

# Radio listening grows across the week

The third release wave of SAARF's Radio Audience Measurement Survey (RAMS®) sees listening levels growing across the week, and increased time spent listening to radio. The effects of seasonality are also beginning to become visible, thanks to the increased frequency of the survey.

This survey also contains new small town/village/rural data, as taken from the latest AMPS® survey (AMPS® 2004), thus updating this component of radio listening.

Below are the main top line results from SAARF RAMS® 2004/3 (Apr-Aug). More in-depth results, with a focus on station results and community radio in Gauteng, KwaZulu-Natal and the Western Cape, as well as radio trends across the year, will be presented at the following SAARF industry presentations in October 2004.

Fieldwork took place from the end of April to mid-August, excluding June. Flooding occurred in metros, cities and large towns. 153 stations were measured, 135 qualified for reporting.

## New methodology

SAARF RAMS® 2004/3 (April-August) sees a change in the methodology, which, while minor, has yielded significant benefits in terms of the sample size.

In the two previous 'flooded' release waves, primary diary keepers were asked whether other adults in the household would be able to complete a radio diary. Diaries were then given to the primary respondent for those household members only.

However, in the latest fieldwork period, diaries were automatically given to the primary respondent for all adults in the household, which has seen a considerable rise in the total number of diaries in the latest RAMS® sample.

The RAMS® sample is now 17 268 strong, with an additional 1 211 diaries resulting from the above change.

## Demographic notes

- The population has been updated according to the 2004 Bureau for Market Research (BMR) estimates. Adults now number 30.310m, up from 29.773m in 2003. This update affects the gender proportion of the population (males are up from 47.9% to 49.5%, and females have declined from 52.1% to 50.5%). This has not however, had any real impact on radio listenership. The proportion of male listeners has indeed grown (from 48.5% to 49.1%), but this is a growth of only 0.6%, as opposed to the 1.6% growth of males in the total population. Female radio listeners have declined slightly from 51.5% to 50.9%.

- The SAARF Universal LSMs have been updated, with four of the previous 29 variables being replaced. The following variables have fallen out: living in a traditional hut; living in Gauteng or the Western Cape; and having mains electricity. The new variables are: living in a house/cluster house/town house; being a metropolitan dweller; having a DVD player; and having one cell phone in the household. The ability to track and compare SU-LSM® data from previous surveys however, has not been compromised, since the 2004 SU-LSM® group ranges have been adjusted so that the groups are comparable with previous SU-LSMs®.

## Small town/village/rural listening

With the release of the All Media and Products Survey 2004 (AMPS®), a new 6-month small town/village/rural RAMS® measure is now available. This data has been added to the April-August large urban data to produce this third release wave of RAMS® (the small town/village/rural component is not flooded). The RAMS® 2003B rural component was still used for RAMS® 2004/1 and 2004/2.

This segment of radio listening is up significantly, and not because of any methodological change - this amounts to real growth for the sector. Time spent listening in rural areas is up 17 minutes in an average day.

## Time spent listening

For the first time in several years, fieldwork for RAMS® took place during the July school holidays. (Since the fieldwork for AMPS® 2004 ended in early June, and only a few diaries were placed during June, July was included to avoid a large gap from occurring in the fieldwork.) Apart from a slight increase in some daytime slots, this has very little impact on both listening habits and the number of available listeners.

Time spent listening is indeed up, by 10 minutes per average day per listener. Time spent listening is now 4 hours 45 minutes per day (up from 4 hours 35 minutes in the previous period), and 33 hours 18 minutes per week (from 32 hours 6 minutes in the previous period).

*Time spent listening by province (hours, minutes)*

	Mar-May04	Apr-Aug04
Eastern Cape	3h47	4h06
Free State	5h32	5h42
Gauteng	4h47	4h56
KwaZulu-Natal	4h10	4h42
Limpopo	5h02	5h16
Mpumalanga	5h20	4h51
Northern Cape	3h43	3h49
North West	4h50	4h49
Western Cape	4h22	4h20

## Repertoires

*Radio repertoires (number of stations listened to) remain stable*

	Mar-May04	Apr-Aug04
Eastern Cape	1.8	1.8
Free State	1.7	1.8
Gauteng	2.6	2.5
KwaZulu-Natal	1.9	2.0
Limpopo	2.3	2.4
Mpumalanga	2.2	2.2
Northern Cape	1.7	1.6

North West	2.1	2.3
Western Cape	2.0	2.0

## National radio listening

In total, listening levels have grown significantly across the week (over the previous survey).

- **PAST 7 DAYS** - 92.0% (up from 90.1% in the previous survey, RAMS® 2004/2 Mar-May); up in metros, small towns/villages, Northern Cape, Free State, Eastern Cape, Gauteng, amongst females, in the 16-24 and 50+ age groups, and in SU-LSM® 1-4 and 9.
- **MONDAY TO FRIDAY** - 79.9% (up from 77.3% in RAMS® 2004/2); up in metros, Northern Cape, Free State, Eastern Cape, Gauteng, amongst females, in the 16-24 and 35+ age brackets, and in SU-LSM® 1-4.
- **SATURDAY** - 77.4% (up from 74.0% in the previous survey); up in metros, small towns/villages, rural, Northern Cape, Eastern Cape, KwaZulu-Natal, Gauteng, East London, amongst both males and females, in the 16-24 and 35-49 age groups, and in SU-LSM® 5-6.
- **SUNDAY** - 75.0% (up from 72.5% in the previous survey); up in metros, Northern Cape, Eastern Cape, Free State, Gauteng, East London, amongst females, amongst those aged 16-24 and 50+, and in SU-LSM® 9. (The Free State, Gauteng, Northern Cape and Eastern Cape showed an increase in actual listeners, while in Limpopo and KwaZulu-Natal, the same listeners spent more time listening.)

Average day listening for individual stations is comparable with the previous period. Below are those stations which have shown significant changes over the previous period (on a national level).

*(Listenership figures have only been shown where significant movements over RAMS® 2004/2 Mar-May occurred)*

Station	Past 7 days	Monday to Friday (M-F)	Profile shifts over RAMS® 2004/2
5FM Music	-	-	Down in the Northern Cape (past 7 days).
702 Talk Radio	-	-	Up in cities and large towns (past 7 days).
94.7 Highveld Stereo	-	-	Down in SU-LSM® 9 (past 7 days; M-F).
CKI-FM Stereo	Up from 2.0% to 2.5% (762 000)	Up from 1.1% to 1.5% (468 000)	Up in the Eastern Cape, amongst females, and in the 16-34 age group (past 7 days; M-F).
CLASSIC 102.7 FM	-	-	Up in SU-LSM® 7-8 (past 7 days).
94-95 EAST COAST RADIO	Up from 6.0% to 6.9% (2.1m)	-	Up in KwaZulu-Natal, amongst females, and in LSM 3 (past 7 days); and up in KwaZulu-Natal and SU-LSM® 1-5 (M-F).

Jacaranda 94.2fm	Up from 8.0% to 9.0% (2.743m)	Up from 4.3% to 5.0% (1.512m)	Up in KwaZulu-Natal, North West, amongst females, and amongst 16-24s (past 7 days); up amongst 16-24s (M-F).
Radiokansel/ (Radio Pulpit)	-	-	Up in SU-LSM® 5-6 (past 7 days; M-F).
Kfm 94.5	-	-	Up in SU-LSM® 7 (M-F).
Lesedi FM	-	-	Up on the Reef, and down in SU-LSM® 3 and 7 (past 7 days); up in the Free State, amongst 35+, and in SU-LSM® 9-10 (M-F).
METRO FM	-	-	Down in metros, Gauteng and in the Vaal (past 7 days).
Motsweding FM	-	-	Up in SU-LSM® 6-10, and down in SU-LSM® 4 (past 7 days); down in SU-LSM® 4 on M-F.
Ligwalagwala FM	-	-	Down amongst 16-24s (M-F).
Munghana Lonene FM	Up from 4.1% to 4.9% (1.497m)	-	Up in Limpopo, amongst females, in 16-24 and 35+, and SU-LSM® 5 (past 7 days); up amongst females, 16-24 and 50+ (M-F).
P4 Cape Town 104.9fm	-	-	Up in SU-LSM® 10 (past 7 days).
P4 KZN 99.5fm	-	-	Up in SU-LSM® 9-10 (past 7 days).
Phalaphala FM	Up from 2.4% to 2.9% (891 000)	-	Up amongst males and 16-24s (past 7 days); and amongst 16-24s on M-F.
RMFM	Up from 2.3% to 2.9% (887 000)	Up from 0.8% to 1.1% (346 000)	Up amongst 16-24s and 35-49s (past 7 days); and amongst 16-24s (M-F).
Thobela FM	-	-	Up in the 35-49 group (past 7 days) and down in 50+ (M-F).
Ukhozi FM	-	-	Down in Mpumalanga, 35-49, SU-LSM® 6 (past 7 days); down in SU-LSM® 6 (M-F).

Umhlobo Wenene FM	Up from 15.2% to 16.7% (5.075m)	Up from 10.2% to 11.6% (3.523m)	Up in the Eastern Cape, females, 16-24, SU-LSM® 3 and 8, and down in SU-LSM® 6 (past 7 days); up in the Eastern Cape, females, 16-34, and SU-LSM® 1-4 and 8 (M-F).
99.2 YFM	Down from 6.1% to 5.2% (1.573m)	-	Down in metros, Gauteng, amongst males, 16-34, and SU-LSM® 5-6 (past 7 days).
Total Community	Up from 15.5% to 18.1% (5.482m)	Up from 8.2% to 10.0% (3.028m)	Up in rural, Eastern Cape, KwaZulu-Natal, Mpumalanga, PE/Uitenhage, males and females, and 16-34 (past 7 days and M-F). Up in 35+ and SU-LSM® 1 (past 7 days), and in 50+ and SU-LSM® 1-4 (M-F).

*Industry presentations to present the latest findings will be held in October, venues to be announced later: Johannesburg: 15 October, at 09:30; Durban: 18 October, at 14:00; Cape Town: 19 October, at 09:30. Go to [www.saarf.co.za](http://www.saarf.co.za) for more.*

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