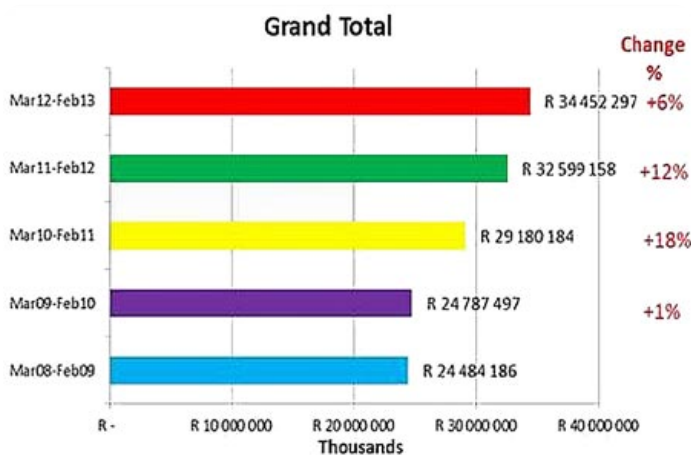


Adspend declines in real terms

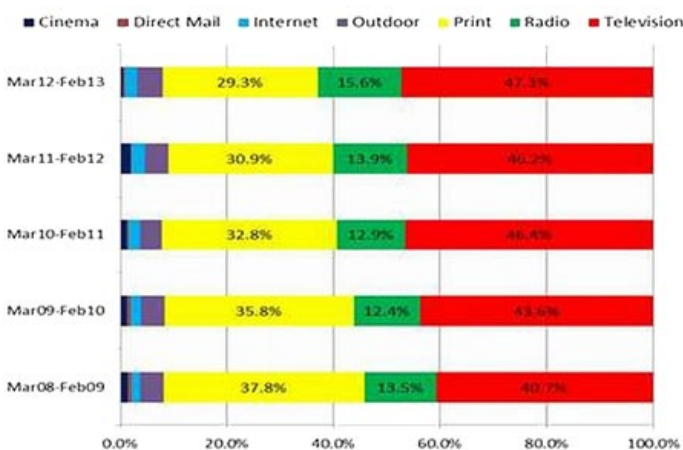
MediaShop has analysed adspend trends covering a five-year period from 2008 to 2013 (March to February). This excludes self-promotion adspend.

Whilst adspend is growing, the latest data clearly indicates that the positive adspend trend seen in the last couple of years is clearly slowing down. A five year trend shows that the total adspend for the period March 2012 to February 2013 has increased by only 6% to R34,452 million. This is after two years of good growth (18 & 12%).



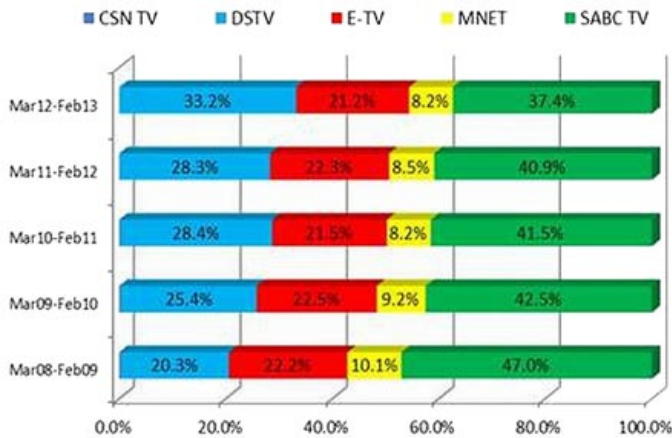
Source: AdDynamix

A look at the split by media type shows that TV continues to grow its share - up to 47% - at the expense of print, which has shown a consistent decline over the past five years. Radio has shown good growing to reach its highest level in five years at 15.6%.



Source: AdDynamix

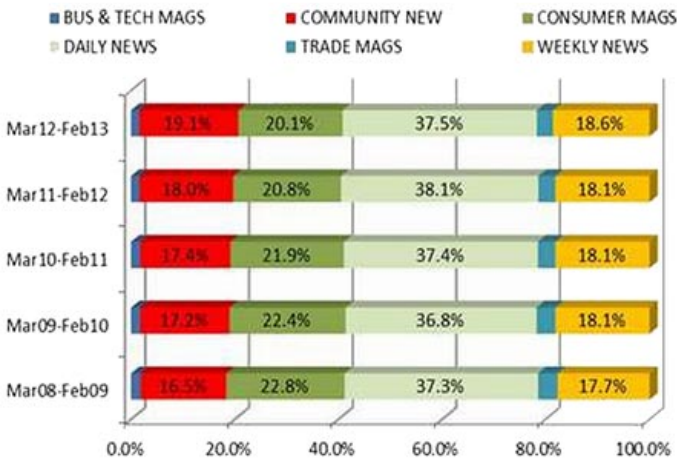
Within TV, we see a continuous growth in the DSTV share, which is up to 33% from 20% five years ago. This growth is mostly at the expense of SABC stations but M-Net has lost share whilst e.tv has remained relatively static.



Source: AdDynamix

A look at print shows that year on year expenditure has not really declined. Rather print growth has been at lower level than other media, which manifests itself in reduced share.

Within print, daily newspapers have the lion's share at 38% but it must be remembered that from a revenue point of view there are five or even six issues a week, compared to other weekly or monthly titles.



Source: AdDynamix

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