

SAARF RAMS 2002A - a stable radio market

As is becoming the trend in the radio arena in South Africa, listenership is, in the main, extreme stable. This is the major finding of the latest Radio Audience Measurement Survey (RAMS) to be released by the South African Advertising Research Foundation (SAARF).

Place of listening/viewing and preferred station are again available as SAARF RAMS analysis enhancements. Detailed geographic analyses, which can be used for micro-marketing, demographic profiling and in-depth station analyses. This demographic analyses can be done on both SAARF RAMS and SAARF AMPS data.

All the FMCG product category data, released with SAARF AMPS 2002A, is available for RAMS users, as all the AMPS demographic data, activities, services, durables and shopping habits. AMPS readership and media data is also available, allowing for intermedia analyses, target marketing and media scheduling.

Technical information

SAARF RAMS 2002A used a large national sample of 29 016 diary keepers, the same sample as was used for SAARF AMPS 2002A.

FMCG product data was collected using the self-completion FMCG product questionnaire left behind with the SAARF RAMS diary.

A total of 130 radio stations were measured in this survey - 43 commercial and 87 community stations. Of the 130, 124 qualified for reporting on a 12-month database. Another five will qualify for release in the 24-month report at the end of August: they are Radio Atlantis, Vaaltar FM, Takalani Community Radio, Ilitha Community Radio, and Radio Namakwaland.

SAARF RAMS 2002A - Major Findings

National radio listenership

Overall, the picture for radio is stable, with almost no significant changes either in audience numbers or in audience profiles.

As was seen in the previous SAARF RAMS survey, radio listening is down significantly across the week, both over the last period and over the past 12 months. Listening on a Monday to Friday basis is down to 77.1% (from 78.3% in SAARF RAMS 2001B), with significant demographic shifts downward amongst females and the 35+ group. Weekend listening is also down. On Saturday, 72.8% of South African adults listen to the radio, compared to 74% in the previous period. Significantly fewer females, people aged 35-44 and those in rural areas, listen on this day. On Sunday, listening is down from 71.9% to 70.8%.

On average, people listen for 27.6 hours per week, or 3.9 hours a day. The pattern of quarter hour listening is stable, mirroring that of quarter hour listenership in past surveys.

Listenership shifts on a national level

Only two stations showed significant shifts in their audience levels, on a national basis, over the last RAMS period.

East Coast Radio has shown good growth in this survey, with gains in audience levels across the week, bc over the past survey, and over the past 12 months. Monday to Friday audiences are up from 2.6% to 3%, with the station attracting 876 000 listeners. Penetration on a Saturday is up from 2.2% to 2.6%, or 782 00 listeners. Sunday listenership is up from 2.1% to 2.6% (771 000).

There has also been good growth for Jacaranda 94.2fm, which has boosted audience levels across the week. On Monday to Friday, audiences are up from 2.7% to 3.1%, with 922 000 listeners. Saturday audiences are up from 2.2% to 2.6% (761 000), and Sunday sees the station's audience growing from 2% to 2.6% (757 000).

While significant changes period on period are limited to two, there have been a number of significant year on year changes, over SAARF RAMS 2001A.

- GHFM - Monday to Friday audiences are down from 1.8% in SAARF RAMS 2001A, to 1.5% in 2002/ (437 000), and Saturday audiences are down from 1.7% to 1.4% (414 000).
- RMFM - up on weekdays and Saturdays from 0.4% to 0.6%, with 164 000 listeners on an average Monday to Friday.
- SAFM - weekday audiences are up from 1% to 1.3%, or 370 000 listeners.
- Thobela FM - the station is down across the week over the past 12 months. Monday to Friday levels are down to 5.9% from 6.7% (1 754 000), Saturday levels are down to 5.5% from 6.5% (1 616 000), and Sundays, audiences are down from 6.7% to 5.6% (1 659 000).
- Ukhozi FM - audiences are down from 17.6% to 16.7% on Mondays to Fridays, to 4 933 000. Sunday listenership is also down from 15.7% to 14.8%, or 4 366 000 listeners.
- Umhlobo Wenene FM - weekday listenership is down from 11.6% to 10.8% (3 209 000), and Saturday audiences have declined from 10.7% to 10% (2 971 000).

Demographic shifts

While most stations maintained their SAARF RAMS 2002A audience levels, many have seen small shifts within their audience bases in terms of demographics.

- 94.7 Highveld Stereo - on Monday to Friday, this audience is up in SU-LSM 6-9, and down in SU-LSM 10. Afrikaans listeners and those in SU-LSM 8 are up on Saturdays.
- East Coast Radio - on Monday to Friday, the 16-34 demographic is up. Listening in rural areas, amongst females, and Zulu speakers is up on Saturday, and on Sunday, the KwaZulu-Natal, 16-24, and Zulu demographic is up.
- GHFM - down on weekdays and Saturday in SU-LSM 7.
- Radio Bop - down in the 35+ age group on Sundays.
- Jacaranda 94.2fm - the station has boosted levels during the week amongst the male and 16-34 demographic, on Saturdays amongst males, and on Sunday, there are more male, 25-49, and Northern Sotho listeners, as well as from rural areas and Limpopo.
- Kaya 95.9 FM - down in metros and amongst English listeners on Saturday.
- Lesedi FM - down for English listeners during the week, and down amongst Afrikaans and English listeners on the weekend.
- Motsweding - down in the 50+ age group on weekends.

- P4 CT - up in SU-LSM 9 during the week, and amongst Afrikaans speakers on Sundays.
- Thobela FM - up in SU-LSM 7 on weekdays, and down in SU-LSM 5 on Saturdays.
- Ukhozi - down on Sundays in the 16-24 age group, but up in the North West.
- YFM - down across the week amongst English speakers, and up in SU-LSM 8 on Saturdays.
- Total community radio - audiences are up in the Eastern Cape, East London and the Cape fringe, and amongst Xhosa and SU-LSM 5 listeners. On weekends, community radio is up in metro areas, in the Eastern Cape, Cape fringe and East London, and amongst Xhosa and SU-LSM 5 listeners.

Listenership trends around South Africa

Gauteng

Radio listening in Gauteng has remained fairly stable. From Monday-Friday, 77.6% of adults listen to the radio in this province, with 72.4% doing so on Saturdays, and 69.7% on Sundays.

The number of stations listened to on average every week is marginally down - 2.13 stations on average per listener.

The number of days on which people listen to the radio is stable - 5.73 days a week - and the number of hours per week is down fractionally, to 28.39 hours a week.

Looking at radio stations which attract a minimum of 2% penetration in the province, there is little change in terms of listenership. The picture of radio listening in Gauteng is generally a very stable one, both for commercial and community radio. There have been very few significant audience changes in the province over either the previous period, or the past 12 months.

Significant audience changes were seen for Metro fm, which is down significantly for Sundays on the previous 12 months, with penetration dropping from 13.9% to 12.1%, or 739 000 listeners.

Ukhozi FM is also down significantly for its weekday listening, on the previous 12 months - from 13.6% to 11.5%, or 699 000 listeners.

Demographic changes in Gauteng

Stations showing significant changes to their audience profiles were:

- 94.7 Highveld Stereo - up amongst Afrikaans listeners on a Saturday.
- Kaya FM 95.9 - down in metros on Saturdays.
- Lesedi FM - down amongst English listeners across the week.
- Ukhozi - down across the week amongst English listeners.
- YFM 99.2 - down amongst Afrikaans listeners on Monday to Friday, and Sundays, and amongst English speakers on Sundays.

Gauteng's radio shares in terms of time listened

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