BRC Total Video Measurement (TVM)

Methodology Document — Total Video Measurement

A Guide to how South Africa measures Video Audiences

Prepared by: Broadcast Research Council of South Africa (BRC)
Measurement Partner: GfK
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Scope: Total Video Measurement — Linear TV, Time-Shift, Connected TV (cTV) and Other Devices (mobile / PC / tablet), reported at platform level from launch, with a fused TV + Online panel
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How to use this document: This is written for everyone — whether you work in media buying, broadcasting, marketing or just want to understand how TV ratings work in South Africa. No technical degree needed. Where things get a bit complex, we explain them in plain English first.

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Company Registration: 2015 / 099994 / 08

THE BROADCAST RESEARCH COUNCIL OF SOUTH AFRICA

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Chapter 1: What Is TVM and Why Does It Exist?

The Simple Explanation

Think of TVM — Total Video Measurement — as the official "who watched what" system for South Africa. It tells broadcasters, advertisers, and media agencies how many people watched a specific programme or advertisement, who those people were, and when they watched it.

Without a reliable measurement system, nobody knows whether an advert reached 500,000 or 5 million people. Broadcasters cannot price their airtime fairly, and advertisers cannot judge whether their campaigns are working.

Why a New System?

TV viewing has changed dramatically. South Africans no longer just watch live TV on a traditional television set. They also:

- Watch programmes they recorded or paused (Time-Shift Viewing)
- Stream content on smart TVs, streaming sticks, and set-top boxes connected to the internet (Connected TV / cTV)
- View content on phones, tablets, and laptops — measured from launch through the fused Online panel at platform level

The previous measurement system tracked only live, traditional TV. The new TVM system is built to capture the full picture from day one — TV, connected TV (cTV) and other devices (mobile, tablet, PC) at platform level — by fusing a TV panel and an Online panel. This is a single move to a modern Total Video currency, not two disruptive resets. Broadcaster-level programme/episode reporting on digital is then added on top of the same panel and universe via a v2.0 upgrade in mid-2027, with no further currency change.

Who Runs This?

- **BRC (Broadcast Research Council of South Africa)** is the industry body that owns and governs the measurement system. It represents broadcasters, advertisers, and agencies.
- **GfK** is the research and technology company contracted to build, run, and deliver the measurement system on BRC's behalf.

Chapter 2: The Big Picture — What Gets Measured at Launch?

TVM at Launch (1 January 2027) Covers:

What Gets Measured	How It Is Measured	Where Viewing Happens
Linear TV — live broadcast TV	TV Logger 2.1 (people-meter)	On a traditional TV set
Time-Shift Viewing (TSV) — recorded or paused content watched within 28 days	TV Logger 2.1	On a traditional TV set
Connected TV (cTV) — streaming apps on a TV screen via the internet	Router Meter	On a TV set connected to the internet
Other Devices — Online Video — video watched on mobile, tablet, laptop or PC	Online Panel measurement app (2,000 individuals 15+, ~50% overlap with TV panel)	On a personal device (phone, tablet, laptop, PC) — reported at platform level

What Is Reported at Platform Level Only at Launch (Content-Level Detail Coming in v2.0, Mid-2027):

- **BVOD (Broadcaster Video on Demand)** on personal devices — measured at platform level from launch via the Online panel (e.g. total reach and time spent on SABC+ on mobile). Programme/episode-level detail on personal devices is added in v2.0.
- **OTT/SVOD services** (Netflix, Showmax, Disney+, etc.) — measured at platform level on the TV set (via router) and on personal devices (via Online panel). No programme/episode-level detail from these non-member platforms.
- **Social video** (YouTube, TikTok, etc.) — measured at platform level. Broadcaster content viewed on these platforms is credited back to the broadcaster via audio matching when watched on a TV screen; on personal devices this content sits inside the platform total.

Coming next: The v2.0 upgrade in mid-2027 adds broadcaster programme/episode-level detail on digital — on the same TVM universe and the same fused panel. This is an addition of value, not a new currency reset. See Chapter 16 for details.

Chapter 3: South Africa's TV Universe — Who Are We Measuring?

Defining the Universe

In research, the word "universe" means the total group of people we want to measure. For TVM, there are two nested universes — a broader Total Video universe and a TV universe sitting inside it:

Total Video universe (headline reporting base): All South Africans living in households with permanent electricity that have either a working TV set able to receive a broadcast signal, or a working computer/laptop/tablet/mobile device with internet access (mobile or broadband). Based on the 2026 Establishment Survey, this is approximately 40.1 million individuals aged 15+ in around 15.8 million households.

TV universe (nested inside the Total Video universe): All South Africans aged 4+ in households with permanent electricity and at least one working TV set able to receive a broadcast signal. Based on the 2026 Establishment Survey, this is approximately 30.4 million individuals aged 15+ in around 11.2–12.5 million households. TV-only figures remain visible as a subset of the wider Total Video reporting.

Why These Criteria?

- Age 4+: Young children can and do watch TV. Measuring from age 4 is standard practice in TV research globally.
- Working TV set: If there is no TV in the home, there is no TV viewing to measure.
- Permanent electricity: Without reliable power, a TV cannot be used consistently and measurement equipment cannot function properly.

How Is the Universe Divided?

South Africa is geographically and demographically diverse. To make sure the panel reflects the real country, the universe is split into three recruitment areas:

Area Type	Definition
Metropolitan Municipalities	The 8 large metros: Johannesburg, Tshwane, Ekurhuleni, eThekwini, Mangaung, Nelson Mandela Bay, Buffalo City, Cape Town
Non-Metro Urban	Urban areas outside the metros
Non-Metro Rural	Rural and semi-rural areas

The panel is designed to mirror these proportions accurately, using a technique called *disproportionate sampling* to ensure smaller or harder-to-reach areas are still well represented. Weights are then applied so that the final data reflects the true national split.

Chapter 4: The Establishment Survey — Our Permanent Foundation

What Is an Establishment Survey?

Think of the Establishment Survey as the "ground truth" check — a large-scale, nationally representative survey of South African households that asks questions about media habits, device ownership, household composition, and socio-economic status. The Establishment Survey is not a one-off event. It runs continuously and is updated on a regular cycle. This is deliberate and essential.

Why Is a Continuous Establishment Survey So Important?

South Africa is a rapidly changing country. Households get connected to the internet. New TV platforms launch. Families move, grow, or change their viewing habits. If the measurement system is calibrated against data that is years out of date, it will gradually stop reflecting reality — and the ratings it produces will become less and less trustworthy.

A continuous, regularly updated Establishment Survey ensures that:

- The universe stays accurate. As more South African households get electricity, internet access, or new devices, the universe definition is updated to reflect this — so the panel always represents the right population.
- Panel recruitment targets stay current. The panel needs to match the demographic and geographic profile of the country. If that profile shifts — more urban households, different age structures, changing SEM distributions — the recruitment targets update accordingly.
- Weighting targets remain valid. The weights applied to panel data are only meaningful if they are based on up-to-date population figures. Stale weighting targets are one of the most common sources of bias in audience measurement.
- New technologies are tracked. The Establishment Survey monitors how many households own smart TVs, use streaming devices, or have broadband internet. These figures directly inform decisions like how many router meters to deploy in the panel.

In short: a measurement system is only as good as the population data it is calibrated against. The Establishment Survey is that calibration. Keep it fresh, and the ratings stay credible. Let it go stale, and the whole system drifts.
The Establishment Survey methodology and detailed findings are documented separately. This document focuses on how the TV and cTV measurement panel uses the ES as its foundation.

Chapter 5: The TV Panel — Our Representative Group of Households

The Simple Explanation

The panel is a carefully selected group of South African households that agree to have their TV viewing measured 24 hours a day, 7 days a week. It is like a permanent, consenting focus group for TV viewing — but much more scientific and strictly controlled.

How Big Is the Panel?

Panel Size	Detail
4,200 households	Gross panel size (total installed)
3,500 households	Net daily in-tab minimum (households providing valid data on any given day)
~11,000 people	Estimated daily individual respondents (based on average household size)

Who Can Be in the Panel?

Any household that:

- Falls within the defined universe (working TV, permanent electricity)
- Consents to participate and to having their data collected under POPIA — the Protection of Personal Information Act
- Has at least one eligible TV set

How Are Households Recruited?

Recruitment happens in two ways:

1. From the Establishment Survey: Households that participated in the ES and agreed to be re-contacted are offered the chance to join the panel.
2. Fresh field recruitment: GfK fieldworkers visit specific geographic areas and recruit households matching a detailed specification — for example, "a household of 4 people in a non-metro urban area, with the main income earner aged 35–50."

Recruitment Timeline:

- March – September 2026: First 80% of the panel (3,360 households)
- October – December 2026: Final 20% (840 households)
- January 2027: Panel goes live

What About Domestic Workers?

South Africa has a significant number of domestic workers who live in the households they work in. The TVM system handles this carefully:

- Domestic workers classified as household members (those who live in and are counted as part of the household in the Establishment Survey) are treated as full panel members with their own viewing buttons.
- Domestic workers not classified as household members (those who come and go daily) have their viewing captured as "guest" viewing.

No viewing by domestic workers is discarded from the data.

How Long Can a Household Stay in the Panel?

- Maximum panel life: **15 years** (hard cut-off).
- Target: No more than 20% of households should have been in the panel for more than 8 years.
- Households are regularly refreshed to prevent "panel fatigue" — where people start watching differently because they know they are being measured.

What Is POPIA Consent?

POPIA stands for the **Protection of Personal Information Act** (Act 4 of 2013). Before any household joins the panel, they must give written consent for GfK to collect and process their personal and viewing data. GfK's data practices comply with both POPIA and the European GDPR.

Chapter 6: The Router Meter — Capturing Connected TV (cTV)

What Is cTV?

Connected TV (cTV) means watching video content on a TV screen via the internet. Examples include:

- Watching DStv Stream on a smart TV
- Using a streaming stick (like an Amazon Fire Stick or Chromecast) to watch content on a TV
- Playing YouTube on a TV set connected to the home Wi-Fi

This is different from watching on a phone or laptop — cTV is specifically about the big screen accessed via an internet connection.

How Is cTV Measured at Launch?

At launch, cTV on the main TV set is measured using a router meter installed in approximately 25% of TV panel households — specifically those with broadband internet and at least one TV set connected to that broadband.

The router meter sits between the home Wi-Fi router and the internet connection. It sees the internet traffic flowing to and from the TV screen and identifies which platform is being used — for example, DStv Stream, Netflix, or YouTube.

Important: At launch, the router meter tells us which platform is being used on the TV screen, and for how long. It does not yet identify the specific programme being watched on that platform. That level of detail is added in the v2.0 upgrade in mid-2027 through direct broadcaster data integrations — without changing the universe or the currency.

How Many Households Get a Router Meter?

Approximately 25-30% of TV panel households receive a router meter. This percentage is guided by the Establishment Survey's data on broadband penetration and internet-connected TV ownership, and will be reviewed annually as the market evolves.

Chapter 7: The Online Panel — Fused with the TV Panel from Day One

What Is the Online Panel?

Alongside the TV panel, GfK is setting up a separate **Online Panel** of 2,000 individuals aged 15 and over. These panellists install a measurement app on their smartphone, tablet, or laptop/PC that records their video viewing on those devices. The Online Panel is live from day one of TVM (1 January 2027) and feeds directly into the daily Total Video reporting alongside the TV panel.

How the Online Panel and the TV Panel Work Together

To make Total Video reporting possible from launch, GfK aims to recruit up to 1,000 of the 2,000 online panellists from inside TV panel households — a ~50% overlap target. These fully measured "Single Source" panellists act as donors in a daily panel-fusion step: their observed TV + personal-device behaviour is used to statistically impute personal-device viewing for the TV-only panel homes, so every TV panel household ends up with a plausible personal-device profile. The result is one deduplicated Total Video dataset covering the big screen and personal devices on the same universe, updated every day.

What the Online Panel Delivers at Launch

From day one, the Online Panel delivers platform-level video measurement on personal devices — BVOD apps (e.g. SABC+, DStv Stream), OTT/SVOD services (e.g. Netflix, Showmax, Disney+) and social video platforms (e.g. YouTube, TikTok). Reporting is at the platform level (reach, time spent, share) and is combined with the TV panel via panel fusion into a Total Video currency. Broadcaster programme/episode-level detail on personal devices is added as an upgrade in mid-2027 (v2.0) on top of the same panel and universe.

Coming next: Broadcaster content-level (programme/episode) reporting on digital is added in the v2.0 upgrade in mid-2027. See Chapter 16.

How Personal-Device Viewing Is Measured — The Online Panel Measurement App

Where the TV Logger 2.1 does the watching on the big screen (see Chapter 8), the **Online Panel Measurement App** does the watching on personal devices. It is a small, always-on piece of software that each online panellist installs on their own smartphone, tablet, laptop and/or PC. Once installed, it runs quietly in the background and sends viewing data to GfK's systems every night — in the same nightly cycle as the TV panel data.

What Is the Online Panel Measurement App?

The Online Panel Measurement App is the personal-device equivalent of the TV Logger 2.1. It is a passive meter — the panellist does not have to press a button or announce themselves. Because the panellist logs into their own device, the app already knows *who* is watching. One install is required per personal device the panellist uses regularly. The KPI is that at least 80% of recruited online panellists have the app active on at least one personal device by October 2026, ahead of the 1 January 2027 launch.

What Does the App Actually Do?

The app does three things at the same time, mirroring what the TV Logger does on the big screen:

- **Detects video activity on the device** — it sees when the panellist opens a video app or website and starts a video session (foreground app in use, video player active, audio playing).
- **Identifies the platform being used** — it captures the app or domain the video is being played from (e.g. SABC+, DStv Stream, Netflix, Showmax, YouTube, TikTok) so viewing can be credited to the correct Publisher.
- **Times the session** — it records when the video session starts, when it ends, and any pauses in between, to the second. That gives the same start–stop viewing minutes that the TV Logger produces for the big screen.

How Does It Identify What Is Being Watched?

The Online Panel Measurement App does not use audio-matching. Audio-matching is a TV-panel technology used only on the big screen by the TV Logger 2.1 (see Chapter 9). On personal devices, GfK uses on-device metering to identify the platform being used, and — where available — combines this with broadcaster server-to-server (S2S) data to add content-level detail:

- The app records which video app or website is in the foreground with a video session active — for example SABC+, DStv Stream, Netflix, Showmax, Disney+, YouTube or TikTok — together with session start, session end and any pauses in between. That gives the platform, the individual viewer and the time spent, in the same nightly cycle as the TV panel data.
- For broadcaster BVOD platforms (e.g. SABC+, DStv Stream, eVOD), GfK is setting up server-to-server (S2S) integrations. Where the broadcaster shares programme and ad metadata via S2S, the platform-level data from the app is combined with that S2S feed to report content-level BVOD viewing. Where S2S is not (yet) available, BVOD is reported at **platform level only** at launch (reach, time spent, share per platform). All other streaming platforms — OTT/SVOD and social video (e.g. Netflix, Showmax, Disney+, YouTube, TikTok) — are reported at platform level only. Broader programme/episode-level detail on personal devices is added in v2.0 in mid-2027 as more S2S integrations come online (see Chapter 16).

How Does It Know Who Is Watching?
On the big screen the TV Logger asks people to announce themselves with a remote-control button. On personal devices this is not needed — personal devices are, by definition, personal. The app assumes the registered panellist is the viewer of any video session on their own device. Panellists are asked to flag the (rare) occasions where somebody else uses their device, and those sessions are excluded from the data. The result is a clean, individual-level record of *who* watched *what* on *which platform* for *how long*.

Data Transmission, Privacy and POPIA
The app only captures video-related activity — not the panellist's messages, banking apps, browsing outside video, contacts or photos. Data is encrypted on the device and transmitted securely to GfK's cloud systems overnight, in the same nightly cycle as the TV Logger and router meter data. Every online panellist gives explicit written POPIA consent before the app is installed; consent can be withdrawn at any time and the app removed. GfK's data handling for the Online Panel complies with POPIA (Act 4 of 2013) and GDPR, in line with the standards already applied to the TV panel.

From App Data to Total Video Ratings
Every night, the app data is cleaned and validated, then fed into the same processing pipeline as the TV panel data (see Chapter 11). Single Source panellists (those in both the TV panel and the Online Panel) are used as donors in the daily panel-fusion step to impute personal-device viewing for TV-only panel homes. The output is one deduplicated Total Video dataset covering the big screen and personal devices on the same universe — with Big Screen usage credited to the Station and Second Screen usage credited to the Publisher (see Chapter 13).

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Chapter 8: The TV Meter (TV Logger 2.1) — The Device That Does the Watching

What Is the TV Logger 2.1?

The TV Logger 2.1 (TVL 2.1) is a people-meter — a small electronic device that attaches to each eligible TV set in the panel household. It runs continuously and sends viewing data to GfK's systems every night.

One TV Logger is installed per eligible TV set in the household. GfK aims to meter 100% of eligible TVs, with a minimum KPI of 90%.

What Makes a TV "Eligible"?

A TV set is eligible if it is:

- Working and in use
- Connected to a signal source (aerial, satellite, cable, or internet)
- Permanently connected to power
- Has an audio output (needed for audio matching — see Chapter 9)
- In a fixed position in the home
- Used at least once a month

What Does the TV Logger 2.1 Actually Do?

The TV Logger 2.1 does three things simultaneously:

1. Detects when the TV is switched on or off and records the precise time
2. Captures audio fingerprints from the TV's audio output, which are matched against a reference database to identify the channel being watched (see Chapter 9)
3. Prompts viewers to announce themselves using a dedicated remote control (see Chapter 10)

What About Guests?

When a guest watches TV in a panel home, the guest must first sign in on the remote. This can be done in two ways.

- The quickest way is to press the female or male button, then enter the guest's age.
- The other way is to press the guest button, select a new guest, and then enter gender and age. The meter gives that guest a temporary letter for that viewing session. If the guest leaves, the guest is signed out again on the remote.

That viewing is captured, but it is not added to the household members in that home. Instead, it is reassigned through guest fusion to a weighted panellist elsewhere in the panel who was not viewing at the same time and who is the closest match to the guest. The match starts with age and gender, and other modelling rules can also be applied.

Domestic workers who are not classified as household members are handled in the same way. Their viewing is kept, treated as guest viewing, and fused into the panel data. No such viewing is discarded.

This makes guest viewing and non-household domestic worker viewing part of the normal audience currency. It is included in ratings, reach and other standard outputs. So it becomes usable in the same reporting stream as all other viewing, rather than sitting outside the main reporting system

Chapter 9: How We Know What's on TV — Audio Matching

The Simple Explanation

Every TV channel has a unique audio stream. GfK continuously records a "reference fingerprint" of every measured channel, from multiple signal sources. The TV Logger 2.1 also records short audio samples from the TV in the panel household. Those samples are then matched against the reference database to identify which channel is being watched — and for exactly how long.

This audio matching technology has been in use since 2011 and works reliably even for short viewing events.

How Does It Work Step by Step?

1. Reference Recording: GfK's Sound Sampling Units (SSUs) record audio fingerprints of every TV channel continuously, with both a primary and a backup stream to ensure reliability. Both streams are cross-correlated to confirm they carry the same content.
2. Meter Recording: As soon as a TV in a panel home is detected as switched on, the TV Logger 2.1 begins recording audio fingerprints from that set.
3. Daily Matching: At the end of each broadcast day, the fingerprints from panel homes are matched against the reference database. This runs in GfK's secure cloud environment and is fully automated.
4. Channel Identified: The match confirms which channel the household was watching, and for how long, down to the second.

What About Simulcast?

Some channels broadcast the same content simultaneously on free-to-air TV and on a streaming platform — this is called a simulcast. GfK uses audio matching as the primary method to resolve simulcasts, identifying from which platform the viewing originated. Optional watermarking — a hidden identifier embedded by the broadcaster — can additionally support platform identification where needed.

What About Channels That Cannot Be Matched?

Viewing that cannot be matched to a known channel is clustered in non-matched viewing. Except for cTV homes as there it is still captured at platform level via the router meter. No viewing time is lost — even if the exact channel cannot be identified.

Chapter 10: How We Know Who Is Watching — The Announcement System

The Simple Explanation

Detecting that the TV is on is not enough. The system also needs to know *who* in the household is actually in the room watching. This is done through the announcement system, using a dedicated remote control.

How Does It Work?

Every person in the panel household — including children aged 4 and above — is assigned a personal button on the remote control, labelled with a letter (A, B, C, etc.). When the TV is switched on, the TV Logger 2.1's display lights up, prompting everyone present to press their own button. This registers them as a current viewer.
When someone leaves the room, they press their button again to de-register themselves.

What About Special Situations?

Panel members can also record specific situations:

- Holiday button: Pressed when the household is away, so absence is correctly recorded rather than interpreted as non-viewing
- No-viewer button: Pressed when the TV is on but nobody is actively watching — for example, background TV during household chores

Why Does This Matter?

This person-level data is what makes ratings commercially useful. Advertisers do not just want to know a TV was on — they want to know their ad was seen by a woman aged 25–54 in a metropolitan household earning in a certain income band. The announcement system makes this level of detail possible.

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Chapter 11: Data Processing — From Raw Measurements to Ratings

The Journey from Meter to Rating

Every morning, GfK's systems process the previous day's viewing data. Here is what happens, step by step:

Step 1 — Data Collection

All TV Logger and router meter data is transmitted securely from panel homes to GfK's cloud systems overnight.

Step 2 — Technical Cleaning

Small technical noise in the data is removed:

- Very short viewing detections under 3 seconds are discarded
- Gaps between channel recognitions of up to 7–30 seconds are bridged, to avoid breaking up a continuous viewing event into fragments
- Short gaps between events on the same channel are bridged (up to 5 seconds)

Step 3 — Validation and Edit Rules

GfK's data processing engine applies a series of structured validation rules in stages:

- Stage 1: Data cleaning and completeness checks
- Stage 2: Short bridging (closing tiny gaps)
- Stage 3: Simulcast resolution (assigning viewing to the correct platform)
- Further stages: Additional validation, quality flags, and consistency checks

Step 4 — Weighting

The cleaned and validated data is weighted to represent the full South African population. See Chapter 12 for detail on how weighting works.

Step 5 — Output

Daily ratings data is produced and made available to broadcasters, agencies, and advertisers through the reporting platform.

Note on Return Path Data (RPD): The potential use of Return Path Data — large-scale viewing data transmitted back by decoder boxes and smart TVs across the full population — is being actively investigated as a future enhancement to the panel data. RPD is not part of the launch TVM data processing pipeline. If and when it is introduced, it will be documented as a methodological update.

How Quickly Is Data Available?

Data Type	Availability
Live / Same-Day (VOSDAL)	Overnight 9:30
Time shifted	Every day delivery for the last day, reflecting watching on the broadcast day.

Day 28 (full TSV)	Includes all Time-Shift Viewing up to 27 days after broadcast-day

Chapter 12: Weighting — Making the Panel Represent South Africa

The Simple Explanation

TVM measures the whole of South African video viewing using two panels: the TV panel (4,200 households with a people-meter on the big screen) and the Online panel (2,000 individuals aged 15+ with a measurement app on their personal devices). Together these panels amount to only a tiny fraction of the country. Weighting is the step that scales what the panels record so the numbers add up to the real South African population.

Each panel household and each panel individual is given a weight — a number that says, in effect, "this one home stands in for this many real homes" or "this one person stands in for this many real people." If rural households are slightly under-represented in the panel, rural panel homes get a higher weight to compensate. If young urban men are over-represented, their weight is dialled down.

The whole calculation is anchored to the Establishment Survey (ES). The ES tells us how many households and individuals there are in South Africa, and how they split across geography, demographics and TV/device ownership. Those ES figures are the "truth" the panels are stretched to fit.

Two Universes, One Weighting Story

TVM reports on two nested universes (see Chapter 3), so weighting is done against both:

- **TV universe —** ~11.2 million households, ~36.6 million individuals aged 4+ (the operational weighting target used by GfK for the TV panel) which corresponds to ~30.4 million individuals aged 15+ in the reporting base (see Chapter 3). All are living in homes with permanent electricity, a working TV set and either a broadcast signal or a fixed internet connection to the TV. This is the reporting base for the Broadcaster Total TV currency.
- **Total Video universe —** ~40.1 million individuals aged 15+ in ~15.8 million households, covering everyone with either a working TV set or an internet-connected personal device (mobile, tablet, laptop, PC). This is the reporting base for the Total Video currency.

The TV universe sits inside the Total Video universe. That nesting is deliberate: it lets the industry keep a clean TV-only view alongside the wider Total Video view, from the same daily dataset.

The Three-Step Weighting Process

Every night, after the raw viewing data has been cleaned and validated (see Chapter 11), the panels are weighted in three connected steps.

Step 1 — Weight the TV Panel to the TV Universe

The TV panel is stretched to match the TV universe (the ~11.2m TV-owning households and ~36.6m individuals aged 4+, which corresponds to ~30.4m aged 15+ in the reporting base). This is done at two levels at the same time:

- **Household level —** weighted to ES targets on Area type × Province, Household size, SEM group, presence of kids and number of TV sets.
- **Individual level —** weighted to ES targets on Area type × Province × Population group, Household size, SEM group, presence of kids, number of TV sets, and Gender × Age.

Because the panel is deliberately over-sampled in some cells to keep small groups reliable (see "Why Disproportionate Sampling?" below), the weighting uses proportionate ES targets — i.e. the true national shares. The disproportionate shares are only used for the panel balance quota that guides recruitment.

Step 2 — Fuse the TV Panel and the Online Panel into a Single "Total Panel"

To report on the wider Total Video universe, the TV panel and the Online panel are combined into one dataset — the Total Panel. Panel fusion (see Chapter 7) fills in the gaps so every panellist ends up with both a plausible TV viewing profile and a plausible personal-device viewing profile:

- **Single Source panellists** (people who are in both panels — TV panellists who also have the Online app on their small screen) are measured on everything. They are the "donors" that make the fusion possible.
- **TV-only panellists** (TV panel homes without personal-device measurement) have their small-screen viewing statistically imputed, using Single Source donors (or Digital panellists who also own a TV) as the closest match.
- **Digital-only panellists** (Online panel members with no TV set at home) join the Total Panel as-is; they have no linear TV viewing to impute, and they extend the reach of the Total Panel into non-TV households.

The result is one deduplicated dataset covering the big screen and personal devices for every panellist, ready to be weighted as a whole.

Step 3 — Weight the Total Panel to the Total Video Universe, With TV Ownership as a Constraint

The Total Panel is then weighted to the Total Video universe using the same iterative technique, but with one extra rule: TV ownership is used as a weighting constraint. In plain English, the weighting must simultaneously reproduce two things:

- The correct national demographic shape of the full Total Video universe (all ~40.1m individuals aged 15+ in TV or internet-connected homes), and
- The correct size of the TV-owning sub-universe inside it (the ~36.6m individuals aged 4+ in TV homes, i.e. ~30.4m aged 15+ in the reporting base).

This is what makes it possible to report Total Video and Broadcaster Total TV from the same nightly dataset. The Total Video numbers reflect the wider universe; the TV-only

numbers can be pulled out cleanly as the TV-owning subset, with the same weights.

How the Weights Are Calculated: Iterative Proportional Fitting (IPF)

The mathematical engine behind all three steps is Iterative Proportional Fitting (IPF) — also known as RIM (Random Iterative Method) weighting. GfK uses an advanced version called Simultaneous Weighting, tuned for daily panel production.

The idea is simple. The panel is out of shape on many dimensions at once — a bit too metro on one, a bit too old on another, a bit too pay-TV on a third. IPF nudges the weights up and down until the panel matches all of the ES target shapes at the same time. The key features:

- All weighting dimensions are adjusted at the same time, not one after the other, so the order in which they are listed does not affect the outcome.
- Where no perfect solution exists (the panel simply cannot hit every target exactly), the system computes the best balanced fit rather than failing.
- If a weighting cell drops below a minimum sample size, adjacent cells are merged automatically to keep the daily weighting robust.
- Statistically the result is equivalent to classic IPF; operationally it has been proven reliable in daily panel production for decades.

This is the same engine used for TV panel weighting, for Online panel weighting, and for the final Total Panel weighting to the Total Video universe.

Why Disproportionate Sampling and Weighting Go Together

To make sure smaller groups, or groups with more diverse behaviour (such as metro households), have enough panel members to produce stable ratings, the panel deliberately over-samples some cells relative to their true national share. Weighting then corrects this over-sampling, so the final ratings reflect the real South African population — not the panel's deliberate skew. Over-sampling improves the reliability of small-group numbers; weighting keeps the totals honest.

How Often Are the Weights Refreshed?

Weights are computed every day as part of the standard nightly processing pipeline, using each panellist's current data. The ES targets that anchor those weights (universe sizes and demographic shapes) are refreshed on the annual Establishment Survey cycle, so the reference "truth" the panels are stretched to fit stays up to date as South Africa changes.

Chapter 13: Total Video Ratings (TVR) — The Final Output

What Is a TVR?

A TVR (Total Video Rating) is the headline measurement produced by this system. It tells the user, for any given programme, advertisement, or time period:

- How many people watched (i.e. expressed as a percentage of a defined target audience)
- Who they were (age, gender, SEM group, province, and other demographics)
- How they watched (live TV, time-shifted, cTV on the main screen, or online video on personal devices)

Key Metrics Explained

Metric	What It Means
Rating (%)	The percentage of a defined target audience that watched
000s	The number of viewers expressed in thousands
Reach	How many different individuals watched at least once
Average Viewing Time (AVT)	Average time spent watching, among those who did watch
Share	A channel's percentage of total TV viewing at a given time
GRP (Gross Rating Points)	The sum of ratings across all spots or breaks in a campaign — the standard media planning currency

TVM Output at Launch: Total Video (TV + cTV + Online)

At launch, TVM produces two related currencies that sit inside the same daily dataset:

- Broadcaster Total TV currency — linear TV viewing (from the TV panel people-meter) plus cTV viewing on the main TV set (from the router meter, credited to the broadcaster as Station). Reported on the TV universe.
- Total Video currency — the Broadcaster Total TV numbers plus platform-level online video from personal devices (from the fused Online panel, credited as Publisher). Reported on the Total Video universe.

This gives a unified view across screens — broadcast TV, streaming apps on the TV set, and online video on personal devices — in a single deduplicated currency, with a nested TV-only view still available.

Reporting rules at a glance:

- Router (Big Screen) usage: credited to the Station and included in Broadcaster Total TV.
- Online panel (Second Screen) usage on personal devices: credited to the Publisher and included in Total Video only — not in Broadcaster Total TV.
- There is no back-trending from legacy TAMS numbers to the new TVM currency; TVM is a fresh baseline.

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CEO: G. Whitaker
Company Registration: 2015 / 099994 / 08

Chapter 14: Quality Control — Keeping the Data Honest

Why Is Quality Control So Important?

The ratings produced by this system are used to trade significant advertising budgets. Even small errors in data quality can lead to consequential financial decisions going wrong. Rigorous and systematic quality control is therefore built into every layer of the system.

Daily Automated Checks

Every day, GfK's automated systems check:

- Has data arrived from each panel household within the expected time window?
- Are arrival times and data volumes within normal ranges?
- Are there anomalies in channel matching results?
- Are individual household patterns consistent and plausible?

Any household that fails a daily check has a work order raised, which triggers a support intervention — either remote or via a field technician visit.

Household-Level QC

If a household fails quality checks 5 or more times within 8 weeks, it is flagged as "serial non-compliant" and may be temporarily suspended or replaced in the panel.

Coincidental Surveys

Once a year, each panel household receives an independent coincidental survey — an unannounced check that independently verifies whether the household actually behaved as the meter recorded. A minimum 50% completion rate is required across all panel households, with no single demographic group falling below 80%.

Panel Health Reporting

GfK provides BRC with a monthly panel health report to the BRC covering:

- Daily in-tab rates against KPI targets
- Household tenure distribution (how long each home has been in the panel)
- Technical fault rates and resolution times
- Replacement and ongoing recruitment status

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Chapter 15: Reporting and Tools

How Do Users Access the Data?

Broadcasters, media agencies, and advertisers access TVM data through any software of their choosing. South Africa is an open software market where users can buy license to a software as long as that software has a BRC-Certificate. Ensuring calculations are done as prescribed by the BRC.

This allows users to:

- Query ratings by channel, programme, daypart, or custom time period
- Define target audiences by any combination of demographic variables (e.g., Women 25–49, SEM 6–10)
- Run reach and frequency analyses across advertising campaigns
- Compare linear TV, cTV and online video side by side across screens
- Export data for use in media planning and buying tools

Chapter 16: What Comes Next — The v2.0 Upgrade in Mid-2027

TVM launches in January 2027 as a full Total Video currency — a robust people-meter-based measurement of the big screen (broadcast TV plus cTV apps on the TV set) combined with platform-level online video on personal devices via the fused Online panel. Once TVM is live and performing against its KPIs, a v2.0 upgrade is delivered in mid-2027 on the same panel and universe:

Future Phase	What It Adds
v2.0 (mid-2027): Broadcaster Content-Level Digital	Broadcaster server-to-server integrations added on top of the launch panels, unlocking programme/episode-level reporting on BVOD apps (e.g. SABC+, DStv Stream) on top of the existing platform-level view
v2.0 (mid-2027): Deeper Content Detail on Personal Devices	Enriched programme/episode-level detail on personal devices — phones, tablets, laptops — using the same Online panel already live at launch, together with broadcaster integrations for social video (e.g. YouTube, TikTok) at content level
Later Enhancements	Further integration of additional data sources including Return Path Data (RPD) where viable and Cross-device post campaign reporting.

The goal of Total Video Measurement is to capture all video viewing, on all screens, by all South Africans — in a single, unified currency. The 2027 launch already delivers this at platform level; v2.0 in mid-2027 adds broadcaster programme/episode-level detail on top of the same universe.

Timeline note: The v2.0 upgrade will be further scoped, developed, and launched once TVM is live and stable, without a currency reset. The indicative date for v2.0 is to progress during 2027.

Chapter 17: Glossary of Key Terms

Term	Plain-English Meaning
ASO	Analogue Switch-Off — the transition from analogue broadcast signals to fully digital
BVOD	Broadcaster Video on Demand — catch-up viewing services (e.g., DStv Catch Up)
cTV	Connected TV — watching video apps on a TV screen via an internet connection
ES	Establishment Survey — the national survey that defines the TV universe and provides calibration data
EVO	GfK's data processing engine that converts raw meter data into validated ratings
GRP	Gross Rating Points — the total of all ratings across all spots in a campaign
In-tab	A panel household or person providing valid, usable data on a given day
Linear TV	Traditional broadcast TV watched live at the time of scheduled transmission
OTT / SVOD	Over-the-top / Subscription Video on Demand services — e.g. Netflix, Showmax
People-meter	The device attached to a TV set that records both what is on and who is watching
POPIA	Protection of Personal Information Act — South Africa's data privacy legislation (Act 4 of 2013)
RIM weighting	Random Iterative Method — a statistical technique to make panel data represent the national population
Router meter	A device that measures internet traffic to and from a TV screen, identifying streaming platform usage
RPD	Return Path Data — large-scale viewing data transmitted back by set-top boxes and smart TVs; under investigation for future phases
SEM	Socio-Economic Measure — South Africa's standard audience classification framework
Simulcast	When the same content is broadcast simultaneously on multiple platforms
SSU	Sound Sampling Unit — GfK's equipment that records reference audio fingerprints of TV channels
TSV	Time-Shift Viewing — watching recorded or paused content after the original live broadcast

TVR	Total Video Rating — the headline audience measurement metric from this system
TVL 2.1	TV Logger 2.1 — the specific people-meter device deployed in South African panel homes
Universe	The total population being measured — all South Africans aged 4+ in TV households with electricity
VOSDAL	Viewing on the Same Day as Live — data available at the end of the broadcast day
Watermarking	A hidden signal embedded in a broadcast stream to identify the platform on which viewing occurs
Total Video Universe	The wider reporting base for TVM: all South Africans in mains-electricity households with a working TV set and/or an internet-connected personal device (mobile, tablet, laptop or PC). Approximately 40.1 million individuals aged 15+ in ~15.8 million households (2026 ES).
Online Panel	A separate panel of 2,000 individuals aged 15+ who install a measurement app on their smartphone, tablet, laptop or PC. Live from TVM launch, with a ~50% overlap target with the TV panel to enable Total Video reporting via panel fusion.
Online Panel Measurement App	The passive on-device measurement software each online panellist installs on their smartphone, tablet, laptop and/or PC. It is the personal-device counterpart to the TV Logger 2.1, but it does not use audio-matching (that is a TV-panel technology used only on the big screen). Instead, the app identifies the platform being used (e.g. SABC+, DStv Stream, Netflix, YouTube), times each video session and sends the data to GfK overnight. Content-level detail on BVOD is added, where available, via broadcaster server-to-server (S2S) integrations. Personal devices are treated as individual, so no button-press announcement is needed.
Panel Fusion	A statistical technique that combines the TV panel and the Online panel into one dataset. Single Source panellists (people in both panels) act as donors; their observed TV + personal-device behaviour is used to impute plausible personal-device viewing for TV-only panel homes, producing deduplicated Total Video results.
v2.0	The mid-2027 upgrade to TVM that adds broadcaster programme/episode-level detail for digital viewing on top of the existing panels and universe. It is an addition of value, not a currency reset.

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Station vs Publisher	Reporting rule used by TVM. Big Screen usage measured by the Router meter is credited to the Station and included in the Broadcaster Total TV currency. Second Screen usage on personal devices measured by the Online panel is credited to the Publisher and included in the Total Video currency only, not in Broadcaster Total TV.

Appendices

Appendix A: Panel Balance Matrix

[To be populated with the final panel configuration once Establishment Survey data has been fully processed and approved — targeted Q1 2026]

The panel balance matrix will define the required distribution of the 4,200 panel households across:

- The three recruitment strata (Metro / Non-Metro Urban / Non-Metro Rural)
- District municipalities
- Household size and composition
- Race group
- Age of the main income earner
- Pay-TV vs. free-to-air status

Appendix B: Weighting Dimensions

[To be confirmed following Establishment Survey finalisation]

Weighting targets will be set at both household level and individual level using RIM weighting, on dimensions including:

- Geographic area and province
- Race group
- Age and gender
- Household size
- SEM category

Appendix C: Channel List and Classification

[To be populated prior to launch — targeted Q4 2026]

The channel list will define:

- All channels measured as "Reference and Audit" (full audio matching with audited programme data)
- All channels measured as "Standard" (audio matching)
- Channel groupings and families (e.g., bouquet groupings)
- Rules for temporary and pop-up channels

Appendix D: Key Performance Indicators (KPIs) Summary

The following are the headline KPIs from the BRC-GfK Master Service Agreement. The full KPI detail is contained in the separate KPI Appendix document.

Area	Key KPI
Panel size	Minimum 3,500 net in-tab households daily
TV meter coverage	Minimum 90% of eligible TV sets metered per household
Router meter installation	Approximately 25% of broadband-connected TV panel homes
Panel rotation	Maximum 20% of households with panel life exceeding 8 years at any time

Data delivery	VOSDAL data delivered by agreed daily cut-off time
Coincidental survey	Minimum 50% completion rate annually; minimum 80% within any demographic group
Query response	BRC queries acknowledged within 1 business day; responded within 5 business days
Online panel size	2,000 individuals aged 15+ with the measurement app installed on at least one personal device; ~80% ready by October 2026 for launch on 1 January 2027
Single Source overlap	Target of ~50% of Online panellists (up to ~1,000) recruited from within TV panel households to act as fusion donors

Appendix E: Regulatory and Legal Framework

All TVM operations comply with:

- POPIA (Protection of Personal Information Act 4 of 2013)
- ICC/ESOMAR International Code of Marketing and Social Research Practice
- SAMRA (Southern African Marketing Research Association) codes of conduct
- GDPR (European General Data Protection Regulation) — applicable to GfK's data handling and storage processes