

## Little change in SA media - AMPS 2008B

While there may have been ups and downs over the previous period, overall, there has been little change. This is according to the latest AMPS figures, AMPS 2008B (mid-January 2008 to mid-December 2008), which was released last week.

This second release of All Media and Products Survey (AMPS) shows a media playing field where the players are tenaciously holding onto their patch of turf, according to SAARF.

Overall, the results for AMPS 2008B are little changed over the previous survey. Few media have managed to grow their audiences, but on the upside, few have lost audience.

All comparisons made are between the previous AMPS release, AMPS 2008A (covering the July 2007 to June 2008 fieldwork period), and the current release, AMPS 2008A (covering the mid-January to mid-December 2008 fieldwork period), unless otherwise stated.

- Total 2008B sample: 21083
- Total 2008B universe: 31,303 million adults aged 16+

### Demographics

#### *Where are the women?*

Over the past decade, the makeup of the South African population has changed substantially. In 1999, there were 1.1 million more females than males. Today, there are only 106 000 more. The impact of HIV/AIDS is apparent with younger females. There are now proportionately more males than females in the two younger age groups. In 1999, there were 178 000 more females than males aged 16-24, and currently, there are 170 000 more males.

Similarly, in the 25 - 34 age group, there are now 325 000 more males than females, where 10 years ago women outnumbered men by 139 000. The difference between males and females in the 35+ groups is less disparate.

#### *Services and possessions*

Service levels in South Africa have not improved over AMPS 2008A, with access to electricity and water remaining unchanged at 88.6% and 77.1% respectively. As with services, the number of appliances and electronic goods in homes has stayed relatively stable.

The only shifts were in high-tech appliances, such as home PCs, home theatre systems and M-Net/DStv decoders. Cellphone growth has slowed, with access to cellphones stable on AMPS 2008A (at 67.9%). Home phones, however, have continued their downward march, dropping from 19.4% in the previous survey, to 18.2%, particularly in metros, cities, large towns, and in Gauteng.

#### *LSM movement slows*

The lower LSMs declined significantly in the previous two AMPS releases, but movement has now stopped. Similarly, the growth seen in LSM 4-6 has abated. The current LSM picture remains largely unchanged over AMPS 2008A.

#### *Employment and income*

Local employment levels have remained unchanged over the previous AMPS release, with the impact of the global

economic recession yet to be picked up by the survey.

- Working full time: 30.3%
- Working part time: 9% (with declines in metro areas)

Proportionately, there are more people working now than five years ago, as measured by AMPS 2003, but looking back to 1999, levels are sorely down. It is of great concern that even those with a higher education are unemployed. Just having a matric is no longer good enough. Eight percent of people with a tertiary qualification are unemployed and seeking work, while 30.3% of people holding a matric qualification are without work. Average monthly income is up slightly over AMPS 2008A, from R6 537 to R6 771.

## Education

Education levels have remained unchanged over AMPS 2008A.

- Illiteracy levels: 1.9%
- No schooling: 3.3%
- Primary completed: 8.1%
- Some high school: 39.8%
- Matric: 28.5%
- Technikon diploma or degree: 5.6%
- University degree: 3.4%



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## The big picture: media in South Africa



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## Print media

The print medium has held its own since the previous AMPS survey, with no significant growth or decline. Print reaches 60.3% of SA adults, with a total readership of 18 870 million people.

## Newspapers

In total, newspapers reach 48.6% of all adults, with 15 222 million readers. There has been no movement over AMPS 2008A.

Newspaper snippets:
• Highest reach: Gauteng (69%)
• Lowest reach: Eastern Cape (29.4%)
• Wealthiest daily readership (ave. household income): <i>Business Day</i> , R21 623
• Wealthiest weekly readership: <i>Beeld Naweek</i> , R17 546

**Stable** - Any Daily Newspaper: readership of the dailies has remained precisely as it was in the previous AMPS, at 31.4%. There are 9 844 million daily newspaper readers.

**Stable** - Any Weekly Newspaper: as with the dailies, there is no change over AMPS 2008A. Weeklies reach 35.4% of all adults, with 11 068 million readers.

The top-five daily newspapers are:

1. *Daily Sun*, with 16.5% reach nationally
2. *Sowetan*, 6.7%
3. *The Star*, 3.5%
4. *Isolezwe*, 2.1%
5. *Die Beeld*, 1.8%

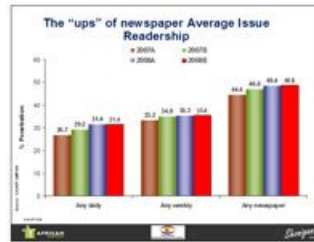
The top-five bi-weekly/weekly newspapers are:

1. *Sunday Times*, with 12.4% reach nationally
2. *Sunday Sun*, 9.8%
3. *City Press*, 7.4%
4. *Soccer Laduma*, 7.9%
5. *Sunday World*, 6.1%

The only changes in the newspaper sector have been the following demographic shifts:

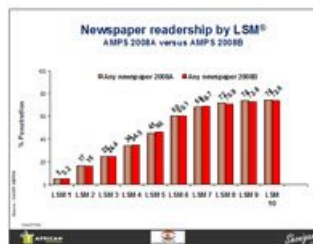
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- Business Day's male readership is down over AMPS 2008A, from 0.7% to 0.4%. The paper has also lost readers on the Reef.
- There are fewer metro readers of the Sunday issue of *City Press*, particularly in Gauteng, and on the Reef. The paper's reach into metro areas is down from 9.9% to 8.4%, and its reach into Gauteng has dropped from 14% to 11.6%.
- *Ilanga* (Monday/Thursday) has lost readers in cities and large towns, with its reach down from 1.5% to 0.8% over AMPS 2008A.
- The *Pretoria News Weekend* has increased its readership in metro areas, up from 0.9% in AMPS 2008A to 1.3% currently.

- *The Star*: down in Durban.
- The weekly title, *UmAfrika*, has grown its metropolitan readership from 0.5% to 0.9%, especially in Durban.



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## Newspaper readership since AMPS 2007A



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How newspaper readership varies by LSM, comparing AMPS® 2008A with AMPS 2008B.

### Magazines

As in AMPS 2008A, magazines in total have remained stable, with no significant growth or decline being reflected in the latest AMPS release. Magazines reach 40% of South African adults, with 12 537 million readers.

- **Stable** - Any weekly: at 22.1% reach, with 6 904 million readers.
- **Up** - Any fortnightly: has grown from 6.2% in AMPS 2008A, to 7.8% currently, with 2 427 million readers. Growth has occurred across both genders and all ages, in metros, cities and large towns, and in the Western Cape (especially in Cape Town), the Free State (especially in Bloemfontein) and Gauteng (particularly on the Reef). Growth also took place in PE/Uitenhage and Durban.
- **Stable** - Any monthly: readership levels remain **Stable** at 29.6%, with 9 255 million readers.
- **Stable** - Any alternate monthly: there is no change in this sector, which reaches 8.1% of adults. There are 2 550 million readers.
- **Stable** - Any newspaper subscriber magazine: at 21.8%, with 6 829 million readers, these titles have remained stable. There has been growth in Bloemfontein.
- **Stable** - Any quarterly: while **Stable** at 2.2%, with 681 000 readers, this magazine sector has experienced growth in metros, and the Western Cape and Cape Town in particular.

The first 12-month data for *Zigzag* is in. The surfing magazine has a reach of 0.4%, with 129 000 readers.

The top-five magazines are:

1. *Jet Club*, 11.2%
2. *True Love*, 6.9%
3. *Bona*, 7.1%
4. *You*, 6.8%
5. *Edgars Club Magazine*, 6.9%

The only other statistically significant changes in the magazine sector were to the readership profiles of the following

titles:

- *Car's* Gauteng readership has declined from 5.2% in the last survey, to 4% currently. Losses come particularly from Pretoria.
- *Clicks Club Card* magazine has lost readers in Pretoria.
- *Club Mag* (Foschini Group) has seen declines in its metro readership base, from 4.9% previously to 4.1% in AMPS 2008B. There are fewer readers in Cape Town specifically.
- *Dish/Skottel*: up in Pietermaritzburg.
- *Fairlady*: down in Greater Johannesburg.
- *Move* is up in Kimberley.
- *O, the Oprah magazine* has lost readers in Gauteng, with its reach dropping from 4% to 3%.
- *Soccer Life FourFourTwo's* metro readership has fallen from 3.2% in AMPS 2008A to 2.6% currently.



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## Magazine readership since AMPS 1999.



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## How magazine readership varies by LSM, comparing AMPS 2008A with AMPS 2008B.

## Electronic and digital media

### Television

(Please note that SAARF TAMS is the official currency for television.)

Seven-day total TV viewing is stable over the previous period as well as the year previous: 83.7% of South African adults watch television across a week. As in the previous AMPS release, Dstv is the only channel to have achieved significant growth. The satellite offering now reaches 16.8% of adults, up from 15.2% in AMPS 2008A. The growth of Dstv's audience comes from both males and females, and especially the 16 - 24 age group. Areas which have driven the platform's growth are Gauteng (and particularly Greater Johannesburg and Pretoria), Durban and Pietermaritzburg, across metros, cities and large towns.

Performance across the week for SA's other TV channels is as follows:

- e.tv reaches 57.1% (**stable** on AMPS 2008A)
- SABC1: **stable** on 70.6% (but with declines in the Western Cape and Cape Town)
- SABC2 reaches 60% of adults (stable)
- SABC3: **stable** on 47.6%

- M-Net main service: 6.4%
- M-Net CSN has significantly declined, from 0.5% in AMPS 2008A to 0.1% currently. There are significantly fewer both male and female viewers and in metros.

## Radio

(Please note that SAARF RAMS is the official currency for radio.)

- Total radio listening across the week remains unchanged over AMPS 2008A, at 94.1%.
- Total community radio reaches 18.6% of adults, **stable** on the previous survey.

## Cinema

Levels of cinema attendance have remained **stable** over AMPS 2008A. The only changes in the medium have been demographic in nature: attendance is down in metros for the three- and five-month filters, and is up in Pretoria for the “Cinema - Ever” filter.

- Up to seven days: 1.4%
- Average four weeks: 7.4%
- Ever: 56.2%

## Internet

As with other media, Internet usage is **stable** over the previous survey. There were also shifts in the profile of Internet users.

- “Yesterday” usage: 5.6%
- Past seven day usage: 8.1%
- Past four week usage: 9.5%
- Past 12 months: 10.7%

## Out-of-home media

(The electronic measure, SAARF OHMS, is the official currency for out-of-home media.)

There were no significant gains or losses in audience for the various out-of-home media. A number of media types, however, had profile shifts over AMPS 2008A.

	Reach	Gains in	Losses in
Billboards	72.3%	None	None
Stores	79.7%	Pretoria	Reef
Taxi ads	64.8%	Bloemfontein	Reef
Truck ads	64.00%	Durban, Greater Johannesburg and Pretoria	None
Bus shelters	39.1%	Bloemfontein	None
Buses	41.4%	East London, Bloemfontein and Greater Johannesburg	None
Dustbins	42.4%	Metros, the Free State, Durban, Pietermaritzburg and Bloemfontein	None
Trailer ads	40.9%	None	None
Trains	12.3%	None	Reef

- SAARF AMPS provides a wealth of information on South Africa's adults (aged 16+, and aged 15+ from AMPS 2009A). The cornerstones of AMPS are people's demographic data, which media they consume, from print to radio to cinema, and which products and brands they purchase and use. AMPS also includes branded information, with data on products and brands, including FMCG brands, fast food outlets, cell phones, financial institutions, and food and grocery retailers, amongst others. This allows users to match target markets with media consumption behaviour, segment markets, identify

characteristics of media consumers as well as their brand usage, and identify opportunities for individual media types and titles.

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