

## SAARF RAMS OCTOBER 2014

The introduction of the first and only new small-urban/rural update for 2014 to SAARF's Radio Audience Measurement Survey (RAMS) for October has seen a number of changes coming through for radio listening, both at an overall level and for individual radio stations.

Although the medium as a whole has maintained its stability, there were declines in weekend listening, and four commercial stations and 10 community stations posted significant audience gains or losses.

### NEW SMALL-URBAN/RURAL SAMPLE

RAMS October 2014 combines two RAMS large-urban waves, covering mid-May to the third week of August 2014. These two waves have been merged with the new small-urban/rural update for 2014, which covers fieldwork from January to June 2014. This update will be used until June 2015.

Combined, the large urban and small-urban/rural diaries number 25 505 for this RAMS release.

### STATISTICAL SIGNIFICANCE

Only statistically significant changes are reported in this RAMS round-up. Any up or down arrows used represent statistically significant changes.

*All figures quoted are for adults, aged 15+.*

## DEMOGRAPHIC CHANGES

### HOUSEHOLD INCOME

GROUPS	RAMS Aug 2014	RAMS Oct 2014
Up to R799	2.6%	1.9% ↓
R800-R1 399	8.4%	6.2% ↓
R1 400-R2 499	10.4%	8.0% ↓
R2 500-R4 999	20.0%	22.0%
R5 000-R7 999	17.3%	18.0%
R8 000-R10 999	10.8%	12.1% ↑
R11 000-R19 999	14.2%	14.7%
R20 000+	16.2%	17.2% ↑

## SAARF LSMs

Two of the variables used to create SAARF's Living Standards Measure were changed in the June 2014 release of the SAARF All Media and Products Survey (AMPS). This was done to ensure that the LSMs better reflect the constantly changing nature of South Africans' standard of living.

Having a hi-fi or music centre was added, while the 'two cellphones per household' variable fell away.

The new LSMs show some regression over the previous RAMS release. LSM 1-4 now accounts for 22.0% of the population, a statistically significant rise from the 20.4% seen in RAMS August 2014. LSM 5-7 fell slightly from 53.5% to 52.4%, while LSM 8-10 declined from 26.2% to 25.7%.

The backsliding of South Africa's standard of living is possibly linked to the damage done to the economy by the protracted strikes in the platinum mining industry, which had a detrimental knock-on effect in a number of sectors.

In terms of the average Monday-Friday radio audience, there are now more LSMs 2 (up from 2.7% to 3.4%) and LSM 4 listeners (up from 11.2% to 12.3%), and fewer LSM 5 listeners (down from 18.2% to 16.6%).

## NATIONAL LISTENING LEVELS

While average week-day audience levels remained stable, there was a significant decline in weekend radio listening, coming through from the new small-urban/rural sample.

↓ **Saturday** listening levels dropped from 64.5% in the previous survey to 62.5% currently. Gains made in Saturday listening in the Cape Town fringe were not sufficient to offset the losses which came through from small towns, villages and rural areas, KwaZulu-Natal and the North West, 35+ audiences, and female audiences.

↓ **Sunday** listening showed a similar pattern; losses in small towns, villages and rural areas, in KwaZulu-Natal and Mpumalanga, and in the 35+ and female audiences contributed to a significant decline in listening from 64.2% to 62.5%.

Looking at weekend listening by quarter hours, the fall-off in listening over the previous RAMS release occurred in the early morning and in the afternoon and evening.

**Past seven day** listening levels were stable on 88.3%, despite declines in Mpumalanga, small towns, villages and rural areas, and in female audiences.

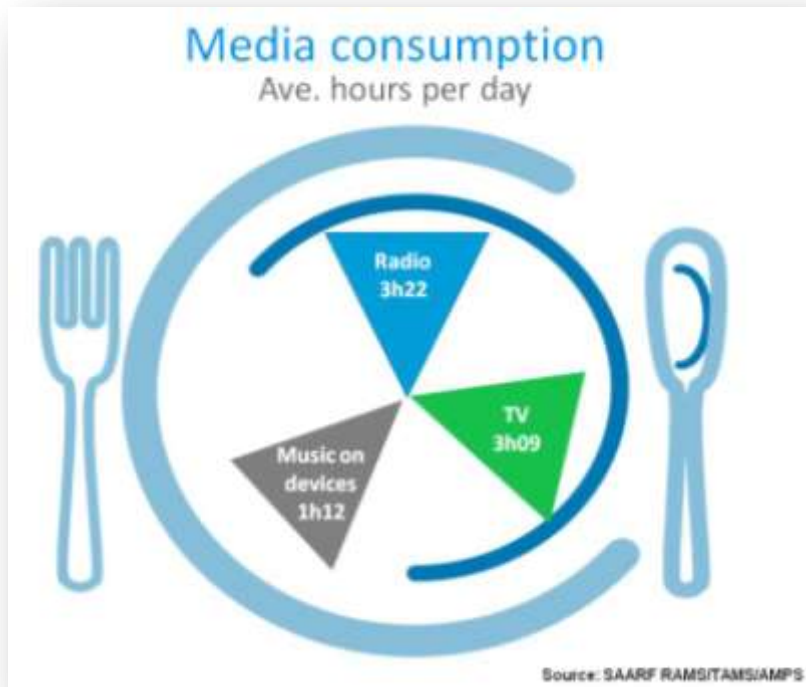
**Average Monday to Friday** listening was also stable, with 67.1% of the adult population tuning in to the medium. Losses were seen in small towns, villages and rural areas, with gains in Bloemfontein.

## TIME SPENT LISTENING (TSL)

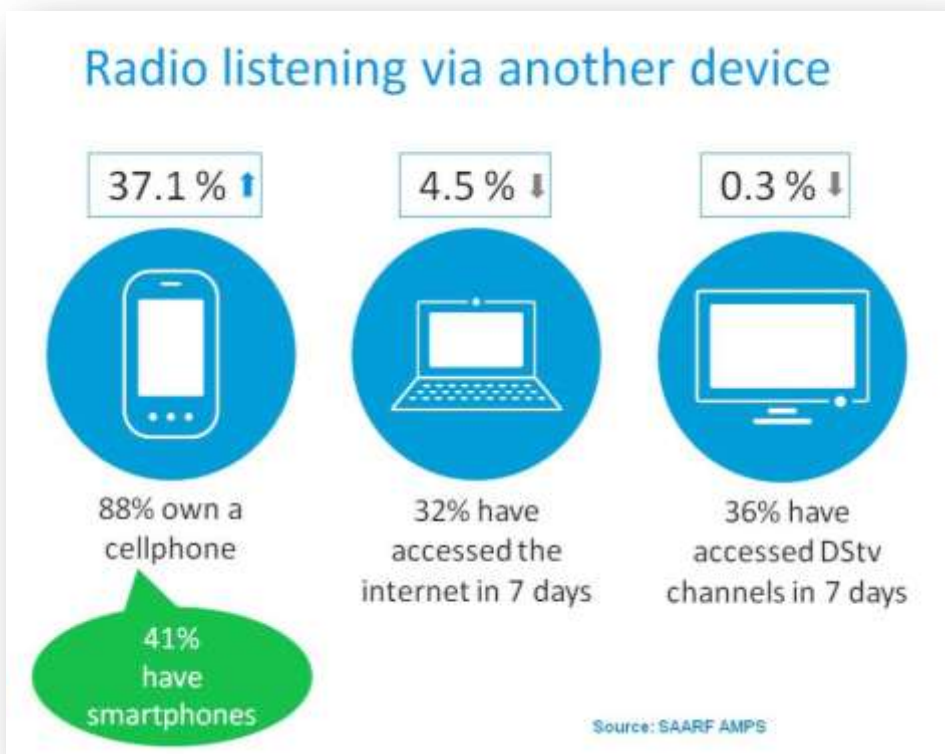
↓ The attrition of time spent listening (TSL) continued in this survey, with a loss of six minutes per day over the previous RAMS release. Listening time is now an average three hours, 22 minutes per person per day, or 23 hours, 36 minutes a week, down from 24 hours, 18 minutes in RAMS August 2014.

Small-urban/rural audiences shed double the minutes of their large-urban counterparts, with time spent listening in small-urban/rural areas dropping by eight minutes. This section of the total radio audience continues, however, to listen to more radio than does the large-urban audience: TSL is three hours, 37 minutes per day in small-urban/rural areas.

In comparison, large-urban audiences listen for three hours, nine minutes per day, down four minutes on the previous survey.



## LISTENING PLATFORMS



## INDIVIDUAL STATION DATA

↓ **Capricorn FM** showed a significant decline in its weekly and average Monday-Friday audiences.

Past-7-day listening for the station dropped from 3.9% to 3.3%, driven by losses in small towns, villages and rural areas, and in the 15-24 age group. Average Monday-Friday listening dropped from 1.6% to 1.2%, with losses in small towns, villages and rural areas, in the 15-24 age group, and in female listeners.

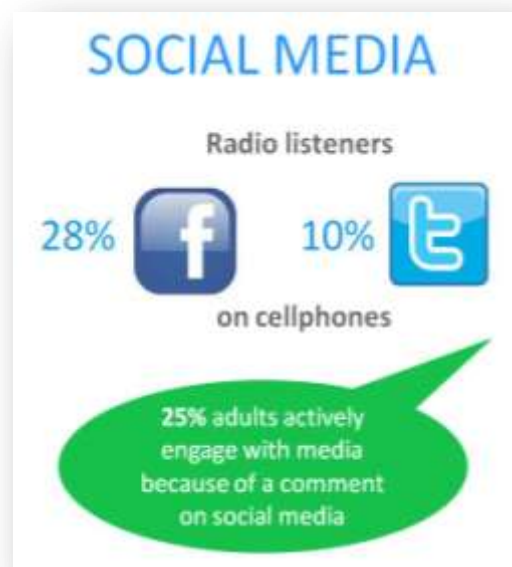
↓ Like Capricorn, **Ligwalagwala FM** lost both 7-day and weekday listeners. The station's past-7-day audience declined from 4.2% previously to 3.7%, with losses in rural areas and in Mpumalanga. Its average Monday-Friday audience declined from 2.3% to 1.9%, driven by losses in rural areas, Mpumalanga and listeners aged 35+.

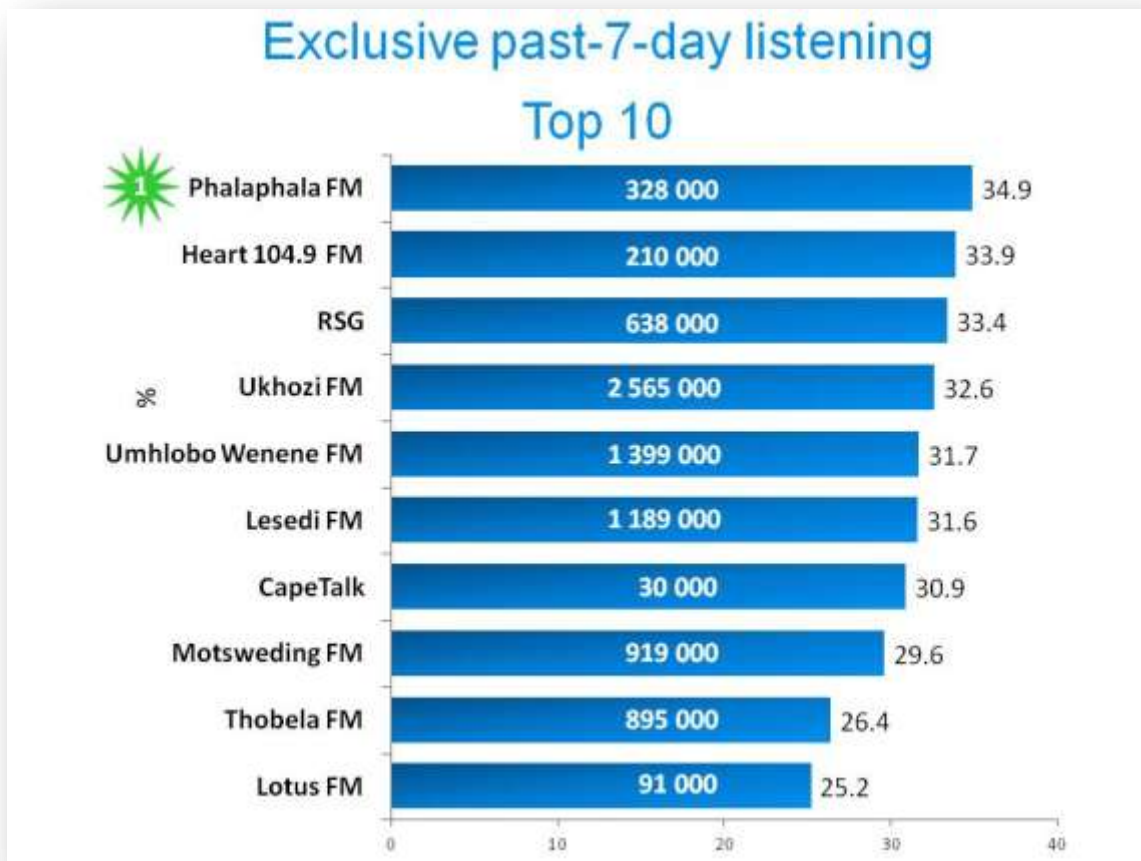
↑ **METRO FM** grew its weekly audience from 16.9% in the previous RAMS to 18.0%, pushing up its audience numbers from 6.282-million to 6.766-million. The station now has more listeners from small towns, villages and rural areas, and KwaZulu-Natal, and has more female and 50+ listeners.

↑ **Vuma FM**'s weekly audience increased from 0.5% to 0.9%, up to 330 000 a week from 186 000. This growth came from small towns, villages and rural areas, and from the 25-34 age group.

### CHANGES IN DEMOGRAPHIC PROFILE

- East Coast Radio gained listeners aged 15-24 across the week.
- Good Hope FM lost coloured listeners across the week.
- iKwekwezi FM gained audience in rural areas and in Limpopo on a past-7-day level, and in Limpopo on an average Monday-Friday.
- Jacaranda FM lost audience in Gauteng (past 7 days).
- KFM gained black listeners (past 7 days).
- Lesedi FM lost audience in the North West (past 7 days).
- Motsweding FM lost audience in Gauteng and the North West (past 7 days).
- North West FM saw its audience in small villages, towns and rural areas decline (past 7 days).
- OFM lost black listeners (past 7 days).
- Radio 2000's white audience grew across the week.
- Thobela FM grew its audience in Mpumalanga (past 7 days).
- Ukhozi FM has more listeners in the Eastern Cape (past 7 days, and average Monday-Friday).
- Umhlobo Wenene FM lost listeners in the Eastern Cape (past 7 days).





## COMMUNITY RADIO

Total listenership for community radio remained stable at 23.8% across the week, with 11.7% of adults tuning in to community stations on an average Monday-Friday.

The sector gained audience in the Western Cape and Bloemfontein across the week, and in Bloemfontein during the working week.

### LISTENERSHIP CHANGES OVER RAMS AUGUST 2014 (past 7 days)

↑ **Maputaland Community Radio** grew its KwaZulu-Natal audience from 0.7% in RAMS August 2014 to 2.3%, up from 49 000 listeners to 165 000.

↑ **Zululand 97.0 FM** enjoyed a significant audience boost in KwaZulu-Natal, upping its numbers from 34 000 (0.5% reach into the province) to 231 000 (3.2%).

↑ In the Western Cape, **The Voice of the Cape** increased its audience from 154 000 (3.5% reach into the province) to 220 000 (5.0%).

↓ **Inkonjane FM** has a decreased presence in the Eastern Cape, with its reach down from 5.8% to 3.7%.

↓ **Unitra Community Radio's** Eastern Cape audience declined from 6.3% to 3.6%.

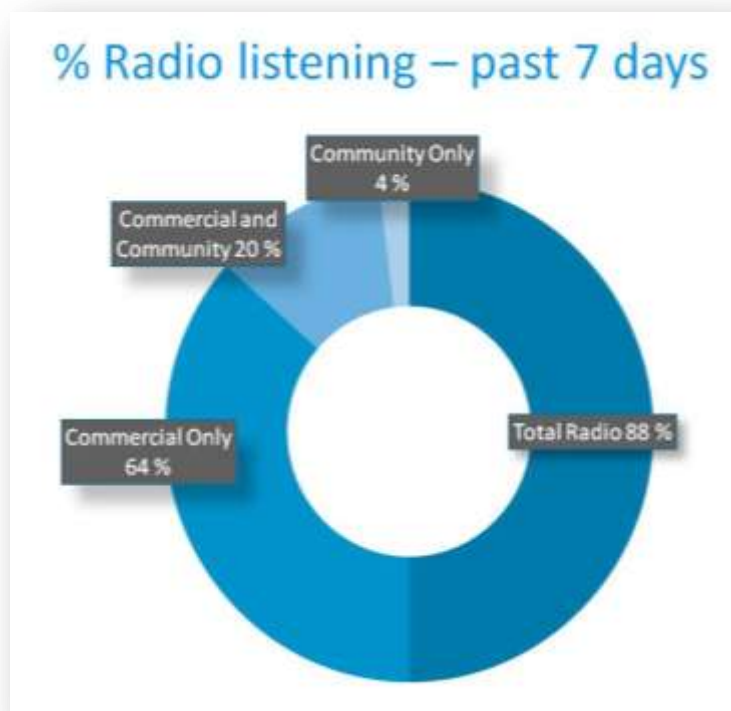
↑ The Eastern Cape's **Vukani FM** grew its reach within the province from 1.1% to 2.8% (up from 51 000 listeners to 127 000).

↑ **Kasi FM 107.3** now has an audience of 142 000, with reach of 5.0% into Mpumalanga, up from 1.5% previously.

↑ Limpopo's **Tubatse FM** increased its listenership from 1.9% to 4.7% within the province, with 173 000 listeners.

↑ New Free State station **The Rock Community Radio** saw its provincial audience rise from 3.0% to 5.0%, or 99 000 in total.

↓ **Radio Riverside 98.2FM**'s reach into the Northern Cape declined from 11.0% previously to 5.8%.



#### CHANGE IN REGIONALISATION FOR THE 2015 DIARIES

For some time now, SAARF has split the community radio stations across two regionalised diaries, since it was impractical to carry 220 community radio stations in one diary. With the recent addition of a further 30 community stations to the sector, SAARF's RAMS contractor, Nielsen, identified a need for a third regionalised diary.

As was the case before, all commercial radio stations appear in all three regionalised diaries. Community radio stations whose footprints overlap any of the RAMS diary regional boundaries will be carried in more than one diary.

This addition of a third regionalised diary will have no methodological impact on RAMS 2015 results.

## NEXT INSTALMENT

The next RAMS release will be on 4 December 2014.

ends

Note to the editor:

*The South African Audience Research Foundation (SAARF) is the provider of research data to the advertising, marketing and media industries. Its main objective is to direct and publish media and product/brand research for the benefit of its stakeholders, thereby providing data for target marketing and a common currency for the buying and selling of media space and time. The information is also used by media owners for strategic programme and editorial planning.*

*SAARF conducts a number of major media and product/brand surveys. The All Media and Products Survey (AMPS<sup>®</sup>), includes extensive information on media as well as products, services, brands, attitudes, interests and activities and is South Africa's only free source of data on nearly 120 product categories and over 1 500 brands. Other important surveys are the Radio Audience Measurement Survey (RAMS<sup>®</sup>); the Television Audience Measurement Survey (TAMS<sup>®</sup>) and the SAARF Out of Home Media Survey (OHMS). SAARF also provides comprehensive information on target groups, and supplies segmentation tools which include the SAARF Living Standards Measure (LSM<sup>®</sup>), SAARF Life Stages, SAARF Lifestyles and SAARF Attitudes, which are widely used for segmenting target markets.*

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