TAMS Technical Committee Report

23 May 2025

Agenda

KPI update

TAMS scorecard

Executive summary

ASO by province

Measured channles

KPI update

TAMS panel characteristic

<table>
<tr><td>Previous
ES Jul 18 – Jun 19
Implemented 28/10/19</td><td>Current
PAMS 2019
Implemented 05/10/20</td></tr>
<tr><td>Total TV HHs   14.6m</td><td>Total TV HHs   15.9m</td></tr>
<tr><td>Total TV population   46.6m</td><td>Total TV population   50m</td></tr>
</table>

Definitions

Installed households
- The number of households on the panel with an installed meter within a reporting period.

In-tab panel / Reporting panel
- The number of panel homes that contribute to the daily ratings. Where failure to meet quality control standards or communications related problems occur, such installed homes are eliminated from the reporting panel (also known as In-tab homes).
- Events such as load shedding / power outages will have a negative impact on the number of households that are able to report viewing.

Metered TV Sets
- The number of **working TV sets** on the panel, to which a meter is attached, expressed as a percentage.

Definitions

Weighting efficiency
- **The household weighting efficiency %** refers to the degree to which the panel represents the household universe set out in the ES. (Target % = 65%)
- **The individual weighting efficiency %** refers to the degree to which the panel represents the individual universe set out in the ES. (Target % = 70%)
- A panel is considered balanced if the weighting efficiency is equal to or above the target.

Panel balance
- The extent to which the sample proportions of certain demographic variables match the universe proportions of those demographic variables.
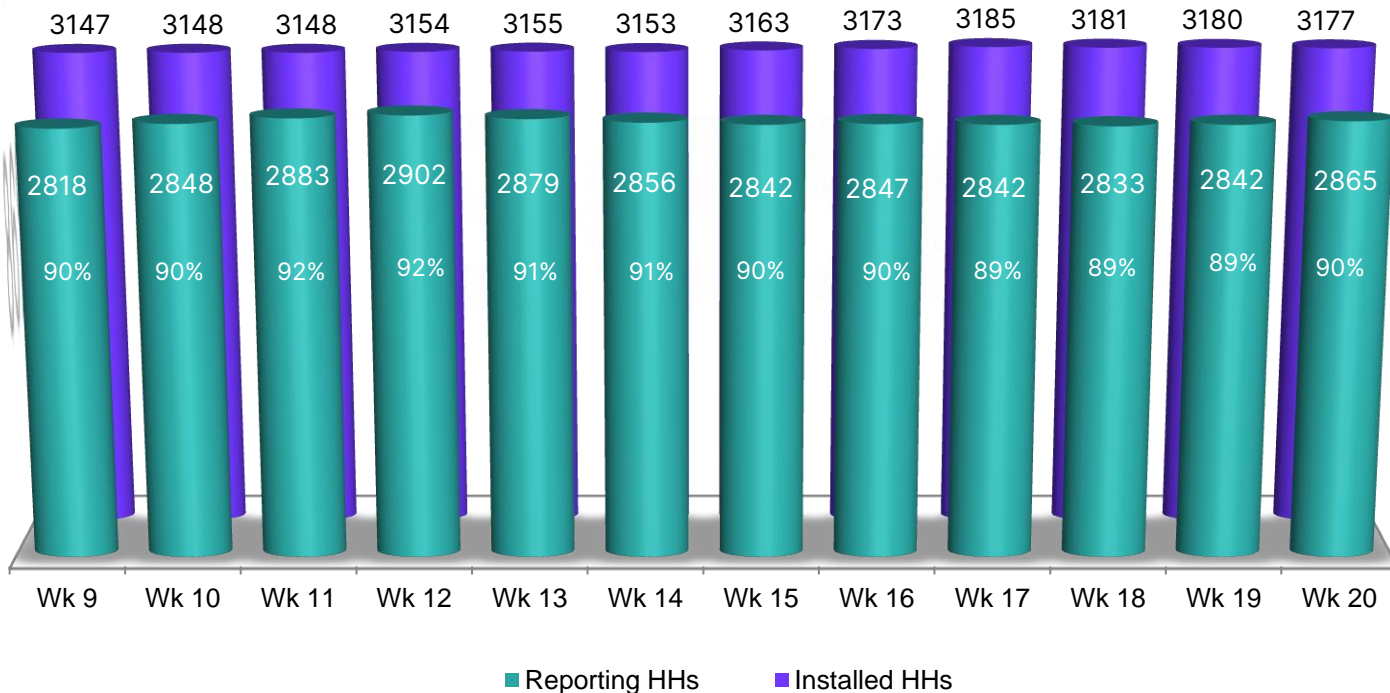
Panel tenure
- The number of consecutive months/years that a household exists on the TAMS Panel, from the date of installation.

Panel composition
- The number of households on the panel that have access to the available Pay or non-Pay TV platforms.
- Note: The samples for OpenView and DTT are a result of natural uptake on the TAMS panel and have not been controlled nor weighted to represent established universe estimates.

TAMS sample overview (in-tabs)
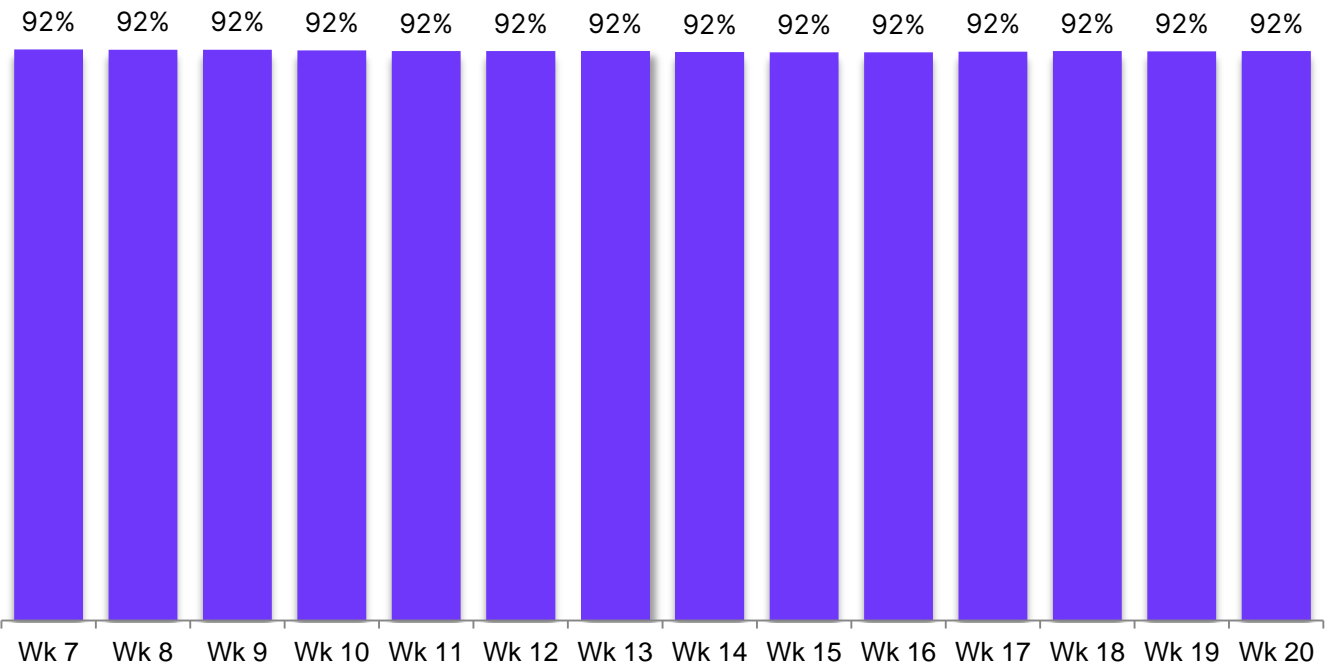
Installed and reporting households 2025

	Wk 9	Wk 10	Wk 11	Wk 12	Wk 13	Wk 14	Wk 15	Wk 16	Wk 17	Wk 18	Wk 19	Wk 20
Installed HHs	3147	3148	3148	3154	3155	3153	3163	3173	3185	3181	3180	3177
Reporting HHs	2818	2848	2883	2902	2879	2856	2842	2847	2842	2833	2842	2865
%	90%	90%	92%	92%	91%	91%	90%	90%	89%	89%	89%	90%

■ Reporting HHs   ■ Installed HHs

Target **Installed** HHs
3 134

Actual: wk 20 @ 100%

Target **Reporting** HHs
2 821
(90% of installed)

Actual: wk 20 @ 90%

% of total TV sets that are metered

2025

	Wk 7	Wk 8	Wk 9	Wk 10	Wk 11	Wk 12	Wk 13	Wk 14	Wk 15	Wk 16	Wk 17	Wk 18	Wk 19	Wk 20
	92%	92%	92%	92%	92%	92%	92%	92%	92%	92%	92%	92%	92%	92%

Target
Metered TV sets
90%

Actual: wk 20 @ 92%

Weighting efficiencies

Efficiencies indicators 2025

	Week 15	Week 16	Week 17	Week 18	Week 19	Week 20
Individuals *weighting efficiencies*	72%	72%	72%	72%	72%	72%
Individuals *maximum weight*	36 618	33 878	35 006	35 382	33 525	34 147
Households *weighting efficiencies*	84%	84%	84%	84%	85%	84%

Target
Individual weights
70%

Target
Household weights
65%

Panel tenure

Week 20 2025

Category	Percentage
10+ years	37,08%
8-10 years	18,76%
6-8 years	14,54%
4-6 years	8,47%
1-3 years	10,76%
7-12 months	3,12%
0-6 months	7,27%
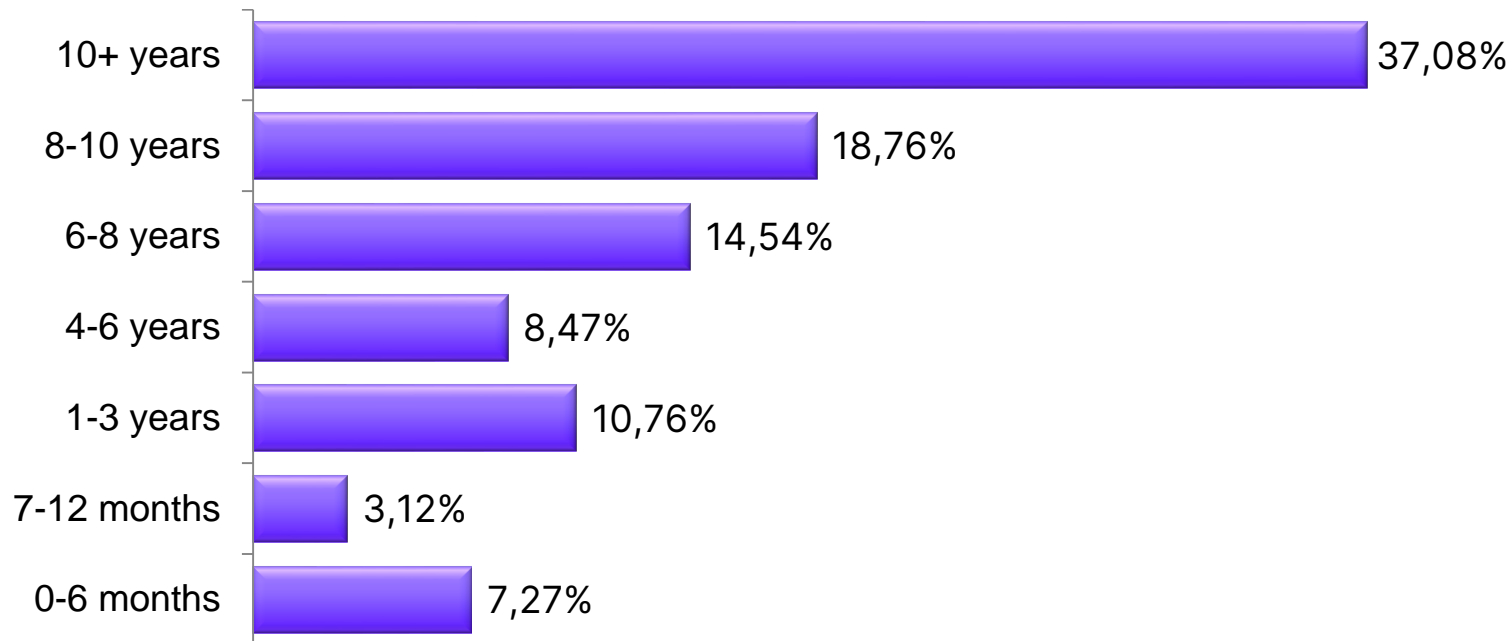
Recruitment and De-installations

TAMS Installations and De-installations By Month
(*No addresses received from Jan - June 2024)
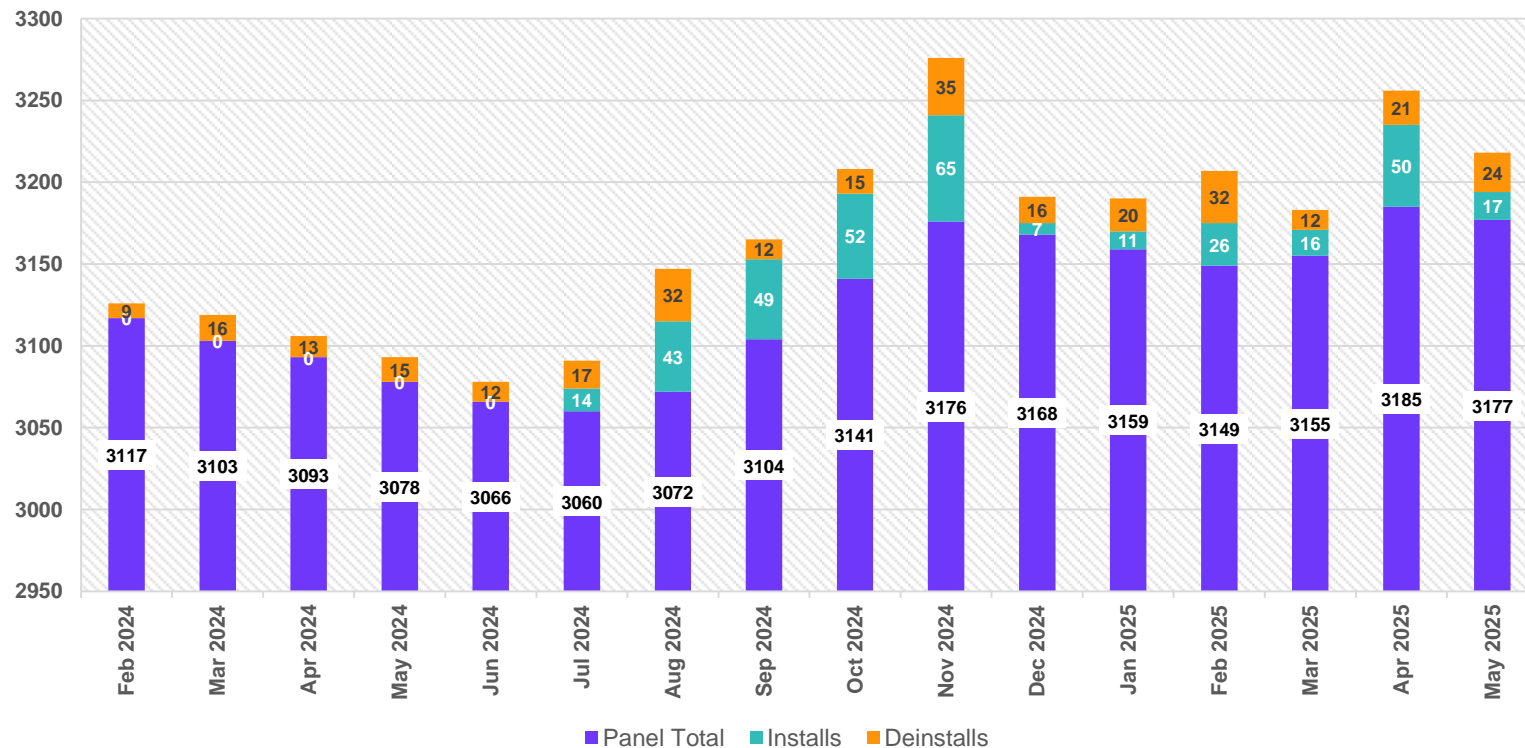
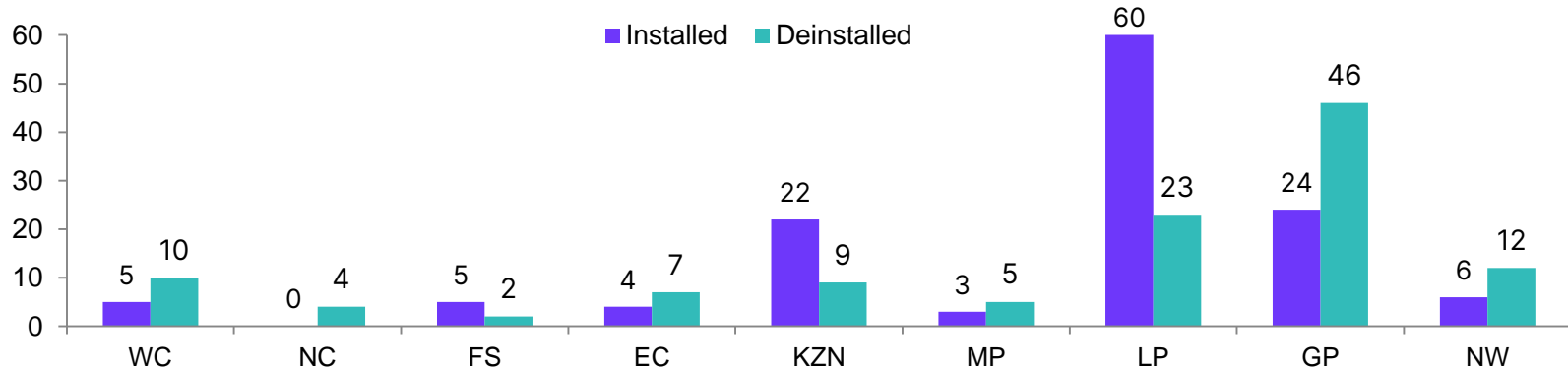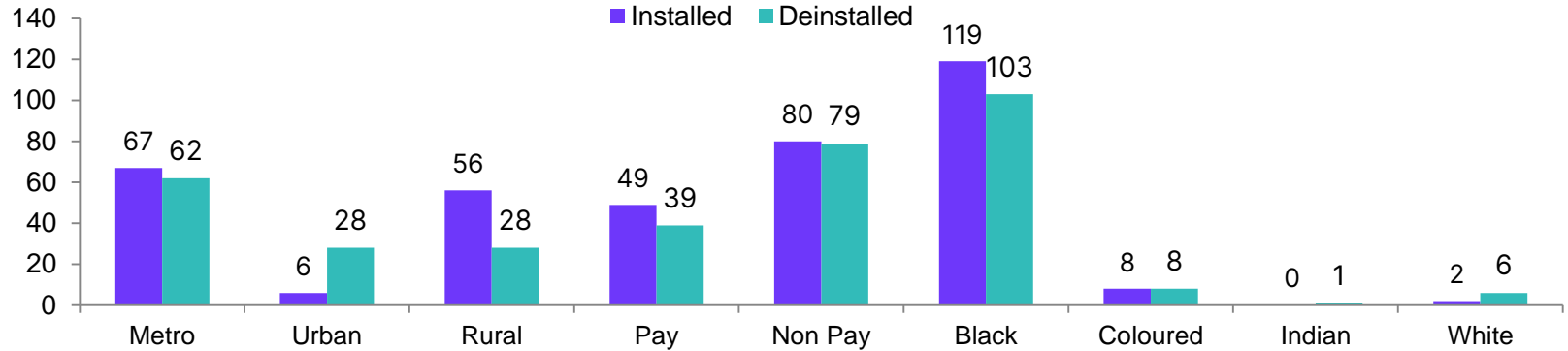# KPI Dashboard: Panel Install
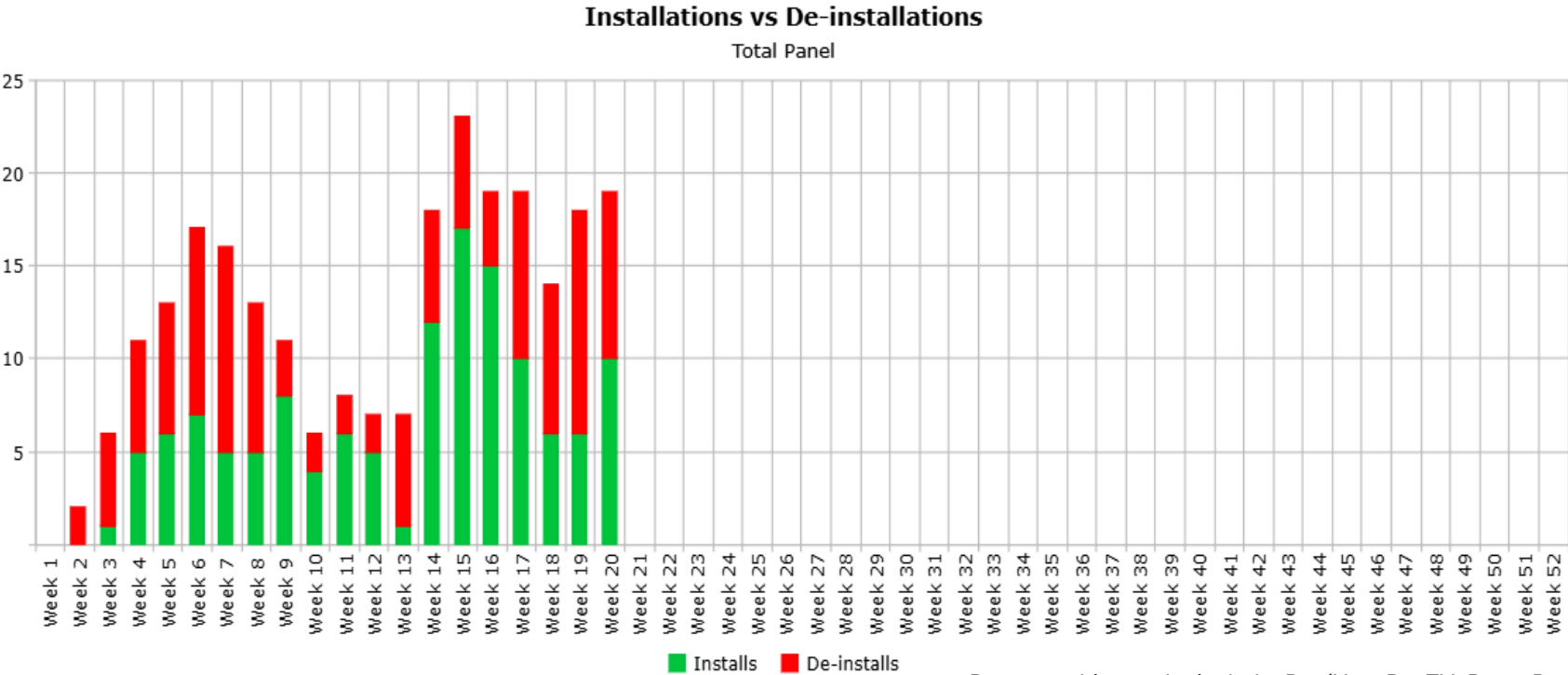
Demographic graphs include: Pay/Non-PayTV, Race, Province

Installs and Deinstalls: Weeks 1-20, 2025

Pay / Non-Pay Panel

	Week 48		Week 12		Week 16		Week 20	
Pay TV	1 773	55,9%	1 777	56,3%	1 777	56,0%	1 775	55,9%
Non-Pay TV	1 401	44,1%	1 377	43,7%	1 396	44,0%	1 402	44,1%
Total	3 174	100%	3 154	100%	3 173	100%	3 177	100%

Panel HH balance (PAMS 2019)

Week 20 2025

	PAMS 2019 %	TAMS Panel %	
WC	11.4	10.5	⭐ (Below)
NC	1.8	1.6	⭐ (Below)
FS	5.6	5.7	
EC	9.1	9.1	
KZN	16.7	17.5	⭐ (Above)
MP	7.7	7.2	
LP	9.2	10.6	⭐ (Above)
GP	31.2	30.3	
NW	7.3	7.5	

	PAMS 2019 %	TAMS Panel %	
Metro	47.1	47.8	
Urban	25.8	27.1	⭐ (Above)
Rural	27.1	25.1	
Black	78.9	82	
Coloured	7.4	8.8	⭐ (Above)
Indian	2.0	1.9	
White	11.6	7.4	⭐ (Below)
Pay*	47.0	55.9	⭐ (Above)
Non-Pay	53.0	44.1	⭐ (Below)

⭐ Above

⭐ Below

* DStv audited subscribers 31 March 2020

Panel composition trend

Week 20

	2022	2023	2024	2025
Pay TV	1 848	1 840	1 829	1 775
Non-Pay TV	1 194	1 239	1 256	1 402
OpenView	346	404	464	539
DTT	164	248	250	268

DTT Overview

DTT week 20 = 268

DTT week 16 = 258

Difference = 10 household

We gained 10 households and lost 0 household.
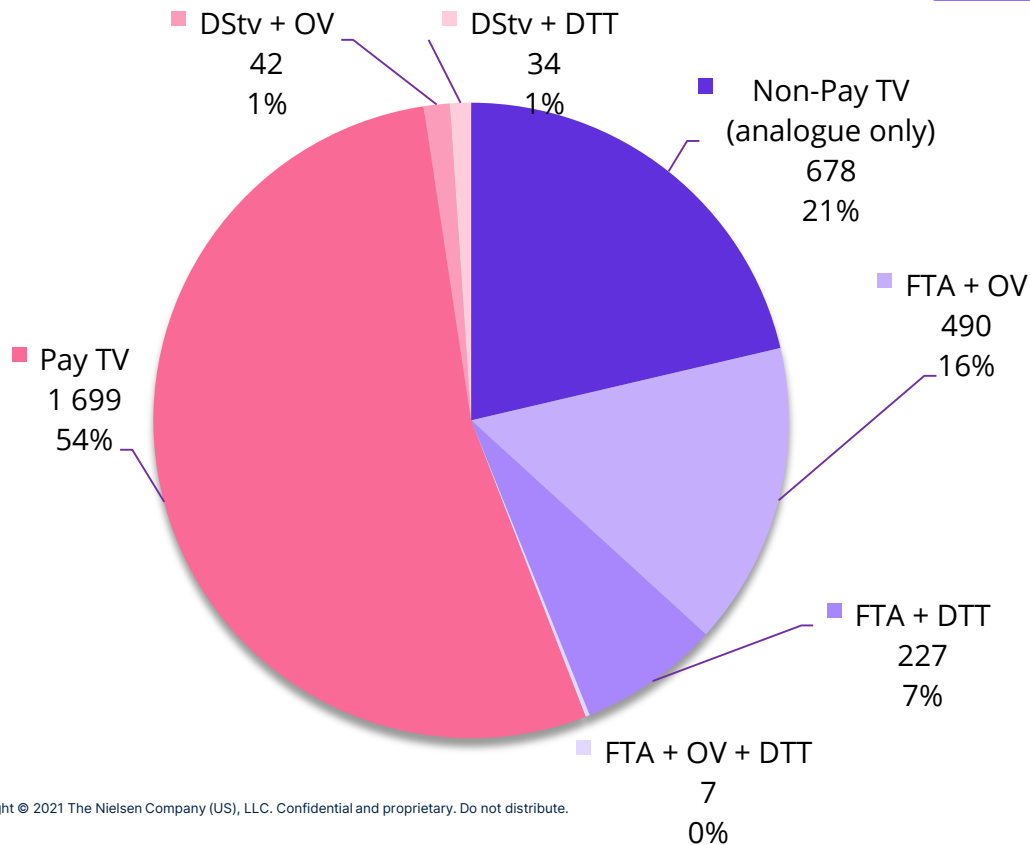
DTT target market and viewing overview

- The **DTT Households** target market includes households with a **DTT Set Top Box** in the home. It is based on the **STB durable** in the home.

- Therefore, if this target market is selected the ratings will reflect the viewing of **household/individuals who have a DTT STB in the home**.

- With this target market, the ratings will not reflect viewing of those who do not have a DTT STB in the home but could be watching DTT channels through other means, for example, a DStv decoder, OpenView STB or an integrated tuner on their smart TV.

Panel composition

Week 20 2025

Pie chart values:
- DStv + OV — 42 — 1%
- DStv + DTT — 34 — 1%
- Non-Pay TV (analogue only) — 678 — 21%
- FTA + OV — 490 — 16%
- Pay TV — 1 699 — 54%
- FTA + DTT — 227 — 7%
- FTA + OV + DTT — 7 — 0%

Total pay TV HHs
1 775 (56%)

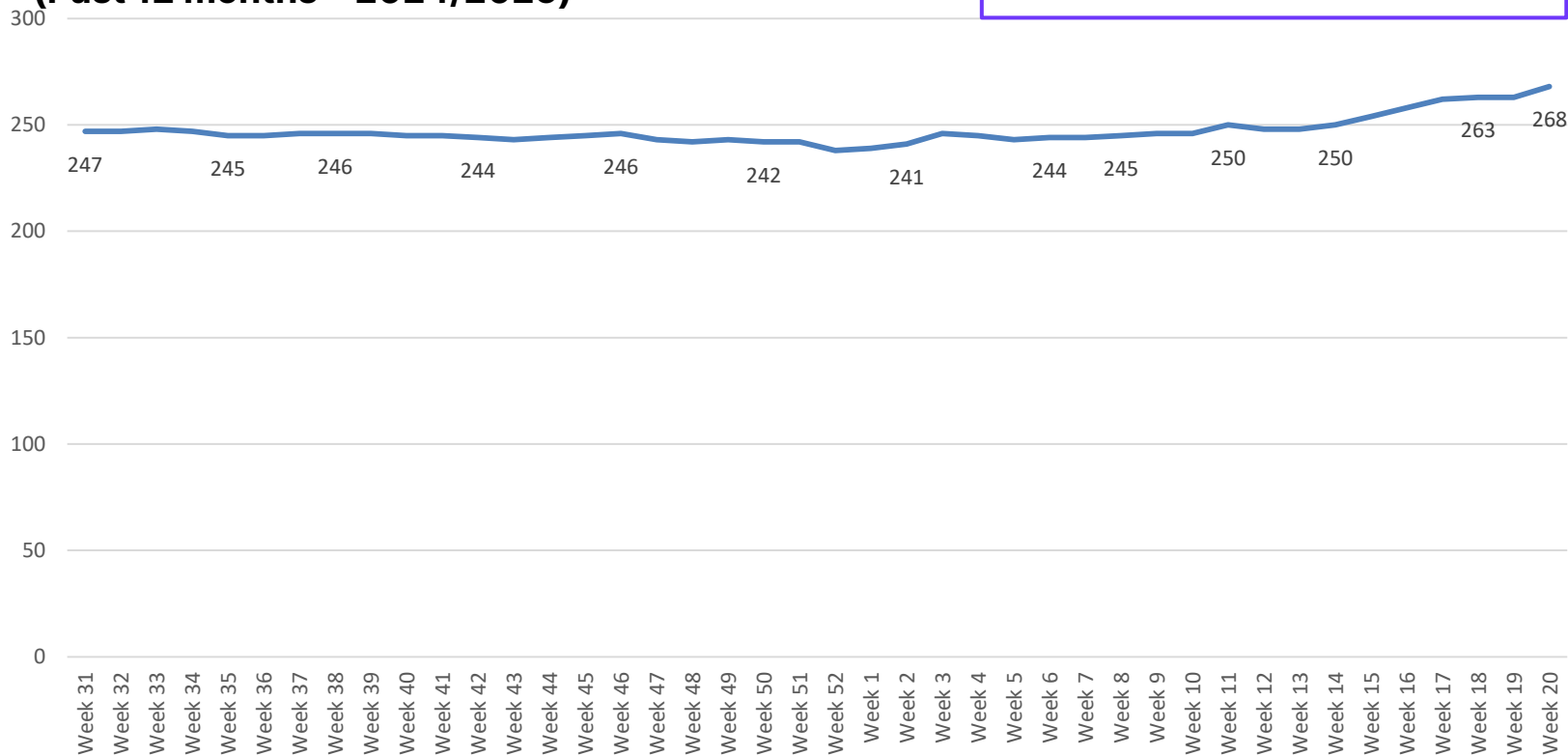Total non-pay TV HHS
1 402 (44%)

Total OpenView
539 (17%)

Total DTT
268 (8%)

DTT HHs on Panel Trend
(Past 12 months – 2024/2025)

Base: number of DTT households installed on the panel

Note: A DTT household target market comprises households that have a **Digital STB** in the home

DTT reporting households on TAMS

Monthly reporting households on TAMS

Base: *number of **DTT reporting** households per month **weighted** to the household universe*

Note: *This reflects the number of **reporting** households on the panel and not the number of DTT viewers.*

Note: *A DTT household target market comprises households that have a **Digital STB** in the home*
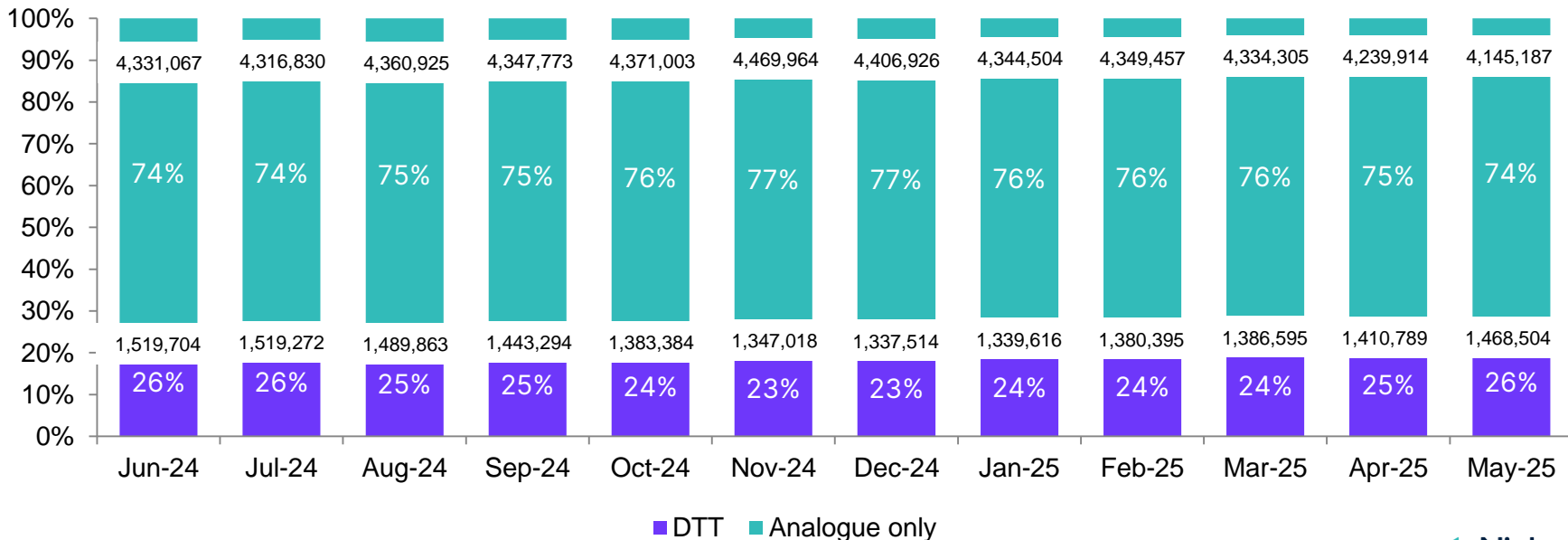

	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25
DTT Households	1 517 339	1 529 851	1 489 863	1 443 294	1 383 384	1 347 018	1 337 514	1 339 616	1 380 395	1 386 595	1 410 789	1 468 504
% change per month	0%	1%	-3%	-3%	-4%	-3%	-1%	0%	3%	0%	2%	4%
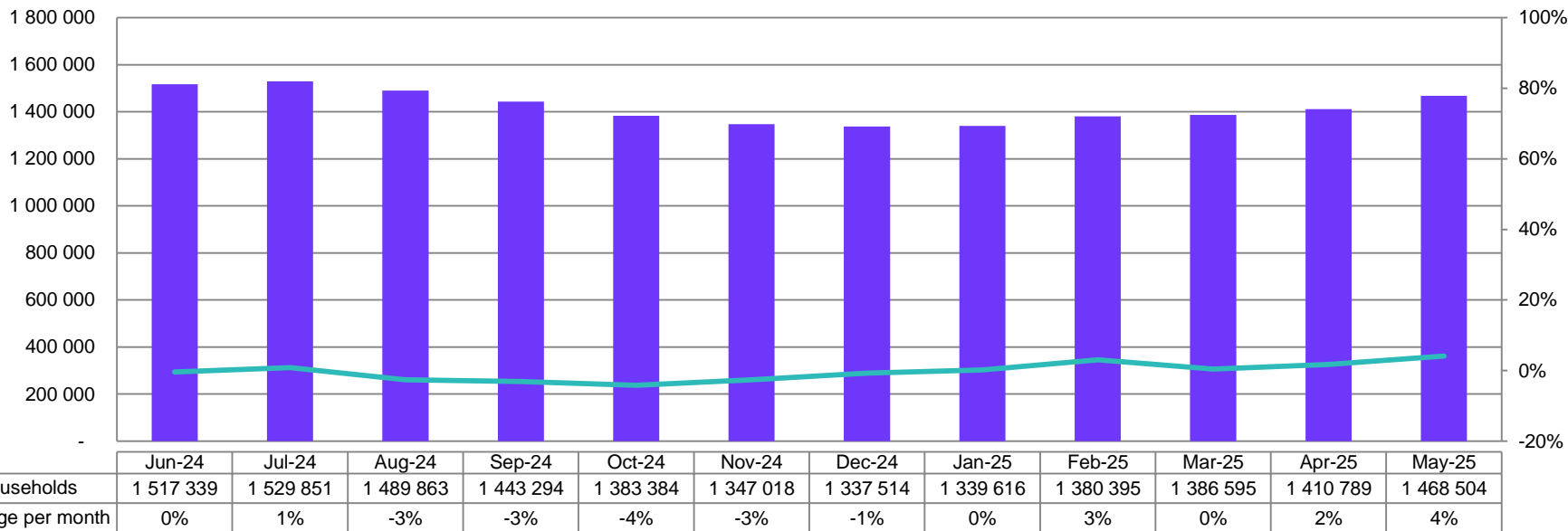
Share of DTT and Analogue only HHs

Monthly reporting households on TAMS (Base: DTT and Analogue Only HHs)

Base: Share between **Analogue Only and DTT reporting** households per month **weighted** to the household universe (excludes DStv and OpenView HHs)

Note: This reflects the proportionof **reporting** households on the panel and not the proportion of DTT or Analogue only viewers.
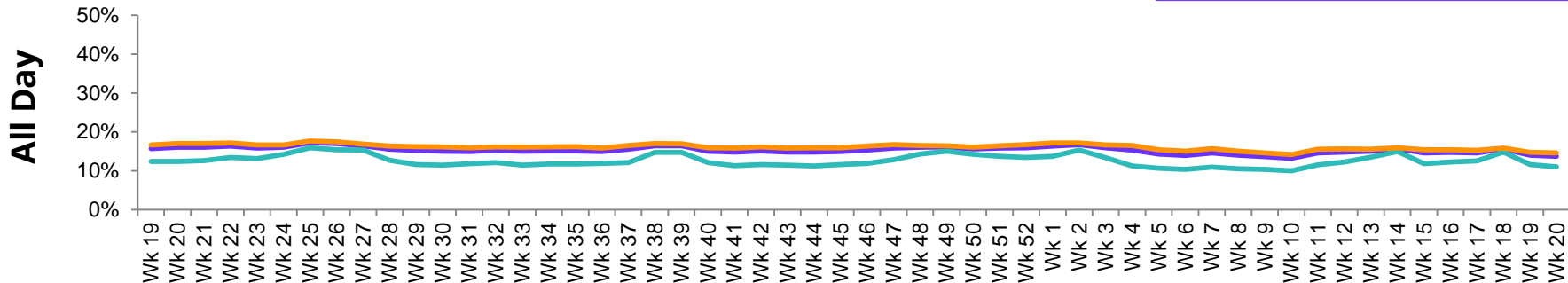
Note: A DTT household target market comprises households that have a **Digital STB** in the home

	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25
Analogue only	4,331,067	4,316,830	4,360,925	4,347,773	4,371,003	4,469,964	4,406,926	4,344,504	4,349,457	4,334,305	4,239,914	4,145,187
	74%	74%	75%	75%	76%	77%	77%	76%	76%	76%	75%	74%
DTT	1,519,704	1,519,272	1,489,863	1,443,294	1,383,384	1,347,018	1,337,514	1,339,616	1,380,395	1,386,595	1,410,789	1,468,504
	26%	26%	25%	25%	24%	23%	23%	24%	24%	24%	25%	26%

■ DTT ■ Analogue only

TVR% past 12 months: Adults/Kids

2024/2025 (total screens)

AMR% per day for each week

AMR% per day at prime time for each week

All Day
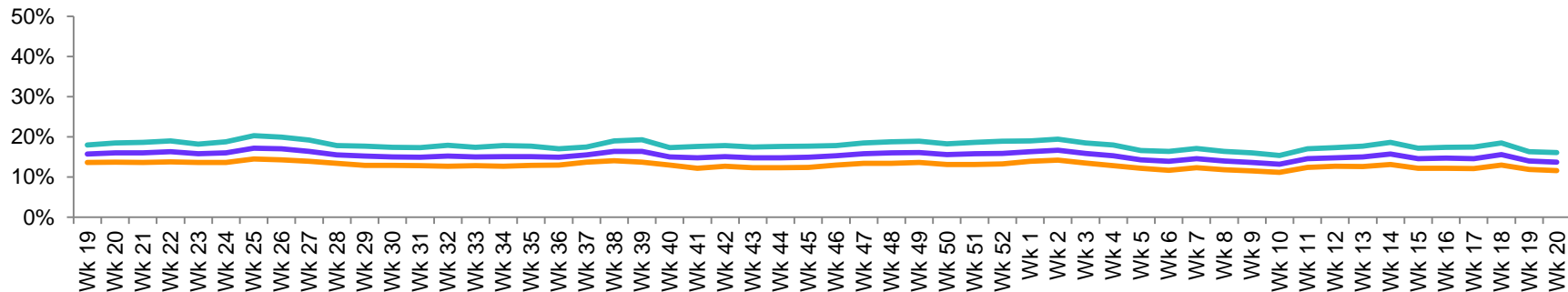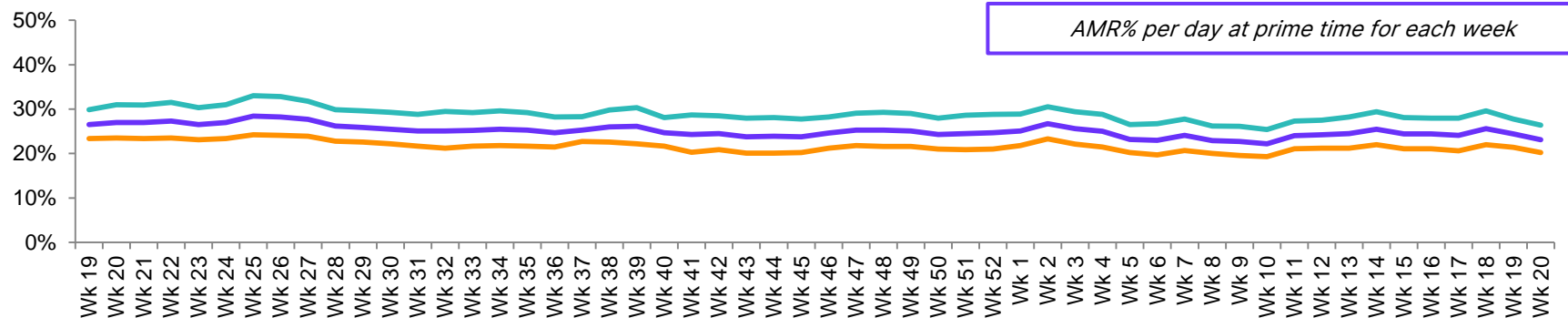
Prime Time 17:00-22:59

— Total individuals — Kids age 4-14 — Adults age 15+
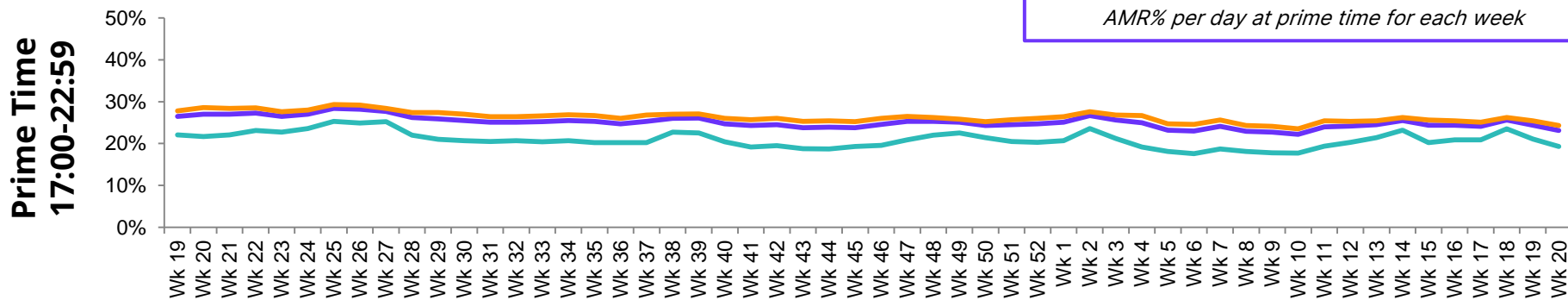
TVR% past 12 months: Pay/non-Pay

2024/2025 (total screens)

AMR% per day for each week

All Day

AMR% per day at prime time for each week
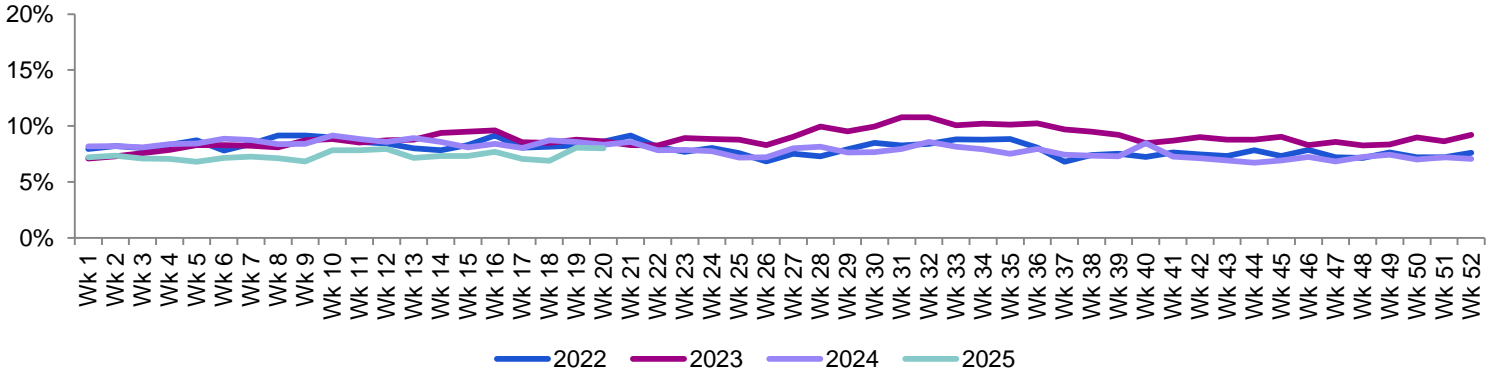
Prime Time 17:00-22:59

26

Total individuals — Pay TV — Non-Pay TV

TVR% past 12 months: Race

2024/2025 (total screens)

4-year trend of non-broadcast activity

All day

AMR% per day for each week

Non-referenced

Any content that is aired/streamed directly onto a TV set and is not monitored by the BRC. This includes content viewed on Netflix, Showmax, Youtube and so on.
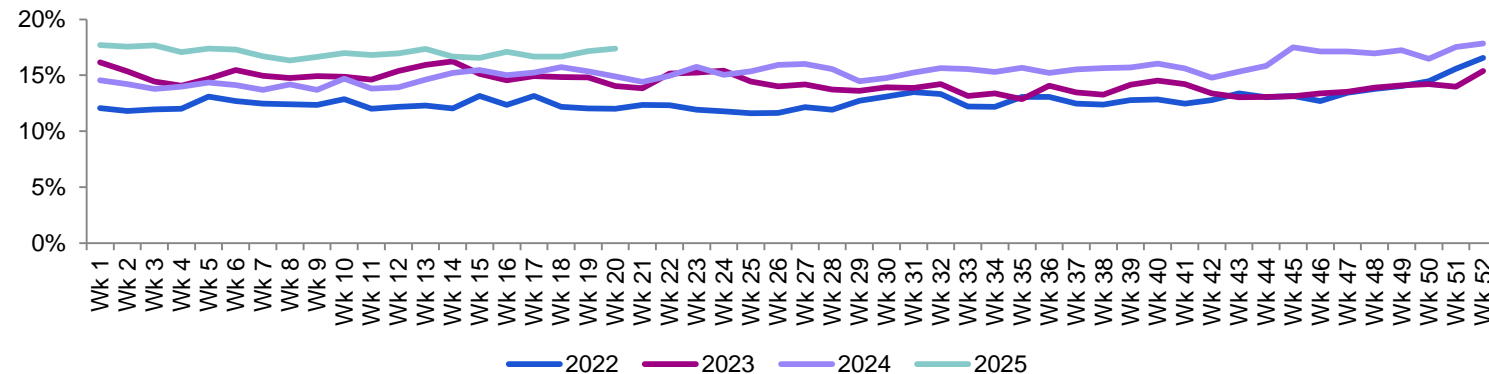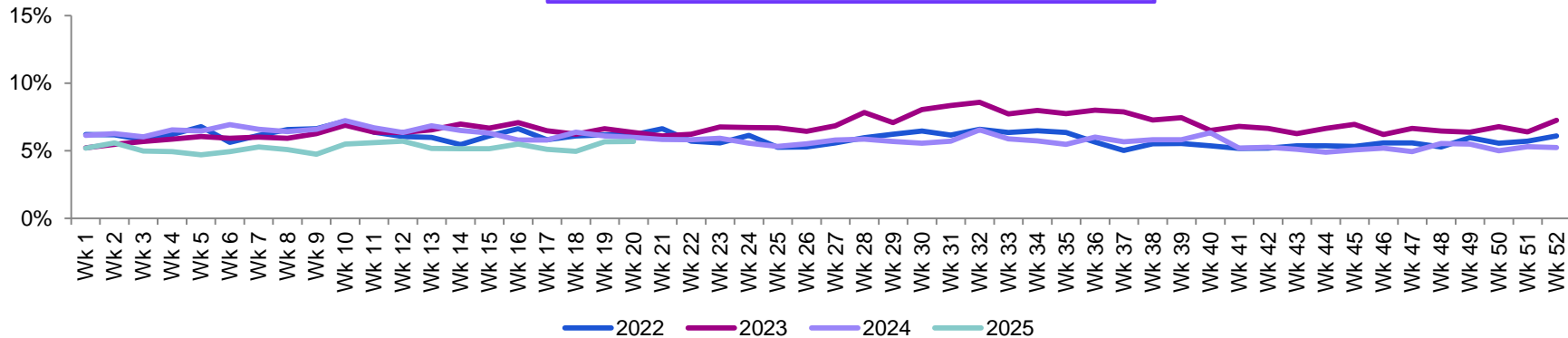
Non-broadcast devices

Any activity that is viewed on the TV via a separate device such as Xbox, a computer, a USB stick.
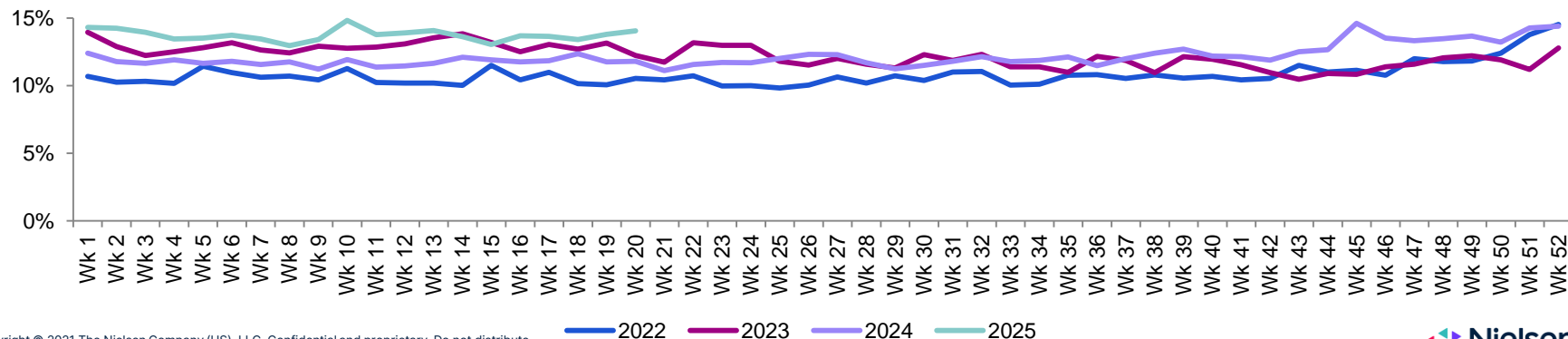
4-year trend of non-broadcast activity

Prime time 17:00-22:59

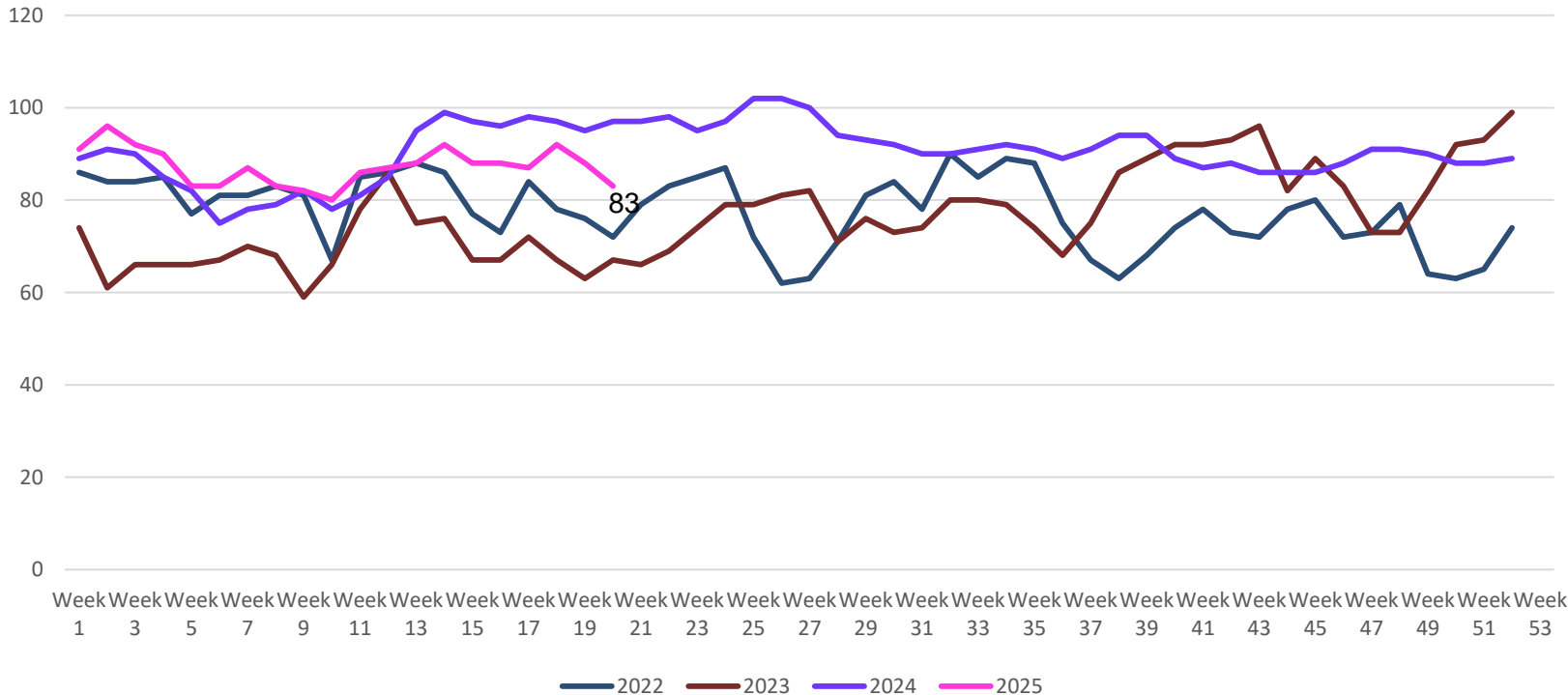*AMR% per day at prime time for each week*

Non-referenced

Legend: 2022, 2023, 2024, 2025

Non-broadcast devices

Legend: 2022, 2023, 2024, 2025

Average Time Viewing (ATV)

Prime Time 17:00-22:59 (2022-2025)

4-year trend all screens share

All day (2022-2025)

Legend: Non-referenced/Non-broadcast devices — DStv — SABC 1 — SABC 2 — SABC 3 — eTV — OpenView
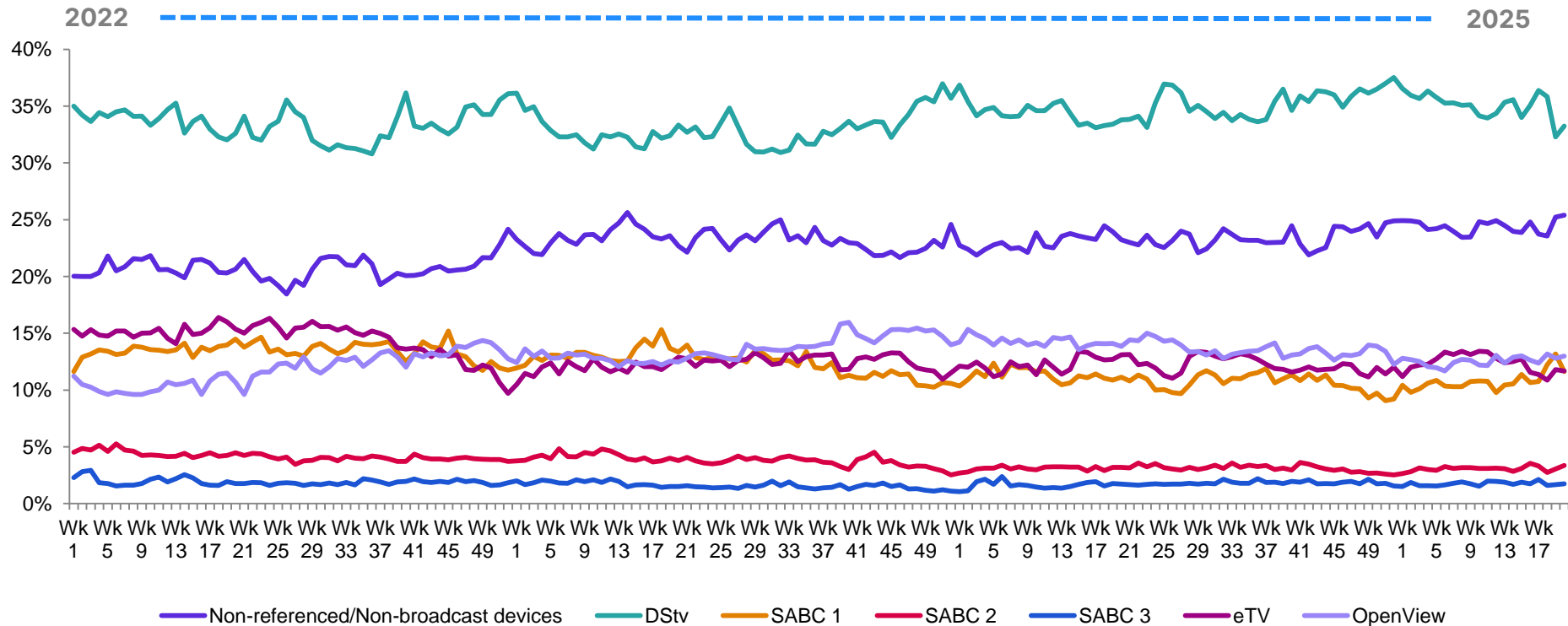
4-year trend all screens share

Prime time 17:00-22:59 (2022-2025)

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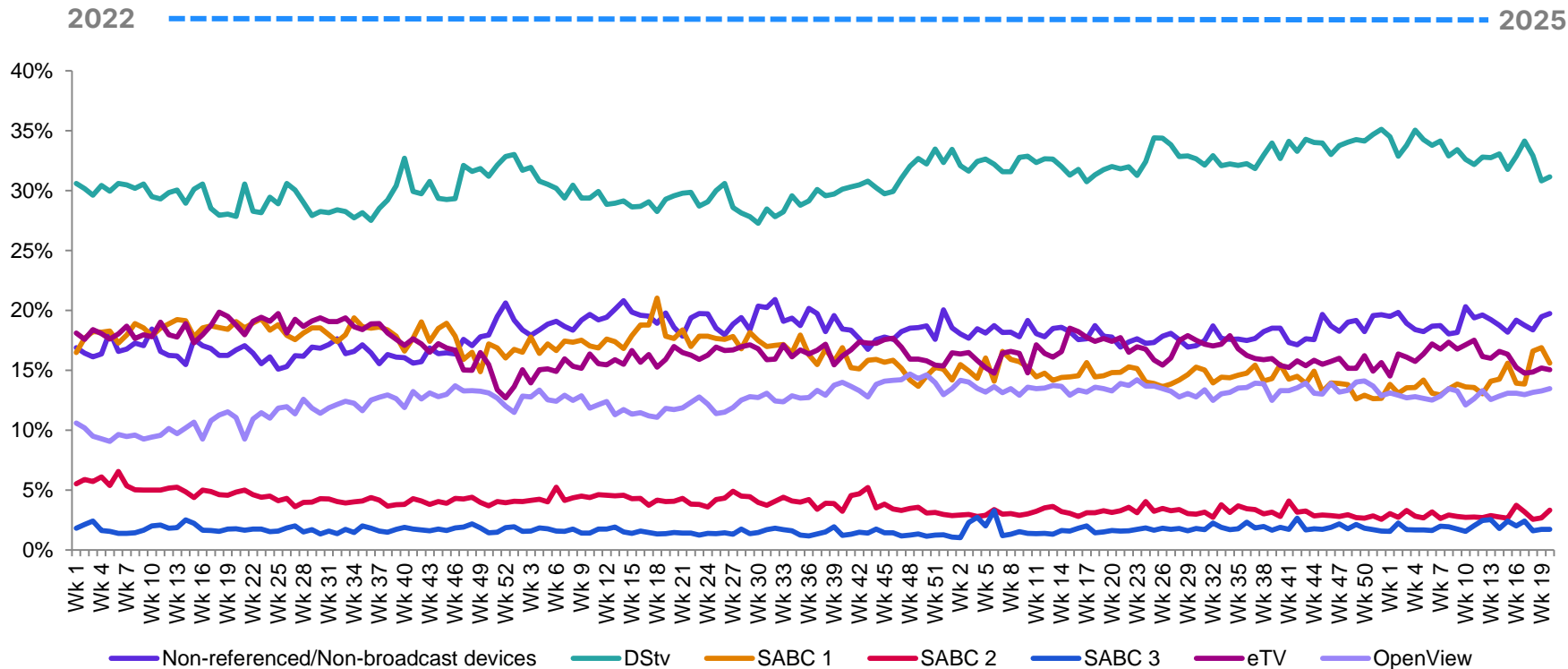
4-year trend broadcast TV only share

All day (2022-2025)

2022 — 2025

Legend: DStv · SABC 1 · SABC 2 · SABC 3 · eTV · OpenView
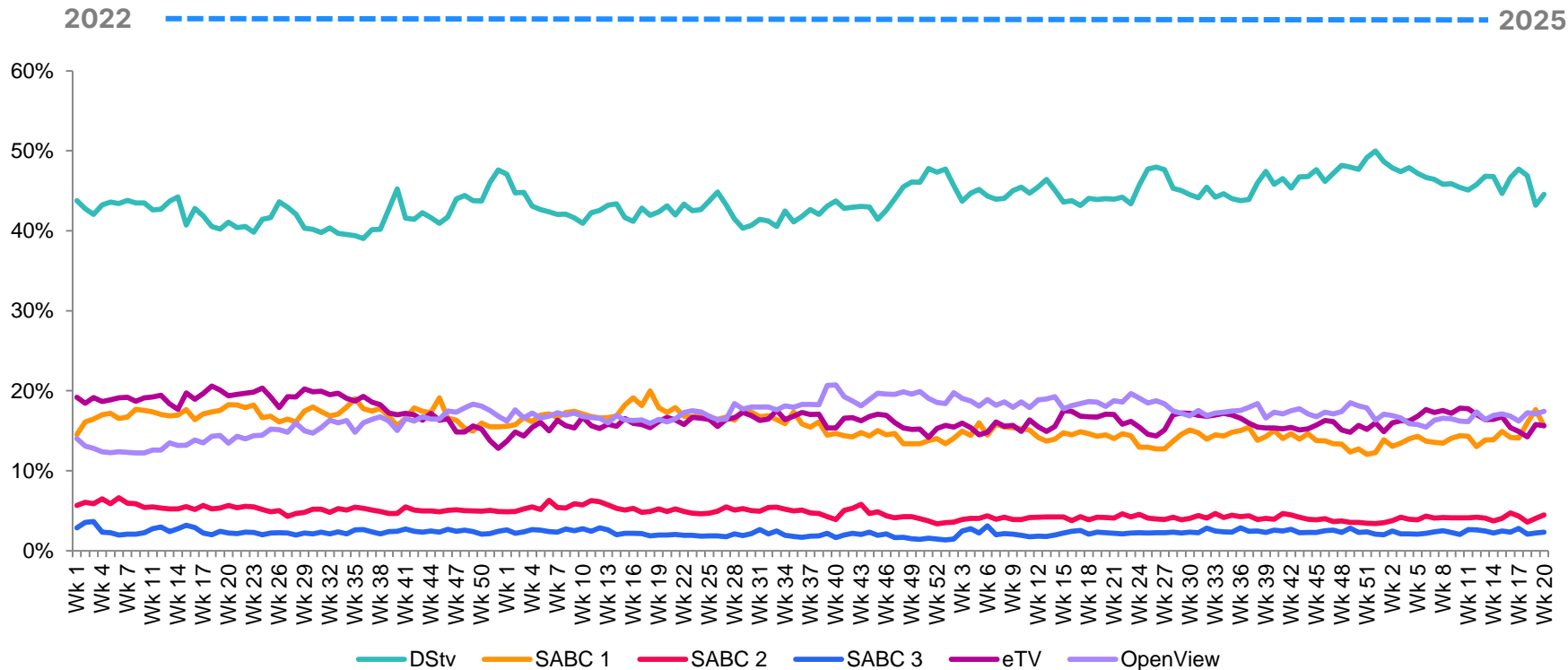
4-year trend broadcast TV only share

Prime time 17:00-22:59 (2022-2025)
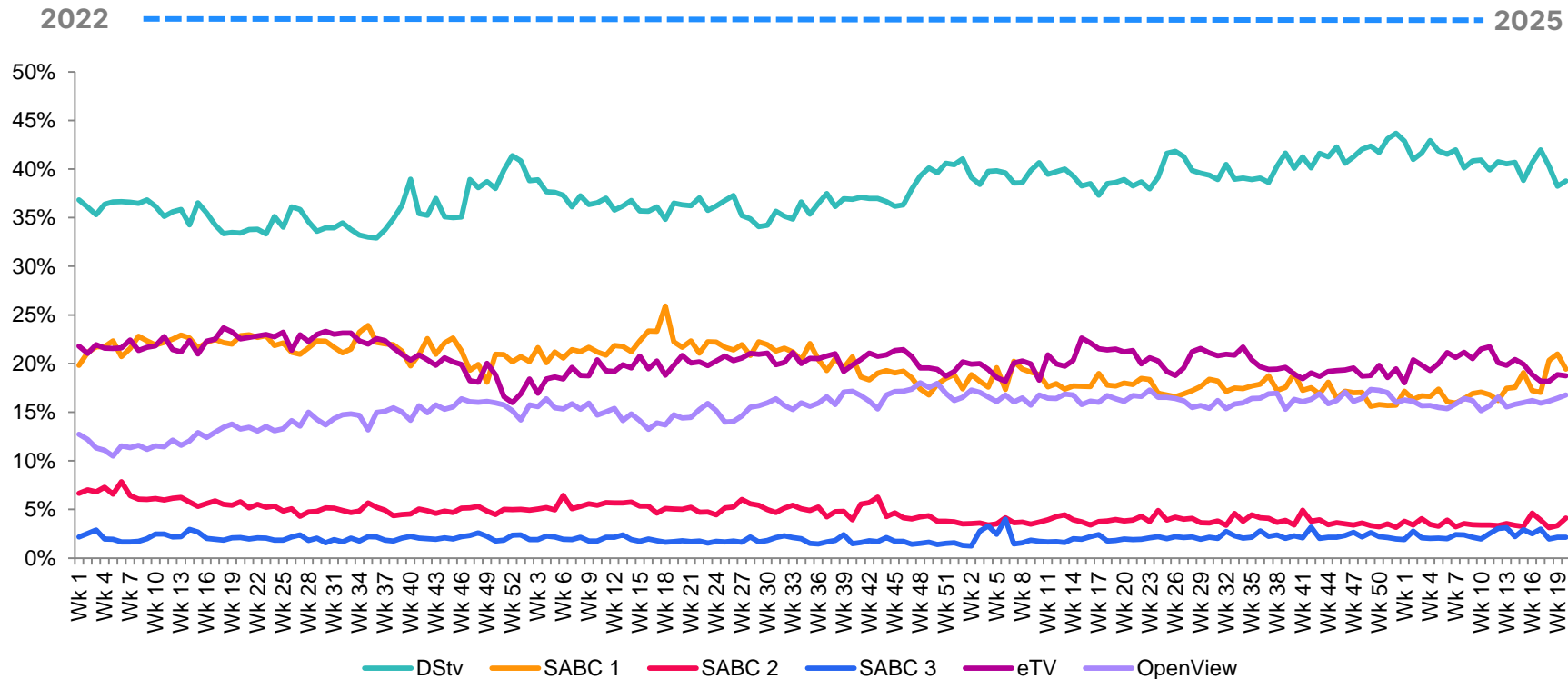
TAMS scorecard

TAMS scorecard

Week 20 2025

Panel Health KPIs	Target	Achieved	Grade	Description	Comment
TV coverage	90%	92%	▲	Weekly average of all working TV sets	
Reporting households	90%	90%	▲	A weekly average reach based on the installed panel	
RIM weighting efficiency households	65%	84%	▲	Overall efficiency (excludes times of panel expansion or universe changes)	
RIM weighting efficiency individuals	70%	72%	▲	Overall efficiency (excludes times of panel expansion or universe changes)	

TAMS scorecard

Week 20 2025

Panel Health KPIs	Target	Achieved	Grade	Description	Comment
Primary controls # of balance cells Last ES Jan-Dec 2019	18	9	🔺	Panel balance on overall sample (weighting matrix) # balanced cells Ideal HH 1-10: ± 2 homes Ideal HH 11-50: ± 10% of set ideal Ideal HH 51-100 : ± 8% of set ideal Ideal HH 100+: ± 6% of set ideal	Cells affected: Urban, WC, NC, KZN, LP, Whites, Coloureds, Pay TV, Non-pay TV.
Tenure % <8 years		44%		Households that have tenure of less than 8 years	1774 households to be removed.
Daily consolidated viewing data delivery	28	30	🔺	10am next business day Fri, Sat, Sun: delivered 11am Mon Day previous to/and public holiday: delivered 11am day after	
Delivery of all station, programmes, breaks and spots	26	30	🔺		

Executive summary
Week 20 2025

In-tabs

- In-tabs are at **90%**, and the panel remains balanced and weighting efficiencies are well above target.

Load shedding impact on AMR%

Load shedding weeks 17 – 20 /2025

| Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |

Monthly dashboard: 1-18 May

Monthly Viewing with Load Shedding Impact
AMR %
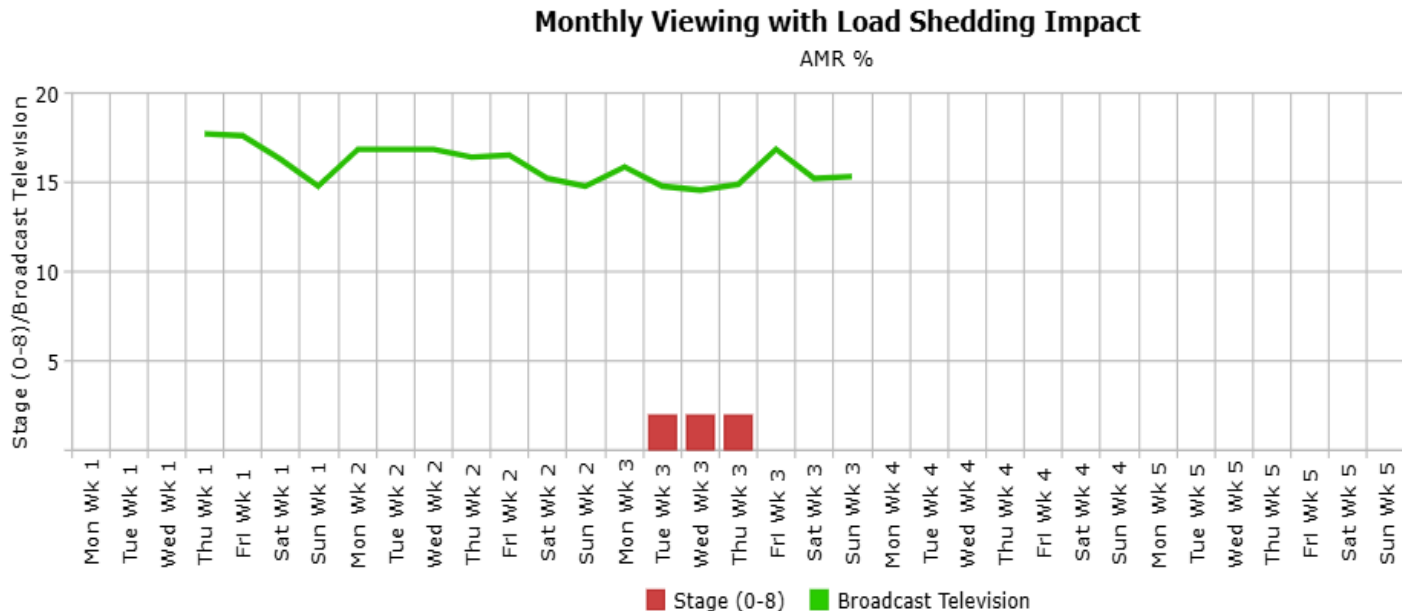
No loadshedding during this period

ASO by province

ASO Trend: Free State (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA — e tv — SABC 1 — SABC 2 — SABC 3
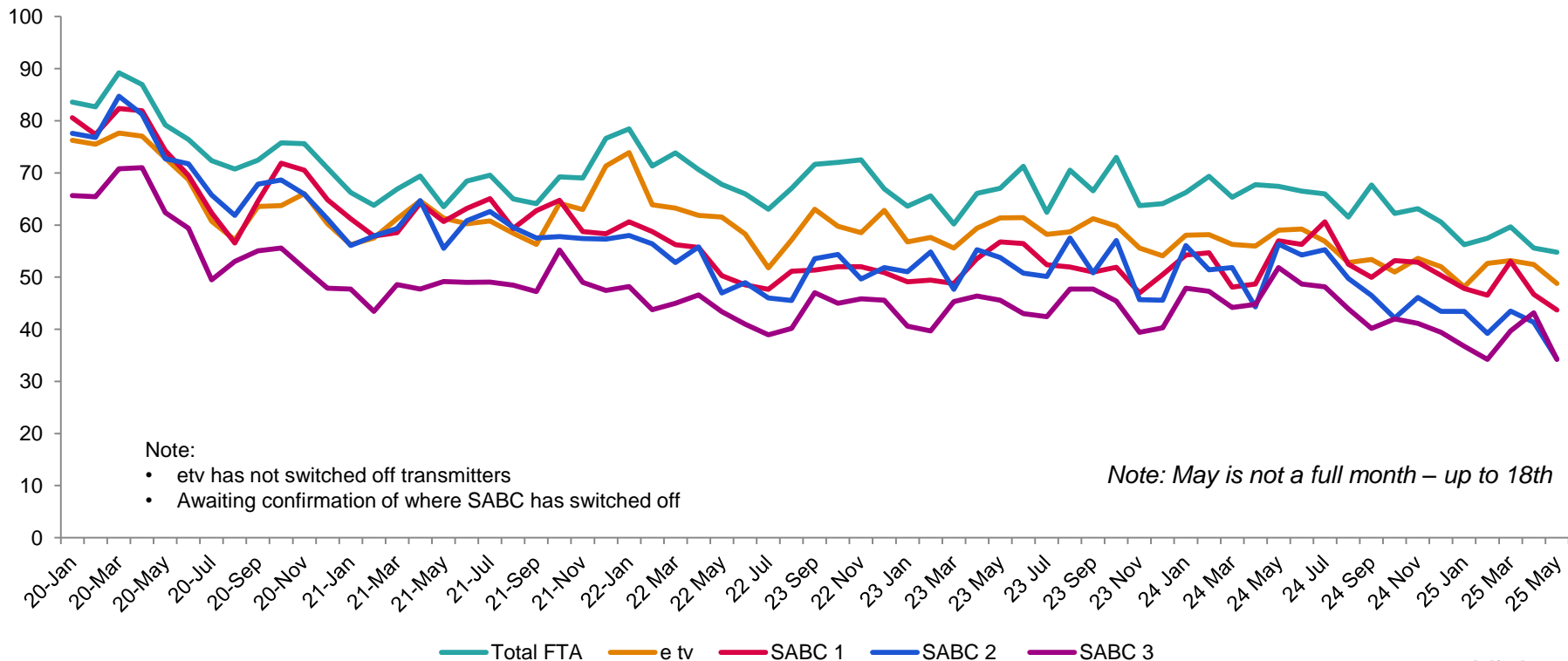
ASO Trend: Northern Cape (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA, e tv, SABC 1, SABC 2, SABC 3
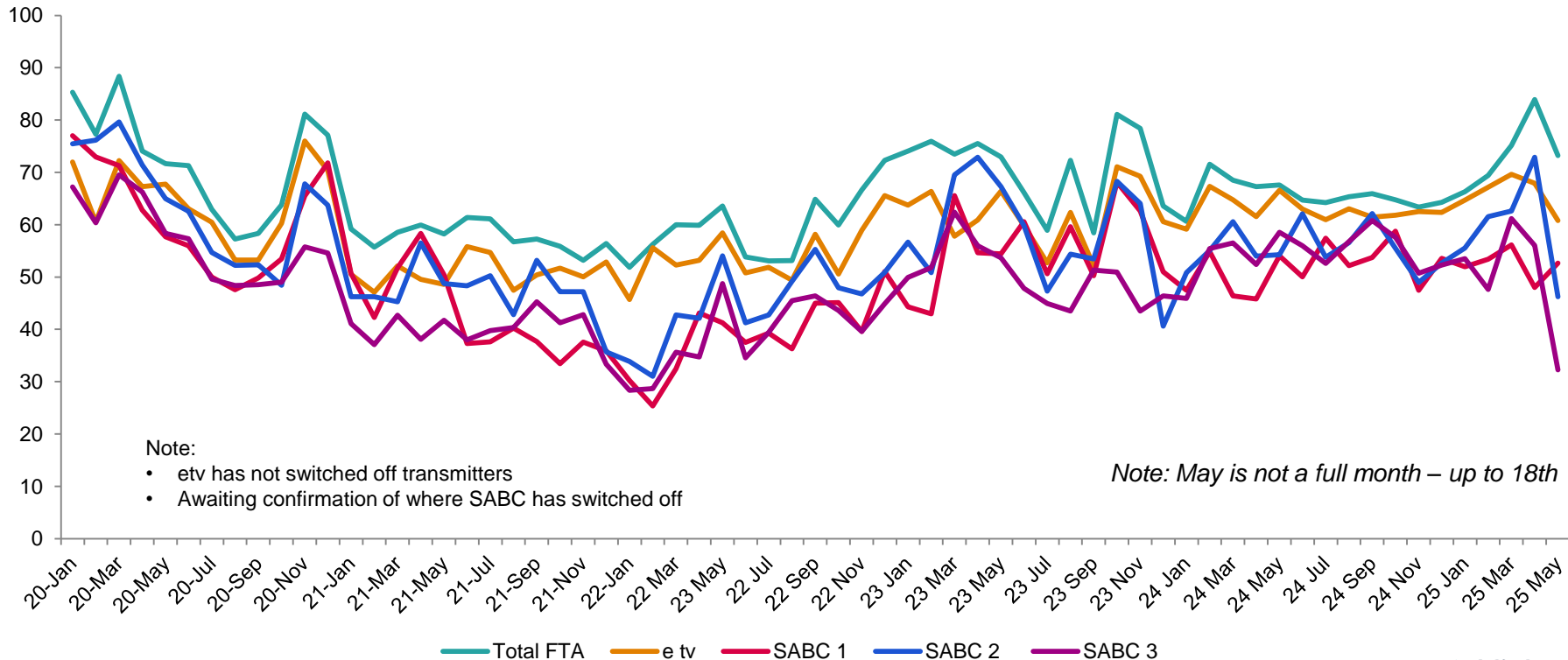
ASO Trend: North West (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA, e tv, SABC 1, SABC 2, SABC 3
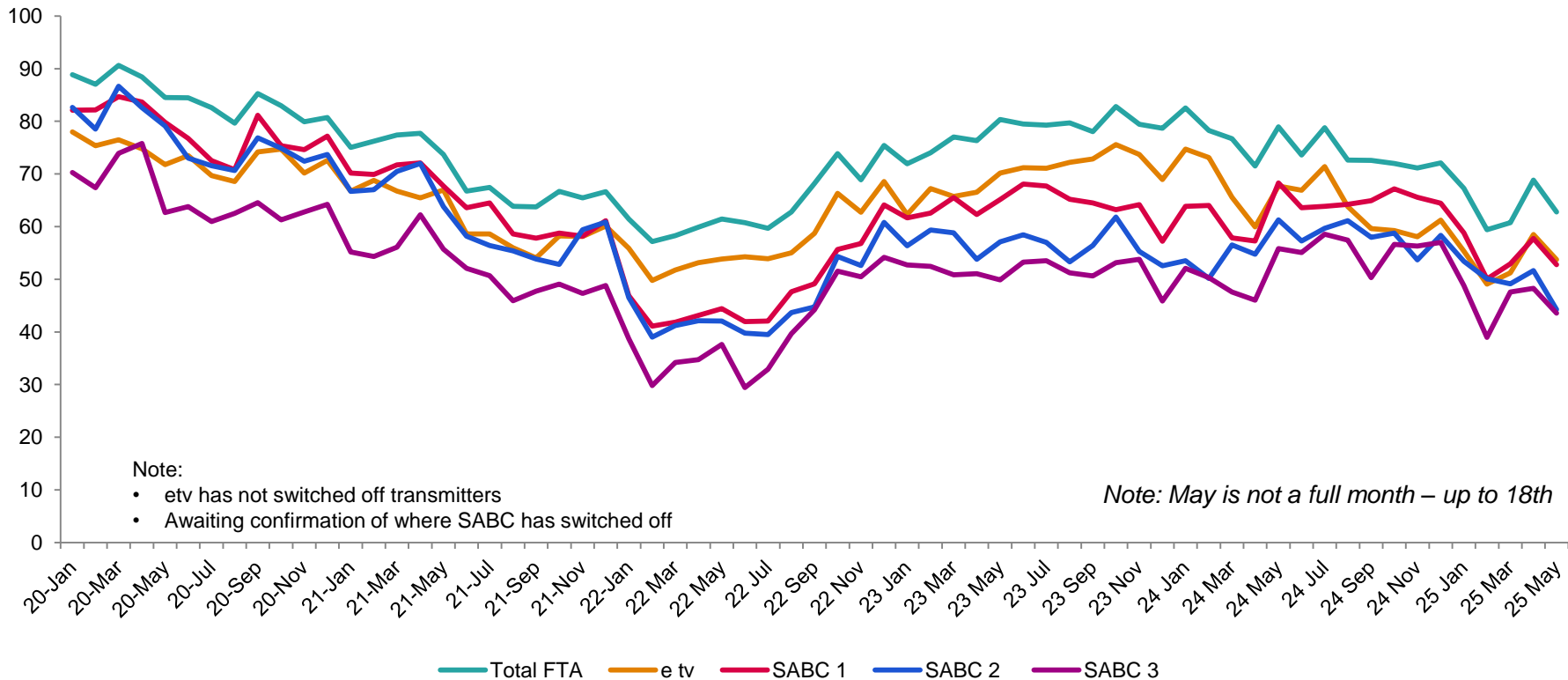
ASO Trend: Mpumalanga (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA, e tv, SABC 1, SABC 2, SABC 3
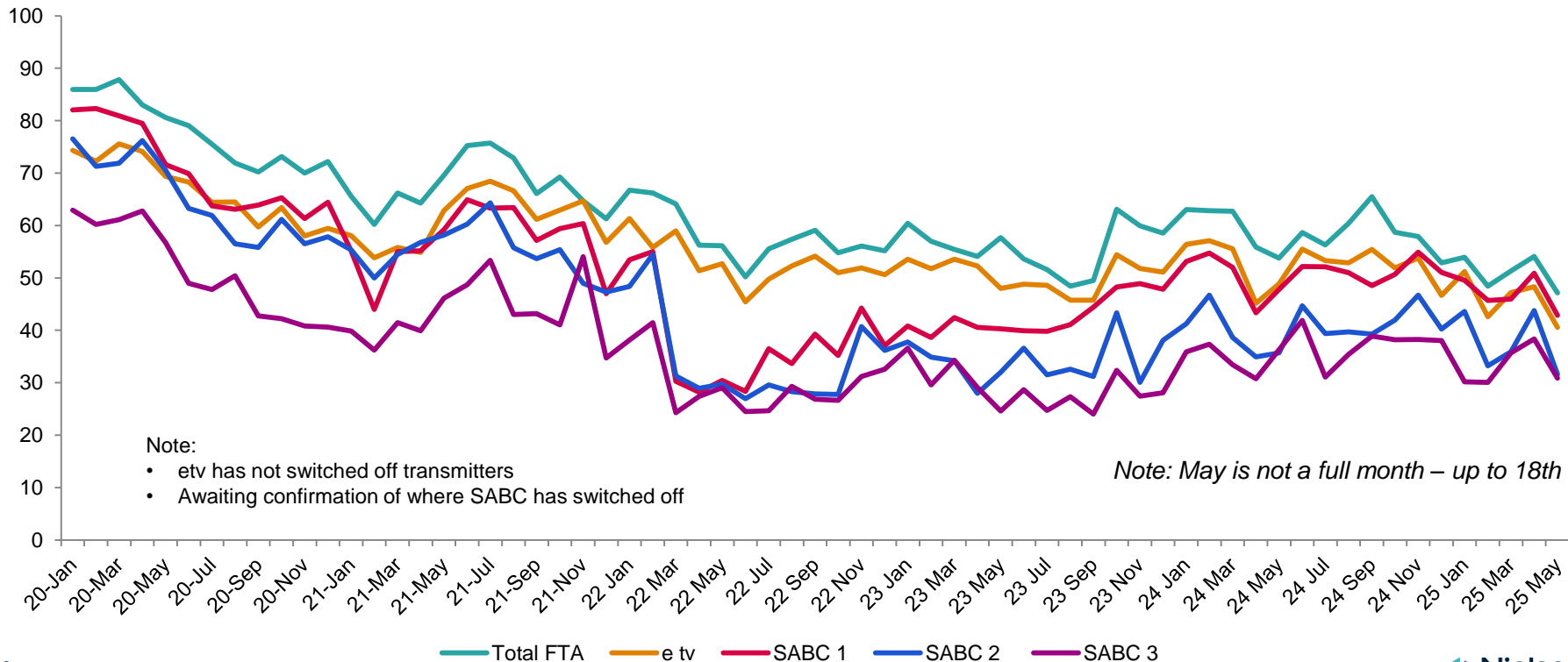
ASO Trend: Eastern Cape (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Total FTA — e tv — SABC 1 — SABC 2 — SABC 3
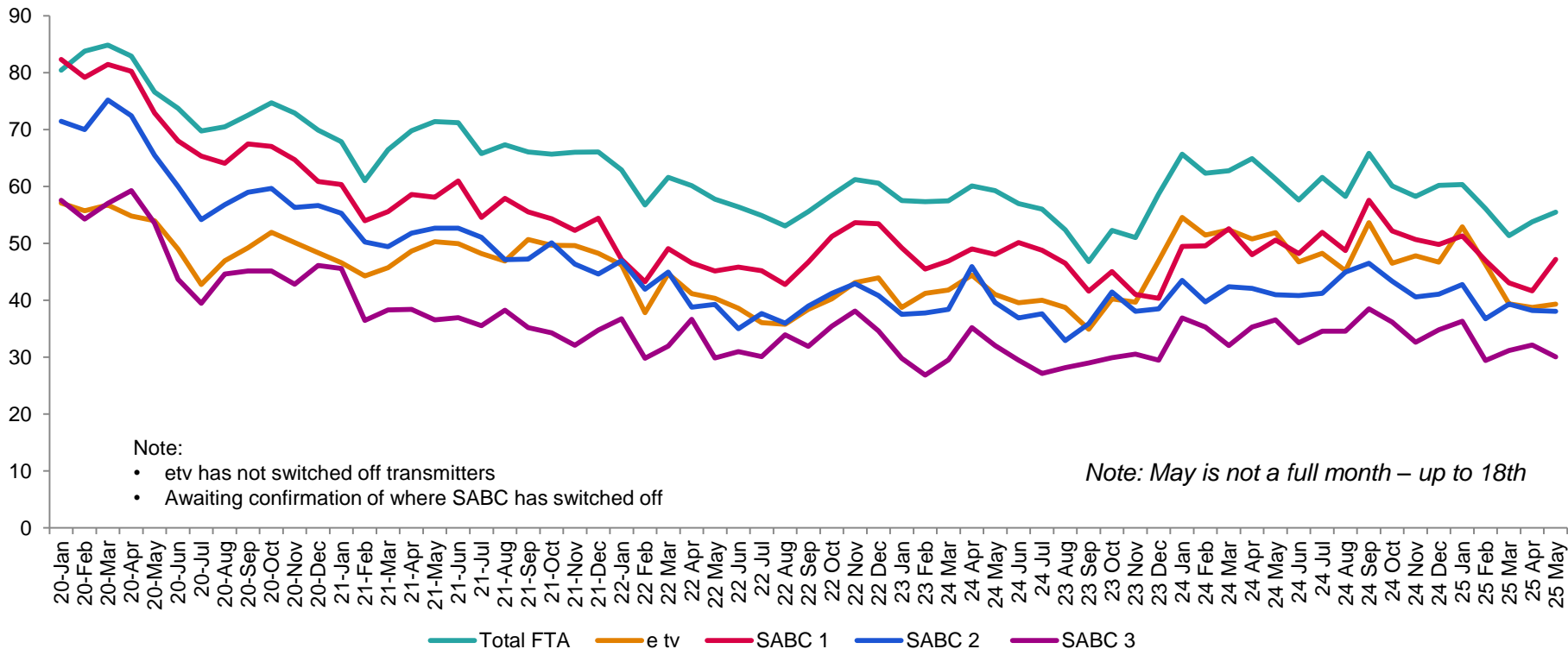
ASO Trend: Gauteng (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Total FTA — e tv — SABC 1 — SABC 2 — SABC 3
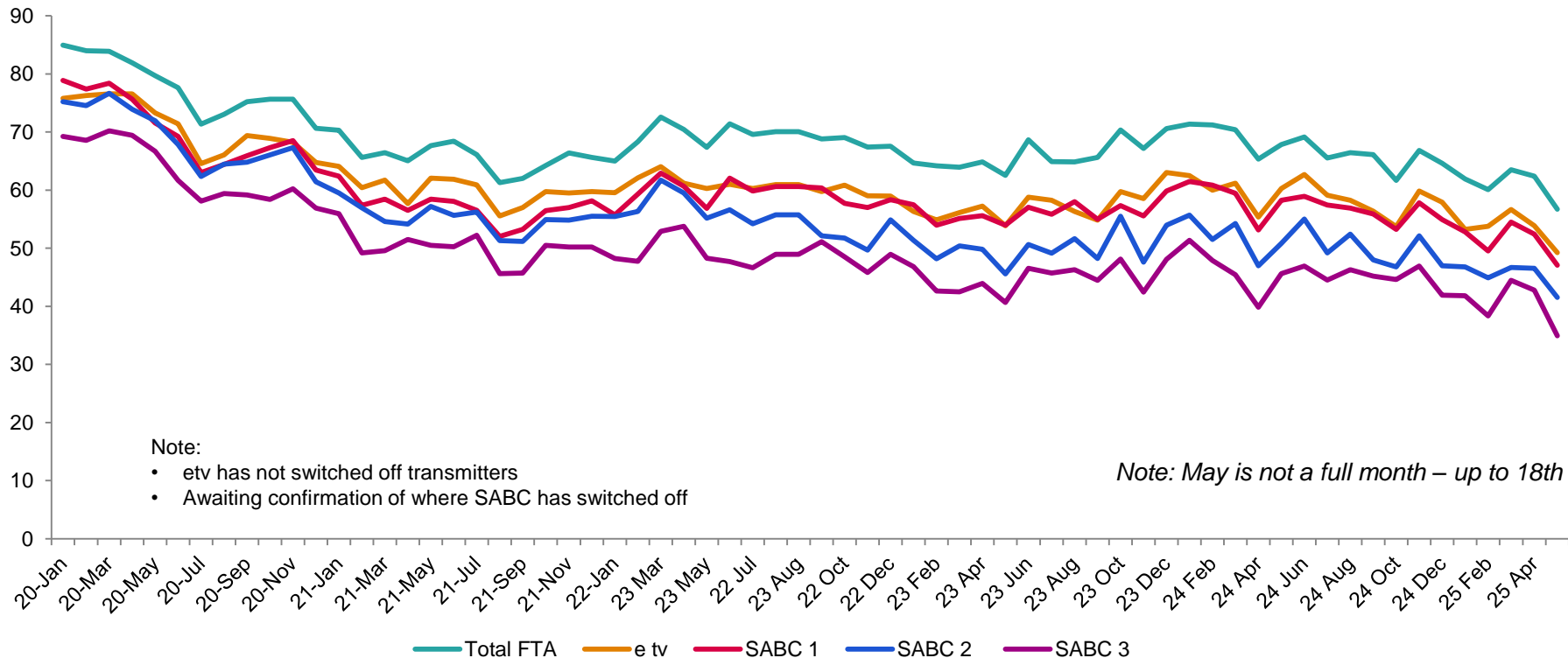
ASO Trend: KwaZulu Natal (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA, e tv, SABC 1, SABC 2, SABC 3
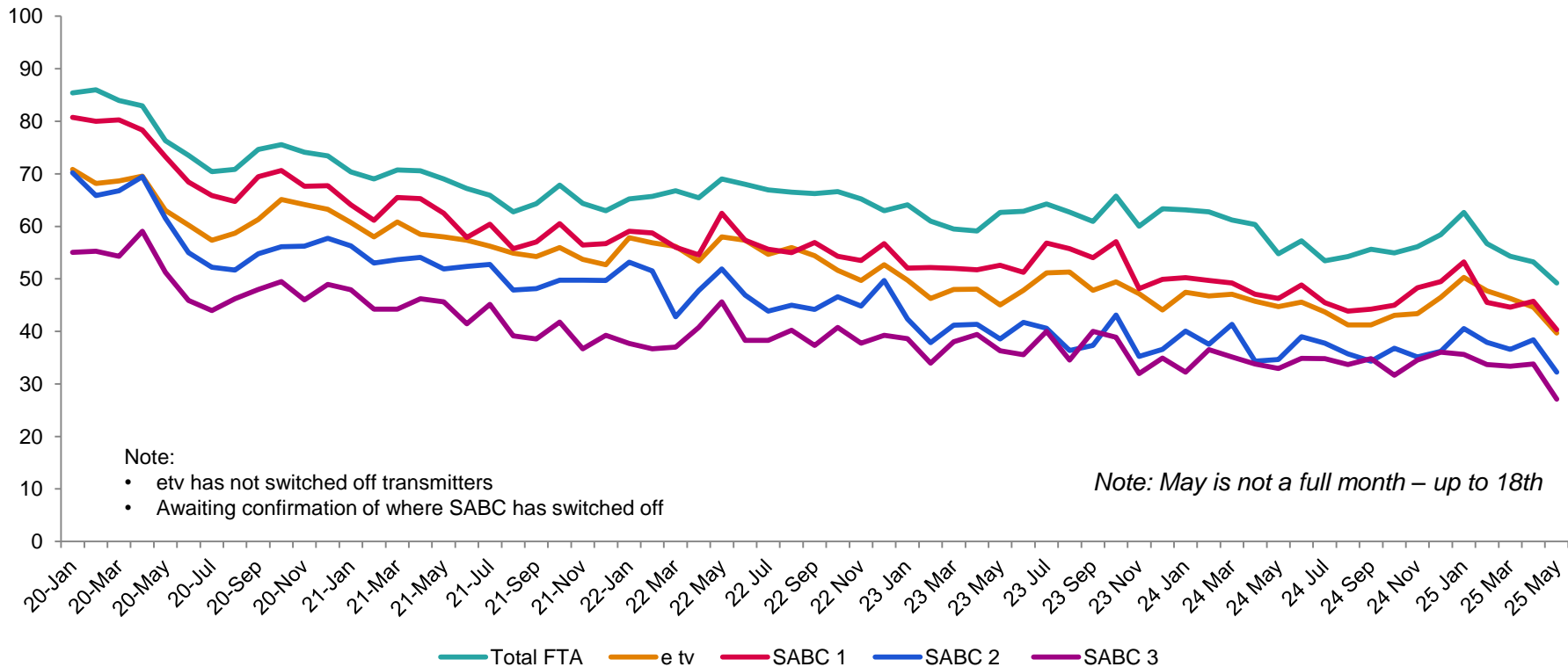
ASO Trend: Limpopo (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA, e tv, SABC 1, SABC 2, SABC 3
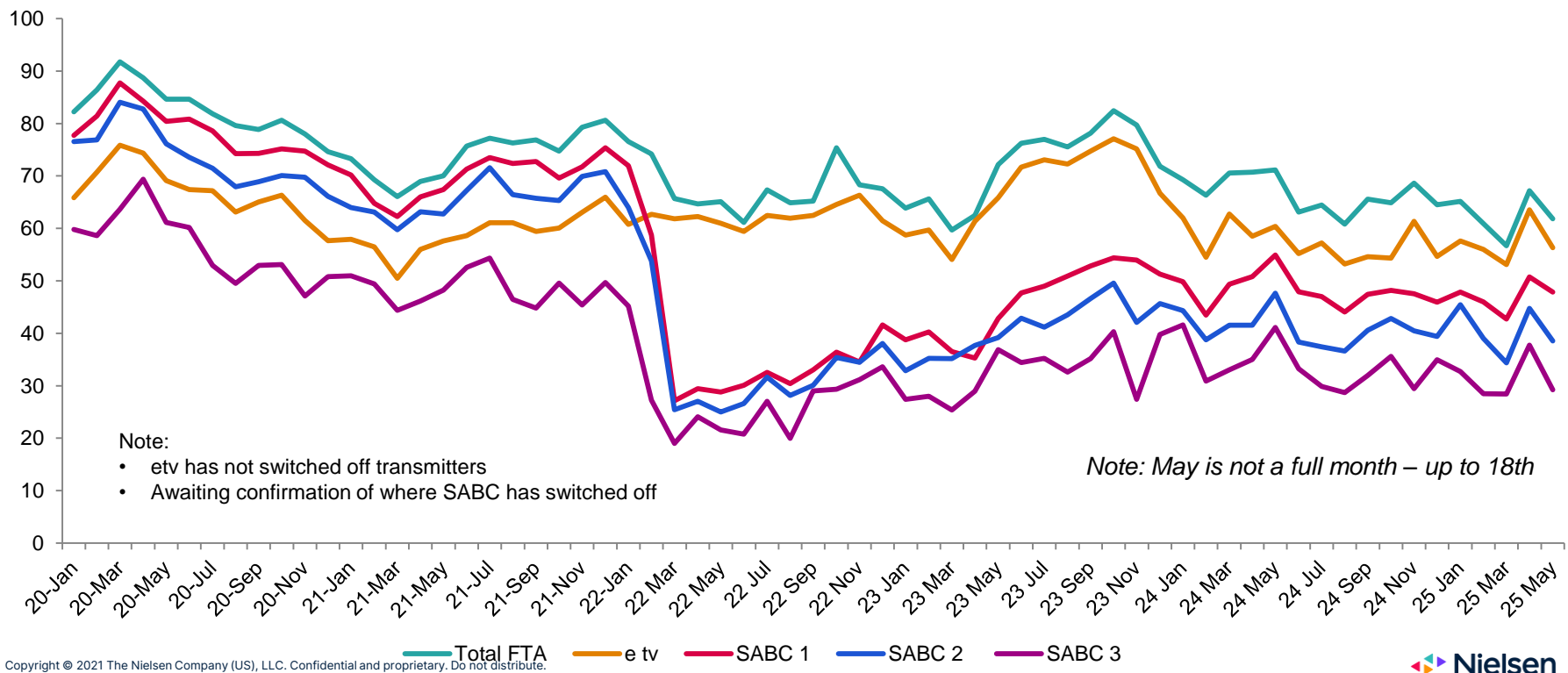
ASO Trend: Western Cape (Reach%*)

*Excludes Pay TV households

Note:
- etv has not switched off transmitters
- Awaiting confirmation of where SABC has switched off

Note: May is not a full month – up to 18th

Legend: Total FTA — e tv — SABC 1 — SABC 2 — SABC 3
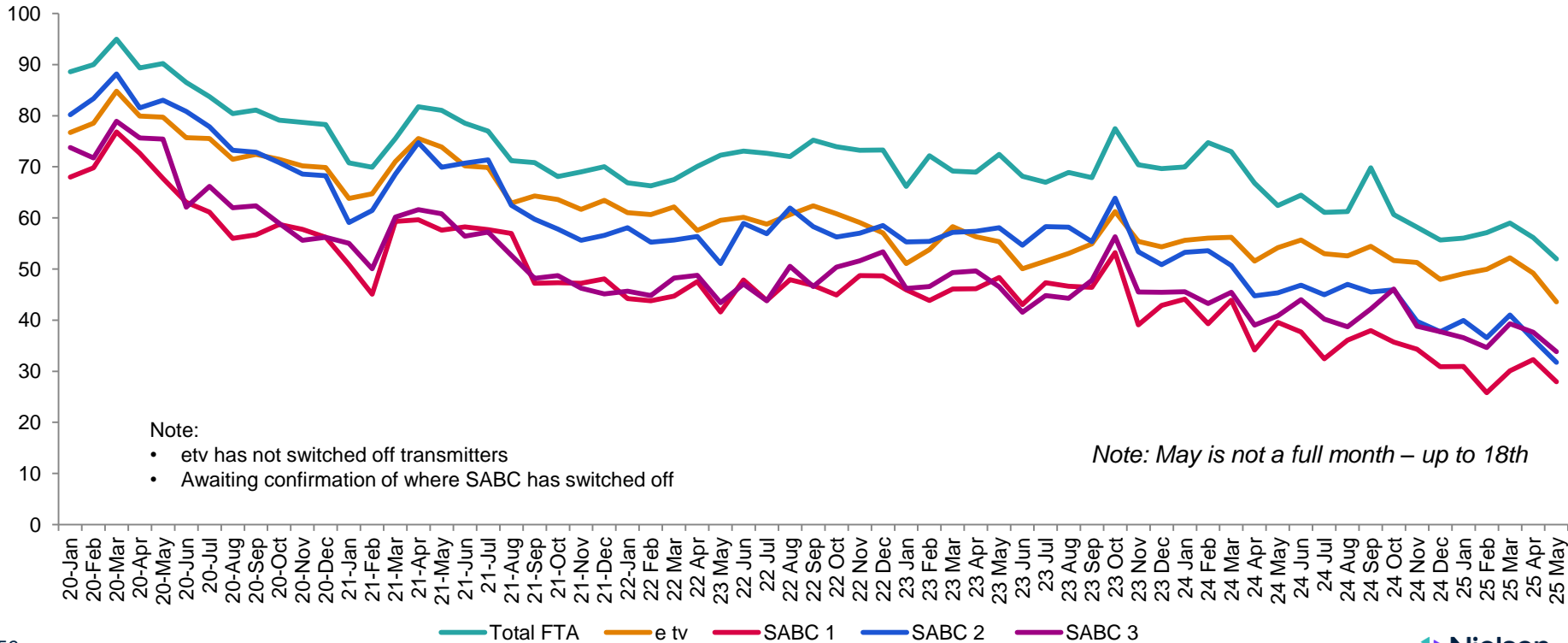
Measured channels

DSTV TURNAROUND	DSTV TURNAROUND	SABC	ZEE TV	SOWETO TV
BBC BRIT	RACING 240	SABC 1	ZEE WORLD	SOWETO TV
BBC EARTH	BBC UK TV	SABC 2	ZEE ONE	1
BBC LIFESTYLE	DREAMWORKS	SABC 3	ZEE ZONKE	
BBC NEWS	CBS REALITY	BC NEWS INTERNATION	3	1KZN
CHANNEL O	PLAYROOM	SABC SPORT	DISNEY	1KZN
CNN	VIA	SABC EDUCATION	DISNEYJNR	1
E!	BET	SABC Lehae		
FOOD NETWORK	COMEDY CENTRAL	7	DISNEY	OPEN VIEW / ETV
HGTV	MTV		2	eEXTRA
HISTORY	MTV BASE	NBC UNIVERSAL		e MOVIES+
NATIONAL GEOGRAPHIC	NICK TOONS	STUDIO UNIVERSAL	PARAMOUNT	eMOVIES EXTRA
TIONAL GEOGRAPHIC W	NICKELODEON	UNIVERSAL	NICK JNR	eTOONS
SKY NEWS	ROK	2	1	ETV
TELEMUNDO	50			ENCA
TRACE URBAN		DSTV DOMESTIC	CAPE TOWN TV	eREALITY
TRACE AFRICA	DSTV SUPERSPORT	AFRICA MAGIC EPIC	CAPE TOWN TV	PEOPLE'S PLANET
TRAVEL	SS GRANDSTAND	KYKNET	1	DBE
TNT	SS PSL	KYKNET&KIE		eSERIES
CARTOON NETWORK	SS PREMIER LEAGUE	KYKNET LEKKER	ARENA HOLDINGS	ePlesier
RTOONITO (BOOMERAN	SS LA LIGA	KYKNET NOU	IGNITION	The Home Channel+
TRACE GOSPEL	SS FOOTBALL	M-NET	THE HOME CHANNEL	STAR LIFE
MOJA 9.9	SS VARIETY 1	MM 3	2	SA MUSIC
MOJA LOVE	SS VARIETY 2	MM 2		SPORTY TV
ONE GOSPEL	SS VARIETY 3	MM 1	MPUMA KAPA TV	15
TBN	SS VARIETY 4	MM 4	MPUMA KAPA	
CBS JUSTICE	SS BLITZ	MZANSI BIOSKOP	1	
CURIOSITY	SS ACTION	MZANSI MAGIC		
KIX	SS RUGBY	MZANZI MUSIC		
Cbeebies	SS CRICKET	MZANZI WETHU		
DISCOVERY	SS WWE	1MAX		
DISCOVERY TLC	SS GOLF	MOVIE ROOM		
DISCOVERY FAMILY	SS TENNIS	SWITCH'D ON (109)		
DISCOVERY ID	SS MOTORSPORT	SWITCH'D ON (110)		
REAL TIME	ESPN1	18		
NEWZROOM	ESPN2			
DUMISA	SS SCHOOLS			
HILAAL TV	20			
Non-Commercial	4			
Upcoming channels				
Total	124	Total Verified	118	