop 000's: 2,102 (5%)

P7D Reach
Base: Listeners and Non-Listeners
%

000's

	Lesedi FM	Radio 2000	Metro FM	Motsweding FM	Ukhozi FM	5 FM	OFM	Umhlobo Wenene FM
Jun'23	1,407	189	174	173	91	73	69	66
Sep'23	1,388	193	156	155	85	72	70	67

GAUTENG P7D AUDIENCE – STATION RANKING

The very diverse population of the country's economic powerhouse provides a very competitive landscape. A variety of station formats and broadcast languages are enjoyed by GP dwellers.
Metro FM reaching 2.3m people.
Ukhozi FM, Lesedi FM and 947 reaches more than 1m. Motsweding and Thobela just under 1m.
YFM and Jacaranda audiences above 700k.
Radio 2000 and talk station 702 above 600k.

AUD 000'S		
METRO	8 022	88%
URBAN	1 072	12%
RURAL	35	0.4%

Total pop 000's: 12,313 (28%)
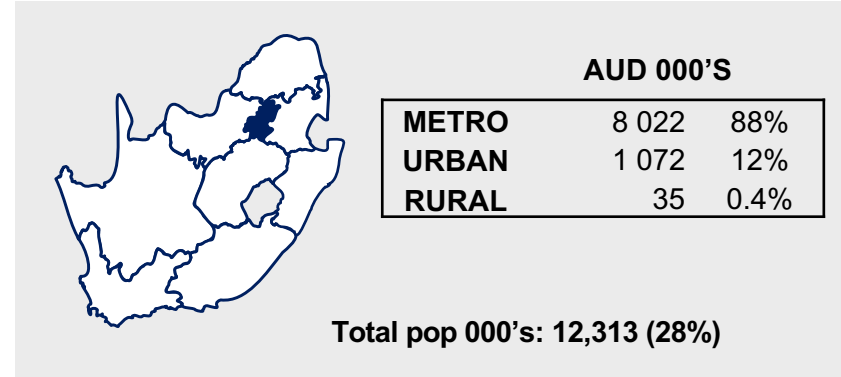
P7D Reach
Base: Listeners and Non-Listeners

%

Metro FM: 19.7 / 19.1
Ukhozi FM: 14.8 / 14.7
Lesedi FM: 11.9 / 11.3
947: 8.5 / 8.3
Motsweding FM: 7.9 / 7.6
Thobela FM: 7.7 / 7.5
99.2 YFM: 6.7 / 6.3
Jacaranda FM: 6.5 / 6.2
Radio 2000: 5.4 / 5.5
702: 5.6 / 5.4

000's
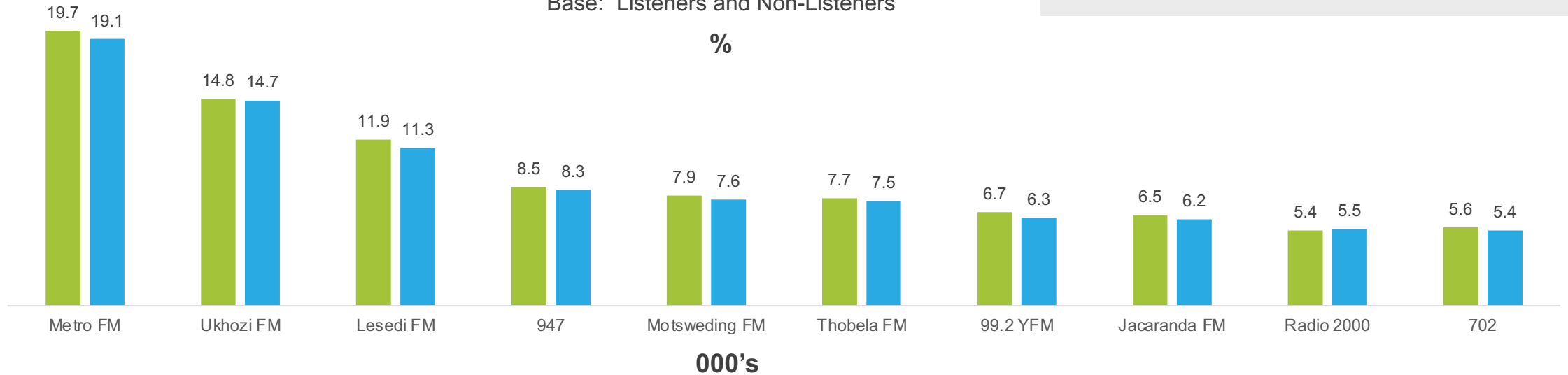
	Metro FM	Ukhozi FM	Lesedi FM	947	Motsweding FM	Thobela FM	99.2 YFM	Jacaranda FM	Radio 2000	702
Jun'23	2,329	1,757	1,405	1,012	935	911	790	765	641	663
Sep'23	2,351	1,810	1,396	1,019	935	922	779	761	672	**659**

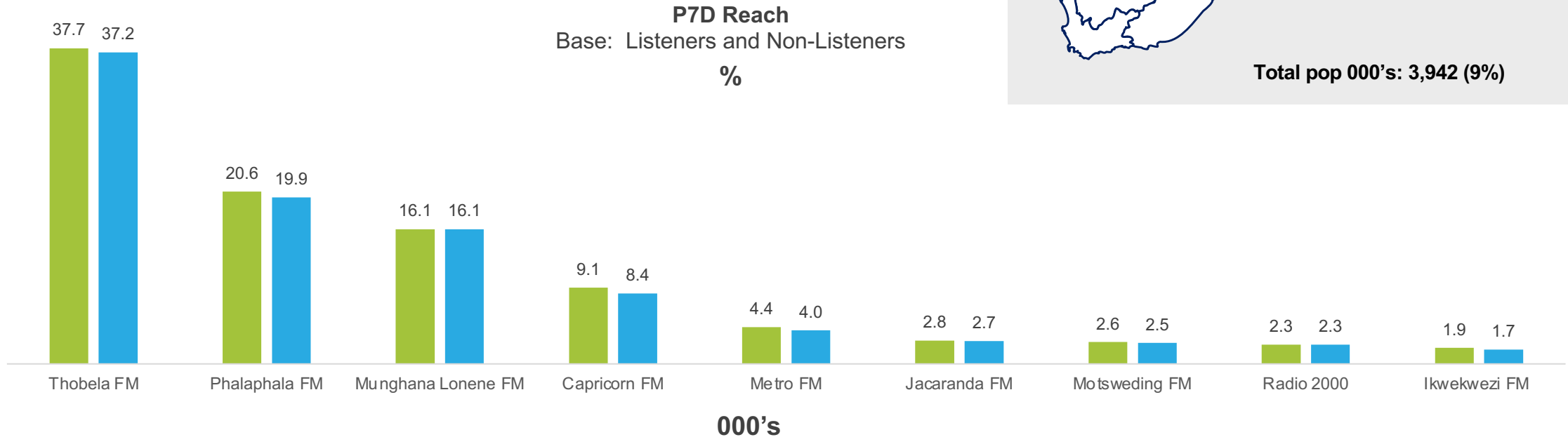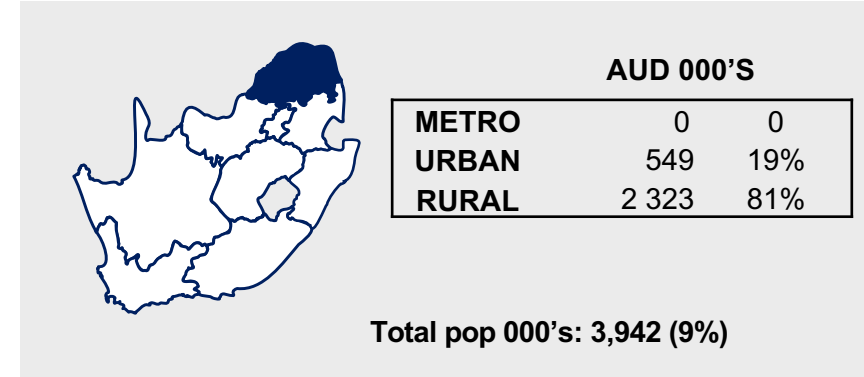# KWAZULU-NATAL P7D AUDIENCE – STATION RANKING

Ukhozi FM, broadcasting in mostly isiZulu, attracts more than 4m listeners in the second most populous province. Gagasi FM , broadcasting in English and isiZulu and East Coast Radio, broadcasting in English, attract more than 1m listeners each.
Community station Izwi LoMzansi featuring in the top ten list with an audience of just under 300k.

	AUD 000'S	
METRO	2 377	39%
URBAN	1 226	20%
RURAL	2 485	41%

Total pop 000's: 7,950 (19%)

P7D Reach
Base: Listeners and Non-Listeners
%

59.4 58.3 — Ukhozi FM
17.2 16.8 — Gagasi FM
14.0 13.6 — East Coast Radio (ECR)
7.6 7.7 — Metro FM
3.8 3.6 — KZN_Izwi LoMzansi 98.0 FM
3.1 3.0 — Umhlobo Wenene FM
2.7 2.6 — Radio 2000
2.4 2.5 — Vuma 103 FM
2.4 2.2 — Lotus FM
1.9 1.7 — 5 FM

000's
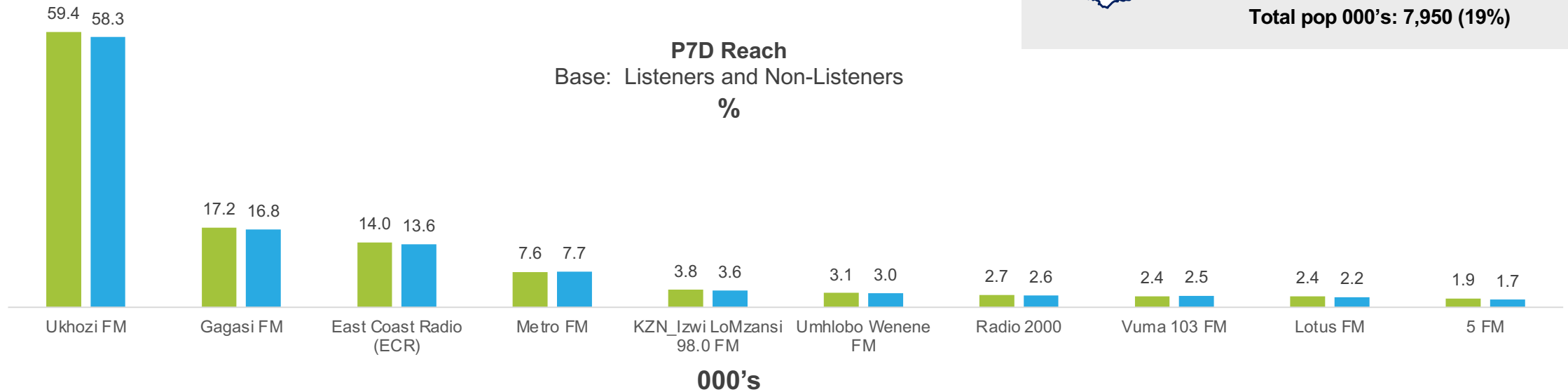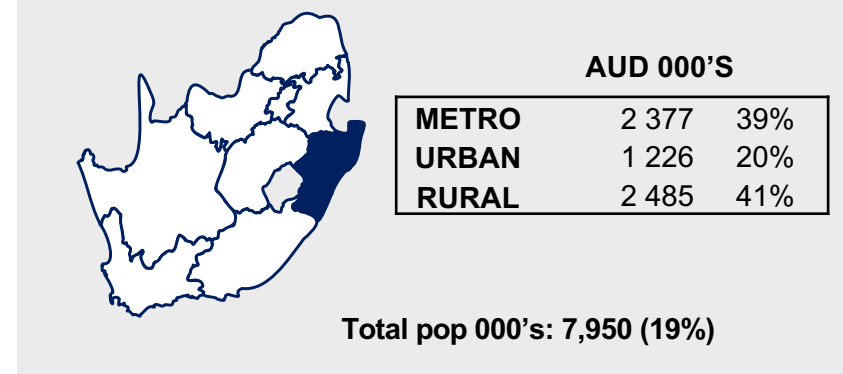
	Ukhozi FM	Gagasi FM	East Coast Radio (ECR)	Metro FM	KZN_Izwi LoMzansi	Umhlobo Wenene FM	Radio 2000	Vuma 103 FM	Lotus FM	5 FM
Jun'23	4,646	1,343	1,098	593	293	244	209	189	186	147
Sep'23	4,637	1,332	1,082	609	285	239	206	196	175	141

brc Ipsos [MILTON DATA]

LIMPOPO P7D AUDIENCE – STATION RANKING

Station selection is mostly static in the LP region, with Thobela FM owning the biggest audience of just under 1.5m.
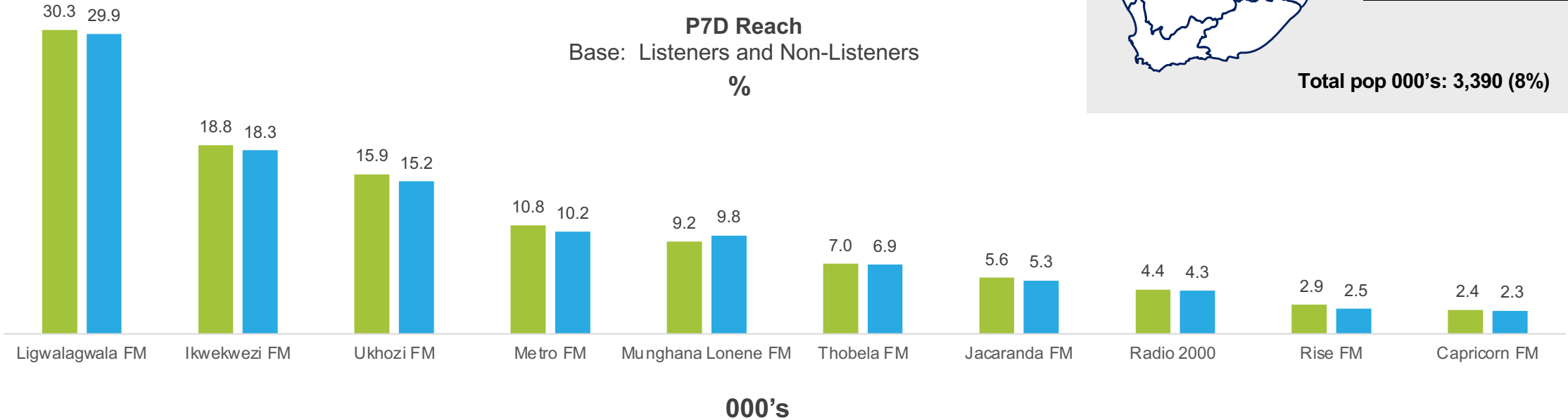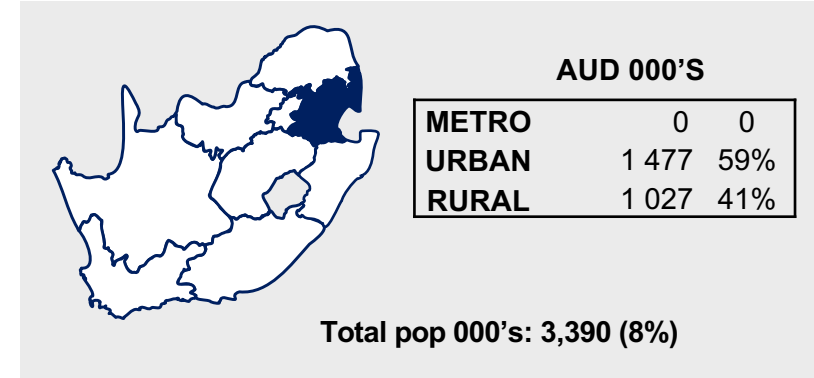
AUD 000'S

METRO	0	0
URBAN	549	19%
RURAL	2 323	81%

Total pop 000's: 3,942 (9%)

P7D Reach
Base: Listeners and Non-Listeners
%

Thobela FM: 37.7 / 37.2
Phalaphala FM: 20.6 / 19.9
Munghana Lonene FM: 16.1 / 16.1
Capricorn FM: 9.1 / 8.4
Metro FM: 4.4 / 4.0
Jacaranda FM: 2.8 / 2.7
Motsweding FM: 2.6 / 2.5
Radio 2000: 2.3 / 2.3
Ikwekwezi FM: 1.9 / 1.7

000's

	Thobela FM	Phalaphala FM	Munghana Lonene FM	Capricorn FM	Metro FM	Jacaranda FM	Motsweding FM	Radio 2000	Ikwekwezi FM
Jun'23	1,463	800	624	354	170	107	102	91	75
Sep'23	1,468	784	636	333	156	107	97	92	68

Source: CATI DAR (24M: Jul'21 to Jun'23 / Oct'21 to Sep'23)

MPUMALANGA P7D AUDIENCE – STATION RANKING

Ligwalawala FM consistenly holding on to 1m listeners, followed by Ikwekwezi with more than 600k.

AUD 000'S

METRO	0	0
URBAN	1 477	59%
RURAL	1 027	41%

Total pop 000's: 3,390 (8%)

P7D Reach
Base: Listeners and Non-Listeners
%

Ligwalagwala FM: 30.3 / 29.9
Ikwekwezi FM: 18.8 / 18.3
Ukhozi FM: 15.9 / 15.2
Metro FM: 10.8 / 10.2
Munghana Lonene FM: 9.2 / 9.8
Thobela FM: 7.0 / 6.9
Jacaranda FM: 5.6 / 5.3
Radio 2000: 4.4 / 4.3
Rise FM: 2.9 / 2.5
Capricorn FM: 2.4 / 2.3

000's

	Ligwalagwala FM	Ikwekwezi FM	Ukhozi FM	Metro FM	Munghana Lonene FM	Thobela FM	Jacaranda FM	Radio 2000	Rise FM	Capricorn FM
Jun'23	1,001	619	526	356	304	230	184	144	94	79
Sep'23	1,012	622	515	345	331	235	179	144	86	79

NORTHERN CAPE P7D AUDIENCE – STATION RANKING

Two different broadcast language stations Motsweding FM and RSG maintaining audience share.

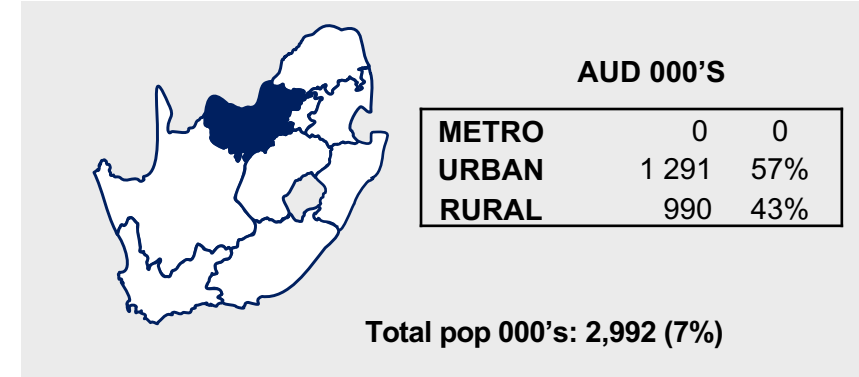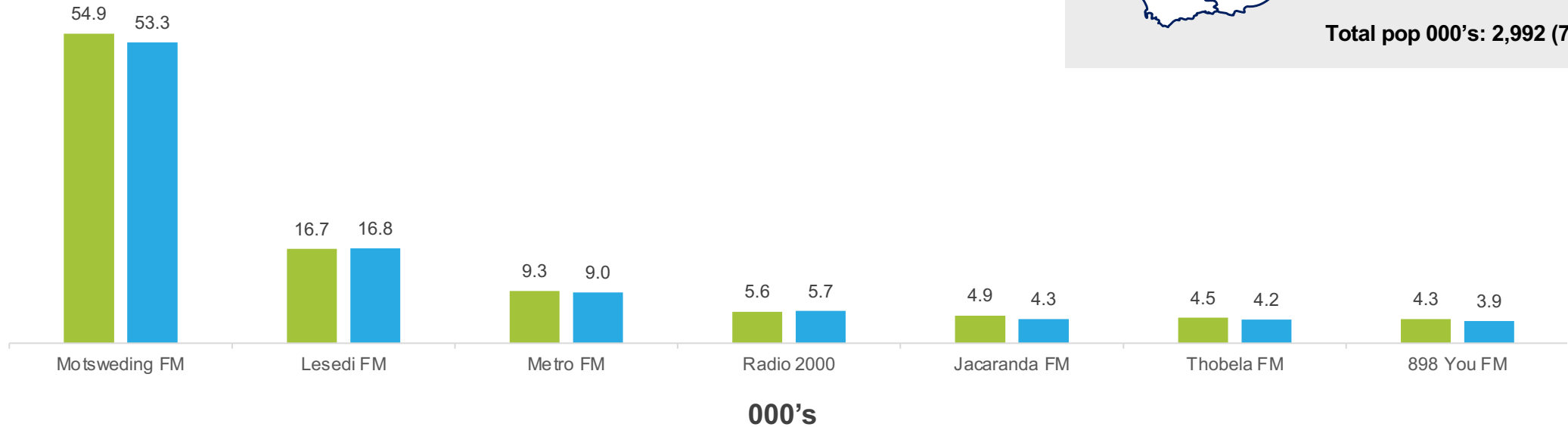| AUD 000'S		
METRO	0	0
URBAN	489	81%
RURAL	116	19%

Total pop 000's: 930 (2%)

P7D Reach
Base: Listeners and Non-Listeners
%

31.0 30.5   16.2 14.1

Motsweding FM   RSG / Radiosondergrense
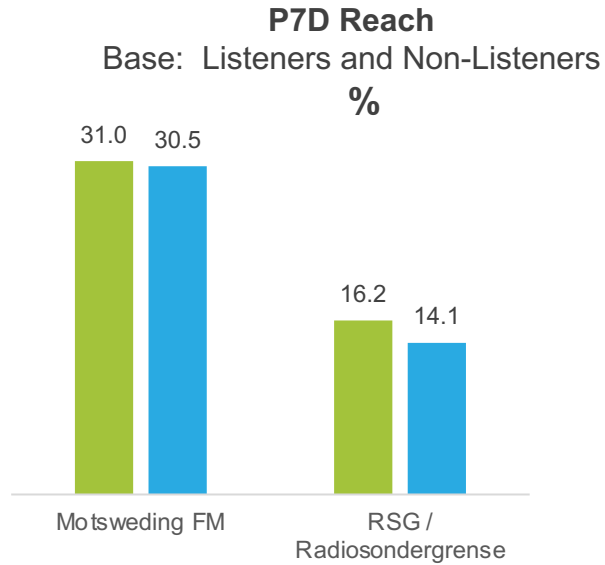
000's

	Motsweding FM	RSG
Jun'23	285	148
Sep'23	283	131
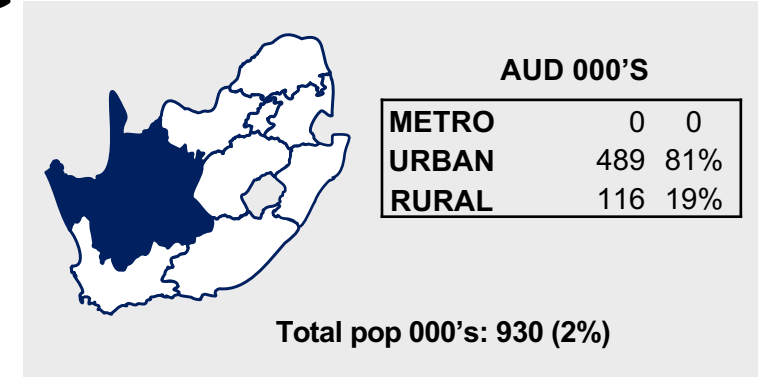
NORTHWEST P7D AUDIENCE – STATION RANKING

Motsweding FM listened to by more than half of NorthWest residents.
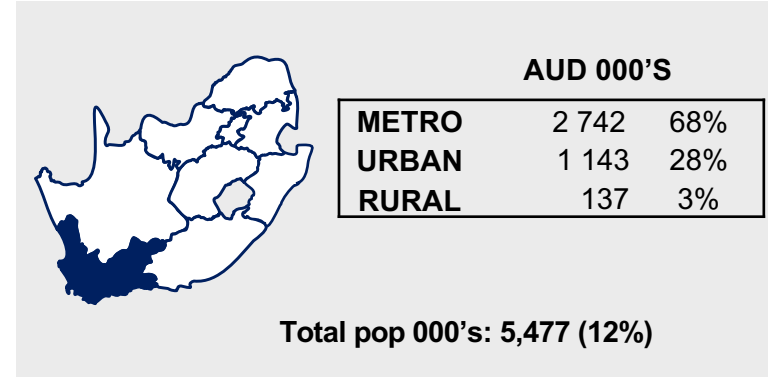Lesedi capturing an audience of 500k.

P7D Reach
Base: Listeners and Non-Listeners
%

AUD 000'S

METRO	0	0
URBAN	1 291	57%
RURAL	990	43%

Total pop 000's: 2,992 (7%)

	Motsweding FM	Lesedi FM	Metro FM	Radio 2000	Jacaranda FM	Thobela FM	898 You FM
Green	54.9	16.7	9.3	5.6	4.9	4.5	4.3
Blue	53.3	16.8	9.0	5.7	4.3	4.2	3.9

000's

	Motsweding FM	Lesedi FM	Metro FM	Radio 2000	Jacaranda FM	Thobela FM	898 You FM
Jun'23	1,595	484	272	162	144	129	124
Sep'23	1,593	502	270	171	128	125	116

35

WESTERN CAPE P7D AUDIENCE – STATION RANKING

KFM leading in the WC reaching over 1m, followed by Umhlobo Wenene reaching just under 1m.
Heart FM obtaining more than 750k and Good Hope FM over 650k
RSG over 500k and Metro FM over 400k,
Smile FM, community station Voice of the Cape, 5FM and Radio 2000 each reaching audiences
above 150k..

AUD 000'S		
METRO	2 742	68%
URBAN	1 143	28%
RURAL	137	3%

Total pop 000's: 5,477 (12%)

P7D Reach
Base: Listeners and Non-Listeners
%

Chart values:
- KFM 94.5: 19.6 / 19.1
- Umhlobo Wenene FM: 18.3 / 18.2
- Heart 104.9FM: 14.6 / 14.2
- Good Hope FM: 12.6 / 12.1
- RSG / Radiosondergrense: 10.7 / 10.8
- Metro FM: 8.0 / 7.8
- Smile 90.4FM: 3.6 / 3.6
- WC_Voice of the Cape: 3.2 / 3.2
- 5 FM: 3.4 / 3.1
- Radio 2000: 2.8 / 2.9

000's
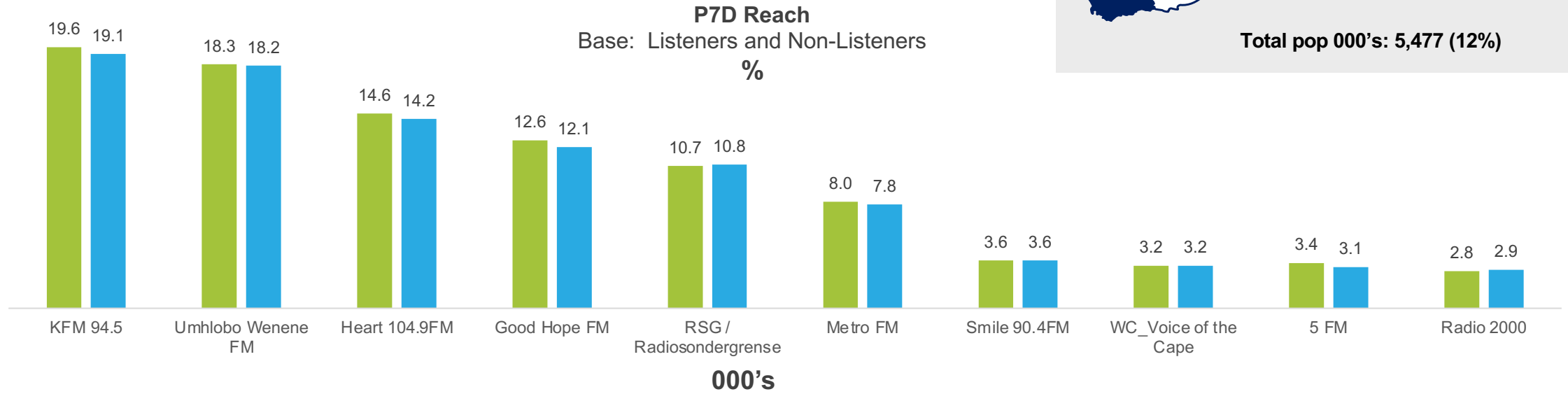
	KFM 94.5	Umhlobo Wenene FM	Heart 104.9FM	Good Hope FM	RSG	Metro FM	Smile 90.4FM	WC_Voice of the Cape	5 FM	Radio 2000
Jun'23	1,037	968	773	665	568	426	192	167	179	149
Sep'23	1,049	997	775	662	590	428	198	175	172	159

brc Ipsos [MILTON DATA]

05
Modelling Update

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

BRC & Ipsos evaluated alternatives

- R&F modelling

- Data integration

- Fusion approach

Building a panel of listeners from DAR data

- Build one "synthetic" person from seven respondents

- Preserve key dimensions

    Demographics

    Listening

    Audience accumulation

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

STEPS

1. Start with 73,920 respondents
   i. 24-month database up to Sep'23
   ii. Core demographics

Id	Day	Gender	Age	Province	Metro	PopGroup
1	Saturday	Male	35-49 years	Gauteng	Metro	Black
2	Friday	Male	50-64 years	Limpopo	Non-Metro Urban	Black
3	Monday	Female	35-49 years	Northern Cape	Non-Metro Urban	Black
4	Friday	Male	25-34 years	Mpumalanga	Non-Metro Urban	Black
5	Monday	Female	50-64 years	Gauteng	Metro	Black
6	Tuesday	Male	35-49 years	Gauteng	Metro	Black
7	Saturday	Male	35-49 years	Mpumalanga	Non-Metro Urban	Black
8	Monday	Male	50-64 years	KwaZulu-Natal (KZN)	Non Metro Rural	Black
9	Sunday	Female	65+ years	Limpopo	Non-Metro Urban	Black
10	Sunday	Female	25-34 years	Northern Cape	Non-Metro Urban	Black
11	Saturday	Male	35-49 years	Mpumalanga	Non Metro Rural	Black
12	Monday	Male	50-64 years	Mpumalanga	Non-Metro Urban	Black
13	Tuesday	Male	35-49 years	North West	Non Metro Rural	Black
14	Tuesday	Male	35-49 years	Eastern Cape	Non-Metro Urban	Black
15	Friday	Female	25-34 years	Gauteng	Metro	Black
16	Friday	Female	15-17 years	Gauteng	Metro	Black
17	Monday	Female	50-64 years	Gauteng	Non-Metro Urban	Black
18	Thursday	Female	15-17 years	Gauteng	Metro	Black
19	Tuesday	Male	25-34 years	Gauteng	Metro	Black
20	Monday	Male	50-64 years	Mpumalanga	Non-Metro Urban	Black
21	Sunday	Female	35-49 years	Gauteng	Metro	Black
22	Wednesday	Male	50-64 years	Gauteng	Metro	Black
23	Saturday	Male	35-49 years	Gauteng	Metro	Black
24	Friday	Female	18-24 years	KwaZulu-Natal (KZN)	Metro	Black
25	Sunday	Male	35-49 years	Mpumalanga	Non-Metro Urban	Black
26	Saturday	Female	25-34 years	Gauteng	Metro	Black
27	Friday	Male	35-49 years	Limpopo	Non Metro Rural	Black
28	Friday	Female	35-49 years	Gauteng	Metro	Black
29	Friday	Male	35-49 years	KwaZulu-Natal (KZN)	Non Metro Rural	Black
30	Monday	Male	35-49 years	Mpumalanga	Non-Metro Urban	Black

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

STEPS

1. Start with 73,920 respondents

   i. 24-month database up to Sep'23
   ii. Core demographics

2. Break everything into "critical cells"
   i. Province
   ii. Gender
   iii. Age
   iv. Population group

Wt000			PopGroup			
Province/Gender	Age	Black	Coloured	Indian/Asian	White	Total
Gauteng		**9,990**	**415**	**369**	**1,538**	**12,313**
Female	15-24 years	1,172	43	25	96	1,336
	25-34 years	1,417	55	37	105	1,614
	35-49 years	1,387	76	51	183	1,697
	50-64 years	676	40	37	247	1,000
	65+ years	222	15	18	271	527
Male	15-24 years	1,000	46	30	78	1,154
	25-34 years	1,562	50	27	106	1,745
	35-49 years	1,717	50	80	148	1,995
	50-64 years	659	29	50	145	882
	65+ years	178	12	15	160	364
KwaZulu-Natal (KZN)		**6,746**	**185**	**718**	**301**	**7,950**
Female	15-24 years	900	26	63	30	1,019
	25-34 years	902	20	48	27	998
	35-49 years	992	36	118	32	1,178
	50-64 years	503	15	109	34	661
	65+ years	250	8	61	68	387
Male	15-24 years	894	23	41	21	979
	25-34 years	936	17	49	20	1,022
	35-49 years	859	24	93	21	997
	50-64 years	347	10	90	18	465
	65+ years	164	5	45	31	244
Western Cape		1,905	2,533	113	927	5,477
Eastern Cape		3,913	335	29	218	4,496
Limpopo		3,825	40	12	65	3,942
Mpumalanga		3,112	78	19	181	3,390
North West		2,658	144	10	180	2,992
Free State		1,868	79	6	149	2,102
Northern Cape		490	359	7	74	930
Grand Total		**34,506**	**4,168**	**1,285**	**3,634**	**43,592**

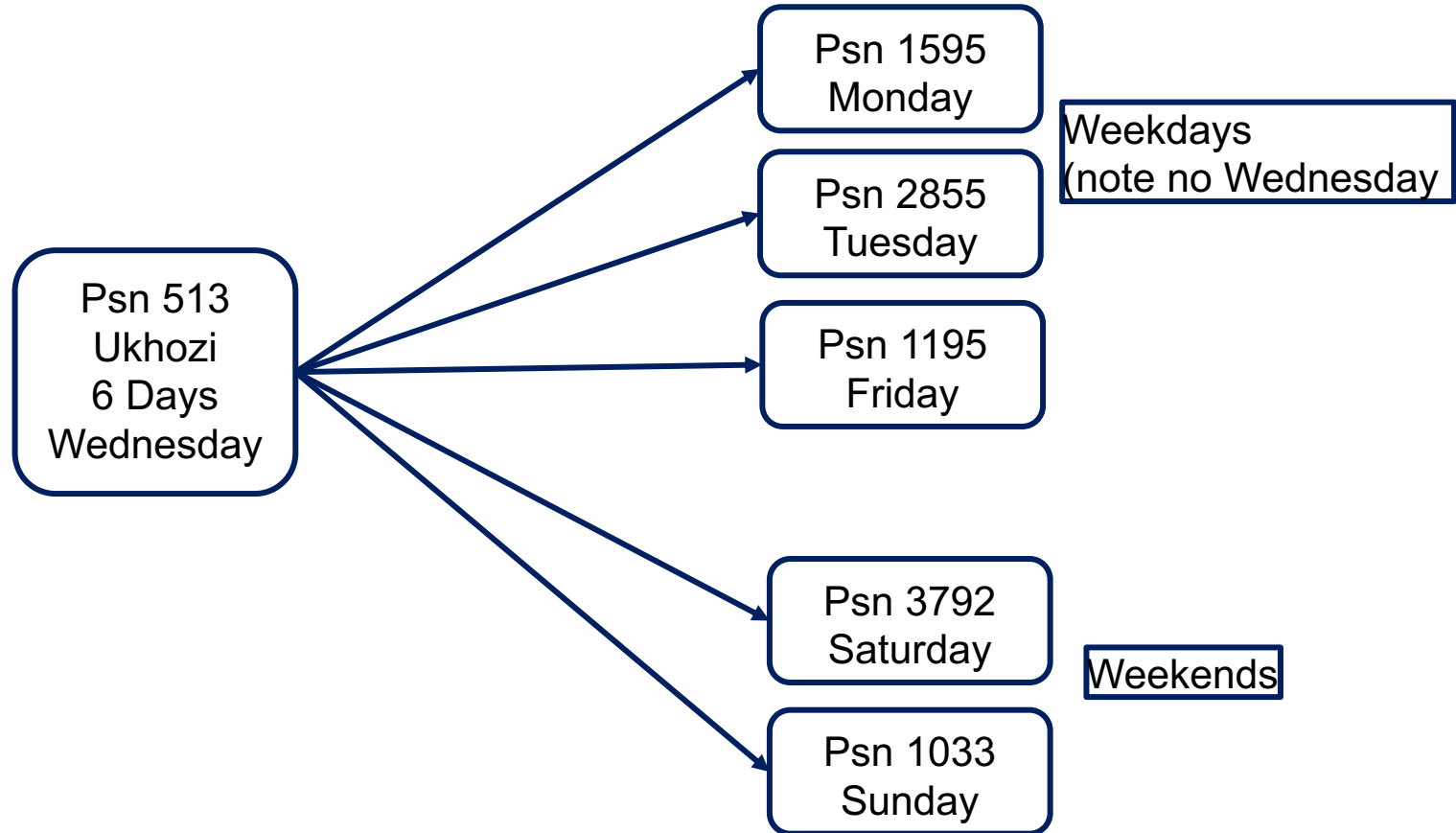# CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

STEPS

1. Start with 73,920 respondents

   i. 24-month database up to Sep'23
   ii. Core demographics

2. Break everything into "critical cells"
   i. Province
   ii. Gender
   iii. Age
   iv. Population Group

3. Assess samples sizes in each critical cell

Sample Count Province/Gender	Age	Black	Coloured	PopGroup Indian/Asian	White	Total
Gauteng		**18,153**	**687**	**312**	**1,616**	**20,768**
Female	15-24 years	1,937	64	19	93	2,113
	25-34 years	2,447	87	30	108	2,672
	35-49 years	2,234	112	38	170	2,554
	50-64 years	1,170	63	30	250	1,513
	65+ years	368	24	14	264	670
Male	15-24 years	1,941	83	27	87	2,138
	25-34 years	3,155	92	25	126	3,398
	35-49 years	3,223	87	69	161	3,540
	50-64 years	1,333	54	47	174	1,608
	65+ years	345	21	13	183	562
KwaZulu-Natal (KZN)		**12,063**	**290**	**584**	**485**	**13,422**
Female	15-24 years	1,142	30	38	32	1,242
	25-34 years	1,674	33	40	43	1,790
	35-49 years	1,637	51	86	46	1,820
	50-64 years	985	27	96	65	1,173
	65+ years	380	12	41	99	532
Male	15-24 years	1,352	31	25	30	1,438
	25-34 years	2,099	35	45	40	2,219
	35-49 years	1,695	41	84	35	1,855
	50-64 years	816	23	93	40	972
	65+ years	283	7	36	55	381
Western Cape		3,364	3,809	175	1,648	8,996
Eastern Cape		6,438	729	64	477	7,708
Limpopo		6,677	53	21	95	6,846
Mpumalanga		5,559	90	22	196	5,867
North West		4,563	148	11	193	4,915
Free State		3,455	108	8	203	3,774
Northern Cape		1,042	495	9	78	1,624
Grand Total		**61,314**	**6,409**	**1,206**	**4,991**	**73,920**

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

STEPS

1. Start with 73,920 respondents

   i. 24-month database up to Sep'23
   ii. Core demographics

2. Break everything into "critical cells"
   i. Province
   ii. Gender
   iii. Age
   iv. Population Group

3. Assess samples sizes in each critical cell

4. Create 400,000+ individuals
   i. Uses all individuals in critical sets
   ii. Identifies number of days listened
   iii. Creates "replicas" for each day of week

		Critical Cell Sample (Guateng Black Female 30-49)							
		Stns Listened L7D (up to 15 stations)				Station/Times Listened Yesterday (0000-2400)			
Id	DOW	L7D_1	Stn1Days	L7D_2	Stn2Days	7:00	7:15	7:30	7:45
22	Sun	Metro FM	3 days	Motsweding FM	4 days				
30	Fri	Thobela FM	2 days						
48	Mon	Motsweding FM	4 days	Thobela FM	7 days	Thobela FM	Thobela FM	Thobela FM	Thobela FM
110	Mon	Metro FM	3 days						
129	Thu	Metro FM	5 days	Thobela FM	1 day				
143	Thu	Ikwekwezi FM	2 days	Motsweding FM	1 day				
148	Sat	Metro FM	7 days	Radio 2000	7 days	Radio 2000	Radio 2000	Radio 2000	Radio 2000
186	Mon	Lesedi FM	1 day	Thobela FM	2 days				
196	Sun	Lesedi FM	7 days	Munghana Lonene FM	3 days				
217	Mon	Motsweding FM	1 day						
273	Tue	Metro FM	3 days	Ukhozi FM	4 days				
314	Sun	Lesedi FM	1 day	Ligwalagwala FM	7 days				
333	Mon	Jacaranda FM	3 days	Metro FM	3 days	Metro FM	Metro FM	Metro FM	Metro FM
368	Thu	Lesedi FM	5 days	Munghana Lonene FM	1 day				
392	Sun	Metro FM	7 days	Radio 2000	2 days				
405	Wed	Umhlobo Wenene FM	2 days						
466	Sun	Thobela FM	3 days			Thobela FM	Thobela FM	Thobela FM	Thobela FM
513	Wed	Ukhozi FM	6 days			Ukhozi FM	Ukhozi FM	Ukhozi FM	Ukhozi FM

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

STEPS

1. Fusion links to like people

2. Key criteria
   i. Station/Day Frequency
   ii. Station repertoires
   iii. Listening levels

3. Matching Criteria
   i. SEM
   ii. Metropolitan/Urban/Rural
   iii. Match day type (weekday/weekend)

4. Further improvements
   i. Day of week allocation
   ii. Device listening
   iii. Location

Psn 513
Ukhozi
6 Days
Wednesday

Psn 1595
Monday

Psn 2855
Tuesday

Psn 1195
Friday

Weekdays
(note no Wednesday

Psn 3792
Saturday

Psn 1033
Sunday

Weekends

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

Numerous checks for evaluation
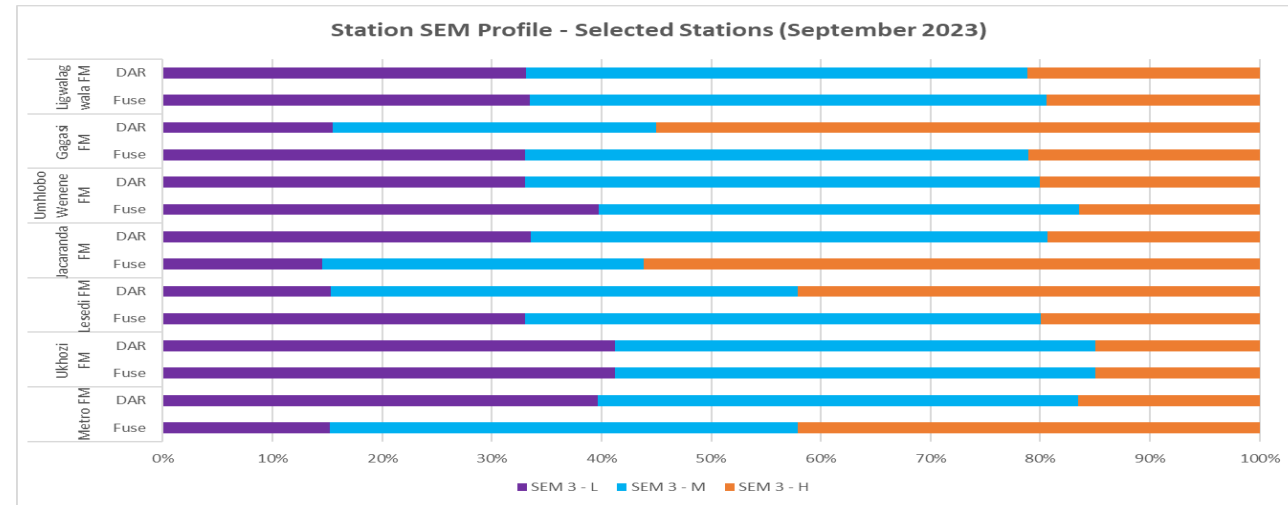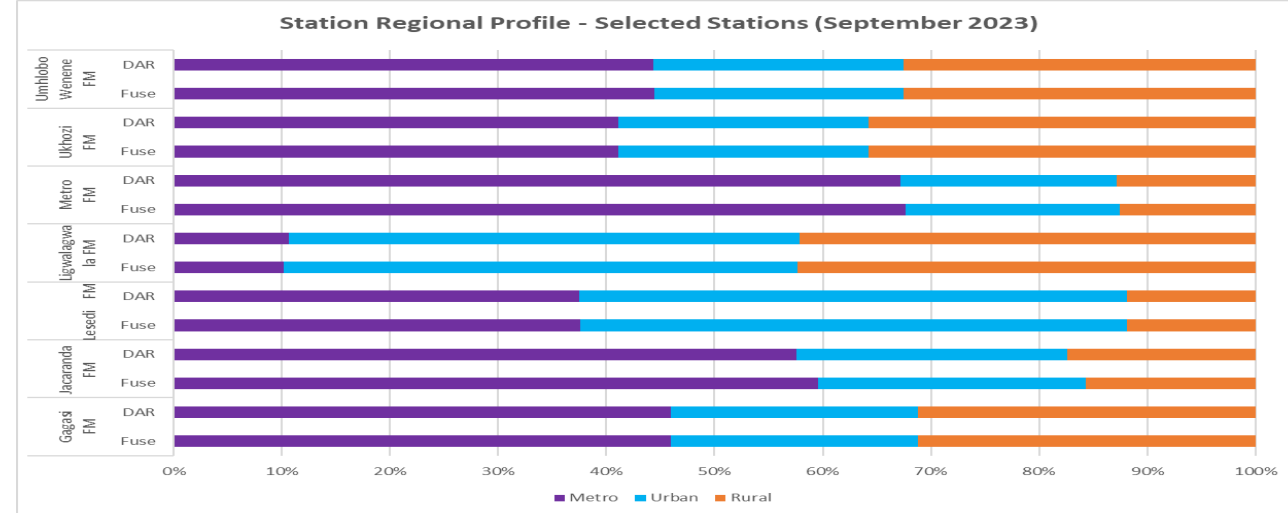
Retain core demographics (critical cells):

Gender

Age

Province

Population Group

Province – September 2023

Race – September 2023

Gender – September 2023

Age – September 2023

CREATING A 7-DAY LISTENER FROM CATI BASED METHODOLOGY

Numerous checks for evaluation

Retain core demographics (critical cells):

Gender

Age
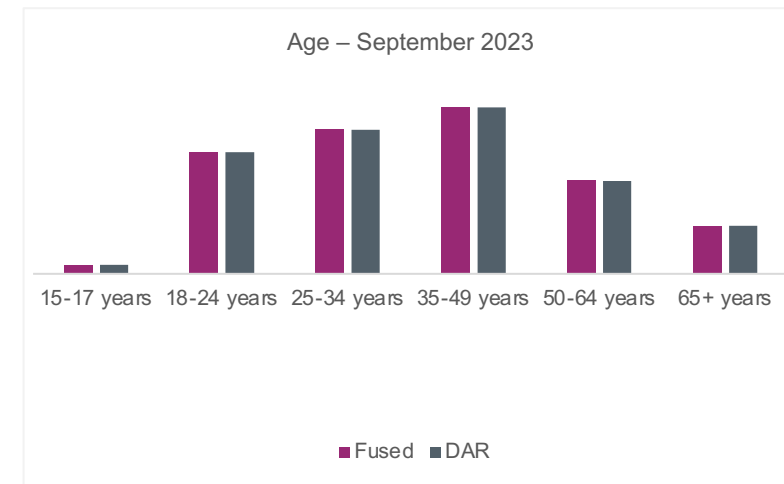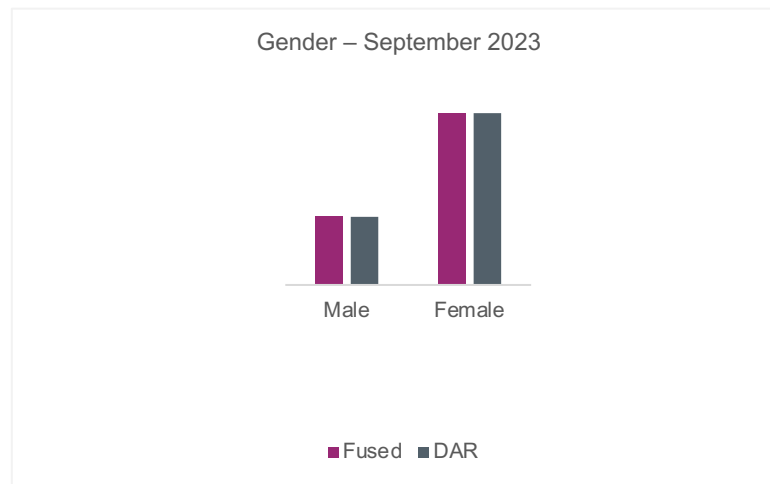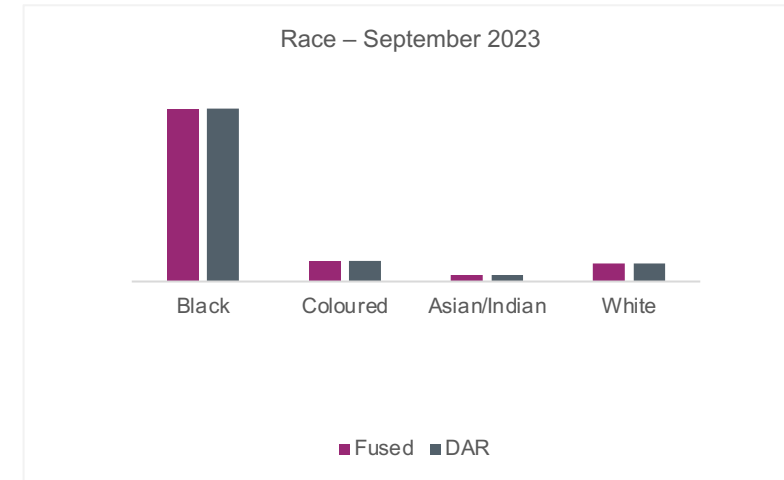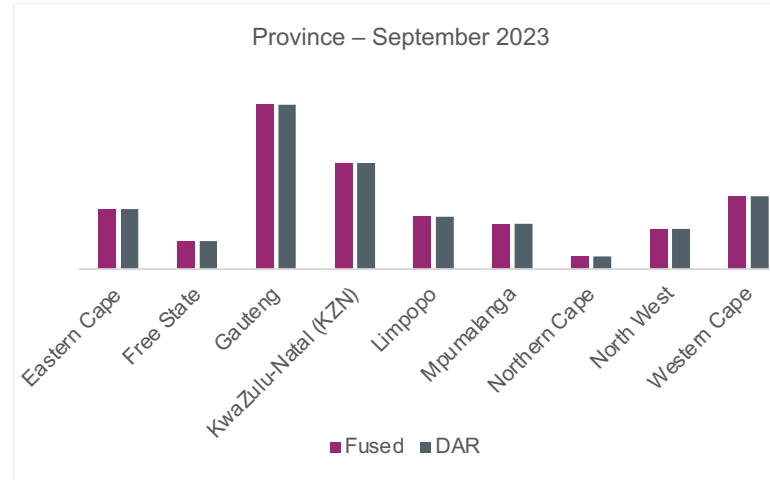
Province

Population Group

Other dimensions needed

Metro/Urban/Rural

Socio-Economic

Station Regional Profile - Selected Stations (September 2023)

Station SEM Profile - Selected Stations (September 2023)

REAL WORLD CAMPAIGN MEASUREMENT

APPROACH

1. The database allowed us to build reach from 1 to 7 days.

2. In reality campaigns are often run over more weeks. We needed to build out the model further for planning purposes

3. We built one spot per hour, every day, 7 days of the week using Telmar RadioMax and compared to the NBD model built by Milton Data

4. As can be seen the Telmar application of the RAJAR model produces almost identical results to the model.

Stations	Wks	Telmar Reach %	NBD model Reach %
Ukhozi FM	1	17.3	17.4
Ukhozi FM	4	27.1	27.5
Metro FM	1	10.4	10.5
Metro FM	4	17.4	17.5
Umhlobo Wenene FM	1	9.5	9.6
Umhlobo Wenene FM	4	15.2	15.4
Lesedi FM	1	8.3	8.3
Lesedi FM	4	13.0	13.1
Gagasi FM	1	3.1	3.2
Gagasi FM	4	5.3	5.3
Jacaranda FM	1	2.6	2.6
Jacaranda FM	4	4.2	4.3
Ikwekwezi FM	1	2.6	2.6
Ikwekwezi FM	4	4.2	4.3
947 (94.7 Highveld Stereo)	1	2.4	2.4
947 (94.7 Highveld Stereo)	4	3.8	3.9
GT_Jozi FM	1	1.0	1.0
GT_Jozi FM	4	1.7	1.8
Algoa FM	1	0.9	0.9
Algoa FM	4	1.4	1.4

RESEARCH CHALLENGES – SOURCE COMPARISONS

**Base comparison: RadioRF & Day After Recall data**

- ✓ Weekly cume and hours/listener by station
- ✓ Frequency of listening by station
- ✓ Specific frequency of listening (1, 2, 3 .., 7 days per week)

Demographic profile of audiences for each station by

- ✓ Age/gender
- ✓ Province
- ✓ By district Municipality
- ✓ Population Group
- ✓ Metropolitan/Urban/Rural location (within province)
- ✓ Socio-economic model (SEM3)

Comparison of schedules (RadioRF vs historic data)

- ✓ Reach 000s/Reach%
- ✓ Impacts (000s)
- ✓ GRPs
- ✓ Average frequency
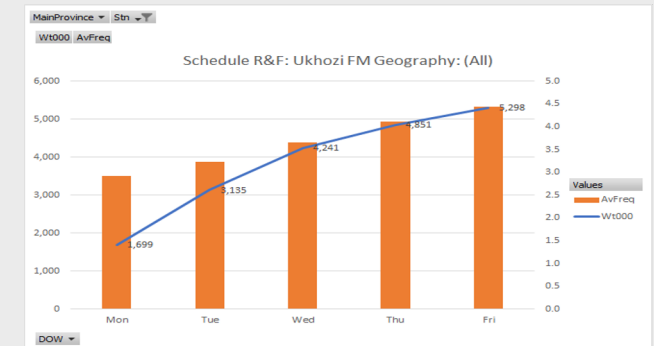
REFINING THE MODEL

01 Day of week improvements

02 Closer alignment of DAR/R&F frequencies

03 Inclusion of platform and location of listening

04 Unified Cross Tab data base (leveraging learnings/implementation already in place)

06
Way Forward

NEXT STEPS

01

Telmar & Clear Decisions
- ✓ Streamlining communication for releases
- ✓ Improving naming conventions and data tree

02

Questionnaire enhancements
- ✓ Decrease interview length
- ✓ Fit-for-purpose, remove superfluous questions

03

Further development
- ✓ Become more hybrid with mixed methodologies, include CAWI and possibly face-to-face
- ✓ With currency measurement instrument stable, delve into qualitative audio needs states and examine options for measuring digital

Thank You