BRC TVM Establishment Survey 2026

Methodological Documentation

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Preface

This document sets out the methodology behind the BRC TVM Establishment Survey (ES) 2026 and describes how the data underpinning South Africa's Total Video Measurement system was collected, processed, weighted and quality assured.

The Establishment Survey is one of the most important building blocks of the BRC's TVM measurement framework. It provides the population benchmarks against which the national TV and video audience panel is weighted, and it serves as the recruitment source for that panel. In a media landscape that continues to change quickly with new platforms, new devices and new viewing habits, the credibility of the BRC's television and total video audience measurement rests fundamentally on the quality of this underlying survey.

The TVM ES is not itself an audience ratings currency; rather, it establishes the population, behavioural and technology benchmarks that provide the foundation for the BRC's television and total video measurement system.

Fielding a nationally representative, face-to-face survey of this scale is a considerable undertaking. Between September 2025 and February 2026, ASK AFRICA completed more than 15,000 interviews across all nine provinces. This fieldwork, together with the rigorous six-layer quality assurance programme applied throughout data collection, and the independent field check carried out afterwards, forms the foundation on which the rest of this document builds. The survey design and its outcomes were shaped by a wide range of expertise. The BRC's Technical Committee for the TVM ES, whose members represent BRC members, guided key methodological choices, including the sampling design and the weighting approach and scrutinised the results before recommending adoption. This oversight drew on established international audience measurement standards and on practice shared with other Joint Industry Committees, combined with the detailed local expertise of ASK AFRICA and GTI in South African fieldwork, sampling frames and population data. It is this combination of international rigour and local knowledge that underpins the quality and credibility of the ES 2026 dataset.

This methodological documentation is intended for BRC members, industry stakeholders, and anyone who wants to understand and interrogate how the ES 2026 results were derived. It sets out the sampling design, weighting procedures, quality controls, key definitions and derived calculations in as much detail as is practically useful, in keeping with the BRC's commitment to transparency in its measurement standards. We welcome questions and feedback from users of this document and of the data it describes.

Broadcast Research Council of South Africa (BRC)

September 2026

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1. Introduction to BRC ES TV 2026

1.1 TVM Establishment Survey

The BRC TVM Establishment Survey is conducted as a national, face-to-face study among people living in South Africa. The purpose is simple: to understand people's media behaviour—especially TV and video viewing—and the devices they use at home.

ASK AFRICA conducts the study, using a sample delivered by GeoTerra Image (GTI). The survey has three main objectives:

1. **Provide population (norm) figures** for South Africans aged 15+ to support weighting of the national TV audience survey.
2. Track and report trends in media use over time.
3. Serve as a **recruitment source** for households joining the BRC TAM panel.

1.2 Research methodology

Face-to-face interviewing—specifically, computer-assisted personal interviewing (CAPI)—was used for the 2026 survey. Interviewers used a device to capture responses during each interview.

This approach ensures a representative random sample and includes everyone aged 15 or older who lives in a private home, regardless of language, literacy level, device ownership, or digital skills.

1.3 Reporting frequency

Results from the TVM ES are shared with ASK AFRICA, GfK, BRC and with the broader industry. They are used to help define target groups and to support weighting in the TV and Total Video Measurement study.

We publish results annually, based on rolling two-year samples (unless agreed otherwise). The annual report includes medium-specific results and key media indicators.

2. Research Universe and Sampling

2.1. Universe

For the 2026 survey, the target universe comprised:

- Individuals: all persons aged 15 years and older, living in private homes in South Africa.
- Households: all private households in South Africa.

Parks and recreation (for example, holiday resorts and national parks) and Collective living quarters (for example, tertiary education hostels, workers' hostels, military barracks, prisons, hospitals) were excluded from the sample selection. As the sampling frame covers all dwelling types in South Africa, all individuals residing in a dwelling were included, irrespective of having a fixed address (as is the case for some dwellings in informal areas).

We base the universe on Stats SA Census data, which provides nationally representative demographic, social, and economic information for South Africa.

2.2. Sampling

The Establishment Survey is used for recruitment, weighting, and audit of the TV measurement system. Because the results underpin trading currencies in the media industry, the sample must be high quality and as representative as possible.

To achieve this, we use a multi-layered sample design. In practice, some groups are sampled at rates higher than their natural share of the population to ensure that enough cases are available for reporting. The following paragraphs explain this approach in greater detail.

2.2.1. Sampling frame

The GTI Enumeration Area (EA) frame was used as the sampling universe for the BRC ES survey. This frame, owned by Geo-Terra Image (GTI - of which Dr Ariane Neethling is a Non-Executive Director), is the most comprehensive and up-to-date resource available in South Africa. It covers the entire country meticulously, ensuring complete representation without overlaps or omissions. Each EA in the frame includes detailed geographical and demographic data such as sub-place, main-place, district municipality, province, type of EA, geographic categorisation, dwelling type, and estimated population counts, including the number of households, total population, and breakdowns by population group, gender, five-year age intervals, and the Neighbourhood-Lifestyle Index (NLI) which is an economic indicator designed by GTI.

The primary goal of utilising this sampling frame is to generate estimates that are as precise as possible and carry the highest degree of confidence. This is achieved by systematically selecting respondents through probability sampling methods, which are known to provide higher precision levels than non-probability sampling methods. The robustness of the GTI EA frame supports the reliable application of these methods.

Additionally, each EA unit is accompanied by maps with clearly delineated boundaries and a unique identification code, further facilitating accurate sample selection. The frame

incorporates measures of size estimates, such as population, number of households, and land-use/dwelling type classifications, essential for effectively drawing probability samples.

GTI and Dr Neethling update the EA sampling frame annually using the mid-year population estimates published by Statistics SA (latest update; MY2024) in combination with spatial data (satellite imagery) for additional on-ground level updates that reflect new building developments and urbanization.

Importantly, the reliability of the results hinges on this comprehensive sampling frame, as it defines the extent to which our findings can be generalised across the target population.

2.2.2. Sample size

We set the target sample size at 15,000 interviews for the 2026 fieldwork. This delivered strong overall precision and supports the most important subgroups. We added about 270 interviews to strengthen coverage of smaller reporting groups—resulting in at least n=1,000 Indian respondents and at least 100 Coloured and White respondents in rural areas.

2.2.3. Sampling method: multistage cluster sampling

Ideally, we would draw a simple random sample from a complete list of all households or people. In South Africa (as in most countries), that kind of up-to-date database is not available for this type of research. Even if it were available, using it would be prohibitively time-consuming and costly.

Stratified multistage cluster sampling is a standard approach in these situations, and it is the method used for TVM ES. The next sections explain what this means in practice.

2.2.4. Stratified sampling

We use stratified sampling as part of our methodology. Under this approach:

- We divide the South African population into non-overlapping subpopulations (strata).
- We determine the sample size per stratum (allocation).
- We draw a sample of units within each stratum.

Stratification variables

Only variables known for the population can be used as stratification variables. In addition, stratification variables should be relevant to the objectives and reporting domains. The ES aims to measure television viewing behaviour and capabilities, and reporting domains are related to basic socio-demographic segments and commonly used TV buying groups.

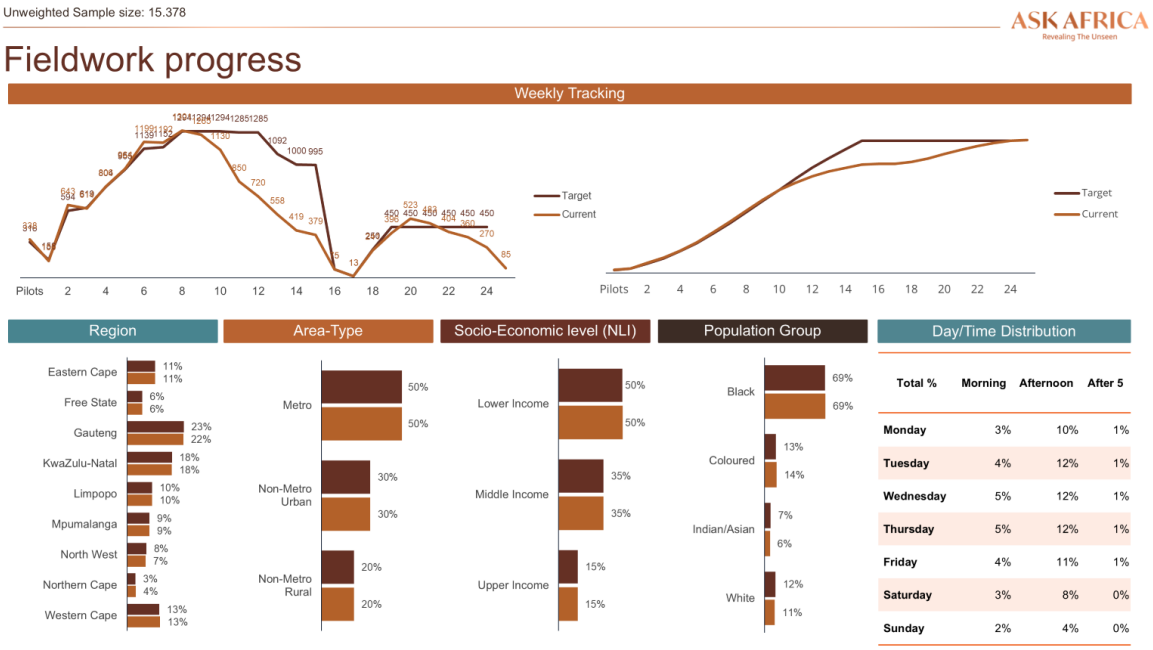
For ES TAM 2026 we selected:

- Province
- Geographical area type (Metropolitan, Non-metro urban, Non-metro rural)
- Population group
- Affluence group (the National Lifestyle Index (NLI), made available by GTI, was used as a proxy for wealth)

Strata were determined by the combination of these variables.

2.2.5. Disproportionate sampling

The TVM Establishment Survey uses disproportionate sampling to accommodate the intended use of the data. Natural fall-out (proportionate sampling) would lead to insufficient sample sizes for segments of particular interest to users—for example, combinations of population groups and higher-income groups.



Weighting is used to ensure the overall results are representative for the South African population. The oversampled groups are for example weighted down again for a representative dataset.

2.3. Cluster sampling

Due to the lack of an up-to-date list of individuals and households, an area-based stratified **multistage cluster sampling** method is used to draw the sample in multiple stages.

1. Selection of Enumeration Areas (EAs). EAs are small, clearly defined geographic units created by Statistics South Africa for census and survey fieldwork, each designed to contain a manageable number of households for data collection.
2. Selection of dwellings and households and their GPS coordinates within these EAs;
3. Selection of the household member as respondent following Kish grid methodology to ensure a random selection.

All stratification variables are available at the EA level. Province and area type are reported by Stats SA; dominant population group and affluence (NLI) are estimated by GTI based on a combination of factors, including dwelling type.

Dr Ariane Neethling was responsible for drawing the EA sample for the ES TAM 2026 study. Under her guidance, GTI provided ASK AFRICA with 5,092 EA maps based on the selected

sample. Each map included three household or location points as sample points and six additional points as substitution points.

2.4. 2026 Fieldwork results

Data collection took place from 6 September 2025 to 15 December 2025, pausing over the holiday period, and resuming from 6 January 2026 to 28 February 2026. In total, 15,378 interviews were successfully completed. The achieved sample was closely aligned with targets for province, area type, population group, and NLI.

Interviews were distributed across days of the week and times of day as intended. This increased the likelihood of reaching household members who were away during typical working hours.

In metropolitan and urban areas, more than 94% of interviews were conducted within 50 metres of the selected sample point (GPS coordinates). In rural areas, 98% were conducted within 2,000 metres. Both results are within the agreed quality boundaries.

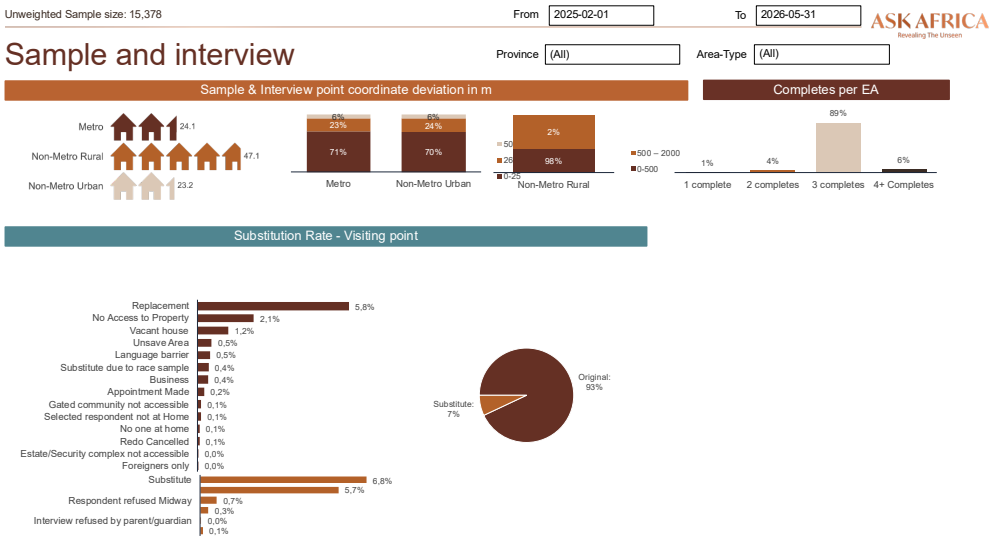
In 89% of Enumeration Areas (EAs), three successful interviews were completed. In 5% of EAs, the number was lower, and in 6% of EAs, four interviews or more were completed.

Most interviews (93%) took place at the original sample points; 5.8% of all interviews were completed at replacement points using the agreed right-hand rule. This rule could be applied only when the allocated sampling point was identified as a vacant plot, an inaccessible property, an unsafe point, business premises, or a location with an incorrect population group.

Substitution points (7%) were used only in the following refusal cases: selected respondent refusal, refusal partway through the interview, or immediate refusal at the study introduction.

At least three attempts were made by the interviewer to complete the interview at the selected sample points before a substitution point was considered. Interviewers were asked to spread their visits at different times and days throughout the week to ensure a higher and more representative response rate.

Fieldwork progress was tracked and reported weekly via an online dashboard.



2.4.1. ES 2026 Fieldwork challenges – incident reports

Data collection, to many, is simply a process, a methodological step in the research journey. What is far less visible, and often entirely unknown to the broader industry, is the reality that fieldwork interviewers navigate daily. An incident report was created to document and bring to light the conditions under which data collection takes place, the safety threats, environmental challenges, and operational obstacles that interviewers face in the field, often in silence and with little industry awareness of the true extent of these challenges. It serves as a record of what lies behind the data: the human effort, risk, and resilience that make research possible in communities across South Africa. During the main study data collection period (September 2025 – February 2026), more than 60 operational incidents were recorded across all nine provinces. Three primary themes emerged from the incident register: safety and security concerns (48%), adverse weather conditions (39%), and field logistical disruptions (12%).

Safety and security were the most prevalent theme and posed the greatest risk to field operations. Incidents under this theme included community-related violence, gangster activity, taxi industry strikes, interviewer assault, team members being held at gunpoint, and teams being mistakenly identified as scammers. In some instances, this led to teams being held hostage. Community Protection Forums (CPFs) across multiple provinces requested that teams vacate enumeration areas on several occasions. KwaZulu-Natal (KZN) and the Western Cape (WC) recorded the highest concentration of safety-related incidents, reflecting the elevated security challenges in these provinces. Gauteng (GP) followed as the third most affected province, with North-West (NW) and Mpumalanga (MP) recording equal numbers of safety disruptions thereafter. Safety challenges were experienced across all nine provinces throughout the data collection period.

Adverse weather conditions constituted the second most prominent theme. Rainfall disruptions were first recorded as early as September 2025 and persisted through to February 2026, affecting all nine provinces across the full data collection period. November 2025 represented the peak, with widespread and persistent rainfall logged across multiple provinces simultaneously. North-West (NW) and the Eastern Cape (EC) each recorded the highest weather-related incident count, followed by Gauteng (GP) and Limpopo (LP). The impact extended well beyond delayed fieldwork. Roads became inaccessible in several areas, vehicles sustained damage navigating flooded and deteriorated terrain, and rising floodwaters made access to certain enumeration areas extremely difficult. Despite these conditions, photographic and video evidence captured by field teams showed interviewers persevering and continuing into the field under extraordinarily challenging circumstances. Their persistence was unwavering, yet the severity of the weather conditions meant that data collection was still heavily delayed, not because of any lack of effort, but simply because the situation on the ground made progress impossible at times.

Field Logistics captured incidents that were neither safety nor weather related, but rather the physical and technological challenges that disrupted fieldwork on the ground. These were situations beyond the control of any individual, where the terrain, infrastructure, and available technology simply could not support the demands of data collection. Limpopo and North-West were the most affected provinces, with Gauteng also recording incidents. In Limpopo, teams operating in remote and rural areas experienced serious vehicle damage, with wheels and undercarriage components sustaining significant harm on deteriorated and unpaved roads. In North-West, GPS technology failures presented a different but equally disruptive challenge, where bouncing and inaccurate coordinate pins prevented teams from correctly locating and completing assigned enumeration areas. In Gauteng, vehicle damage caused by pothole-ridden roads further compounded accessibility into certain areas. These

incidents highlight that successful data collection is not only dependent on the willingness of interviewers, but also on the physical infrastructure and technological reliability of the environments in which they work.

All incidents were reported in real time, and mitigation actions were implemented where possible. The fieldwork period saw the highest incident frequency in November, coinciding with a combination of widespread adverse weather and escalating community tensions. North-West, KwaZulu-Natal, and the Western Cape collectively bore the heaviest burden of disruptions across the data collection period, yet teams in these and all other provinces continued to push forward under considerable pressure. Collectively, these incidents serve as a reminder that behind every completed interview is an interviewer who showed up, often under circumstances that most would consider insurmountable, and that the true cost of quality data collection extends far beyond what any methodology section can capture.

2.4.2. ES 2026 Fieldwork quality check

Producing data that is reliable, representative, and research-ready does not happen by chance. It is the result of deliberate, structured, and consistent quality assurance applied at every stage of the data collection process. For this study, quality assurance was not treated as a single checkpoint at the end of fieldwork, but rather as a continuous and layered commitment that ran in parallel with every phase of the project. Six distinct layers of quality assurance were implemented, each serving a specific purpose and together forming an integrated framework designed to identify, address, and prevent error from the foundation of the study through to the final data delivered.

Layer 1: Set-up Phase

Quality assurance began before a single interview was conducted. The first layer focused on the foundation of the study, covering sample and questionnaire design, electronic programming, and field interviewer training. This proactive approach ensured that every element of the study was built on a robust and error-resistant framework from the outset. A total of 17 briefing sessions were conducted over 9 days, training 262 interviewers across all provinces prior to the start of data collection. By investing in rigorous preparation at this stage, the risk of downstream errors was significantly reduced before fieldwork commenced.

Layer 2: Pilot

Before the main study data collection began, a pilot phase was conducted targeting 574 points representative of the full sample design. The pilot served as a real-world stress test of all operational components, allowing the research team to conduct comprehensive evaluations spanning electronic programming, questionnaire efficacy, interviewer performance, and field logistics. Feedback gathered during the pilot informed refinements to both the instrument and the field process, ensuring that the main study launched with a tested and validated approach.

As a result of the pilot, a question regarding parent and guardian information was added to the questionnaire, and the survey introduction was revised to be more inclusive of foreign nationals, broadening the scope and representativity of the study. A few trigger adjustments were made, questionnaire phrasing was refined for better conversational flow, and answer options were modified to better reflect respondent realities. Overall, the flow and comprehension of the questionnaire were good, with showcards proving particularly effective in supporting respondents' understanding in instances of uncertainty.

A further outcome of the pilot was the implementation of the right-hand rule for the main study. This resulted directly from interviewer feedback during the pilot phase. It was observed that replacement interviews, those required when a sampled point was found to be a vacant plot, an inaccessible property, an unsafe location, a business premises, or an incorrect population group, were being directed to the substitution point. With only 6 substitution points available per enumeration area, this proved insufficient in several instances and in some cases resulted in interviewers travelling unnecessarily long distances. The right-hand rule addressed this by directing interviewers, at the point of a required replacement, to target the immediate neighbouring dwelling to the right and to continue in that direction until a completed interview was secured. A substitution point was only drawn upon in the event of an outright refusal. This adjustment streamlined the replacement process, reduced unnecessary travel, and made more efficient use of the available substitution points across the main study.

Layer 3: Dashboard Tracking

Throughout the data collection period, fieldwork progress was monitored daily and fed into a weekly tracking dashboard. This layer provided the research team with continuous visibility into the health and progress of fieldwork, reporting specifically on fieldwork progress across sampled strata, substitution and replacement statistics, respondent and household characteristics, household viewing characteristics, and universe statistics. The dashboard ensured that any emerging concerns about progress, coverage, or sample representativity were identified and addressed in a timely manner, rather than discovered at the close of fieldwork.

Layer 4: In-field Quality Dimensions

Quality assurance extended directly into the field through two active and independent monitoring mechanisms, each designed to verify the integrity of the interview process in real time.

Geo-fencing technology ensured that interviewers were physically present at the correct sampling point at the time of interviewing. In urban and rural areas, a 150-metre radius was set around each sampled point, while a 2-kilometre radius was applied for farm areas to account for the practical distances involved in reaching a gate or dwelling. The data collection system was configured to only activate once an interviewer entered the designated geo-fence, making it technically impossible to open and conduct an interview from an incorrect location. The WGS84 coordinate system was used as the standard reference framework across all sampled points.

Covert recordings provided a second and equally important dimension of in-field quality assurance. During the programming phase, specific questions were selected for covert audio recording, with respondents informed at the outset that sections of the interview may be recorded. During the pilot phase, ASK AFRICA made the decision to extend this further by enabling full interview recordings, ensuring that a complete audio record existed for any interview should it ever be required. For quality assurance purposes, only the selected questions were formally reviewed and assessed. Where queries or anomalies were identified during the review process, the availability of the full interview recording allowed the QA team to refer back to the specific question in question, providing an evidence-based basis for investigation and resolution rather than relying on recall or secondary reporting.

Layer 5: QA Team Review

A dedicated quality assurance team within ASK AFRICA (n=11 QA members) conducted independent reviews of completed interviews and fieldwork outputs throughout the data collection period. This layer provided an objective assessment of data quality that was

entirely separate from the field management structure, ensuring that any concerns identified were escalated and addressed through a consistent and impartial process. The QA team review was structured around three distinct dimensions, each targeting a specific and critical aspect of data integrity: coordinate checks, covert recording assessments, household technology verification, and generic QA checks. Each of these is detailed in the sections that follow.

GPS Coordinate checks

Sample design adherence was a cornerstone of the QA team review process, with a multi-layered approach to coordinate verification implemented well beyond the real-time geo-fencing controls applied during data collection. Three distinct checks were conducted, each targeting a specific aspect of geographic compliance: verification of the original sampling point, confirmation of correct right-hand rule implementation, and the detection of any cluster interviews within enumeration areas. Together, these checks provided the research team with a comprehensive and spatially grounded assurance that the integrity of the sample design was upheld throughout the full data collection period.

To understand the coordinate checks that follow, it is important to distinguish between three related but separate concepts. The sampling point refers to the pre-determined locations, being three original sampling points and six substitution points per EA, that interviewers were required to navigate to conduct an interview. The geofence refers to the boundary surrounding each sampling point, set at a 150-metre radius in urban and rural areas and a 2-kilometre radius on farms, within which the data collection software would activate. The in-field coordinate refers to the GPS location captured at the exact point where each interview took place. For an interview to be accepted, this in-field coordinate was required to fall within 30 metres of the original sampling point.

1. Sampling point verification

   Every sampling point used during the study was linked to a GPS coordinate received from GTI during the sampling stage, forming the basis of each enumeration area map. During data collection, a GPS coordinate was captured and uploaded for each interview at the point of completion of the point-of-contact sheet. The QA team reviewed each of these coordinates against the original sampling point, verifying that the logged location fell within the prescribed 30-metre boundary in urban and rural areas and the 2-kilometre boundary for farm points.

   This check was applied thoroughly and consistently across all completed interviews, providing the research team with objective evidence that interviewers were present at and working from the correct sampling locations throughout the data collection period.

2. Right-hand verification

   As detailed in the pilot phase, the right-hand rule was introduced for the main study in response to the limitations identified with the available substitution points per enumeration area. The right-hand rule was activated specifically at the point of a required replacement, where the original sampled dwelling was found to be a vacant plot, an inaccessible property, an unsafe location, a business premises, or an incorrect population group. In these instances, interviewers were directed to the immediate neighbouring dwelling to the right and continued in that direction until a completed interview was secured or, where an individual refused to participate, the substitution point was used. In total, 5.8% of all interviews conducted during the main study were completed following the right-hand rule.

To verify that this rule was correctly applied in the field and that no shortcuts were taken or conveniently located points selected outside of the prescribed process, the QA team conducted a visual check of every GPS coordinate logged during right-hand rule implementation. Each breadcrumb trail of coordinates was reviewed to confirm that interviewers had moved systematically to the right of the original sampling point and continued in that direction without deviation. This level of verification ensured full geographic accountability at every stage of the replacement process and provided the research team with confidence that the right-hand rule was applied consistently and with integrity across all provinces.

3. Cluster checks

Cluster interviews, in which multiple interviews are conducted near one another at a single location, such as a shopping mall, coffee shop, or park, are not permitted under the study's quality standards. Interviews are required to be spread throughout the enumeration area, reflecting genuine household level data collection rather than convenience-based clustering.

To verify compliance with this requirement, all GPS coordinates logged during the main study were imported into QGIS, where a spatial analysis was conducted to identify any instances where two or more interviews within the same EA fell within 10 metres of each other. Where any such instances were flagged, a further visual inspection of the coordinates was conducted to assess and confirm the legitimacy of the interviews in question.

No cluster interviews were identified during the execution of the BRC ES 2026. This outcome reflects the effectiveness of the geo-fencing controls applied during data collection, the rigour of the right-hand rule in distributing interviews across the enumeration area, and the thoroughness of the coordinate verification process conducted by the QA team.

4. Covert recordings

Covert recordings formed a critical independent verification layer within the QA team review, enabling the assessment of interview quality and respondent interaction in a way that no other mechanism could replicate. Rather than relying solely on supervisor observation or respondent callbacks, the covert recording checks allowed the QA team to listen directly to the interview as it was conducted, providing an unfiltered view of interviewer behaviour, questionnaire administration, and respondent engagement.

The covert recording QA programme was initially set at a 20% check rate across completed interviews. As data collection progressed, this threshold was increased to 58% to allow for tighter quality control and greater confidence in the integrity of the dataset. The following areas were subject to formal covert recording checks:

- Kish grid compliance
- Kish grid and household composition comparisons
- Questionnaire checks:
    - TAMS Universe
        - Workable TVs: HH9 to HH13
        - HH45: Energy source used in the home
    - General
        - P14: How respondents connect to view SABC programmes or channels at home
        - HH6: Types of internet connections available in the household

        - HH8: Wi-Fi systems used to extend or distribute internet connectivity at home
        - HH17: Primary internet connection used at home for a specific device and its location
    - Technical person section
    - Rotation questions
        - HH24: Types of decoders or set-top boxes connected to household televisions
        - HH27: DStv subscription package where applicable
        - HHD2: Household income

Once uploaded to the server, recordings enabled immediate verification of each interview, offering a significant advantage over callback methods which are heavily dependent on respondent availability and the reliability of contact details. The availability of full interview recordings proved particularly valuable during the data collection period, providing the research team with the ability to confirm, assess, and respond to questionable results with confidence and with evidence.

5. Household technology verification

While covert recordings and coordinate checks addressed the process and location of interviewing, household technology verification provided a direct visual check on the physical environment in which the interview took place. By grounding responses in what was actually observed inside the home, this mechanism added a tangible and evidence-based dimension to the overall QA process.

As an additional dimension of in-field quality assurance, a photographic verification process was implemented alongside the standard QA checks. During the data collection period, 10% of all interviews were targeted for photographic verification, with interviewers requesting permission from respondents to photograph relevant household technology and infrastructure observed during the interview.

These photographs served as a secondary verification mechanism, allowing the QA team to cross-reference what was visible in the household against the responses captured during the interview. This process provided an objective and independent check on both the correct understanding of the questionnaire by the interviewer and the accurate completion of interview responses. Where discrepancies between photographic evidence and captured data were identified, these were investigated and addressed accordingly.

This approach proved to be a valuable layer of verification, grounding the data in physical reality and providing the research team with an additional level of confidence in the accuracy and integrity of household-level responses, particularly those relating to technology ownership, connectivity, and viewing infrastructure within the home. It is noteworthy that no interviews were disregarded because of inconsistencies identified between the photographic evidence and the data recorded, reflecting the overall accuracy and conscientiousness with which interviewers completed the interview process in the field.

6. Generic QA checks

In addition to the coordinate and covert recording checks, the QA team applied a comprehensive set of generic quality checks across all completed interviews. These checks were designed to detect and address any irregularities that could compromise the integrity of the dataset, covering a broad range of data quality dimensions from timing and device compliance through to respondent verification and interviewer authorisation.

The following checks were applied consistently across all interviews throughout the data collection period:

1. Interviews conducted before 07:00 or after 20:00 were automatically cancelled.
2. Detection of fake GPS or location spoofing applications
3. Detection of manual clock changes on interviewer devices
4. Duplicate respondent details, including the same name, phone number, or other identifying information, were flagged and investigated.
5. Population group classifications were verified through covert recordings and enumeration area allocations.
6. Interview length was monitored and unusually short or long interviews were flagged.
7. The time between consecutive interviews was tracked to detect and prevent potential fabrication.

Only interviewers listed on the official training register were permitted to conduct interviews

Cancellations

As a result of the quality assurance checks applied across all six layers, 2,811 interviews were cancelled for reasons identified during the QA process. The table below provides a detailed breakdown of the cancellation reasons and their frequencies.

Cancellations	**Count**
Cancellation - Covert Recordings	**1588**
Kish Grid	664
Kish vs HH Composition	587
Protocol Violation (No respondent, skipping questions, wrong race, prepped respondent, disguised voice, duplicate cell etc	337
Cancellation - Coordinates	**1223**
Cancellation – Not started at the correct VP	648
Cancellation – Substitute rule not followed	575
Total	**2811**

Layer 6: Data processing checks

The final layer of quality assurance was conducted in-office by the Data Science team once fieldwork data was received. Rather than focusing on interviewer behaviour or field processes, this layer turned attention to the data itself, examining whether the electronic questionnaire had functioned as designed and whether the logic and flow of responses across the instrument were sound.

Systematic checks were applied to verify that all programmed triggers within the questionnaire had fired correctly, routing respondents through the appropriate sections based on their responses. The logical consistency of answers both within individual sections and across the questionnaire as a whole was assessed, ensuring that the relationships between questions behaved as intended and that no contradictory or technically impossible response patterns were present in the dataset. These checks confirmed that the data met the required quality standards before being released for analysis, serving as the final line of assurance in the quality framework and ensuring that what was delivered was not only complete, but logically coherent and research-ready.

Independent Field check

In addition to the internal quality assurance framework applied across all six layers, an independent third-party verification was commissioned to provide an external and objective assessment of the data collection process and its outputs. This field check was not a duplication of the internal QA process, but rather an additional layer of accountability, ensuring that the integrity and quality of the data could be verified by an independent body operating entirely outside of the research team. The decision to subject the study to external checks reflects a commitment to transparency and to delivering data that meets the highest standards of credibility, not only as assessed internally, but as confirmed independently. The findings of the checks are detailed in the sections that follow.

After completion, the fieldwork was also checked by a member of the BRC team to ensure quality. ASK AFRICA provided the BRC with a file that contained all interviews, including whether an interview was conducted at an original sample point or a substitution point, and whether the right-hand rule was applied.

Fieldwork rule status	Completed	% Completed
First time complete	10731	87%
Mix	961	8%
Right-hand rule applied	673	5%
Grand Total	**12365**	**100%**

From this first file, a sample of 400 interviews was selected. This sample set was then sent back to ASK AFRICA so that the actual coordinates and interview characteristics were available, including the various rules applied.

Sample	Sample selection	% sample
First time complete	347	87%
Mix	31	8%
Right-hand rule applied	22	5%
	400	**100%**

From these 400 interviews another selection was made:

Within the first-time completes section, every 7th interview was checked, which resulted in 44 checks in this category; for the other sections, all interviews were checked, resulting in 172 checked interviews.

Actual checks	Count of checks	% of checks
First time complete	44	26%
Mix	71	41%
Right-hand rule applied	57	33%
Grand Total	**172**	**100%**

For these 172 interviews, Google Maps was used to create maps to check the distance between the sample point and the place of interview, and whether the right-hand rule was implemented correctly.

Eighty-eight percent of all interviews checked were within the agreed distance and showed good application of the rules. A few interviews were not within the range of 50 metres but were within 30 metres beyond that—considered within tolerance.

Five percent of this tested set was within distance, but the right-hand rule was not applied correctly according to our strict instructions.

Overall, the additional fieldwork check produced very positive results and showed that ASK AFRICA's internal checks were working well: first-time completions (87% of the total sample) were all executed correctly; mixed-rule cases (8% of the sample) were 86% correct; and right-hand-rule cases (5% of the total sample) were 81% correct.

Check status	Count of checks	% assessment
Good	151	88%
Marginal	2	1%
Marginal unsafe	3	2%
outside distance	2	1%
Outside distance for race	2	1%
Rule not possible	2	1%
Unsafe outside distance	2	1%
Within distance no rule	8	5%
Total	**172**	**100%**

2.4.3. ES 2026 Data Collection Delays

The main study was originally scheduled to be out of field by 8 December 2025. Severe adverse weather, interviewer attrition over the December holiday period, and the logistical demands of completing rural enumeration areas resulted in two timeline extensions. The nearly three-month extension beyond the original deadline reflected the extraordinary conditions encountered rather than any shortfall in planning or execution. The final out-of-field date was 28 February 2026.

1. Adverse Weather Conditions

The primary driver of the initial delay was heavy and widespread rainfall that rendered roads impassable and halted fieldwork across multiple provinces. This challenge first emerged in October 2025.

Up to week 9 of data collection, ending 01 November 2025, the team had been on track with daily completion targets. A sharp decline in progress was observed from week 10 onwards as rainfall intensified and became more widespread. Field teams were documented walking through torrential rain, evacuating hail-affected areas, and navigating completely inaccessible routes, yet continued to pursue completions wherever conditions allowed.

The anticipated delay was formally communicated, and the projected completion date was revised to the end of January 2026 to reflect the cumulative impact of sustained weather disruption on fieldwork progress nationwide.

2. Interviewer Attrition Over the December Holiday Period

A further and compounding challenge arose over the December 2025 holiday period, when a few interviewers made the decision not to return to fieldwork in January 2026. This attrition was not anticipated at the scale at which it occurred and added to the already extended timeline created by the rainfall disruptions.

To address this, teams from within the same provinces were redeployed to take over and complete the incomplete enumeration areas left by departing interviewers. This approach ensured continuity of coverage and avoided the need to onboard and train new interviewers at a late stage of the project. The redeployment of existing, trained field teams also protected the consistency and quality of data collection in the affected areas.

Rural enumeration areas, which accounted for a large share of the outstanding work at that stage, presented an additional logistical challenge. These areas required travel and, in some instances, accommodation for field teams, adding time and cost to the completion of outstanding work and contributing to the extension of the fieldwork timeline to 28 February 2026.

That every targeted enumeration area across all nine provinces was ultimately completed stands as a testament to the resilience of the field teams and the robustness of the operational framework put in place to support them. The data delivered represents the full scope of the intended sample design, completed with integrity and under conditions that few in the industry would fully appreciate without having witnessed them firsthand.

2.4.4. ES 2026 Field changes and mitigations

1. Sample Starting Points and Coordinate Quality Checks

The integrity of the BRC TVM Establishment Survey rests on its adherence to a probability-based sample design. This is not a convenience sample. Interviewers are not free to choose who or where they interview. Each interviewer is directed to specific, pre-determined sampling points within assigned enumeration areas, and it is at these points, and only these points, that interviews are to be conducted, unless operationally justified adjustments are made as detailed below. Upholding this principle throughout the data collection period is fundamental to the representativity and credibility of the data.

At the outset of data collection, a uniform 30-metre acceptance threshold was applied across all area types. As fieldwork progressed, it became evident that real-world conditions in certain environments made strict adherence to this threshold operationally unworkable, despite interviewers being physically present at the correct location. Towards the end of October and into early November 2025, ASK AFRICA and the BRC jointly reviewed the checking parameters and agreed to the following area-specific adjustments:

For **urban formal and rural formal** areas, the acceptance threshold was extended from 30 metres to 50 metres. This adjustment was necessitated by the tendency of device GPS technology to misplace an interviewer's recorded coordinate, even when the interviewer was physically standing at the correct dwelling.

For **urban informal and rural informal** areas, the threshold was extended to 150 metres. The highly concentrated and complex nature of informal settlements, combined with the practical difficulty of navigating to exact sampling points within these environments, made the original 30-metre threshold unrealistic without compromising the integrity of the interview location itself.

For **farms**, the approach was fundamentally reconsidered. Rather than simply extending the coordinate acceptance distance, the decision was made to open the full enumeration area, allowing interviewers to complete any three interviews within the boundaries of the EA, rather than being restricted to the three pre-determined sampling points. This decision was a direct consequence of the geographic realities of farm data collection. Sampling points on farms were at times allocated at farm gates or road access points, which could be several kilometres from the actual farmhouse or dwelling. Requiring interviewers to complete interviews at such points, or to record coordinates within a fixed distance of them, was not operationally feasible given the distances involved and the frequent inaccessibility of farm properties.

Opening the enumeration area for farms did not, however, mean that interviewers were free to interview anyone within that area. This point is critical. Every interview completed within a farm EA was required to match the population group that had been pre-allocated to that enumeration area during the sampling stage. This was not a guideline or a preference; it was a hard requirement enforced throughout data collection. Any interview where the population group classification of the respondent did not align with the sampled population group for that EA was rejected and not accepted into the dataset. The relaxation applied to the physical location of the interview within the EA, and to nothing else. The demographic integrity of the sample design was preserved in full, and the population group allocation remained as binding for farm EAs as it was for every other area type in the study.

To further reduce the need for costly and time-consuming return trips to remote farm areas, four substituted enumeration areas were pre-selected and made available to field teams upfront. Farm areas involve long-distance travel, frequent inaccessibility, and significant costs if return trips are required to complete substituted EAs. By pre-selecting four substituted EAs before teams departed for the field, interviewers had an immediately available alternative should a primary farm EA prove entirely inaccessible during a visit, removing the need to return to the office, await a new substitution, and travel back out to a remote location.

These adjustments were carefully considered and jointly agreed upon to balance the practical realities of fieldwork with the non-negotiable requirement that interviews be conducted within the correct enumeration areas and among the correct population groups. In all instances, the principle of probability-based sampling was maintained: interviewers continued to operate within their assigned enumeration area points, and the coordinate adjustments served only to accommodate the limitations of GPS technology and the physical complexity of certain environments, not to permit deviation from the sample design.

2. Substitution Adjustments

A number of practical challenges related to **substitution** and sampling point accessibility emerged during fieldwork, each requiring a considered mitigation to protect the integrity and completeness of the achieved sample.

High-income estates and gated communities presented an increasingly common access barrier throughout the data collection period. Where interviewers were unable to gain entry to these areas, **substitution points located outside of such developments** were selected, ensuring that the substitution process did not result in repeated failed attempts at inaccessible locations.

From a statistical standpoint, completing an enumeration area is always preferable to substituting it. A completed EA delivers the intended sample design at the most granular

level, whereas a substituted EA introduces an additional layer of deviation from the original plan. With this in mind, the number of **substitution points** available within each EA was **increased from 6 to 12**, providing interviewers with a greater number of options to achieve completion within the EA itself and reducing the likelihood of substitution being required. For farm and tribal areas, where access challenges and long travel distances made substitution particularly costly and disruptive, four automatic substitute EAs were pre-assigned, as detailed in the farm adjustments above.

Where original sampling points were found to be vacant plots, business premises, or dwellings occupied by an incorrect population group, the available substitution points within an EA could be depleted rapidly, placing EA completion at risk. To address this, the **right-hand rule** was implemented as the standard replacement protocol following the pilot phase. As detailed in section 2.4.2, this rule directed interviewers to the immediately neighbouring dwelling to the right of the original point, continuing in that direction until a completed interview was secured, with substitution points reserved strictly for outright refusals. This change preserved the available substitution points within each EA and significantly improved the likelihood of achieving full EA completion without exhausting the allocated resources.

3. Weighting

The primary purpose of weighting is to enable the survey results to be generalised from the realised sample to the South African population. Correct weighting helps to reduce potential bias, improve the reliability of survey results, and increase the precision of estimates.

A survey weight indicates the number of people in the population that a particular respondent represents. For example, a weight of 100 means that the respondent represents 100 people in the target population.

Survey weights are typically calculated in several stages to ensure that the survey results are as representative of the target population as possible, and to address different sources of potential bias or imbalance in the sample:

- **Step 1: Adjust for the sampling design.** Design weights are calculated to account for differences in the probability (change) of selection. This is particularly important when some strata are intentionally oversampled (or "boosted") to ensure sufficient sample sizes for analysis.
- **Step 2: Adjust for non-response.** The design weights may be adjusted to compensate for this non-response in a separate step or in combination with the next step.
- **Step 3: Align the sample with the population.** The design weights are further adjusted to correct for differences between the realised sample and the target population that may arise from coverage limitations or fieldwork outcomes. This is commonly done using calibration methods, such as rim weighting, to align the weighted sample with known population characteristics.

The following sections describe the weighting procedure used for the ES sample.

3.1 Design weights

The first step in the weighting process is to calculate the design weight (also known as the base weight). The design weight reflects the sampling design and accounts for the fact that some population members had a higher chance of being selected than others.

Design weights are calculated separately for each stratum defined by the following variables:

- Province (9 provinces)
- Population group (4 population groups)
- Area type (3 area types)
- National Lifestyle Index (NLI - 3 supergroups).

The sample was selected in three stages:

1. Enumeration Areas (EAs) were selected.
2. Households within the selected EAs were selected.
3. One eligible respondent within each selected household was selected.

The design weight for each respondent is based on the overall probability of being selected through these three stages. In other words, it takes into account:

- the probability that the respondent's EA was selected;
- the probability that their household was selected within that EA; and
- the probability that they were selected as the respondent within the household.

3.2 Calibration weights

The design weights were further adjusted to compensate for differences between the realised sample and the South African population. These differences may arise because some groups are more likely to participate in the survey than others, resulting in the over- or under-representation of certain population groups in the sample.

For example, if the achieved sample contains proportionally more women and fewer men than are present in the population, the weights can be adjusted so that the weighted sample reflects the correct population distribution.

This adjustment process is known as calibration. Calibration uses known population information to align the weighted sample with the target population. As a result, the weighted survey estimates are more representative of the population and are generally more reliable and precise.

For the ES survey, the respondents' design weights were calibrated separately within each Area Type (Metro, Non-Metro Urban and Non-Metro Rural) using the 2024 Mid-Year Population Estimates published by Stats SA. The calibration was based on the following variables:

- Province (9 provinces)
- Population group (4 population groups)
- Age group
- Gender

The calibration weights were calculated using the CALMAR macro developed by INSEE, the French National Institute of Statistics and Economic Studies.

After calibration, the weighted TVM ES sample reflects the distribution of the South African population across the variables included in the weighting process and can therefore be regarded as representative of the South African population.

3.3 Weight Efficiency and Precision

The impact of the final (calibrated) weights on the precision of the survey estimates was assessed using a standard measure of Kish's weighting efficiency. This is the same efficiency calculation used by BRC auditors, detailed as follows:-

- Extract the respondent/individual weights
- Normalize weights (divide all weights by the daily mean weight)
- Compute the Standard Deviation (SD) of the normalized weights
- Compute the Variable Inflation Factor (VIF)
- 1 + (standard deviation of normalized weights)2
- Compute the Efficiency (EFF)
- 1/VIF

This measure indicates how much the variation in the weights reduces the statistical precision of the results.

The weighting efficiency for the BRC ES TVM 2026 is 68% for the individual weights for respondents aged 15 or older. This is considered strong for a complex survey design such as the ES. The weighting efficiency is 77% for the household weights, which is notably high for a complex design.

Because this measure of weighting efficiency does not fully account for the survey's sampling design (such as stratification and clustering), additional checks were also carried out. These included overall efficiency and measures of precision (margins of error) that take the full survey design and variation in weights into account.

These evaluations were conducted for key survey variables. The results showed that the level of precision achieved is acceptable for national estimates, as well as for the most important subgroups of the population.

3.4 Individual level and household level weights

Two weights are available for use with the ES dataset: an person-level weight and a household-level weight. The two weights serve different purposes and should not be used interchangeably.

- The individual-level weight (weighted for South Africans aged 15+) should be used for all results and analyses at person level. This weight expresses each respondent's share of the population in terms of people, and is the correct weight for reporting on individual media behaviour, demographics, and other person-level variables. It may also be applied to variables collected at household level; in that case, however, the results should be described in terms of people living in households with these characteristics, rather than as a proportion of households.
- The household-level weight should be used only for variables that describe the household as a whole, and for analyses conducted at household level. In the questionnaire, these household-level variables are indicated with the prefix HH_ (for example, HH6, HH13, HH24).

Using the wrong weight, or misinterpreting the individual weight as representing households rather than people, will not correctly represent either the population of individuals or the population of households, and should be avoided.

4. Questionnaire

This chapter gives an overview of the questionnaire used in the Establishment Survey 2026. It explains how it was developed and what topics it covers.

We use a structured, face-to-face questionnaire. Most questions are closed-ended (fixed answer options). This keeps interviews consistent across interviewers and supports reliable reporting at scale.

The version used in the first fieldwork period (September 2025 to March 2026) was informed by a qualitative study. In that study, 18 families were interviewed in their homes across all nine provinces.

After programming, we ran a face-to-face pilot with 500+ respondents to test the questionnaire in practice.

We translated the final questionnaire into nine languages so that respondents could participate in the language with which they were most comfortable.

During the interview, the questionnaire follows a fixed flow. Respondents only see questions that apply to them (for example, based on devices in the home or viewing behaviour). This reduces interview time and helps avoid inconsistent answers.

- **Personal demographics** (e.g., population group, age, gender, education, position in household, employment status, personal income).
- **Household demographics** (e.g., number of people, household composition, head-of-household status, household income, SEM).
- **Household infrastructure** (e.g., dwelling type, province, location-derived variables, energy supply).
- **Personal media and viewing behaviour** (e.g., last time watched, devices used, broadcasters and streaming services watched, time spent watching, internet usage).
    - Please note that this represents claimed behavior, which may not always align with measured outcomes.
    - With the establishment survey the focus is on gathering more general information about devices that are available for watching, signals and platforms. Questions are often asked at media group level, not title or station level.
- **Media infrastructure** (e.g., devices available for viewing, TV sets, TV signals and internet availability, TV subscriptions).

Together, these sections provide the inputs for the key indicators in this report (for example, device ownership, viewing recency, and time spent viewing).

The full questionnaire is available for downloading via the BRC Website section TVM Establishment Survey.

5. Definition of terms and calculations

This chapter explains the key terms and calculations used in the Establishment Survey. In other words: if you want to know exactly what we mean by a term, or how a number was derived, you'll find it here.

Clear definitions make results easier to interpret and compare across audiences and time periods.

5.1 Definition of terms

To avoid confusion, we use a fixed set of terms throughout this report. This section explains those terms, so everyone reads the results the same way.

The list below covers what we measure (for example, the *TV Universe*), how the sample is organised (for example, *Dwelling Unit* and *Enumeration Area*), and the main ways we group people and households (for example, *Area Type*, *NLI*, and *SEM*).

If a term is used elsewhere in this document, it should be read using the definition in this section.

- **Population:** The resident population of South Africa covered by the Establishment Survey and forming the basis for all population estimates and universe calculations.
- **TVM Universe:** The defined population eligible for inclusion in the TV and Online Video Measurement (TVM) system. Eligibility is determined by the universe definition adopted for the measurement service and specifies which individuals or households can be represented in audience estimates. See paragraph 4.2. for further specification.
- **Dwelling Unit:** A self-contained residential unit occupied by one or more households, intended for permanent or temporary living.
- **Province:** One of South Africa's nine primary administrative regions, used as a geographic classification in sampling and reporting.
- **Enumeration Area (EA):** The smallest geographic unit defined by Statistics South Africa for census and survey operations, serving as the primary sampling unit for fieldwork.
- **Area Type/ GEO type:** A classification of the geographic environment in which a dwelling is located, typically distinguishing Metro, Urban, and Rural areas for sampling and analysis.
- **Neighbourhood Lifestyle Index (NLI):** is an income-based segmentation classification that categorises neighbourhoods (EAs) according to estimated annual household income and various lifestyle characteristics. The index groups are defined in terms of annual household income ranges.It does not mean that all households within an EA have exactly the same income; rather, it provides an overall indication of the EA's NLI. This works well in South Africa because EAs can generally be characterised as wealthier, middle-income, or poorer areas.
- **Socio-Economic Measure (SEM):** A broader socio-economic classification that groups households according to their overall standard of living, using a

combination of household assets, education, housing and access to services. The exact definition is published by the BRC.

- **Education:** The highest level of formal education by an individual, used as a demographic and socio-economic classification variable for analysis and reporting.
- **Household:** A person or group of people who eat and sleep in the same dwelling at least four days per week. People living in separate dwellings on the same property are considered part of the household if they share meals with the main household at least four days per week; otherwise, they are treated as a separate household.
- **Head of Household (HOH):** The head of household is the person who is considered to be the main decision-maker and/or the primary economic provider for the household.
- **Main Income Earner:** The household member who contributes the largest share of the household's total income, regardless of the source of that income.
- **Primary Shopper:** The household member who is wholly, mainly, or partly responsible for selecting and purchasing the household's day-to-day goods and services.
- **Household Composition / Life Stage:** A classification of households based on the number, age, and relationships of household members, used to group households into comparable life-stage segments for analysis.
- **Nuclear Family:** A household consisting of one or two parents (or partners) living with their dependent child or children. Additional relatives or non-relatives living in the household are not included in the nuclear family definition.
- **Generations:** Age-based population groups representing different generations, used for demographic analysis and reporting (e.g. Generation Z, Millennials, Generation X and Baby Boomers).
- **Occupation:** A classification of an individual's principal economic activity or job, based on their current employment status and type of work, including distinctions such as employed, self-employed, formal or informal employment.
- **Individual Weight**: The weight applied to results and analyses at person level. It reflects each respondent's share of the South African population aged 15+ in terms of people, and should be used for all person-level variables. It may also be applied to household-level (HH_) variables, provided the results are described in terms of people living in households with these characteristics, rather than as a proportion of households.
- **Household Weight**: The weight applied to results and analyses at household level. It should be used only for variables that describe the household as a whole; in the questionnaire these variables are indicated with the prefix HH_.

5.2 Calculations and Derived Measures

Some survey results are taken directly from questions. Others are calculated afterwards (for example, totals, categories, or time-based measures). These are called **derived measures**.

In this section we note, for each derived measure, what inputs are used, how values are combined, and any rules or assumptions applied. This helps users understand (and reproduce) the outputs.

This is part of our transparency: it shows how the key indicators are built.

- **Last time watched TV or video (including social media and internet)**: recency of viewing, based on the combination of the respondents' answers to questions:
    - P1 – last time watched TV or any other video content
    - P5 – last time watched SABC
    - P16 – last time watched E-Media / E-Channels
    - P27 – last time watched DStv / Pay TV channels
    - P38 – last time watched Other TV channels
    - P49 – last time watched Online streaming services
    - P70 – last time watched on any of these SOCIAL MEDIA PLATFORMS?

  The answering categories are similar for each of these questions: Yesterday / past 7 days / past 4 weeks / longer than 4 weeks ago / never.

    - P67 – Usage frequency of internet for watching videos (i.e. YouTube)

  The response categories are: Daily / Weekly / Monthly / Less often / Never. For the calculation, these are assumed to correspond respectively to the following 'last viewed' categories: Yesterday / Past 7 days / Past 4 weeks / Longer than 4 weeks ago / Never.

  All of these questions were only asked to respondents who claim to have watched television at least ever.

- **Time spent viewing** (in general and separately asked for SABC, E-Media, DSTV and Other channels): a calculation of total time respondents report are watching in general, based on:
    - Nr of days they watch on weekdays and weekend days
    - How much time they report to spend on typical weekdays, a typical Saturday and typical Sunday
    - These questions were asked only of respondents who reported having watched television. For non-viewers, a total of 0 minutes was used in the calculations.

Please note that for **Time spent viewing for tv or video in general** the question for how many days of the week they watch was not part of the questionnaire. For the calculation the number of weekdays for watching SABC was taken instead.

Time spent was asked in categories (see below) and values were created for the calculation of total time spent.

	Values used for calculating total time spent (in hrs)
Less than 30min	0.25
30min to 1 hour	0.75
Between 1-2 hours	1.5
Between 2-4 hours	3
Between 4-6 hours	5
Between 6-8 hours	7
More than 8 hours	9
Do not watch these	0

- **TV Imperatives and Streaming Imperatives**

  TV Imperatives divides viewers into three categories based on their total time spent watching TV or video (P9). Streaming Imperatives are derived from the total time spent using streaming services (P53).

  Based on total time spent the viewer groups are divided into three parts of equal size: Light, Medium or Heavy. Non viewers are in a separate category.

- **TVM Universe:** Total TV and Online Video Universe consists of all households that are eligible for the measurement. These are homes that have a stable energy supply, with a working TV set or other device that can be used to watch on, that is connected to a TV signal or the internet. It is derived from the following questions with categories included:

  - HH45. What type(s) of energy source do you use at home? All homes that have any of these sources of energy are eligible for measurement:

Mains electricity (receive a monthly bill from municipality/ Eskom/ independent meter agency)
Mains electricity (prepaid)
Mains electricity combined with solar power (hybrid system)
Inverter/back up battery
Inverter combined with solar power
Generator (used daily)
Generator (used only during load shedding or power outages)

  - HH10: How many TV sets do you have in your home? How many of them are in working condition and how many are currently in use? By "working condition," we mean TVs that can be switched on and are able to receive/view video content and used right now. All homes with at least 1 working tv set are eligible for measurement. Also homes with a TV Set that is under repair and due to be repaired within two weeks are included.
  - HH21. Now, for each device [working tv set], please tell us which of the following are connected to or accessed on this device. Where does the signal

come from? All homes that have at least one working TV connected to one of the following TV Signals are eligible for measurement:

Analogue Terrestrial TV (via antenna or 'bunny ears')
DTT via set-top box/decoder with aerial that picks up the DTT signal (e.g. Bua Africa, FreeVision). These could be subsidized by the government (GO Digital) or got by yourself
DTT via Smart TV with aerial that picks up the DTT signal
OpenView decoder with satellite dish (paid for once)
DStv decoder with satellite dish only (monthly subscription)
DStv decoder with satellite dish and connected to the internet (monthly subscription)
DStv Stream - formerly known as DStv NOW (no decoder, access via internet connection, monthly subscription or as part of the DStv Subscription)
Mirrored TV signal from another TV in the home

- Or from HH17: if at least one working TV set is connected to a fixed broadband internet connection is also eligible for measurement:

Fibre
ADSL (via telephone line)
Fixed LTE/5G Router (Wi-Fi) - plugs into the wall
Satellite Internet (e.g., Starlink)

- **HH14** How many of the following working devices are being used in your home, or by anyone in your household? All homes with at least one working device, connected to a broadband or mobile internet connection are eligible for measurement.

Tablet
Laptop
Mobile phone
Computer/Desktop
Monitor screen (Free-standing and not connected to a computer, desktop or laptop)
Projector
Gaming console
Blu-ray/DVD Player

- At least one of these devices needs to be able to connect to the internet via:

Fibre
ADSL (via telephone line)
Fixed LTE/5G Router (Wi-Fi) - plugs into the wall
Mobile/Pocket Wi-Fi Router (Wi-Fi) - has a battery and can be moved around the home
Satellite Internet (e.g., Starlink)
Mobile access dongle – 3G/4G USB dongle (internet anywhere)
Dedicated mobile data SIM – a SIM that you insert into a mobile phone such as a second SIM or eSIM, TABLET OR LAPTOP solely for internet access (internet anywhere)
Mobile hotspot, thus using another device's mobile data as Wi-Fi
Mobile data on our phones (3G/4G/5G, GPRS, Edge, LTE)

- **Average income calculations:** Average income calculations (PP_Income and HH_Income): a continuous, monetary estimate of income used for calculations and cross-tabulations, based on the income bracket selected by the respondent in:

  PD6 – total monthly personal income bracket (the respondent's own income)

  HHD2 – total monthly household income bracket (the combined income of all household members)

  PD6 and HHD2 use identical income brackets. For calculation purposes, each selected bracket is recoded to a fixed value representing the mid-point of that bracket; the open-ended top bracket (R60 000+) is recoded to R66 000. The recode table applied is shown on the next page.

  Respondents who answered 'Don't know' or 'Refused' are assigned a value of 0 and are treated as not having a valid income value; these cases are *included* in average income calculations.

Code	Income bracket (PD6 / HHD2)	Value used (R)
A	R0	0
B	R1 - R999	500
C	R1 000 - R1 999	1500
D	R2 000 - R2 999	2500
E	R3 000 - R3 999	3500
F	R4 000 - R4 999	4500
G	R5 000 - R5 999	5500
H	R6 000 - R7 999	7000
I	R8 000 - R9 999	9000
J	R10 000 - R11 999	11000
K	R12 000 - R13 999	13000
L	R14 000 - R15 999	15000
M	R16 000 - R19 999	18000
N	R20 000 - R24 999	22500
O	R25 000 - R29 999	27500
P	R30 000 - R39 999	35000
Q	R40 000 - R49 999	45000
R	R50 000 - R59 999	55000
S	R60 000+	66000
T	Don't know	0
U	Refused	0

6. Confidence levels and reporting rules

6.1 Introduction

The Establishment Survey 2026 is based on a sample of **15,378 respondents**. Like any survey, the results include a degree of uncertainty, especially when you look at smaller subgroups.

This chapter explains how to read results responsibly: what confidence levels mean, what margin of error you can expect, and which reporting rules we follow to keep outputs reliable and comparable.

6.2 Understanding Confidence Levels

6.2.1 What Are Confidence Levels?

A confidence level tells you how sure you can be that a survey result is close to the true value in the population. We typically use a **95% confidence level**. That means: if we repeated the same survey many times, the true value would fall within the calculated range in about 95 out of 100 cases.

6.2.2 Margin of Error

The **margin of error (MoE)** is the 'plus/minus' around a survey estimate. It depends mainly on:

- **Sample size**: bigger samples usually mean a smaller margin of error.
- **Variability**: results closer to a 50/50 split tend to have a larger margin of error.
- **Confidence level**: at 95% confidence we use the standard factor **1.96** (i.e., ±1.96 standard errors).

For a sample size of **15,000 respondents**, the table below shows the **margin of error** and **confidence intervals** for different subgroup sizes and response rates (50%, 25%, and 10%) at a 95% confidence level.

Subgroup Size (n)	Effective sample	Confidence Interval for 50% (±)		Confidence Interval for 25% (±)		Confidence Interval for 10% (±)	
		Lower bound	Upper bound	Lower bound	Upper bound	Lower bound	Upper bound
15.000	10.200	48,8%	51,2%	24,0%	26,0%	9,3%	10,7%
10.000	6.800	48,6%	51,4%	23,8%	26,2%	9,1%	10,9%
5.000	3.400	48,0%	52,0%	23,2%	26,8%	8,8%	11,2%
1.000	680	45,4%	54,6%	21,1%	28,9%	7,3%	12,7%
500	340	43,6%	56,4%	19,4%	30,6%	6,1%	13,9%
100	68	35,6%	64,4%	12,5%	37,5%	1,4%	18,6%

6.2.3 Practical Implications

- Larger subgroups (e.g., total population, broad age groups) yield narrower CIs and better precision.
- Smaller subgroups (e.g., niche demographics and low-incidence behaviours) have wider CIs, and their precision may be unacceptable (>5%), requiring cautious interpretation.
- We apply reporting thresholds (see Section **5.3**) so we don't publish results that are too unstable.

6.3 Reporting Rules for ES Dataset

6.3.1 Minimum Sample Size for Reporting

To report results responsibly, we need enough interviews in each subgroup. The table below shows **95% confidence intervals** for different sample sizes (n=100, n=500, and n=1,000) and different result levels (p).

The table shows, for each result level (p) and sample size:

- **Members reached**: how many respondents the percentage represents (e.g., 1% of 100 = 1 person).
- **Lower/upper bounds**: the range around the estimate at 95% confidence, taking into account an average weighting efficiency of 68%.

Why this matters: smaller subgroups have wider intervals, so differences can be harder to interpret.

- With larger samples (e.g., n=1,000), confidence intervals are tighter.
- With small samples (e.g., n=100), confidence intervals are wide.
- Use these rules to decide whether a figure is stable enough to report.

These rules help keep reported insights both credible and usable.

If a subgroup does not meet the minimum requirements, we handle it in one of these ways:

- Suppressed (not reported).
- Aggregated with a broader category (e.g., combining age groups).
- Flagged as having low statistical reliability.

	n=100			n=500			n=1000		
p (%)	**Members Reached**	**Lower Bound (%)**	**Upper Bound (%)**	**Members Reached**	**Lower Bound (%)**	**Upper Bound (%)**	**Members Reached**	**Lower Bound (%)**	**Upper Bound (%)**
1,0%	1	0,0%	0,3%	5	0,3%	1,7%	10	0,5%	1,5%
2,0%	2	0,0%	1,0%	10	1,0%	3,0%	20	1,3%	2,7%
3,0%	3	0,2%	1,8%	15	1,8%	4,2%	30	2,1%	3,9%
4,0%	4	0,8%	2,6%	20	2,6%	5,4%	40	3,0%	5,0%
5,0%	5	1,5%	3,4%	25	3,4%	6,6%	50	3,9%	6,1%
6,0%	6	2,2%	4,3%	30	4,3%	7,7%	60	4,8%	7,2%
7,0%	7	2,9%	5,2%	35	5,2%	8,8%	70	5,7%	8,3%
8,0%	8	3,6%	6,0%	40	6,0%	10,0%	80	6,6%	9,4%
9,0%	9	4,4%	6,9%	45	6,9%	11,1%	90	7,5%	10,5%
10,0%	10	5,2%	7,8%	50	7,8%	12,2%	100	8,5%	11,5%
11,0%	11	5,9%	8,7%	55	8,7%	13,3%	110	9,4%	12,6%
12,0%	12	6,7%	9,7%	60	9,7%	14,3%	120	10,3%	13,7%
13,0%	13	7,6%	10,6%	65	10,6%	15,4%	130	11,3%	14,7%
14,0%	14	8,4%	11,5%	70	11,5%	16,5%	140	12,2%	15,8%
15,0%	15	9,2%	12,4%	75	12,4%	17,6%	150	13,2%	16,8%
16,0%	16	10,1%	13,4%	80	13,4%	18,6%	160	14,1%	17,9%
17,0%	17	10,9%	14,3%	85	14,3%	19,7%	170	15,1%	18,9%
18,0%	18	11,8%	15,2%	90	15,2%	20,8%	180	16,0%	20,0%
19,0%	19	12,7%	16,2%	95	16,2%	21,8%	190	17,0%	21,0%
20,0%	20	13,5%	17,1%	100	17,1%	22,9%	200	18,0%	22,0%

*For a 10% result with n=100, the lower bound of the confidence interval is truncated at 0%, as proportions cannot be negative.

6.3.2 Confidence Levels in Practice: Example

Scenario: Reporting Last time viewed for a small sample

Suppose the Establishment Survey estimates that 12% of adults aged 18–34 watched TV or video yesterday. The subgroup size for this demographic is 2,000 respondents.

Calculate the Margin of Error:

- For n = 2,000, effective sample 1.360 and p = 12%, the MoE is approximately ±2.1%.
- The 95% Confidence Interval is 9.9% to 14.1%.

6.4 Transparency and Ethical Reporting

We aim to be transparent about how results are produced and what the limits are. This helps users interpret findings responsibly.

6.4.1 Disclosure of Methodology

Any report based on the Establishment Survey should include at least:

- A short methodology summary (design, sampling, and weighting).
- Sample sizes for all key figures and any reported subgroups.
- For custom analyses (for example, deep dives into specific groups):
    - Minimum sample sizes still apply.
    - Add clear caveats when subgroups are small or results are volatile.

6.4.2 Addressing Data Limitations

Like any survey, there are limitations. For example:

- **Non-response bias**: some groups may be harder to reach and can be underrepresented.
- **Measurement error**: self-reported viewing may differ from actual behaviour.
- **Fast-changing media landscape**: rapid shifts may not show immediately because we report annually on rolling samples.

We highlight these points in reporting so results are not over-interpreted.

6.5 Closing remarks

These confidence and reporting rules help protect the quality of the currency. They make sure the figures you see are stable enough to act on.

Key takeaways:

- Confidence intervals show the likely range around an estimate.
- Minimum sample and SR rules reduce the risk of unstable results.
- Always report key methodology details and sample sizes.
- Be explicit about limitations when interpreting or comparing groups.