



BRC – TAMS to TVM with GfK transition Q&A Pack

Date: May 27th, 2026

Owner: BRCSA

Section 1: Core Transition Q&A

Q1: Who has been leading this process?

A: The BRC has been in control of the review and transition process since late 2024, when it initiated a full review of the TAMS service at the request of the television broadcasters. Since then, the BRC has commissioned the Television Establishment Survey, consulted widely with industry stakeholders, and run a rigorous international RfP process. All decisions and communications about South Africa's future audience measurement service are BRC-led.

Q2: Is the market at risk of losing audience data during the transition?

A: No. There will be no blackout period. Nielsen has agreed to continue running the current TAMS service until the end of 2026, ensuring continuity until the new GfK service goes live. The BRC is working closely with both Nielsen and GfK to coordinate the transition. Our process review will include software and the registration/ad monitoring service,

Q3: Why was Nielsen not re-appointed?

A: The BRC ran a highly competitive process with multiple (international) contenders. While Nielsen has a long history in South Africa, the review showed that the market requires a modernized service that better reflects today's viewing reality and integrates linear, broadcaster on-demand, and streaming. GfK's proposal was the most aligned with the industry's needs.

Q4: Why GfK?

A: GfK brings proven experience in running modern television and video measurement currencies globally. Its Video360 approach integrates linear TV, broadcaster video-on-demand, and digital video into a single currency dataset. This matches South Africa's need for a service that captures the full video landscape. GfK also operates trusted TAM services in multiple markets, with strong technical expertise and innovation in fusing panel and census data.

Q5: Where else is GfK operating TAM / Video360 services?

A: GfK (an NIQ company) operates television audience measurement and video currency services in several international markets, including Germany, Belgium, Portugal, and Singapore. Its Video360 architecture is built on experience

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delivering integrated total video solutions across these territories, and it continues to evolve in partnership with broadcasters and advertisers.

Q6: What will the market get from GfK's appointment?

A: The roadmap is clear:

- **Phase 1:** A new daily TV currency with a refreshed, representative panel and integration of connected TV usage. Jan 1st 2027.
- **Phase 2:** Integration of broadcaster on-demand and streaming into planning and trading. During 2027.
- **Phase 3:** A unified, all-screens Total Video measurement system – giving one consistent, trusted view of audiences across TV and digital video.

Q7: Is GfK not a subsidiary of NielsenIQ?

A: Yes. GfK and NielsenIQ merged under shared ownership in 2023 to form a combined global company focused on measurement and analytics. However, it is important to note that this entity is completely separate from Nielsen Media, which currently operates the TAMS service in South Africa.

The new GfK/NIQ organisation is an independent business with its own management, governance, and technology stack. It has no operational link to the outgoing Nielsen TAMS structure.

Q8: Do they have offices in South Africa?

A: Yes. GfK maintains a local office in Johannesburg and operates with a dedicated South African team. This team will expand to support the new Total Video Measurement service. In addition, GfK's international experts will work closely with the BRC and local broadcasters to ensure knowledge transfer and strong local capability.

Q9: Who are the owners of the company?

A: GfK is part of the NIQ (NielsenIQ) Group, owned by Advent International, one of the world's largest private equity firms. NIQ operates independently from Nielsen Media, which is the legacy provider of TAMS in South Africa.

This means the new GfK-led service benefits from strong global investment and innovation, but remains fully independent of the company currently providing the TAMS service.

Q10: What is the difference between GfK and Nielsen in this context?

A: GfK (now part of NIQ) and Nielsen Media are completely separate companies. The new GfK/NIQ organisation that will deliver the future South African TVM service has no operational, management, or data continuity with the existing Nielsen TAMS business.

The distinction is important: GfK/NIQ will bring a new system, new technology, and new governance structure, fully contracted and overseen by the BRC. The transition will mark a fresh start for South African audience measurement under BRC leadership.

Q11: Who will be communicating updates going forward?

A: All updates will come directly from the BRC. Nielsen and GfK are partners in delivery, but the BRC is the sole industry body responsible for market

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communication and leadership on this project.

Section 2: Additional Questions from Agencies & Advertisers

Q1: Will advertiser post-campaign data still be available from January 2027? Will Nielsen continue to provide this until handover?

A: Yes. Advertiser post-campaign analysis will continue to be available. Nielsen will continue to deliver these services until the end of 2026, ensuring continuity. From January 2027, GfK will provide equivalent and enhanced post-campaign reporting as part of the new system.

Q2: Will I still be able to do the same analyses I do now – e.g. Patronage, Daily Universes, Quarter-hour analyses, program revenue, average performance?

A: Yes. All current core functionalities will continue. The Nielsen reporting suite might be phased out with Nielsen's exit, but these functionalities will be carried forward into the new system. GfK's Video360 approach ensures that users can continue to run patronage, daily universes, program performance and revenue analyses, with enhanced functionality for cross-platform and streaming environments.

A: Please note: When the actual change to the new service starts on Jan 1st, 2027, reporting reach across that period will not be possible. As we are changing the reporting panel, reach across the 2 datasets is not possible to report on. Reporting average time-based metrics are still available for i.e. CPP deals (average ratings, TRP's). BRC will provide support to the agencies and broadcasters on how to continue service to clients.

Q3: How will CPP deals work if LSMs are no longer used in the new TVM service?

A: The new TVM service will move away from LSMs and towards more modern and representative segmentation variables, such as SEMs and other agreed market definitions. Average audience metrics required for CPP-based trading, including ratings and TRPs, will continue to be available. The BRC will work closely with broadcasters and agencies to support the transition to the new segmentation approach.

Q4: How will broadcasters and agencies set rates and plan campaigns for Q1 2027?

A: Test and parallel-run data from the new TVM system will be made available during 2026 (Q4) to support market preparation for Q1 2027 trading. This will allow broadcasters to prepare rate cards and agencies to begin planning campaigns ahead of the official January 2027 transition.

Q5: Will test or parallel data be provided to software houses before general release so they can prepare?

A: Yes. Test data and parallel run outputs will be supplied to accredited software houses in advance of the go live. This will allow them to test ingestion, adapt their systems, and ensure smooth integration ahead of the 2027 transition.

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Section 3: Questions for Software Providers

Q1: What about the software bureaus – how will they be supported in the transition?

A: Software providers are a critical part of the ecosystem. The BRC and GfK will ensure that they receive test data during the parallel run, as well as technical documentation and support. This will allow them to adapt systems in time for the 2027 cut-over. They will be directly engaged as part of the transition roadmap. Whilst supporting the software bureaus, BRC will also create a clear set of calculation and reporting rules to ensure all calculations in market follow clear and standard guidelines.

A: Technical structures, data formats, and staged test datasets will be shared ahead of launch to allow sufficient time for software accreditation, system updates, and market readiness.

Q2: What software can be used to access the new TVM data?

A: Existing accredited software providers will continue to ingest TVM data. In addition, GfK will provide its own software solution as part of the Video360 offering. This ensures that all market participants have continuity of tools, plus the option to adopt enhanced software from GfK.

Q3: Will dummy or simulated datasets be provided before live testing begins?

A: The focus will be on providing real test and early-stage panel data as soon as technically feasible, rather than synthetic dummy datasets. Priority will be placed on validating formats, fields, calculations, and ingestion processes to ensure software and reporting systems are operationally ready.

Section 4: Questions from Journalists / Trade Media

Q1: How exactly will BRC, GfK, and Nielsen coordinate data delivery during the transition?

A: Nielsen will continue delivering TAMS data until end-2026, while GfK builds the new service. The BRC will manage the overlap to ensure comparability and continuity. Once GfK begins testing, parallel runs will allow the market to understand differences and transition smoothly.

Q2: What does this transition cost the industry?

A: The BRC runs on a lean budget model. Costs of transition are shared fairly across the television broadcasters. The board approved the investment because the benefits of modern, future-proof measurement far outweigh the short-term spend. Importantly, this is about safeguarding trading confidence worth billions of Rands annually.

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Q3: Why was Nielsen not re-appointed after 38 years?

A: Nielsen has provided a long and valuable service, but the industry demanded innovation and integration of new viewing realities. GfK offered the strongest, most future-proof solution through its Video360 model. The decision was unanimous across the BRC Board and TAMS Technical Committee.

Q4: Who on the BRC Board made the final decision?

A: The decision was made by the full BRC Board, including representatives from broadcasters and agencies, supported by independent advisors. It was a unanimous decision after a transparent process.

Section 5: Questions from Broadcasters

Q1: How will GfK ensure the panel represents all South Africans?

A: The new panel will be built using Establishment Survey data, ensuring representation across demographics, pay TV, free-to-air, and connected TV homes. Quality control and independent audits will be embedded from the start.

Q2: What will the new TV universe definition be?

A: The Phase 1 TV universe will consist of households with a working television, stable electricity supply, and access to a television signal, including internet-connected television environments where applicable. The broader Total Video universe definition for later phases will expand to include access to video content across additional connected devices. Final universe definitions will be confirmed following completion of the Television Establishment Survey and industry consultation.

Q3: When will the Television Establishment Survey data be available to the market?

A: The Television Establishment Survey results will be released following final review and sign-off by the BRC Board and broadcaster members. Initial high-level universe updates are expected during 2026, with further detail shared as part of the market transition programme.

Q4: Will the new system show cross-platform reach and frequency?

A: Yes. Video360 is designed to provide cross-platform reach and frequency across linear, broadcaster VOD, and digital video.

Q5: Will broadcaster on-demand be measured at census or panel level?

A: Broadcaster on-demand will be captured using census-level streaming data, calibrated with panel-based viewing to provide the most accurate total audience picture.

Q6: What happens to audiences who don't have broadband or smart devices?

A: The new panel will accurately reflect the makeup of South African households. Router meters will only be installed in homes with broadband access, while other households will continue to use people meters. This ensures representation of all audience types, including those without online access. The Establishment

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Survey, currently in field, will determine the correct proportions and guide the panel design.

Q7: Within broadcaster streaming platforms (e.g. SABC Plus), will there be breakdowns by channel or programme level?

A: Yes. The new system will provide programme-level reporting for BRC member broadcasters across their linear and on-demand platforms. For major global streamers such as Netflix and YouTube, only aggregate or “helicopter view” audience estimates will be available due to data access limitations.

Q8: Will broadcasters face any new financial requirements?

A: No new costs are anticipated beyond existing data supply responsibilities. Broadcasters will be asked to provide log files and census-level streaming data, under secure and anonymised conditions. This enables more complete reporting and ensures all platforms are captured for their commercial value.

Q9: Will broadcasters need to provide new metadata or as-run layouts to support the TVM system?

A: The transition to TVM will include a metadata harmonisation workstream to standardise programme and as-run data requirements across broadcasters. Detailed technical specifications and timelines will be communicated through the BRC technical structures and the upcoming metadata harmonisation project.

Q10: Will there be trending data available between Nielsen and GfK?

A: No, trending between the old and new datasets will not be possible, as the methodologies differ significantly. The new system introduces measurement of streaming and cross-platform behaviour. A new trend baseline will begin in January 2027, following a period of overlap and calibration.

Q11: Will broadcasters and agencies be able to test and familiarize themselves with the data before 2027?

A: Yes. There will be a structured period of testing and evaluation during 2026 (Q4). Broadcasters will have early access to the data for validation and audit purposes, followed by a wider release to agencies and software partners for training and system testing before trading begins.

Q12: Will it be possible to plan on both TV and streaming content within the same environment?

A: Yes. The new Video360 system integrates linear TV, broadcaster VOD, and streaming content into one dataset. This allows unified planning and evaluation across all platforms, using consistent metrics.

Q13: If discrepancies arise between Nielsen and GfK data during overlap, who decides?

A: The BRC will manage governance, with oversight from the technical committee. Parallel runs will highlight differences transparently, and the market will be guided step by step.

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Q14: How will advertisers be reassured about continuity and confidence?

A: The BRC will issue clear communication, backed by Nielsen's continuation until end-2026 and GfK's tested rollout. Advertisers can be confident there will be no break in data to underpin trading.

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Section 6: Closing Message

- The BRC is in control and has been leading this process since 2024.
- There will be no blackout – Nielsen will continue until end-2026.
- Advertisers, agencies, broadcasters, and software providers will have continuity of tools and access.
- The new GfK Video360 system gives South Africa a future-proof, total video measurement service.
- The transition is transparent, well-governed, and has industry-wide support.
- All communications come from the BRC, ensuring clarity and consistency.

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