

# Media Inflation Watch 2012 Jan-Mar: The new data

Media Manager Online has been updated with new Inflation Watch data covering 2012 January to March. Media planners and buyers will be very uncomfortable with the results. Some highlights for you (all figures are 2012 Jan to Mar on 2011 Jan to Mar)...



## ...TV

Rates +17.14%

Performance -0.39%

MIW Index (CPM) +19.79%

No surprise to buyers: SABC TV has become very aggressive with its rate setting. SABC1's 20 spot schedule is a massive +34.4% up which with a slump of -9.2% in viewership yields a massive +48.0% MIW (CPM) increase. SABC2 isn't much better. e.tv was considerably more conservative with rates at just +1.4% and an increase in performance resulting in a -1.0% MIW (CPM).

There are big differences between free-to-air and paid. Free-to-air yields rates at an average +18.7% with audience -2.7% and an MIW Index (CPM) of +23.6%. Pay TV (i.e., DSTV) registers a lower rate increase of 13.4% and still increases audience at 5.2%, thus pulling back the MIW (CPM) to +10.5%.

TV is a major component of the All Media mix. When TV gets aggressive/loses performance, the All Media Index is affected disproportionately. This is why media planners and buyers are very uncomfortable.

## ...Print

Rates +5.36%

Performance -5.12%

MIW Index (CPM) +11.76%

The low comes, surprisingly, from weekends/weeklies, a +6.8% for MIW (CPM), largely due to a rate standstill for the big Media24 newspapers. The high is again daily newspapers at +16.0%. Community newspapers comes in at +7.7%, Consumer magazines is +11.0% and business to business is +11.2% MIW (CPM) increase.

Not all daily newspapers are affected equally. *Isolezwe* looks particularly good compared to the rest of the category. However, there are four titles in the +20% range and one over 30%. Among the weeklies *Ilanga*, *Soccer Laduma*, *Post*, *Sunday Sun* and *Rapport* all deliver low MIW (CPM) increases and *City Press* was a very creditable negative -13.6% MIW (CPM) number.

## **...Radio**

Rates +6.17%  
Performance -4.92%  
MIW Index (CPM) +14.70%

Wow! A disastrous RAMS 2012/1 covering fieldwork October 2011 to March 2012 has pushed back radio's audience gains of the last year or so, changing the final 2011 MIW (CPM) index and yielding a poor 2012 Q1 result. By and large the CIW format stations are more negatively affected than the Black is. When RAMS 2012/2 comes out later in June we'll do an interim update of the medium to see if one RAMS study introduced a trend or is a blip in the data set.

## **...Out of Home**

Rates +0.00%  
MIW Index (CPM) +0.00%

Important outdoor contractors and buyers contacted confirm that the out of home industry kept their 2012 rates at 2011 levels.

## **...Cinema**

Rates +16.20%  
Performance +9.30%  
MIW Index (CPM) +6.40%

The first set of figures for some time with which cinema will be happy! However, the data is largely 2011 performance so this may change for the even better or worse!

## **...Online**

Rates -1.30%  
Performance 0.00%  
MIW Index (CPM) -1.3%

We have now included online as a medium in Inflation Watch and in the CPM analysis. We cannot get revenues for individual sites so an intra-medium weighting is not possible. To evaluate online we created a schedule of 8 of the top regular sites by interest/audience. All of them levied rates on a CPM basis so the sum of the rate card cost of 1x1000 audience in each is trended. The use of this metric means we can strip out audience growth to track real input rate percentage change.

Be aware, however, that many sites do offer massive discounts, perhaps at levels higher than any other medium, so build this factor into any evaluation.

## **...Total All Media**

Rates +10.45%  
Performance -2.33%

MIW Index (CPM) +14.71%

Want to see all the detail? Want to rank the media owners in rate vs delivery vs MIW Index (CPM) change? Want to see an updated cost per thousand all Media Analysis? Then point your browser to <http://online.mediamanager.co.za> right now.

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