







National Television Market







ADS15+ Universe: 38,694,000

			 SABC 3			
Reach (000's)	22.8 mil	21.2 mil	16.4 mil	5.6 mil	3.3 mil	23.3 mil
Reach %	59%	54.8%	42.3%	14.4%	8.6%	60.3%

The SABC's channels still reach substantial proportions of viewers across a variety of platforms, both pay and Free to air

DSTV Platform






ADS15+ (DS) Universe: 18,569,000

			 SABC 3			
Reach (000's)	11.9 mil	10.2 mil	7.6 mil	4.6 mil	11.6 mil	7.7 mil
Reach %	64.2%	55%	40.8%	24.8%	62.4%	41.5%



Openview Platform







ADS15+ (OVHD) Universe: 6,171,000

					
Reach (000's)	3.4 mil	4.0 mil	3.3 mil	2.3 mil	4.4 mil
Reach %	54.6%	62.8%	52.2%	37.2%	70.2%

SABC2's reach into the Openview platform rivals that of etv, while the two largest FTA channels each reach in excess of two thirds of viewers in DTT homes

DTT Platform

ADS15+ (DTT) Universe: 2,121,000

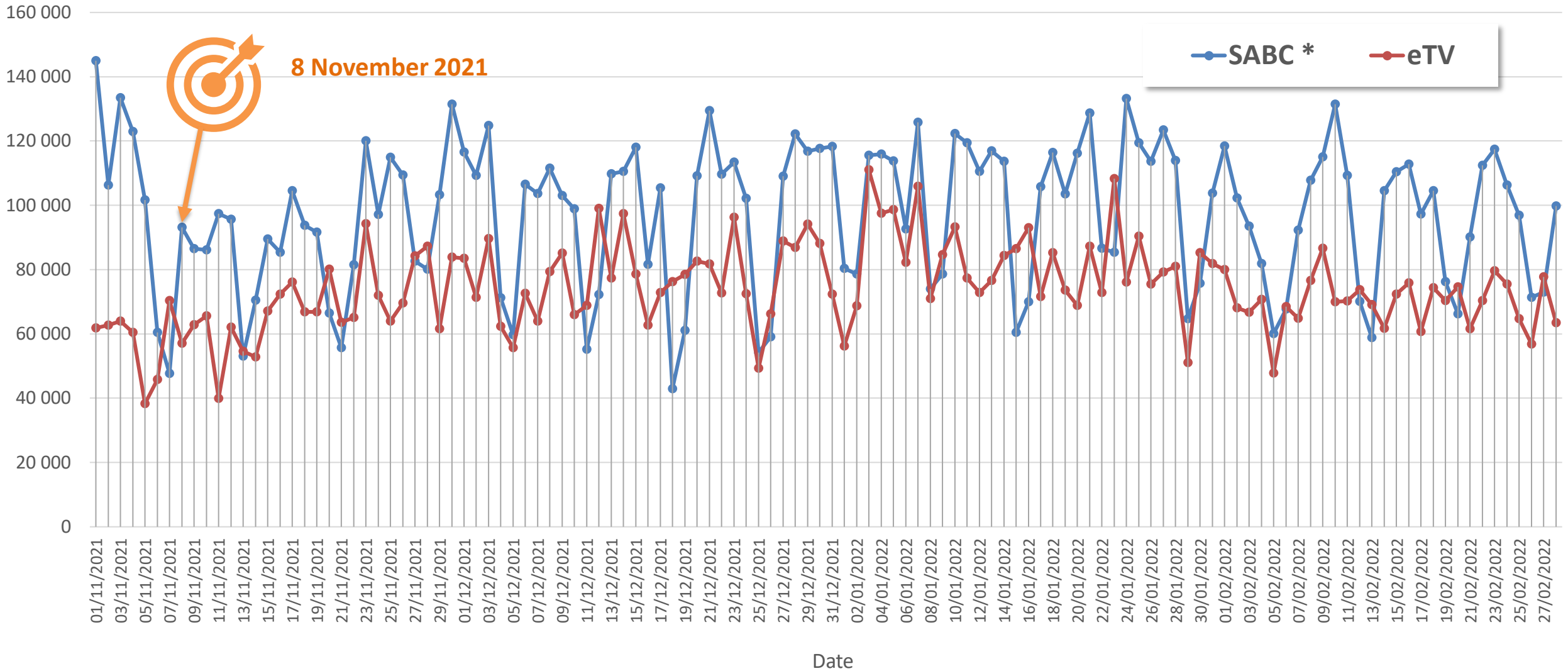
						
Reach (000's)	1.4 mil	1.3 mil	1.1 mil	653K	776K	1.4 mil
Reach %	66.7%	62.4%	53.9%	31.3%	37.2%	66.8%



The SABC's Universal Access Mandate

- The impact on SABC's universal access mandate is monitored using average daily reach
- The ASO/BDM project was accelerated after the last SABC transmitter was switched off in Mangaung, Free State
- So while the impacts in the Northern Cape and North West are difficult to isolate, The impact of final ASO is very clear in Mpumalanga and Limpopo
- While it is hoped that the recovery there will mirror the reach recovery patterns in the Free State, these provinces had low STB registrations compared to number of qualifying households around transmitter sites, thus making the threshold of 70% installations to registrations much easier to attain.

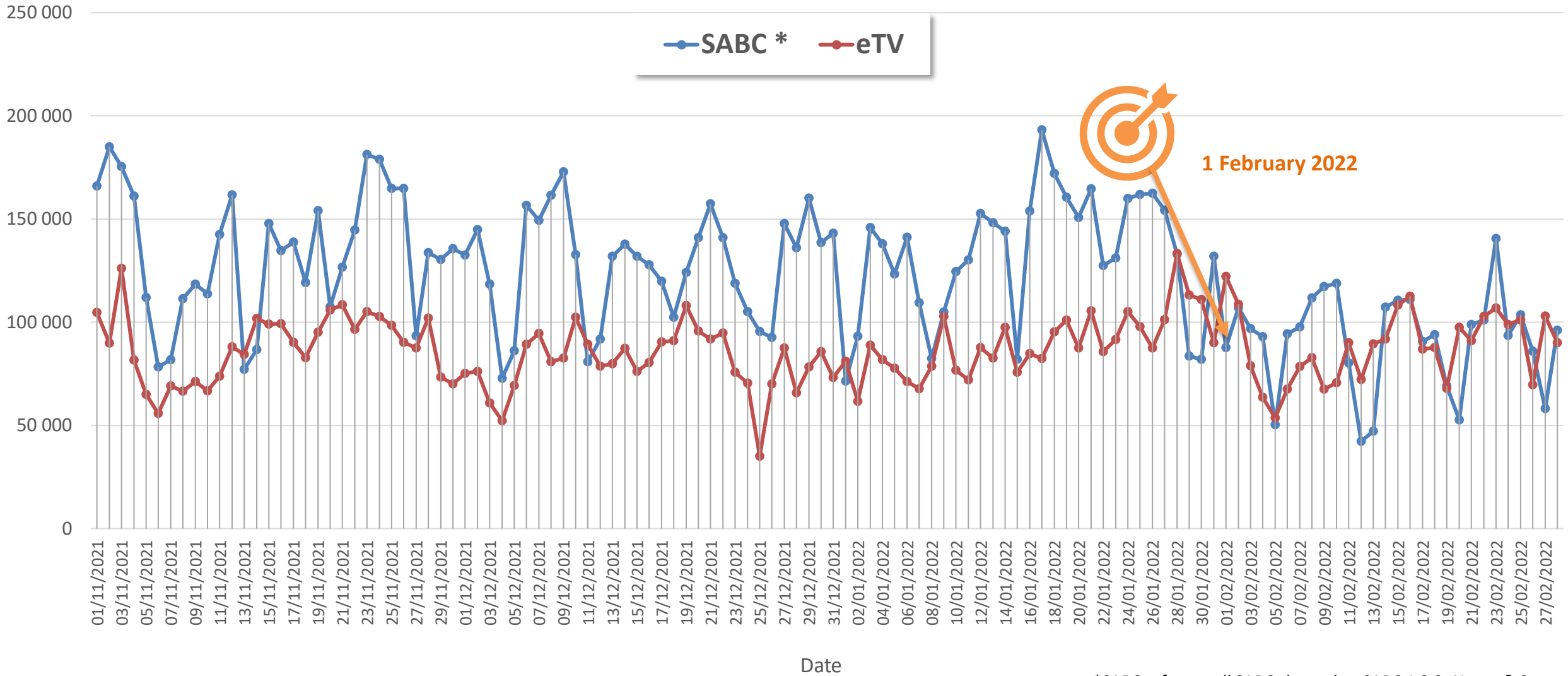
Free State Individuals 4+ Ave daily Reach per Broadcaster



Source: BRC TAM 1 Nov 2021 – 28 Feb 2022

*SABC refers to all SABC channels – SABC 1,2,3, News, & Sport

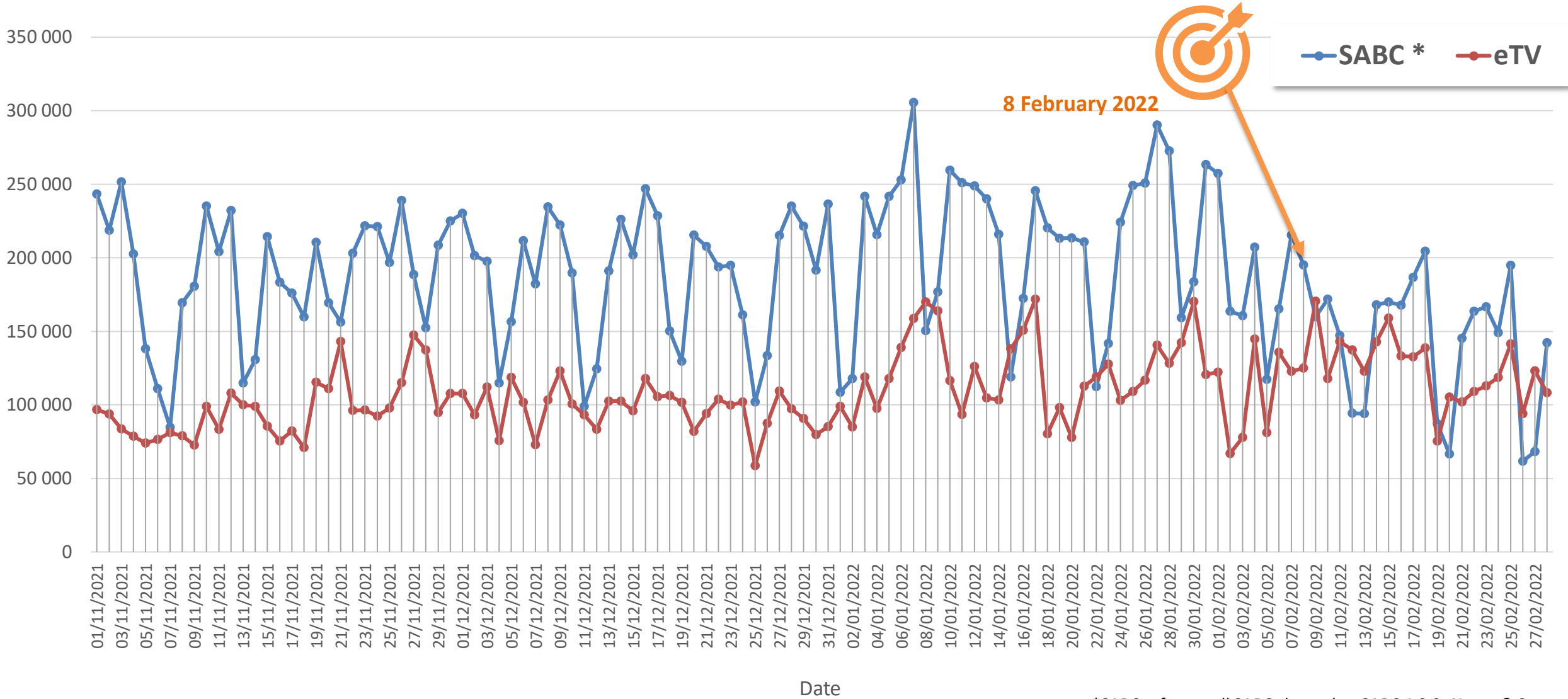
Mpumalanga Individuals 4+ Ave daily Reach per Broadcaster



Source: BRC TAM 1 Nov 2021 – 28 Feb 2022

*SABC refers to all SABC channels – SABC 1,2,3, News, & Sport

Limpopo Individuals 4+ Ave daily Reach per Broadcaster



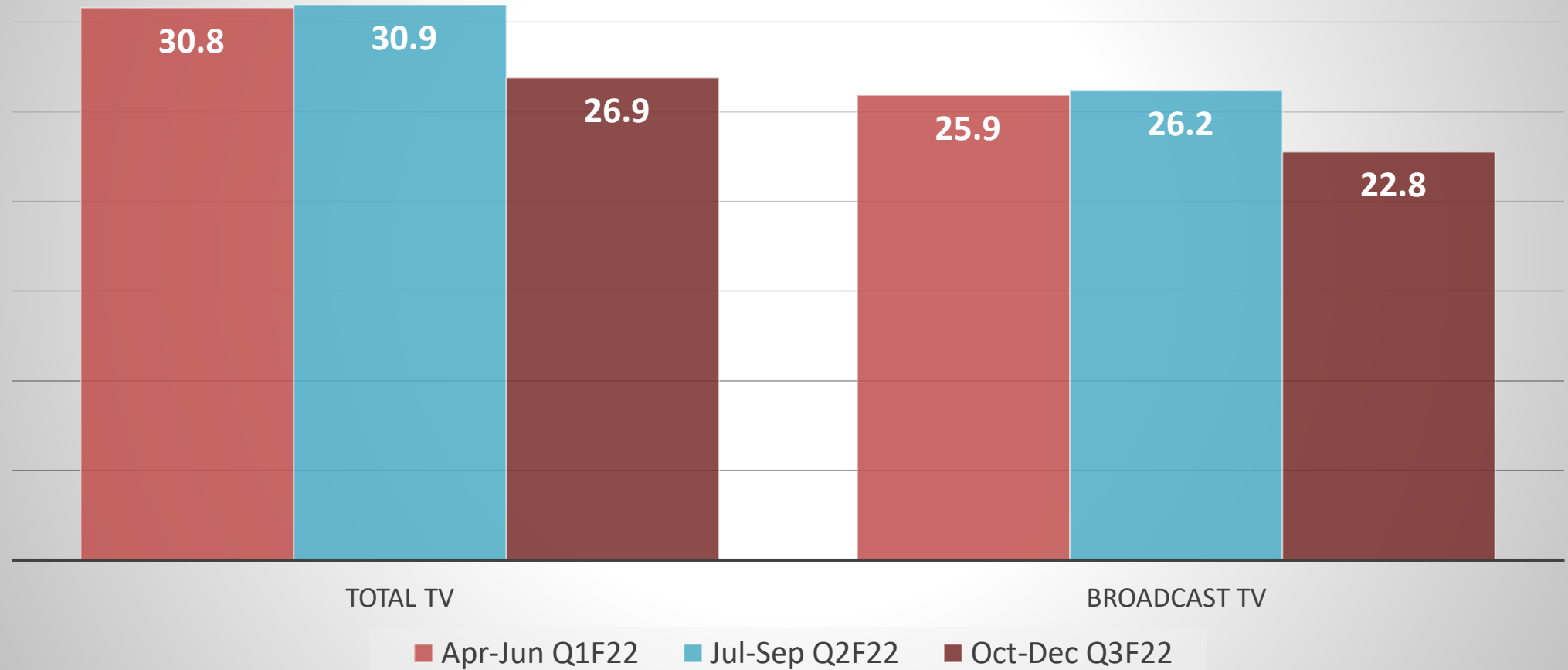
Source: BRC TAM 1 Nov 2021 – 28 Feb 2022

*SABC refers to all SABC channels – SABC 1,2,3, News, & Sport

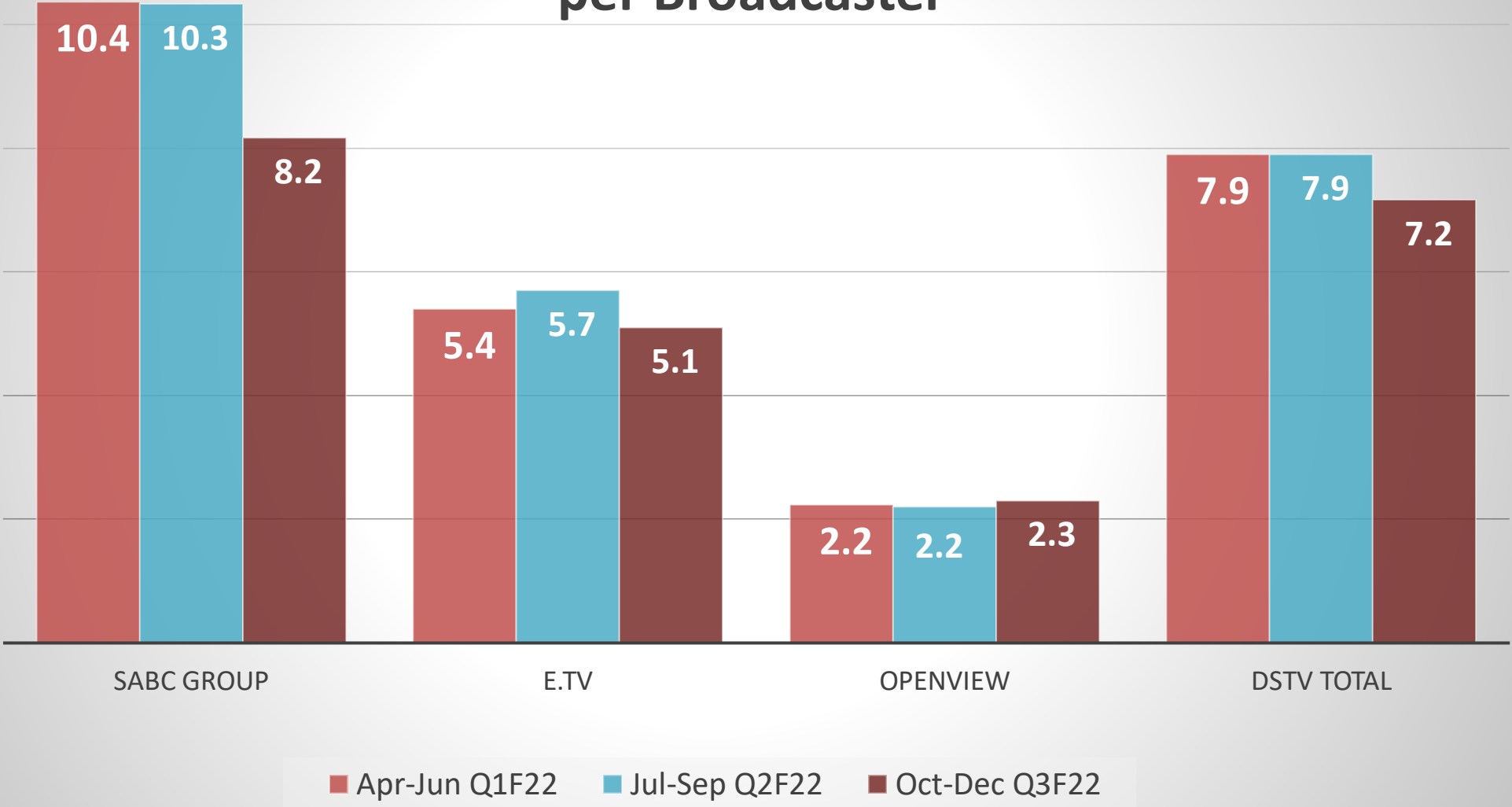
The SABC's Revenue Mandate

- The impact on SABC's commercial mandate is monitored using quarterly prime time ratings where the SABC's mass audiences are accessed.
- The impact of extended reach and access to multichannel platforms is always going to include the fragmentation of audiences to the larger brands – and the SABC is picking this up in the quarter Oct-Dec 2021.
- Isolating this shift is harder to do across smaller time bands, but does become visible in the view that is trended quarterly
- A loss of 4 TV ratings quarter on quarter for the medium amounts to the equivalent of 1.5m pairs of eyeballs.

Quarterly Trends in Prime Time Audience Ratings



Quarterly Trends in Prime Time Audience Ratings per Broadcaster



Source: TAMS Prime Time (18h00-22h00) Mon-Sun AR; periods as shown