RAMS reveals national results for new stations

The first national results for South Africa's three new commercial stations are in, ending the speculation about how well these new players are attracting listeners. RAMS October 2008 has staggering results for one of them - a million plus jump in listenership!

The South African Advertising Research Foundation (SAARF) has released the fifth RAMS for 2008. The currency for the South African radio industry, this release of RAMS records significantly changed results for a large number of radio stations.

Stellar results

Starting with the new kids on the block, Capricorn FM has achieved stellar results. Initial RAMS results, which measured only audience in Polokwane, pegged the station's reach at 0.1% (August 2008), with 42 000 listeners. The latest results are sure to have Capricorn FM reaching for the bubbly - 4.9% weekly reach, and 1,543-million listeners.

Capricorn FM's share of total time spent listening in Limpopo, home to 89% of its listeners, is already 15.6%, putting it second in the province behind Thobela FM (33.0%). (Share is defined as the percentage of gross quarter hours, average Monday to Friday.) In Mpumalanga, home to 11% of its listeners, Capricorn's share is 3.9%.

RAMS October 2008 also provides the first breakdown of the new stations' audiences. For Capricorn, 97.4% of its audience is based in small towns, villages and rural areas. The majority of listeners are aged 16-24 (49.2%), with just over a quarter aged 25-34 (26.7%). The station's gender profile is skewed towards males (55.2%), and over three quarters (78.3%) are in SU-LSM 1-5.

As with Capricorn FM, the majority of M-Power FM's audience is based in small towns, villages and rural areas. Its total audience is 103 000 listeners, with a national penetration of 0.3%. Its share of total time spent listening in Mpumalanga is 1.0%.

North West FM's first national weekly audience result is well up from the previous survey's 162 000 (large urban only). The station's audience now numbers 419 000, with a reach of 1.3%. Its listeners are drawn evenly from both urban and rural areas: 0.6% reach in large urban areas, and 0.7% reach in small towns, villages and rural areas.

North West FM's share of total time spent listening in the province is 8.6%, putting it in second place behind the substantially bigger Motsweding FM (46.9%, down from 55.2% previously).

The station appeals most to the 35-49 year-old set (39.6%). Just over a quarter (26.1%) of listeners are aged 16-24, while

22.9% are 25-34. There is a slight skew towards females (52.7%), with 62.5% of listeners in SU-LSM 1-5.

The ups and downs of SA's other stations

Exceptional growth hasn't been the sole preserve of the new licences. Gagasi 99.5 has done it again, increasing both its weekly and working week audiences, both over the previous release, and year on year.

The station is now gunning for 2 million listeners a week. Its current weekly audience is 1.906-million, giving it a national reach of 6.1%, up from 4.9% previously. Much of this growth has been in small towns, villages and rural areas, in SU-LSM 4 and 6, and amongst those older than 50. (SU-LSM 7 listeners have dwindled.)

During the working week, Gagasi's growth from 2.7% previously to 3.5% has come through mainly from small towns, villages and rural areas, females, and 16-34 year-olds. This audience numbers 1.100 million.

Other changes are listed below:

- Algoa's BRFM's weekly audience has grown year on year. The station now reaches 0.5% of the total population (up from 0.3% in RAMS® October 2007).
- Channel Africa's first national result is 16 000 listeners per week, with a reach of 0.1%.
- Ending its growth streak is Kaya FM 95.9, whose weekly audience has declined over the previous survey from 4.7% to 4.1%, with 1.278-million listeners. Much of these losses came from the Reef, the Vaal, age 35+, and SU-LSM 6+.
- Jacaranda 94.2 has lost audience during the working week across both the previous survey, and year on year. The station's reach of 4.2% (for both RAMS October 2007 and August 2008) is now 3.6%. Loss of male listeners, and listeners in the 16-34 age group have contributed to this. Weekly audience is down in Mpumalanga, amongst males, and those aged 16-24.
- Jacaranda RM.fm has also shown declines. Weekly audience is down year-on-year from 2.3% to 1.8% (554 000 listeners), with losses amongst males and people aged 16-24, but with gains in SU-LSM 9. Average Monday to Friday audiences declined on an annual basis, as well as over the previous survey. Reach is now 0.5% (161 000 listeners).
- CKI FM/tru fm's weekly audience has declined over October 2007, from 1.8% to 1.4%, with 430 000 listeners.
- Radio 2000's weekly audience is up year-on-year, from 0.8% in October 2007, to 1.1%, with 358 000 listeners.
- Declines have come through for SAfm on an annual basis, with total numbers down to 532 000, and reach down to 1.7% (from 2.2% in October 2007). SU-LSM 7 audience is significantly down.
- Talk Radio 702 has been steadily increasing its weekly audience over the past three periods. Growth has now reached levels where it is significantly improved year-on-year. The talk station's audience of 343 000 in RAMS October 2007 has now grown to 552 000, with reach up from 1.1% to 1.8%.
- Ukhozi FM has also been steadily improving its 7-day standing, and has now posted significant increase, both over the previous period and year-on-year. Up from 20.0% reach in RAMS August 2008 to a current weekly reach of 21.3%, South Africa's biggest radio station now pulls in 6.668-million listeners. Growth was mainly in Mpumalanga, amongst males, 35+, and in SU-LSM 6. Its SU-LSM 8 audience has shrunk. Average Monday to Friday figures show gains in Mpumalanga, amongst males, 50+ and in SU-LSM 6, but no significant change in numbers.

  Total community has done well, improving on its weekly reach of 19.3% a year ago. The sector's current reach, of 22.8%, is up significantly year-on-year, as well as over the previous period. Gains came through from several quarters: 16-24, 35-49, SU-LSM 5, rural areas, Eastern Cape, KwaZulu-Natal, Limpopo and North West.

Average Monday to Friday community radio listening is also up on an annual basis, from 10.5% to 11.6%, with growth in the Eastern Cape.

Community core

Five community stations showed significant 7-day changes:

- Eden Fm, from a zero base a year ago to 4.0% reach currently, up from 2.5% in August 2008.
- Izwi loMzansi has also risen from nothing a year ago, to 1.4% currently, growing its reach from 0.9% in the previous period.
- Qwa-Qwa Radio has improved its reach from 6.7% in both October 2007 and August 2008, to 10.3%.
- Radio CCfm has shown a year-on-year decline, from 4.7% to 3.1% reach.
- Vaaltar FM is up annually, from 2.3% to 5.5%.

Facts and figures for radio in general

Total listening

Period-on-period, listening levels are stable on the August release, apart from Saturday which is significantly down. There has however, been annual growth:

- 7-day listening is up on 2007, climbing steadily from 92.1% in RAMS October 2007, to 94.4% currently (up in KwaZulu-Natal and small towns, villages and rural areas, but down in metros, Gauteng, and on the Reef).
- Average Monday to Friday listening is also up on 2007, moving from 75.7% in RAMS October 2007 to 77.8% in the current survey. Significant growth occurred in KwaZulu-Natal.
- Saturday listening is down on the previous RAMS release, August 2008. Reach on a Saturday fell from 73.6% to 72.1% currently. (Much of the decline can be attributed to lower listening in rural areas, amongst males, and in the Northern Cape, Eastern Cape, Limpopo, Gauteng and on the Reef. Levels were up, however, in Welkom.)
- Listening on a Sunday has grown significantly over 2007, swelling from 69.2% to 71.0%, despite loss of audiences in the Eastern Cape, in Gauteng and on the Reef, and amongst 16-24 year-olds.

There has been annual growth in listening in large urban areas across the week. Despite gains over the previous year, 7-day listening dropped over the previous RAMS release (from 93.9% to 93.0%).

In small urban and rural areas, the upward trend continues for 7-day listening, which is currently at 95.6%.

Time spent listening (TSL)

Time spent listening has decreased by 10 minutes per day over the August release, and by 15 minutes per day year-on-year. Both the large urban (03h45 daily) and small urban/rural (04h27 daily) sectors are contributing to this annual change, but with more weight coming from the latter, which lost 17 minutes over the previous survey:

- Daily TSL: four hours, eight minutes (August 2008: 04h18)
- Weekly TSL: 28 hours, 54 minutes (August 2008: 30h06)

Repertoires

Repertoires remain stable at 2.1 stations across an average week. The significant increase in repertoires in Limpopo (from 2.1 to 2.6) and the North West (from 1.9 to 2.2) is possibly due to the new commercial stations on offer.

Technical data

- With the release of AMPS 2008A, a new 6-month small town/village/rural RAMS measure is now available, and has been added to the May-August large urban data to produce the current national release wave.
- The small town/village/rural component is not flooded. Only primary respondents in households had diaries placed with them.
- October RAMS reflects new 2008 population estimates supplied by the Bureau of Market Research of UNISA (BMR). The total adult population (16+) for the RAMS universe increases by 0.6%, from 31.109 million to 31.303 million. There were no significant changes to demographic proportions.

- Combined rolling wave of two fieldwork periods: beginning of May to the end of June 2008, and from the beginning of July to the third week of August 2008.
- Diary keepers: 18 818

- The final release of SAARF RAMS for 2008 is scheduled for 26 November, 2008. The South African Advertising 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.