

2023 TV Establishment Survey finds shifts in SA's TV landscape

The 2023 TV Establishment Survey (ES) reveals significant shifts in South Africa's TV viewing landscape compared to the last universe update in 2019.



Source: © pixander [123rf](#) The 2023 TV Establishment Survey (ES) reveals significant shifts in South Africa's TV viewing landscape

This is according to the Broadcast Research Council of South Africa (BRC) has officially unveiled and enacted updates to the Television Audience Measurement Survey (Tams) universe estimates, leveraging insights from the recently conducted 2023 TV ES.

"Despite the continued prevalence of TV viewership, there has been a remarkable surge in streaming activities across all age groups," says Gary Whitaker, CEO of the BRC.

"We are also observing the impacts of various factors such as the analogue switch-off, load shedding, and other environmental considerations," he adds.



TV

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2023 ES key findings

Key findings from the 2023 ES:

- The number of households in South Africa has increased by 5% since the previous ES in 2019.
- 91% of the total population engages in video viewing on TVs and/or streaming devices. Streaming accounts for 28% of video viewing with the majority using smartphones for streaming.
- Tams household universe (linear only) has reduced.
- Streaming viewing has increased across age groups and socio-economic levels, especially among the youth.
- Analogue switch-off, economic strain and load shedding have impacted linear TV viewership.
- Internet access has enabled streaming, with 69% of households having smartphone access and 15% having fixed broadband.



TV

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"Aligned with international trends, individuals continue to consume a substantial amount of video content; however, how this consumption occurs has undergone significant transformation," says Whitaker.

He further comments, "Tams needs to evolve to precisely mirror South Africa's intricate viewing ecosystem."

Last year's TV ES, with a sample size of 8,000, was conducted using a hybrid methodology combining face-to-face and online survey data to obtain a representative national SA sample.

The BRC will adjust the Tams panel composition over time to align with the new universe estimates. Given the measurement changes, there will be impacts on TV ratings and audience sizes.

The BRC recommends proper contextualisation when analysing TAMS data during this transition period. The Tams Universe update was implemented and released on Monday, 29 January 2024.

Complete Tams universe update details as well as profile changes of the TV population and TV panel which include province, area type, population group, pay/non pay TV can be found on the [BRC website](https://www.bizcommunity.com).

For more, visit: <https://www.bizcommunity.com>