

Media becoming greater part of life in SA

South African adults are consuming more media. As measured by the latest All Media and Products Survey (AMPS), the 2007B released today, Thursday, 13 March, most media types have shown significant growth over the previous AMPS, released in September 2007 (AMPS 2007A).

According to the South African Advertising Research Foundation (SAARF), this latest AMPS release also shows positive gains being made in terms of the development of South African society, with improvements being seen in the SU-LSM wealth measure, as well as in education and access to services and amenities.

SAARF AMPS provides a wealth of information on South Africa's adults (aged 16+). 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.

SAARF AMPS 2007B also includes Branded AMPS, with data on products and brands, including FMCG brands, fast food outlets, cell phones, financial institutions, and food and grocery retailers, among 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.

SAARF AMPS 2007B presents data collected during the February – November 2007 period. The total sample size was 21 068 respondents, representing a total universe of adults, aged 16+, of 31,109 million people, an increase over AMPS 2007A of 0.7%, or 206 000 people.

All comparisons made are between the previous AMPS release, AMPS 2007A, and the current release, AMPS 2007B.

DEMOGRAPHICS

South Africans' lives are improving when it comes to the basic necessities. More homes have electricity. Nationally, 87.4% of homes are electrified, up from 86.0%, with specific gains being made in Mpumalanga and Limpopo.

More homes also have water piped in, with a resultant decline in the incidence of water on the plot only. Currently, 51.2% have water in the home (up from 49.5%) with significant growth of this service in KwaZulu-Natal, and 23.3% have water on the plot (down from 24.4%, especially in KwaZulu-Natal and Gauteng).

The incidence of flush toilets in the home has grown, from 44.4% to 46.2%. These gains were seen especially in Gauteng, on the Reef and in Pretoria.

Life improvements

Bad news for Eskom, but good news for the country's development index, is that the incidence of geysers in households has grown (35.6% to 37.3%). Putting more strain on the national grid is the growing number of electric stoves making an appearance in homes. Just over 56% of homes now have electric stoves (from 53.6%), while gas and charcoal stoves have been on the decline, falling from 16.6% to 15.4%. Across the country, except in the Western Cape and North West, more homes have microwave ovens than before, up from 41.6% to 45.9%.

- Six out of ten South African adults have access to a cellphone, either owning, renting or using one. This is a 7.5% increase over the previous survey, where 56.3% of people had access. The downward slide of landlines continues, from 20.1% to 19.2% (especially in the Free State and Northern Cape).
- More homes have TV sets – from 77.4% to 80.1% currently – with gains especially in the Eastern Cape, KwaZulu-Natal, Mpumalanga, Limpopo and Gauteng.
- The incidence of DVD players in the home has grown nationally, except in the North West, from 40.2% to 44.9%. VCRs continue to decline, from 24.1% to 21.5% currently.
- Refrigerators have expanded their reach, and are found in 72.5% of homes, up from 70.4%. Deep freezers are also up, from 19.2% to 20.6%.
- Top loading washing machines are up, from 13.1% to 14.9%.
- One in ten homes now has a home security system, up from 9.2% previously. Homes in Gauteng have been driving this security growth.

SU-LSMs

The wealth profile of South Africa continues to steadily improve. SAARF's Universal Living Standards Measure (SU-LSM) shows the steady exodus of people from the lower SU-LSMs, while the ranks of the upper middle and upper SU-LSMs are swelling.

Over the previous AMPS release, SU-LSM 1 has fallen from 4.8% of the total population, to 4.1%, with losses seen especially in the Eastern Cape. SU-LSM 2 has declined from 11.0% to 9.8% nationally, with significant declines in Mpumalanga and the Free State. The decline of SU-LSM 3 completes the picture of a dwindling lower class. This group now accounts for 10.8% of South African adults, down from 11.9%. These changes were seen especially in KwaZulu-Natal and the Northern Cape.

Higher up the scale, SU-LSM 6 and 7 have grown. Nationally, SU-LSM 6 is up to 17.3%, from 16.0% in the previous AMPS release. SU-LSM 7 has grown significantly from 8.5% to 9.3%.

Looking back just three years to 2004, these changes are even more noteworthy. SU-LSM 1-4 has declined by 24% since AMPS 2004, from 50.6% to 38.5%. SU-LSM 5-6 has grown by 17%, from 27.1% of the population to 31.8%. The top SU-LSM groups have also increased significantly, with SU-LSM 7-8 growing by 45% (11.0% to 16.0%), and SU-LSM 9-10 by 21% (11.3% to 13.7%).

Income

Income levels are slowly improving. Significantly fewer people are to be found on the two lowest income levels, while income brackets higher up are swelling. SAARF believes this is not due to people becoming unemployed and therefore falling out of these categories entirely, but rather that wages are improving and households are moving up the income ranking.

There has been a significant decline in the R1-R499 income bracket, from 4.5% of people to 3.6%, especially in KwaZulu-Natal and Gauteng. Similarly, the second lowest bracket – R500-R899 – has declined, from 15.2% to 13.1%, across all provinces except the North West and Western Cape.

The two highest income brackets have grown significantly. From 12.4%, the R7 000-R11 999 bracket has grown to 13.9%, and the R12 000+ group has risen from 11.2% to 13.2%.

Education

Overall, fewer South African adults are without schooling than before. The previous AMPS release showed that almost 5% of people had no schooling. This has dropped to 4.2% in the current release, substantially lower than a mere ten years ago, when 12% of adults had no schooling at all.

Functional literacy levels, where people have completed at least primary school, are up significantly, from 85.9% to 87.8%. Other significant changes in education level were seen in secondary and tertiary schooling. More people have matric, from 25.6% previously to 26.7% currently. The number of people holding technikon degrees has also increased, from 4.8% to 5.4%.

MEDIA

More people are making more media a part of their lives.

Print

Print has grown its share of the media pie since the last AMPS release. The medium is closing in on the 60% consumption mark, as its reach increases to 58.0%, significantly up from the 55.5% seen in AMPS 2007A. Growth came through from Gauteng, where just shy of 80% of people consume print (79.2%, up from 74.8%). Mpumalanga has also delivered more readers, with 55.8% of the adults in these provinces reading papers or magazines (up from 47.9%).

The tables below show the growth in the number of titles over the years, based on the number of publications measured in SAARF AMPS 2007B.

| NUMBER OF NEWSPAPERS (SAARF AMPS) | | | | | |
|-----------------------------------|------|------|------|---------|-------|
| | 1998 | 2000 | 2002 | 2005 RA | 2007B |
| Daily | 17 | 17 | 18 | 18 | 20 |
| Weekly | 27 | 26 | 22 | 24 | 27 |
| Any | 44 | 43 | 40 | 43 | 50 |

[click to enlarge](#)

| NUMBER OF MAGAZINES (SAARF AMPS) | | | | | |
|----------------------------------|------|------|------|---------|-------|
| | 1998 | 2000 | 2002 | 2005 RA | 2007B |
| Weekly | 15 | 13 | 15 | 13 | 16 |
| Fortnightly | 5 | 5 | 3 | 2 | 1 |
| Monthly | 43 | 59 | 61 | 66 | 88 |

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Newspapers

The newspaper medium has significantly upped its readership over the previous AMPS release, across all categories. The latest AMPS release shows that 46.8% of all South Africans over 16 read a newspaper, up from 44.4% six months ago. There are now 14,572 million newspaper readers, a gain of 747 000 readers for the medium.

The medium has made real headway into three provinces – Gauteng, where penetration rose from 63.2% to 67.7%, Limpopo (36.2% to 41.7%) and Mpumalanga (38.6% to 45.0%).

- UP – Any Daily Newspaper: 29.2%, a statistically significant increase from 26.7%, with 9,092 million readers currently, compared to 8,321 million in the previous survey. Strong growth was seen in Gauteng where newspaper consumption rose from 44.9% to 50.8%. Other areas showing strong uptake of newspapers include Cape Town (36.7% to 41.9%), Greater Joburg and Soweto (51.7% to 57.1%), on the Reef (41.2% to 47.4%), and in Pretoria (44.1% to 50.2%).

Average number of publications per reader: 1.45

- UP – Any Weekly Newspaper: This category reaches 34.9% of adults, up from 33.2%, with 10,847 million readers – a statistically significant increase. Regional growth was seen in Gauteng.

Average number of publications per reader: 2.02



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Any newspaper reading: penetration change 2006 to 2007

Changes in newspapers' readership

Several titles made significant readership advances over the last AMPS release.

Again and again, SA's newspaper phenomenon, the *Daily Sun*, is proving that it's doing all the right things for its readers. AMPS after AMPS, the paper has posted enviable growth, and the latest release is no exception.

Crossing the 4 million reader mark in the previous AMPS release, the *Daily Sun* now has the 5 million reader target firmly in its sights. Its reach is up from 13.9% to 15.3%, with 4,755 million readers in the bag. This growth has come through primarily from Gauteng.

The second daily to show statistically significant growth is the *Sowetan*, which grew its readership from 5.5% to 6.6%, with 2,040 million readers. The paper has grown its base in Greater Joburg and Soweto, on the Reef and in Pretoria.

Looking at weeklies, the *Mail & Guardian* is up from 1.2% to 1.5%, with 467 000 readers, a growth of 100 000 readers. It has enjoyed significant growth in Gauteng

City Press grew from 7.5% to 8.6%, with a readership of 2,667 million currently. The paper increased its reach in Gauteng.

In the weekend market, *The Independent on Saturday* has declined, from 0.7% to 0.5%, with a current total of 163 000 readers.

The Sunday market is buoyant. The *Sunday Sun* has attracted 320 000 more readers, pushing up its readership to 2,846 million, with a reach of 9.1%, up from 8.1%.

Sunday Times has picked up a further 260 000 readers, upping its reach from 11.4% to 12.3%. Much of the title's growth came from Gauteng, where it grew its readership base from 1,271 million readers to 1,454 million (a reach of 22.7%, up from 19.9%). *Sunday Times* currently has 3,820 million readers.

Lastly, *Sunday World's* reach has increased from 4.1% to 4.7%, with 1,459 million readers, just over 190 000 more readers than in the previous AMPS release.

Magazines

As was the case with newspapers, the glossier side of the print medium has enjoyed growth over the previous survey, with

magazine readership in general going up. Almost 40% of adults consume the medium (39.3%, from 37.5% previously), with more readers coming on board from Gauteng. Total magazine readership is 12,239 million.

Weekly and alternate-monthly magazines have been the main contributors to the sector's growth, being the only two magazine categories to achieve significant growth.

- UP – Any weekly: currently with a reach of 20.8%, from 19.2%. This category has 6,466 million readers.
- DOWN – Any fortnightly: significantly down from 9.0% to 7.4%, with declines seen specifically in the Western Cape and KwaZulu-Natal. Western Cape readership went from 15.3% to 5.6% (primarily in Cape Town and the Cape fringe), and KwaZulu-Natal's fell from 6.9% to 4.7% (predominantly in Durban).
- STABLE – Any monthly: at 29.6%, with 9,218 million readers.
- UP – Any alternate monthly: this category has grown its reach from 5.9% to 7.7%, with 2,401 million readers currently. Significant gains were made in the Western and Eastern Cape, KwaZulu-Natal and Gauteng.
- STABLE – Any newspaper subscriber magazine: at 20.7%, with 6,430 million readers.
- STABLE – Any quarterly: at 1.8%, with 556 000 readers.

The average number of magazine titles per reader is 4.25.



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Any magazine reading: penetration change 2006 to 2007

Changes in magazines' readership

Several titles have grown their readership over the previous AMPS survey. A handful of magazine titles showed significant declines this period.

- *Auto Trader* is up from 1.5% to 1.8%, with 571 000 readers. Significant growth came through from Gauteng, on the Reef especially.
- *Drive 2.0* saw its readership declining, from 0.5% to 0.3%, with drops in KwaZulu-Natal.
- *Drum's* readership has climbed, from 5.0% or 1,562 million readers, to 5.7% and 1,776 million readers.
- *Heat's* readership has grown, from 1.3% to 1.6%, giving it a current readership of 491 000.
- *Kickoff's* readership is 6.0%, up significantly from 5.4% in the previous survey. Significant growth was seen in Gauteng and the Free State. Readership now stands at 1,880 million.
- Now with its second set of data, *Move* has grown its readership from 1.7% to 2.5%.
- *People* is up from 2.5% to 2.9%, bringing it closer to a million readers at 904 000.
- Three club magazines have increased their reach. First is *Foschini Group's Club Magazine*, whose readership has now overshot the million target, at 1,307 million, up from 953 000 in the previous survey. Its reach has grown from 3.1% to 4.5%, especially in the Western Cape and Gauteng. *Lewis/Best Electric's Club Magazine* now has a readership of 981 000, with its reach increasing from 2.8% to 3.2%. *Jet Club's* readership is now firmly in the three millions, growing from 3,074 million to 3,330 million, with a reach of 10,6%, up from 9.9%.

Outdoor

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

Only billboards and store ads failed to make a significant gain in reach into the SA population, although even these two

outdoor categories are trending up. All other categories showed statistically significant growth over any given week, compared to the previous AMPS period.

- STABLE – Billboard ads: trending up from 73.5% to 74.6%.
- STABLE – Store ads: trending up from 81.2% to 82.0%.
- UP – Bus shelters: up from 37.3% to 39.6%.
- UP – Trailers: climbing from 35.5% to 39.5%.
- UP – Minibus taxi ads: up from 65.0% to 66.9%.
- UP – Train ads: risen from 11.0% to 12.3%.
- UP – Bus ads: from 38.3% to 42.2%.
- UP – Trucks: from 60.0% to 65.5%.

Radio

SAARF RAMS is the official currency for radio.

Total radio (past 7 days), 29,081 million listeners, or 93.5% of the adult population, stable on the 93.3% of the previous AMPS survey. On a “Yesterday” filter however, radio has made a statistically significant jump, from 81.1% to 82.2%.

A number of individual radio stations have shown significant audience changes.

Mirroring the movements seen in RAMS, Gagasi 99.5 and Kaya FM 95.9 have grown their audiences, as has Talk Radio 702.

- Gagasi 99.5 grew its listener base from 3.7% to 4.8%.
- Kaya FM 95.9 increased its reach from 3.2% to 4.0%.
- Talk Radio 702 grew from 0.9% to 1.2%.

Three other stations saw their reach declining over the previous AMPS release:

- CKI Stereo, down from 1.8% to 1.5%.
- Lesedi FM, down from 11.5% to 10.8%.
- Radiokansel/Radio Pulpit shows a decline in reach, from 1.2% to 0.8%.

Television

SAARF TAMS is the official currency for television.

Any TV (Yesterday) viewership has climbed from 70.5% to 73.7%, with growth in KwaZulu-Natal, Mpumalanga and Gauteng. Across any given week, television viewing is also up significantly, from 81.4% to 83.4%, especially in Mpumalanga, Limpopo and Gauteng.

Most other TV channels have also fared better across the week compared to the previous AMPS release.

- Viewership of e.tv went from 58.4% to 59.7%. Growth was mostly in the Western Cape,
- All three SABC stations have increased their viewership. SABC 1 grew its audience from 70.2% to 71.6%. SABC 2 increased to 60.7%, from 58.3%, and SABC 3 grew from 44.9% to 47.8%, with growth in the Northern Cape and Limpopo.
- DStv is being measured on a number of new channels now, including Animal Planet, Channel O, Crime and Investigation Network, TCM and VH1. It grew its audience from 8.3% of adults to 9.7%, with significant growth in Gauteng.
- M-Net's reach has declined, from 9.4% to 7.3%, with declines in the Western Cape (from 32.8% to 21.1%) and in

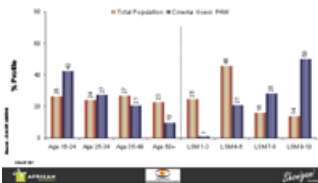
KwaZulu-Natal (from 8.9% to 6.1%), most likely due to the exclusion of open time from AMPS 2007B.

Cinema

Across any given week, cinema audience levels have remained unchanged, with 1.8% of adults settling down to take in a show.

On all other time filters, the medium has shown no change, except in the “Cinema – Ever” category, where a growth in the number of cinema-goers in Mpumalanga and Limpopo contributed to an increase to 58.1%, from 55.8%.

Profile of Cinema Goers (past 4 weeks)
SAARF AMPS® 2007B



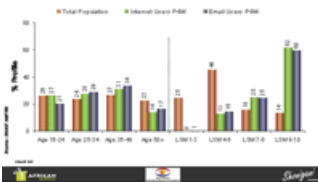
[click to enlarge](#)

Internet

Internet usage has risen significantly over the previous AMPS period.

- past 7 days: from 6.0% to 6.9% (significant gains were seen in Gauteng).
- past 4 weeks: from 7.1% to 8.1%, with significant growth in Gauteng.

Profile of Internet Users
SAARF AMPS® 2007B



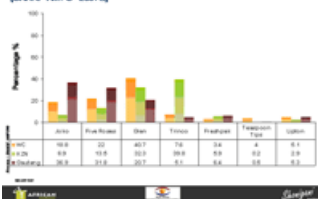
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Products and brands

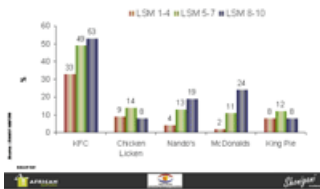
SAARF AMPS 2007B measured 1 435 brands, in 106 product categories ranging from acne preparations to yoghurt.

Below are examples of the kind of data which users are able to extract from AMPS about brands and their consumers.

Tea Consumption: Brands
Base: 1+ Cups of Tea Yesterday
(SAARF AMPS® 2007B)

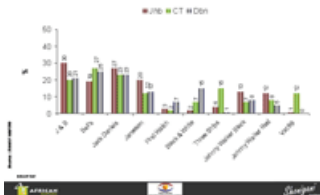


Visited Fast Food Outlet P4W: By SU-LSM®
(SAARF AMP® 2021/3)



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Whisky Consumption: Brands
(SAARF AMP® 2021/3)
Base: 1+ Whisky Tot Drinkers P70 by City



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- The South African Advertising Research Foundation (SAARF) (www.saarf.co.za) 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.

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