

the things you
need to know about

THE SOUTH AFRICAN MEDIA LANDSCAPE

Is our media landscape bleak? Is it being overrun by ‘alien’ media in the form of digital technology? What are the current realities? We had to find the answers when we were tasked to present a lightning short presentation at the Menell Media Exchange conference and it proved surprising on several fronts.

By Jos Kuper, Kuper Research

The media landscape: some key trends and features

Did you know that the number of daily newspaper titles increased from 18 to 22 over the 10 years from 2004 to 2014 and while it is true that circulation declined (by 16% over the 10 years), the reach actually increased from 21% to 29%? Weeklies had a decline of 21% in circulation and the reach stayed the same, despite a slight increase in the number of weekly titles from 23 to 26. For newspapers in general, the circulation decline over the period has been 20% while the reach has increased to 46% from 39% with the number of titles growing from 41 to 48.

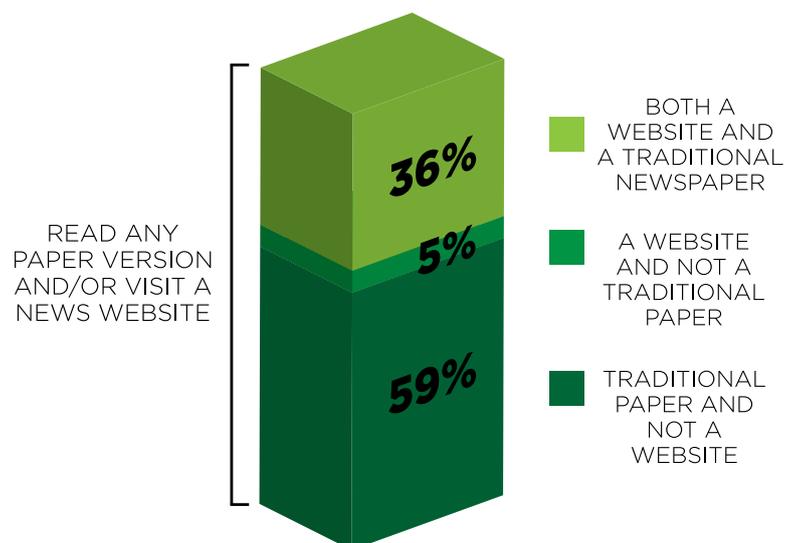
The implication? Newspapers are still important to people but they are sharing copies more than they used to do.

A brief look at digital “migration” shows news websites have considerable traction but are not anywhere near supplanting the traditional newspaper as yet (even if we exclude the Daily and Sunday Suns from consideration). Of those reading newspapers, almost 6 in 10 are still reading only the traditional print version, 36% are reading both the print and the digital, and a small 5% are only reading digital. Interestingly it is access to a PC that particularly enables access to news and publications online, or at least a bigger screen afforded by a tablet.

Radio is the medium least affected by digital and

READERSHIP: NEWS WEBSITES AND TRADITIONAL PRINT NEWSPAPERS

SOURCE: FUTUREFACT 2014



traditional ways of listening to the radio are holding strongly. Devices aren't generally used for streaming radio but rather for listening to music that's been downloaded or live radio. Commercial stations' listeners are far more likely to have internet access than those who listen to the public broadcasting or community radio stations. Podcasts tend to be downloaded by those with tablets.

As far as TV is concerned, an evident trend is the predominance of local over international even among those with satellite TV access. Of the 38% of DStv subscribers who watch any news on TV, the majority are watching the local channels rather than the international news channels. And when asked about their favourite TV programmes, South African soaps, drama series, soccer and sitcoms or comedy series stand out above all the rest. Also among the top 10 favourites are music, reality shows, lifestyle programmes, documentaries and international soccer.

While TV viewing is shifting in many countries overseas with decent broad bandwidth and possibly more affordable rates, TV is still strong here with satellite viewership increasing exponentially as more affordable packages become available. In fact there is a considerable proportion of the DStv viewership that is heavily dependent on it and would rather do without other things if times were tough than give up their subscriptions.

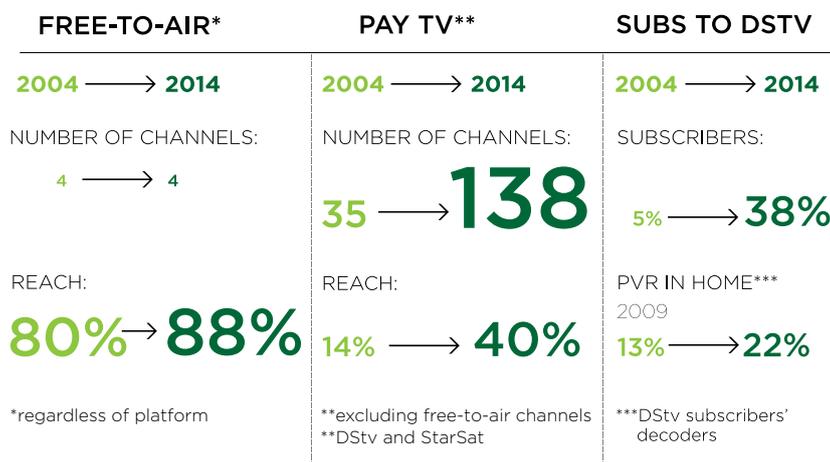
Advertising and audience research

Many years ago there was a substantial study on the value of media 'synergy' to advertisers – the value of using more than one medium to get optimal opportunities to see the ads (the concept of I+I=3). The latest futurefact findings bear this out. For example, when looking at those in the market for a house, their useful media were newspapers (43%) and the internet (32%) but the two combined increased their usefulness to 63%. Depending on category of purchase, different media combinations prevailed: for example for computer/laptop/cell phone purchases, newspapers garnered 45%, TV 39% but in combination it was 61%.

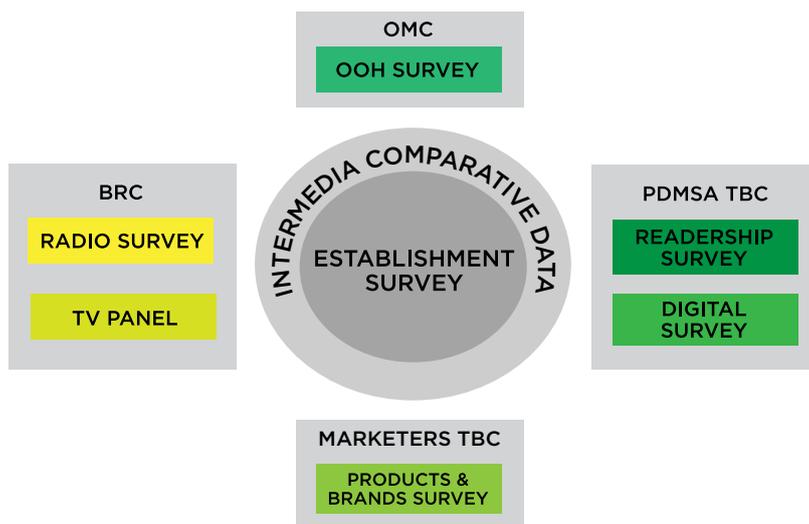
The audience research landscape has changed significantly over the last year or so with the move prompted by the National Association of Broadcasters (NAB) leaving the South African Audience Research Foundation (SAARF) fold to go it alone. They commissioned audits of the Television Audience Measurement Survey (TAMS) data, showing that television audience research had been operating on very low efficiency levels and the broadcasters felt they had been funding a great deal of the SAARF audience research without the co-relevant representation on the board. Since then they have re-awarded the tender for TAMS, increased the size of the panel, made it more representative, and practically doubled the efficiencies. The radio

TV (THE TV MARKET ACCORDING TO AMPS)

SOURCE: AMPS



AUDIENCE RESEARCH: THE STATE OF PLAY



tender has been awarded and soon will go it alone as well. Print and digital are also on the road to finding their way forward and Out of Home, previously the Cinderella medium on the All Media Products Survey (AMPS), are well into a technologically sophisticated measure for static media in association with Spanish company Cuende.

Going forward, there is in all likelihood going to be a central Establishment Survey (ES) consisting of key demographics and broad intermedia that will

serve as the core of all the industry surveys which can be fused with the ES to provide the central linking mechanism for all the surveys. All this was part of a model proposed when a task team led by Kuper Research was commissioned to conduct what was called the Future Proofing Project. It involved a great deal of research into international media audience measurement trends and practices as well as a survey of local media planners, strategists and owners.

A beleaguered media landscape? Credibility and politics

futurefact has been monitoring the views of the population on elements related to the media for several years now and what is palpable is that the role of the media as a corruption fighter is absolutely acknowledged. But there are caveats: there is undoubtedly a perception that journalists sometimes harm people's reputations because there is insufficient checking of facts and there is a perception that the media are too negative in the way they reflect what is going on in the country and don't show the good things that are happening. It needs to be remembered by journalists and editors that while people are pessimistic about corruption ever being contained in our current milieu, they still are optimistic that business and government can work together to help to solve the country's problems and even that their children's lives can be better than theirs in the future. Under these circumstances they don't only want a daily diet of gloom and doom from the media, but also a reality check in terms of the balance of what is reflected.

Fascinatingly the louder the noise has been from government against the media, the more people are expressing trust and confidence in journalists and the media. In the most recent futurefact survey the trust and confidence score for journalists was a great deal higher than for the ANC, SAPS and far higher than the President whose ratings have been plummeting. Even comedians and cartoonists score higher than the ruling party and SAPS, among others. The scores of journalists and satirists were lower though than those for the Public Protector and the Constitutional Court.

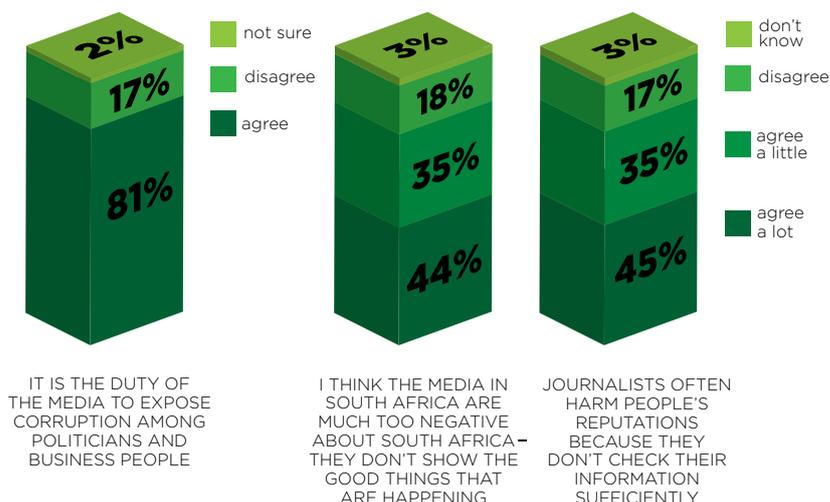
Over half of the South African population now has internet access fuelled by the growth of smartphones. And social media is certainly the name of the game with a great deal of time being devoted to social media, particularly by the under 35s but substantial even beyond that. Those who are connected are far more likely to express trust and confidence in social media than those who aren't familiar with it.

But with the municipal elections looming in 2016, social media are going to be critical to the political arena for all political parties. Our political affiliations are in a considerable degree of fluidity compared to past times despite the strength of the ANC, and the fact that many are still ruled by their hearts rather

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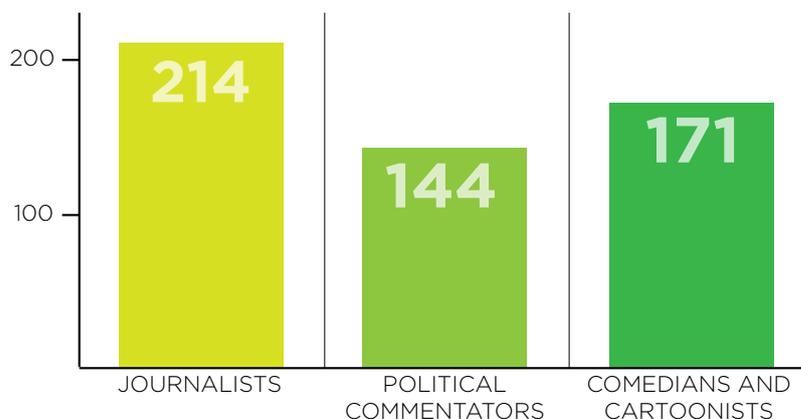
PERCEIVED DUTY OF THE MEDIA

SOURCE: FUTUREFACT 2014



CONFIDENCE SCORES: MEDIA

SOURCE: FUTUREFACT 2014



TO PUT THIS IN PERSPECTIVE:

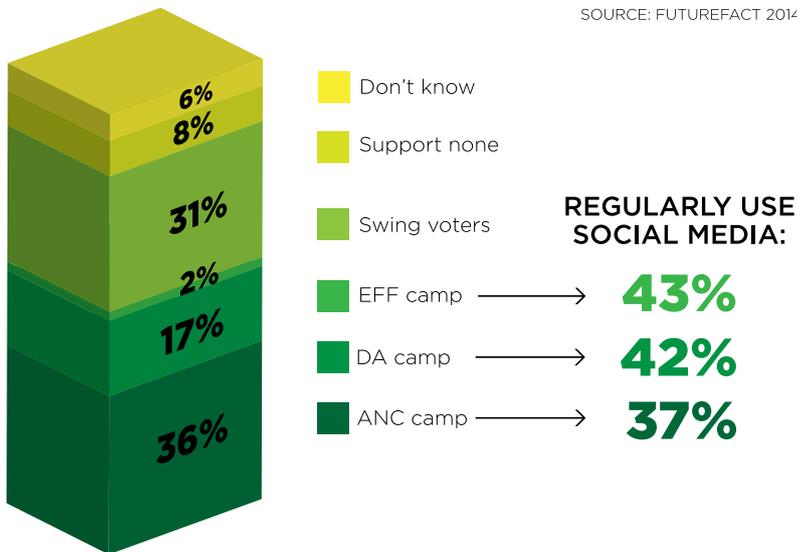
ANC = 120
 THULI MADONSELA = 262
 CONSTITUTIONAL COURT = 288
 SAPS = 152
 JACOB ZUMA = -6



Soweto by Jodi Bieber

INTERNET ACCESS AND POLITICS

SOURCE: FUTUREFACT 2014



Sources

AMPS: All Media and Products Survey

ABC: Audit Bureau of Circulations

futurefact: futurefact has been surveying the attitudes and beliefs

of South Africans since 1998. The findings presented above are

from the futurefact survey conducted in late 2014, based on a probability sample of 3 048 adults aged 18 years and over, living in communities of more than 500 people throughout South Africa and representing 22.8-million adults living in 9.4-million households. If you would like to find out more about futurefact and its extensive attitudinal databases please contact Jos Kuper 082 904 9939 or check out www.futurefact.co.za

than their heads in their political affiliations. There is a great deal of concern reflected about the ANC and its leadership and there is a wish for the opposition to be stronger so that the democratic process is more robust. Nonetheless there are many indications that a large number of people will stick to the party of their hearts, the ANC, particularly as many believe there is no point voting for a party that is unlikely to win.

Despite all this, many are wavering in their support for various parties and the proportion of swing voters is high. It will be key to secure party supporters and bring more on board using social media as the municipal elections get underway.

Young people, the media and social identity

The youth of today don't have to depend on one newspaper title, one radio station or one magazine for their views anymore. They are using multiple platforms to build up their view of issues in our complex society and global world and when they have reassured themselves on the credibility of their sources and the opinions being reflected, only then will they express their own in a social context. In this way they are building their sense of belonging to a social group, their value in the group, and finding their social identity. It is an interesting phenomenon that is worth exploring further in times to come and has immense relevance for how the media in this country adapt and grow to meet the needs of future audiences.

In the meantime we can watch and/or participate in the rollercoaster ride as the media landscape evolves in our rapidly changing world.



Jos Kuper is a research professional and founded Kuper Research, a consultancy specialising in media, marketing and socio-political analysis. She is one of the independent researchers responsible for the futurefact survey that has been monitoring the significant social, political and economic attitudinal changes in our country since 1998. joskuper@futurefact.co.za

Jos Kuper:

10 THINGS ABOUT THE SA MEDIA LANDSCAPE

SHORT SHARP

- 1 Newspaper numbers are up; newspaper circulations are down; readership is up; radio listenership is stable; while the number of community stations is up. TV viewing is up, PVRs are up in number, free to air also up.
- 2 News websites have thankfully not supplanted newspapers.
- 3 Digital information has had little effect on radio.
- 4 Local TV is prevailing over international TV.
- 5 18 to 24 year olds spend at least two hours a day watching TV.
- 6 If you want exposure think both newspapers and internet.
- 7 This is the end of single- source audience research.
- 8 It's the duty of the media to fight corruption and politics and business (according to audience surveys) but journalists do harm to their reputations when there is too much negativity.
- 9 For the upcoming municipal elections social media will be crucial; about 31% of the electorate is undecided, but hearts and minds are not necessarily aligned.
- 10 The volume of attacks on the media has a relationship with the trust in the media.



Soweto by Jodi Bieber

