MEDIA RELEASE

**SAARF AMPS DEC 10**

**Calm waters for print while electronic media grow**

The South African Advertising Research Foundation (SAARF) has released AMPS Dec 10 (Jan-Dec 2010), the third full DS-CAPI database since the move to the new methodology.

In broad strokes, the print currency has settled, with overall readership remaining stable on the previous AMPS period. Newspaper readership – of both the dailies and the weeklies – mirrored the stability of the medium as a whole.

In the daily market, no daily posted any significant changes to average issue readership. The weeklies showed a different picture at the title level – six titles lost readership over this period.

Like their newspaper counterparts, magazines matched the stability of print in general, with only fortnightly magazines changing, experiencing a decline in readership. Unlike newspapers however, a large number of magazine titles showed movement in their readership figures, although only two of the 18 were positive changes.

As was the case in AMPS Jun 10, the incidence of both television viewing and radio listening increased, as did internet usage.

The decline in exposure to out-of-home media seen in AMPS Jun 10 has halted, with the medium now stable overall.

Cinema attendance is stable, while internet usage has increased significantly.

**DEMOGRAPHIC DATA**

*Only statistically significant differences are quoted, and are based on percentages,
not on number of people.*

**HOUSEHOLD DATA**

The household weighting procedure for AMPS Dec 10 is identical to the previous two AMPS releases, making household results comparable across these releases.

The household population is also identical to the previous AMPS release and stands at 13,369-million.

**LIVING STANDARDS IMPROVING IN SOUTH AFRICA**

The middle class is expanding, with LSM 6 showing significant growth over AMPS Jun 10 – from 19.3% of the population, to 20.3%. The LSM 1-3 segment continues to decline, with LSM 1 now down to just 2.4%, LSM 2 to 5.7% and LSM 3 to 7.0%.

**Average household income** now stands at R7 868 per month, an increase of 5.3% from the R7 473 measured in AMPS Jun 10. The six-month change is ahead of inflation at 4.3% (July 2010).

Fewer households are earning in the two lowest income brackets. Where 5.3% of households earned less than R800 a month in AMPS Jun 10, the latest figure is 4.2%. The R800-R1 399 income bracket has also shrunk, from 13.9% to 12.3%.

All other income groups remained stable with the exception of the middle income of R5 000-R7 999 bracket, which grew from 14.7% to 15.6%.

Unfortunately, **employment levels** remain unchanged over the previous period:

* 26.2% of South African adults have full-time work;
* 8.7% work part-time; and
* 65.1% are not working.

On the positive side, there has been some improvement in terms of **access to services**: 80.1% of South Africans now have access to water either in the house or on the plot, a significant increase over AMPS Jun 10’s 77.8%.

A growing proportion of households are also enjoying the ease of owning such – some would say indispensable – **durables** as electric stoves, fridges and washing machines.

|  |  |  |
| --- | --- | --- |
|  | **AMPS Jun 10** | **AMPS Dec 10** |
| Electric stove  | 60.3% | 62.0% |
| Microwave oven  | 53.0% | 56.0% |
| Refrigerator  | 78.6% | 80.4% |
| Washing machine  | 37.0% | 38.8% |
| Tumble dryer  | 8.2% | 9.4% |

More and more households also have greater access to electronic **entertainment** choices. The following lists those entertainment devices and services which have made a stronger appearance in SA homes than they did in AMPS Jun 10.

|  |  |  |
| --- | --- | --- |
|  | **AMPS Jun 10** | **AMPS Dec 10** |
| TV  | 82.0% | 84.0% |
| Hi-fi/music centre  | 50.2% | 52.2% |
| DVD player  | 56.1% | 58.5% |
| Home theatre system  | 24.8% | 26.2% |
| Pay TV (M-Net/DStv)  | 18.9% | 20.7% |

More people now have some degree of **schooling** than in the previous survey, with only 3.5% of people currently having no schooling at all, down from 4.1%, and only 5.7% of adults claiming only “Some Primary” as their highest qualification, down from 6.5% in AMPS Jun 10.

**MEDIA AUDIENCE RESULTS**

This report compares data from two AMPS releases:

* the current release, SAARF AMPS Dec 10 (Jan-Dec 2010); and
* the previous release, SAARF AMPS Jun 10 (July 2009 to June 2010).

Both surveys were conducted in DS-CAPI and are based on adults aged 15+.

***Only statistically significant differences are quoted, and are based on percentages,
not on number of people.***

**TECHNICAL NOTES FOR PRINT**

* AMPS Dec 10 DS-CAPI readership results are totally comparable with AMPS Jun 10 and AMPS Dec 09.
* There is no longer double prompting for multilingual publications with identical/almost identical titles.
* Dual language titles are measured separately but readership results are combined in the release.
* Store magazines have not been included, as per the SAARF Scrutiny Committee decision.

**PRINT**

The print currency is settled at its new post-DS-CAPI benchmark, with the medium remaining stable on the previous AMPS release.

**Average issue readership of any newspaper/magazine is stable at 64.6%** with 21.984-million readers.

**Average number of publications read (based on readers)**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Dec 09**  | **Jun 10**  | **Dec 10**  |
| Daily newspapers  | 1.43 | 1.38 | 1.36 |
| Weekly newspapers  | 1.96 | 1.87 | 1.80 |
| Total newspapers  | 2.39 | 2.26 | 2.16 |
| Magazines  | 3.77 | 3.61 | 3.35 |
| Total newspapers/magazines  | 4.91 | 4.63 | 4.21 |

**NEWSPAPERS**

**AIR at a glance**

* **Any newspaper**: 47.5% (stable)
* **Dailies**: 29.4% (stable)
* **Weeklies**: 33.4% (stable)

Total newspaper readership remains stable, as was the case in the previous AMPS release. **Average issue readership of newspapers as a whole was stable at 47.5%**, with 16.150-million readers in total, although declines in metropolitan readership came through.

While average issue readership remained unchanged however, there was upward movement at the six-month readership filter.

Six-month readership grew from 78.2% in AMPS Jun 10 to 79.5% in AMPS Dec 10, with growth coming from settlements and rural markets, the Northern Cape, females, the 15-24 and 50+ age groups, and significantly more black readers.

**DAILIES**

The daily newspaper sector remains on an even keel – **average issue readership of any daily newspaper was 29.4%**, stable on the previous period’s 29.2%. Readers total 9.99-million, with fewer readers in Durban being the only demographic shift.

On the **six-month readership filter** however, daily newspaper readership was up significantly, from 73.6% in the previous period, to **74.9%** currently. Growth was driven by the following markets: the Northern Cape, small towns, villages and rural areas, females and the 50+ age group.

On an individual title basis however, not one title showed any significant change to its total readership figure. There were also few demographic shifts within titles, with the vast majority continuing to reach the same audience profiles seen in the previous AMPS release.

**WEEKLIES**

Like the dailies, overall readership of weekly newspapers has remained stable compared with AMPS Jun 10, although the metropolitan, Western Cape, and Coloured and white readership bases showed decline.

Weeklies currently have an **average issue readership of 33.4%**, with a total readership of 11.351-million.

While daily newspapers drove the growth seen in the total sector’s **six-month readership**, weekly newspapers in total remained stable at this filter, at **47.2%**. While six-month readership of the weeklies has strengthened in the Northern Cape and East London, in metros, the Western Cape and Limpopo, and amongst Coloured and white markets, readership is down.

A number of individual weekly titles were also in flux, with all but one being a weekend newspaper.

**READERSHIP CHANGES IN THE WEEKLY SECTOR**

* ***Die Burger*** (Saturday) has lost ground over the previous AMPS period, declining from 0.9% reach nationally to 0.6%, with 194 000 readers. Losses were seen in metropolitan areas and specifically the Western Cape, amongst females and the 35-49 age group.
* Readership of the ***Super Saturday Citizen*** has declined over AMPS Jun 10, from 1.0% reach to 0.5%. Demographics showing declines were large urban areas, as well as Gauteng, amongst males, and in the 35-49 age group.
* ***The City Press*** dipped, seeing its readership decline from 6.2% to 5.5%, with a readership of 1.867-million. Fewer metro readers, specifically in Gauteng, as well as fewer male readers and those aged 15-34 contributed to the decline.
* ***Naweek Beeld*** is down from 0.6% to 0.3% reach, with a readership of 114 000. The Afrikaans weekend paper lost readers in large urban areas, especially in Gauteng, with fewer male and 35+ readers.
* The country’s biggest weekend read, ***Sunday Times***, has shed readership, dropping from 12.0% penetration nationally to 11.2%. Now with 3.8-million readers, the publication lost ground in metros, the Western Cape, and with males.
* ***The Zimbabwean*** declined from 0.2% previously to 0.1%.

**FIRST 12-MONTH FIGURES**

* ***Soccer Week*** now has its first 12-month readership figure: 274 000, with a reach of 0.8%.

**MAGAZINES**

**AIR at a glance**

* **Any magazine**: 50.5% (stable)
* **Weeklies**: 26.8% (stable)
* **Fortnightlies:** 12.1% (declined)
* **Monthlies**: 36.8% (stable)
* **Alternate monthlies**: 11.0% (stable)
* **Quarterlies**: 3.0% (stable)
* **Subscriber mags (excluding club mags)**: 10.0% (stable)

The magazine sector remains stable, with **average issue readership holding at 50.5%** despite indications of a slight upward movement over the previous survey. Total readership is 17.175-million.

On the **six-month filter**, readership is also **stable at 66.1%**, although there were gains in the KwaZulu-Natal market.

All sectors within the magazine industry mirrored the stability of the overall results of the medium, with only fortnightly magazines showing a significant change in its average issue readership.

* **Any Weekly Magazine**: average issue readership (AIR) stable at 26.8%, with 9.119-million readers.
* **Any Fortnightly Magazine**: AIR down from 13.7% to 12.1%, with 4.132-million readers. Audience profiles showing declines include metros, cities and large towns, the Western Cape, Limpopo and Gauteng, both males and females and the 15-24 and 35-49 age groups. Readership of these titles rose however, in the Northern Cape.
* **Any Monthly Magazine**: stable at 36.8%, with 12.506-million readers.
* **Any Alternate Monthly**: stable at 11.0% with 3.741-million readers.
* **Any Quarterly Magazine**: stable at 3.0% with 1.031-million readers.
* **Any Subscriber Magazine** (excluding club magazines): stable at 10.0% with 3.405-million readers.

Unlike newspapers however, a large number of magazine titles showed movement in their readership figures, with positive movement for only *Bona* and *Dish/Skottel*.

**READERSHIP CHANGES IN MAGAZINE TITLES**

* ***Bona***’s readership grew from 9.8% in AMPS Jun 10 to 10.6%, pushing up its total readership to 3.603-million. The title’s readership base in small towns, villages and rural areas grew, as did readership in Mpumalanga, Pretoria, and the 15-34 age group.
* ***Dish/Skottel*** reflects the growth of the digital satellite market in South Africa, with readership rising from 6.6% previously to 8.3%, pushing total readership ever-closer to three million, at 2.807-million. A wide audience base is responsible for these gains, with growth coming through from large urban areas, KwaZulu-Natal and Gauteng.
* ***TVPlus*** now reaches 1.567-million South Africans, witha reach of 4.6%, down from 5.9% in AMPS Jun 10. Declines came through from large urban areas, in the Western Cape and Gauteng, as well as Port Elizabeth/Uitenhage and Bloemfontein.
* ***Amakhosi*’**s readership is down from 5.3% to 4.5%, with 1.538-million readers. Readership in large urban areas and the North West dropped, while fewer 15-24-year-olds read the title.
* ***Animal Talk*** talked to fewer readers this period, as its readership declined from 0.7% to 0.5%, to 176 000 readers in total.
* ***Autotrader.co.za***’s readership fell from 2.5% to 1.7%, leaving the title with a total readership of 593 000. Losses were seen in large urban areas, and especially in the Western Cape and Gauteng.
* ***Fairlady***’s reach declined from 2.9% to 2.2%, giving the title a readership of 742 000. Significant audience shifts down were seen in large urban areas, in Gauteng, and in the 35-49 age group.
* For bilingual title***Home/Tuis***, AMPS Dec 10 shows a decline in readership from 1.5% in the previous AMPS release to 1.2% currently, with 422 000 readers. Much of this loss came from the metropolitan reader base.
* ***Living & Loving*** fell from 1.6% reach to 1.3%, with a readership of 446 000. There were fewer male readers and Cape Town readers behind this decline.
* Readership of***Marie Claire*** fell from 1.0% to 0.7%. The publication has a readership of 252 000.
* ***Property: The Property Magazine*** saw its reach decline from 1.1% in AMPS Jun 10 to 0.8% currently. Losses in metros and the 35+ age group were behind the decline, leaving the title with 288 000 readers.
* ***Rooi Rose*** saw its reachfall from 2.7% to 2.2%, to a total readership of 752 000. Losses were evident in the male demographic, and in metros, the Free State and Cape Town.
* ***Runner’s World*** now reaches 0.1% of the population, down from 0.3% in the previous survey, with a readership base of 45 000.
* For ***Sarie***, fewer Free State readers contributed to a declined audience figure of 767 000, with reach dropping from 2.7% to 2.3%.
* With a reach of 1.2%, down from 1.5% previously, ***Sports Illustrated*** ***South Africa*** saw declines in large urban areas as well as in Gauteng. Its readership currently stands at 410 000.
* ***Top Billing Magazine*** lost male readers and readers in large urban areas and the Western Cape, bringing its reach down to 2.3% (from 2.8%), with a readership of 771 000.
* Alternate monthly titles *Good Taste* and *Habitat* both lost readership over AMPS Jun 10. ***Good Taste***’s reach fell from 0.2% to 0.1%, with 40 000 readers, while ***Habitat***’s reach fell from 0.2% to 0.1%, to 48 000 readers.

**FIRST 12-MONTH FIGURES**

* ***Kuier*** gets its first 12-month readership figure: 166 000, with a reach of 0.5%.
* ***National Geographic Traveller South Africa*** has a reach of 0.8%, with 263 000 readers.
* ***Reality*** has a reach of 0.2%, with 75 000 readers.
* ***SA Rugby Magazine*** has a reach of 1.0%, with 348 000 readers.

**TELEVISION**

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

TV viewing is still on the increase. AMPS Dec 10 shows that 88.5% of all South African adults watch television in any given week, up from 86.8% in the previous survey. Viewing has increased especially in settlements and rural areas, in KwaZulu-Natal, Limpopo and Gauteng.

The driving force behind the overall ascendance of the medium was SABC 1 and Community TV.

**SABC 1** grew its weekly viewership significantly over the period – from 75.6% to 76.8%. Its audience rose in settlements and rural areas and in Limpopo, although the station did lose ground in the Western Cape.

**Community TV** has increased its reach from 4.2% previously to 5.1%. Growth came from metropolitan audiences, and especially the Western Cape, Free State, KwaZulu-Natal and Gauteng.

The seven-day viewing of other channels and platforms remained stable on AMPS Jun 10.

* **SABC 2**: 66.8%, with growth in East London.
* **SABC 3**: 54.7%, growing in settlements and rural areas, and in the North West.
* **e.tv**: 66.2%
* **M-Net Main Service**: 6.5%, declining in the Northern Cape.
* **DStv in total (excluding terrestrial channels)**: 20.2%, growing in large urban areas and the Free State.

**RADIO**

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

Like television, radio has increased its reach into the SA population. Overall, **the medium showed significant growth** over AMPS Jun 10, up from 90.5% reach on a past-7-day basis **to 91.4%**, attributable in particular to boosted audiences in Limpopo, more female listeners, and more listeners aged 35+.

The **commercial radio sector** – covering all non-community stations – was the chief contributor to the medium’s rise, growing from 87.7% weekly listening to **88.6%**, with upward shifts in Limpopo and amongst females.

Total **community listening** remained stable at **24.4%**.

**OUT-OF-HOME**

*(Please note that SAARF OHMS is the official currency for out-of-home media.)*

Exposure to Out-of-Home advertising remained stable.

* **Exposure yesterday**: 74.3%, down in the Eastern Cape.
* **Exposure in the past seven days**: 92.0%, with losses in the Free State and Limpopo.
* **Exposure in the past four weeks**: 96.5%, with a decline in Limpopo.

While the medium as a whole showed little change, weekly exposure to advertising on **minibus taxis** has risen significantly to 76.3%, from 75.1% previously. This sector of the industry is receiving more sightings in metropolitan areas, the Western Cape, Northern Cape and KwaZulu-Natal.

All other Out-of-Home sectors remained stable across any given week:

* **Billboards** at 70.7% (down in the Eastern Cape).
* **Bus shelters** at 41.0% (down in Mpumalanga but up in the Western and Northern Cape).
* **Buses** at 45.0% (up in the Western and Northern Cape and KwaZulu-Natal but down in Mpumalanga).
* **Trailers** at 39.5% (growing in the Northern Cape although declining in metros).
* **Dustbins** at 49.0% (growing in the Northern Cape).

**CINEMA**

Cinema attendance is stable.

* **Attendance during any given week**: 1.6%
* **14-day attendance**: 2.9%
* **Four-week attendance**: 5.3%
* **Attendance within 12 months**: 19.2%

**INTERNET**

Across all time filters, access to the internet has grown significantly.

* **Accessed the internet yesterday**: 9.0%, up from 7.7%, with growth in metros, the Free State and KwaZulu-Natal, and in the 15-24 age group.
* **Accessed in the past seven days**: up from 11.1% to 13.2%.
* **Past-four-week access**: up from 13.4% to 15.6%.

Both seven-day and four-week access grew especially in large urban areas as well as rural, in the Western Cape, Free State and KwaZulu-Natal, and in the 15-34 age group.

Ends

*Note to the editor:*

*The South African Advertising Research Foundation (SAARF) 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.*

*SAARF conducts a number of major media and product/brand surveys. The All Media and Products Survey (AMPS®), includes extensive information on media as well as products, services, brands, attitudes, interests and activities and is South Africa's only free source of data on nearly 120 product categories and over 1 500 brands. Other important surveys are the Radio Audience Measurement Survey (RAMS®); the Television Audience Measurement Survey (TAMS®) and the SAARF Out of Home Media Survey (OHMS). SAARF also provides comprehensive information on target groups, and supplies segmentation tools which include the SAARF Universal Living Standards Measure (LSM®), SAARF Life Stages, SAARF Lifestyles and SAARF Attitudes, which are widely used for segmenting target markets.*

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