

# Latest TAMS July universe shows significant pay TV increase

On 19 December 2011, the TAMS household universe was updated to include PVR households, also releasing time shifted viewing data for the first time.



The current TAMS universe update reflects the new population updates by IHS Global Insight. The IHS demographic model differs from the previous demographic supplier SAARF used in a number of technical areas. These include the following:

- The cohort component model handles mortality in a different way, specifically with regard to the impact of HIV/AIDS.
- For regional distribution, slightly different techniques are employed.
- The model is checked for consistency with the economic, labour, income and development factors of every region in South Africa.

Due to these methodological differences between the current and previous demographers, the resultant population updates are different to the previous population estimates for a number of demographics.

In the TAMS 15+ universe, there has reportedly been significant population increases in metropolitan areas as well as a significant decrease in the rural population. A few provinces namely Northern Cape, KZN, Mpumalanga and Gauteng have increased, while some provinces saw decreases, including the Western Cape, Eastern Cape, Limpopo and most notable North West.

Although not significant, LSM 6 increased by 6.9% to 7 518 738, up from 7 031 159. LSM 10 (with a decrease of 3.8%, down from 2 187 894 to 2 105 104), LSM 9 (with an increase of 4.1%, from 3 007 468 up to 3 129 350), LSM 8 (with an increase of 3.8%, from 2 784 117 up to 2 889 648) also saw noticeable changes although they were not statistically significant.

The 2011B TAMS universe has increased from 11 196 628 to 11 856 888 households (with PVR homes included). This is an increase of 5.9% and quite a bit ahead of the population change of 2.8% (adults 15+ up from 29 209 654 to 30 039 437). Pay TV has also seen significant increases in the 15+ population figures, up from 9 292 804 to 10 098 224, representing a gain of 8.7%.

The tables below show the following:

- The universe that will be implemented in July 2012 (AMPS 2011B TV metered universe)
- The differences between AMPS 2011A and AMPS 2011B TV metered universes.

**Source: AMPS 2011A -6 months - TAMS Universe (All Adults 15+). Includes individuals with PVR in home**

	<b>Total</b>	<b>Satellite</b>	<b>Non-Satellite</b>
Females Afr/Bth	2 459 557	912 169	1 547 388
Males Afr/Bth	2 291 794	926 828	1 364 967
Females Eng/Oth	1 770 843	942 303	828 540
Males Eng/Oth	1 662 531	932 724	729 807
Females Ngn	5 871 823	1 455 042	4 416 781
Males Ngn	5 155 519	1 402 428	3 753 091
Females Sot	5 256 827	1 301 028	3 955 800
Males Sot	4 740 759	1 195 858	3 544 901
	29 209 653	9 068 380	20 141 275
Western Cape	3 415 562	830 560	2 585 002
Northern Cape	641 682	193 486	448 196
Free State	1 985 953	595 217	1 390 736
Eastern Cape	3 414 608	801 512	2 613 096
Kwazulu-Natal	5 444 353	1 915 440	3 528 915
Mpumalanga	1 978 496	662 026	1 316 469
Limpopo	3 406 369	654 870	2 751 500
Gauteng	6 477 456	2 822 222	3 655 234
North-West	2 445 174	593 047	1 852 127
	29 209 653	9 068 380	20 141 275
LSM1-4	4 727 909	66 387	4 661 523
LSM5-7	16 502 265	3 617 445	12 884 820
LSM8-10	7 979 479	5 384 548	2 594 932
	29 209 653	9 068 380	20 141 275

**Source: AMPS 2011B -6 months - TAMS Universe (All Adults 15+). Includes individuals with PVR in home**

	<b>Total</b>	<b>Satellite</b>	<b>Non-Satellite</b>
Females Afr/Bth	2 410 365	958 808	1 451 557
Males Afr/Bth	2 217 582	971 219	1 246 363
Females Eng/Oth	1 648 683	960 270	688 414
Males Eng/Oth	1 546 154	936 580	609 574
Females Ngn	6 079 502	1 639 986	4 439 515
Males Ngn	5 900 295	1 762 641	4 137 653
Females Sot	5 285 147	1 291 419	3 993 728
Males Sot	4 951 709	1 397 302	3 554 407
	30 039 437	9 918 225	20 121 211
Western Cape	3 380 152	969 785	2 410 367
Northern Cape	664 079	199 053	465 026
Free State	1 884 835	501 584	1 383 251
Eastern Cape	3 253 853	882 411	2 371 442
Kwazulu-Natal	5 541 976	1 780 881	3 761 095
Mpumalanga	2 212 646	742 549	1 470 097
Limpopo	3 194 212	784 400	2 409 812
Gauteng	7 753 756	3 534 209	4 219 547
North-West	2 153 928	523 353	1 630 574
	30 039 437	9 918 225	20 121 211
LSM1-4	4 889 073	157 413	4 731 660

LSM5-7	17 026 262	3 988 281	13 037 981
LSM8-10	8 124 102	5 772 531	2 351 571
	30 039 437	9 918 225	20 121 212

## Thousands difference between 2011A and 2011B Universes

	Total	Satellite	Non-Satellite
Females Afr/Bth	-49 192	46 639	-95 831
Males Afr/Bth	-74 212	44 391	-118 604
Females Eng/Oth	-122 160	17 967	-140 126
Males Eng/Oth	-116 377	3 856	-120 233
Females Ngn	207 679	184 944	22 734
Males Ngn	744 776	360 213	384 562
Females Sot	28 320	-9 609	37 928
Males Sot	210 950	201 444	9 506
	829 784	849 845	-20 064
Western Cape	-35 410	139 225	-174 635
Northern Cape	22 397	5 567	16 830
Free State	-101 118	-93 633	-7 485
Eastern Cape	-160 755	80 899	-241 654
Kwazulu-Natal	97 623	-134 559	232 180
Mpumalanga	234 150	80 523	153 628
Limpopo	-212 157	129 530	-341 688
Gauteng	1 276 300	711 987	564 313
North-West	-291 246	-69 694	-221 553
	829 784	849 845	-20 064
LSM 1-4	161 164	91 026	70 137
LSM5-7	523 997	370 836	153 161
LSM8-10	144 623	387 983	-243 361
	829 784	849 845	-20 063

## Percentage change between 2011A and 2011B Universes

	Total	Satellite	Non-Satellite
Females Afr/Bth	-2	5	-6
Males Afr/Bth	-3	5	-9
Females Eng/Oth	-7	2	-17
Males Eng/Oth	-7	0	-16
Females Ngn	4	13	1
Males Ngn	14	26	10
Females Sot	1	-1	1
Males Sot	4	17	0
	3	9	0
Western Cape	-1	17	-7
Northern Cape	3	3	4
Free State	-5	-16	-1
Eastern Cape	-5	10	-9
Kwazulu-Natal	2	-7	7
Mpumalanga	12	12	12
Limpopo	-6	20	-12
Gauteng	20	25	15
North-West	-12	-12	-12
	3	9	0
LSM 1-4	3	137	2
LSM5-7	3	10	1
LSM8-10	2	7	-9
	3	9	0

The TAMS universe is made up of all households, both rural and urban, with mains electricity and at least one working TV set. TAMS measures all platforms both analogue and digital and both terrestrial and satellite. Personal viewing data is captured by the TAMS meter for all household members aged four and older, and includes all guests in the home. Domestic workers are also included in the TAMS universe but are treated as separate households.

Like all TAMS panels worldwide, SAARF TAMS uses an establishment survey to estimate the size of the television universe, which will set the parameters of the sample. In South Africa TAMS uses the All Media and Products Survey (AMPS) for this purpose and the TAMS universe is therefore adjusted every six months with each new AMPS release (normally in about January and August each year).

An establishment survey is the only way to correctly reflect the relative sizes of all the different TV platforms at a given moment in time and to measure TV accurately, SAARF also needs to know amongst other things, how many TVs, and M-Net and DStv decoders, etc. people have. This information is sourced from AMPS.

While people are continuously buying new TV equipment, it is sufficient to update the TAMS universe only once every six months after new AMPS data is released as stated above. These updates routinely take place.

Updating the universe regularly ensures that the TAMS data remains up to date with changes happening in the TV arena, changes which are brought about by the constant addition of new households to the TV-viewing population, new pay-TV providers and the inexorable move to Pay TV.

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