

SOUTH AFRICA & SADC

# MEDIAFACTS 2010



TONY KOENDERMAN'S  
**Ad Review**



**OMD**  
SOUTH AFRICA



SOUTH AFRICA & SADC

# MEDIA **FACTS** 2010

**In partnership with OMD, Tony Koenderman's *AdReview* provides expert and accurate media information, ensuring the primacy of our brand in media and marketing communications.**

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From left:  
Josh Dovey (CEO)  
and Gary Westwater  
(Financial Director) with  
Zakumi, the official  
mascot of the 2010 FIFA  
World Cup.

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## **MEDIA IN 2010. WELCOME TO THE FUTURE**

The FIFA world cup is now just weeks away and promises to be an amazing spectacle. The world's media will descend on South Africa and find the country ready and enthusiastic. **OMD** has gained a particular insight into this event via our involvement with two of the global sponsors. The process of maximising synergy and exposure for these clients has confirmed that there is no longer any such thing as "traditional media" or "above-the-line". Communication with consumers has evolved way beyond shouting messages at a compliant and passive customer base. Increasingly, consumers can edit their personal media consumption to suit their own needs. Reaching them requires a subtleness of approach that allows a permission-based relationship to evolve. This will become more important as the penetration of broadband internet increases in South Africa.

At the same time, both multinational and local advertisers are demanding more price accountability and control. As SA's leading media agency, **OMD** is well positioned to provide both the market intelligence needed to reach the consumer, and the volume and scale to do it at the best price.

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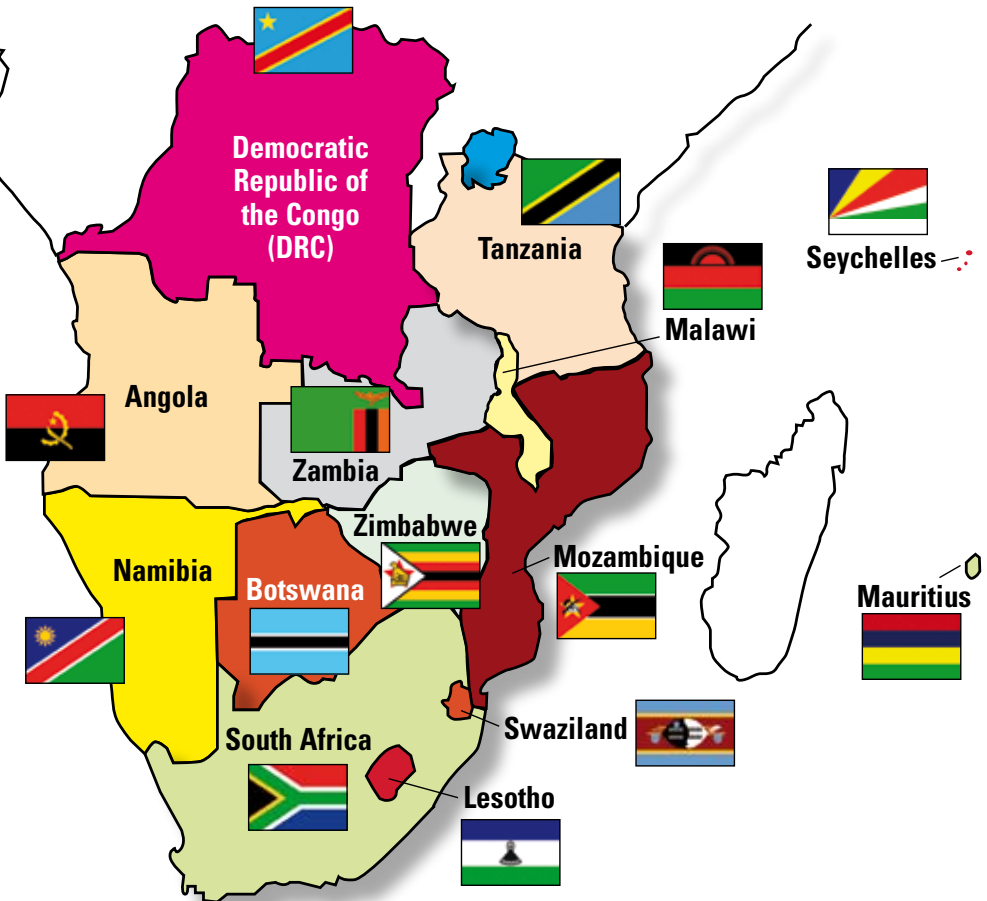
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## SADC COUNTRIES

Anglo  
Botswana  
DRC  
Lesotho  
Malawi  
Mauritius  
Mozambique

Namibia  
Seychelles  
South Africa  
Swaziland  
Tanzania  
Zambia  
Zimbabwe



	Background	Climate
<b>Angola</b> Total: 1,246,700sq km	In 2002 Angola started rebuilding after the end of a 27-year civil war following independence from Portugal in 1975. Up to 1.5 million lives may have been lost, and 4 million people displaced.	Semi-arid in south and along coast to Luanda; north has cool, dry season (May to Oct) and hot, rainy season (Nov to April)
<b>Botswana</b> Land: 566,730; water: 15,000; total: 581,730	Formerly the British protectorate of Bechuanaland, Botswana adopted its new name upon independence in 1966.	Semi-arid; warm winters and hot summers
<b>Democratic Republic of the Congo</b> Land: 2,267,048; water: 77,810; total: 2,344,858	Established as a Belgian colony in 1908, it has been marred by extreme instability since gaining independence in 1960. A successful referendum was held in 2005 and a presidency, National Assembly, and provincial legislatures installed in 2006.	Tropical; hot and humid in equatorial river basin; cooler and drier in southern highlands; cooler and wetter in eastern highlands.
<b>Lesotho</b> Total: 30,355	Basutoland became the Kingdom of Lesotho on independence from the UK in 1966.	Temperate; cool to cold, dry winters; hot, wet summers
<b>Malawi</b> Land: 94,080; water: 24,400; total: 118,480	Established in 1891, the British protectorate of Nyasaland became independent Malawi in 1964.	Sub-tropical; rainy season (Nov to May); dry season (May to Nov)
<b>Mauritius</b> Land: 2,030; water: 10; total: 2,040	First explored by the Portuguese in 1505; it was held by the Dutch, French and British before independence in 1968.	Tropical, modified by SE trade winds; warm, dry winter; hot, wet, humid summer
<b>Mozambique</b> Land: 786,380; water: 13,000; total: 799,380	After almost 500 years as a Portuguese colony, independence came in 1975. Emigration by whites and a civil war which ended in 1992 hindered development. The 1990 constitution provided for multiparty elections and a free market economy.	Tropical to subtropical
<b>Namibia</b> Total: 824,292	Colonised by Germany in the late 1800s, Namibia was administered by South Africa from 1918. After a 25-year bush war, it gained independence in 1990 and has been governed by SWAPO since.	Mainly desert; hot, dry; rainfall sparse and erratic
<b>Seychelles</b> Total: 455	Britain ruled the islands from 1814 to independence in 1976. A new constitution and free elections came in 1993.	Tropical marine; humid; cooler season in southeast monsoon (late May to Sep); warmer during northwest monsoon (Mar to May)
<b>South Africa</b> Land: 1,214,470; water: 4,620; total: 1,219,090	After rule by various Boer republics and the British the resulting Union of South Africa (1910) and Republic (1961) operated under a policy of the separation of the races. The 1990s brought an end to apartheid politically and in 1994 ushered in black majority rule.	Mostly semi-arid; subtropical along east coast; sunny days, cool nights
<b>Swaziland</b> Land: 17,203; water: 160; total: 17,363	Autonomy for the Swazis of southern Africa was guaranteed by the British in the late 19th century; independence was granted in 1968. Political parties banned.	Varies from tropical to near temperate
<b>Tanzania</b> Land: 885,800; water: 61,500; total: 947,300	Shortly after achieving independence from Britain in the early 1960s, Tanganyika and Zanzibar merged to form the nation of Tanzania in 1964.	Varies from tropical along coast to temperate in highlands
<b>Zambia</b> Land: 743,398; water: 9,220; total: 752,618	Northern Rhodesia was administered by the [British] South Africa Company from 1891 until it was taken over by the UK in 1923, changing to Zambia upon independence in 1964.	Tropical; modified by altitude; rainy season (October to April)
<b>Zimbabwe</b> Land: 386,847; water: 3,910; total: 390,757	The UK annexed Southern Rhodesia from the [British] South Africa Company in 1923. In 1965 the (White) government unilaterally declared its independence. UN sanctions and a guerrilla uprising led to free elections in 1979 and independence (as Zimbabwe) in 1980.	Tropical; moderated by altitude; rainy season (November to March)



# Geography

Terrain	Natural resources	Land use
Narrow coastal plain rises abruptly to vast interior plateau	Oil, diamonds, iron ore, phosphates, copper, feldspar, gold, bauxite, uranium	Arable land: 3.0%; other 97%.
Predominantly flat to gently rolling tableland; Kalahari Desert in southwest	Diamonds, copper, nickel, salt, soda ash, potash, coal, iron ore, silver	Arable land: 0.7%; other 99.3%.
Vast central basin is a low-lying plateau; mountains in east	Cobalt, copper, diamonds, gold, silver, zinc, manganese, tin, uranium, coal, hydropower, timber	Arable land: 2.9%; permanent crops: 0.5%; other 96.6%.
Mostly highland with plateaus, hills, and mountains	Water, agriculture, diamonds, sand, clay, building stone	Arable land: 10.9%; permanent crops: 0.1%; other 89%.
Narrow elongated plateau with rolling plains, rounded hills, some mountains	Limestone, arable land, hydropower, unexploited deposits of uranium, coal, and bauxite	Arable land: 20.7%; permanent crops: 1.2%; other 78%.
Island: small coastal plain rising to discontinuous mountains encircling central plateau	Arable land, fish	Arable land: 49%; permanent crops: 2.9%; other 48%.
Mostly coastal lowlands, uplands in centre, high plateaus in northwest, mountains in west	Coal, titanium, natural gas, hydropower, tantalum, graphite	Arable land: 5.4%; permanent crops: 0.3%; other 94%.
Mostly high plateau; Namib Desert along coast; Kalahari Desert in east	Diamonds, copper, uranium, gold, lead, tin, lithium, cadmium, zinc, salt, hydropower, fish.	Arable land: 1%; other 99%.
Islands. Mahe Group is granitic, narrow coastal strip, rocky, hilly; others are coral, flat, elevated reefs	Fish, copra, cinnamon trees	Arable land: 2.2%; permanent crops: 13%; other 84.8%.
Vast interior plateau rimmed by rugged hills and narrow coastal plain	Gold, chromium, antimony, coal, iron ore, manganese, nickel, phosphates, tin, uranium, diamonds, platinum, copper, vanadium, salt, natural gas	Arable land: 12.1%; permanent crops: 0.8%; other 87.1%.
Mostly mountains and hills; some moderately sloping plains	Asbestos, coal, clay, cassiterite, hydropower, forests, small gold and diamond deposits, quarry stone and talc	Arable land: 10.3%; permanent crops: 0.8%; other 88.9%.
Plains along coast; central plateau; highlands in north, south	Hydropower, tin, phosphates, iron ore, coal, diamonds, gemstones, gold, natural gas, nickel	Arable land: 4.2%; permanent crops: 1.2%; other 94.6%.
Mostly high plateau with some hills and mountains	Copper, cobalt, zinc, lead, coal, emeralds, gold, silver, uranium, hydropower	Arable land: 7%; other 93%.
Mostly high plateau with higher central plateau (highveld); mountains in east	Coal, chromium, asbestos, gold, nickel, copper, iron ore, vanadium, lithium, tin, platinum group metals	Arable land: 8.2%; permanent crops: 0.3%; other 91.4%.

	Pop. 2008 (growth pa)	Age structure	Ethnic groups
<b>Angola</b>	18.0 million (2.6%)	0-14: 43.5%; 15-64: 53.7%; + 65: 2.7%	Ovimbundu: 37%; Kimbundu: 25%; Bakongo: 13%; Mestico (mixed European and native African): 2%; European: 1%; Other 22%
<b>Botswana</b>	1.9 million (1.2%)	0-14: 34.8%; 15-64: 61.4%; +65: 3.9%	Tswana: 79%; Kalanga: 11%; Basarwa: 3%; Other, including Kgalagadi and White: 7%
<b>Democratic Republic of the Congo</b>	64.2 million (2.9%)	0-14: 46.9%; 15-64: 50.6%; +65: 2.5%	Over 200 ethnic groups, majority Bantu. Four largest tribes: Mongo, Luba, Kongo (Bantu), Mangbetu-Azande (Hamitic): about 45%
<b>Lesotho</b>	2.0 million (0.5%)	0-14: 34.8%; 15-64: 60.2%; +65: 5.0%	Sotho: 99.7%; White, Asian, and other: 0.3%
<b>Malawi</b>	14.3 million (2.5%)	0-14: 45.8%; 15-64: 51.5%; +65: 2.7%	Chewa, Nyanja, Tumbuka, Yao, Lomwe, Sena, Tonga, Ngoni, Ngonde, Asian, European
<b>Mauritius</b>	1.3 million (0.6%)	0-14: 22.5%; 15-64: 70.4%; +65: 7.1%	Indo-Mauritian: 68%; Creole: 27%; Sino-Mauritian: 3%; Franco-Mauritian: 2%
<b>Mozambique</b>	21.8 million (1.9%)	0-14: 44.3%; 15-64: 52.8%; +65: 2.9%	African (Makhuwa, Tsonga, Lomwe, Sena, and others): 99.7%; Europeans: 0.06%; Euro-Africans: 0.2%; Indian: 0.1%
<b>Namibia</b>	2.1 million (1.6%)	0-14: 35.9%; 15-64: 60.2%; +65: 3.9%	Ovambo: 50%; Kavangos: 9%; Herero: 7%; Damara: 7%; White 6%; Mixed 6.5%; Nama: 5%; Caprivian: 4%; Bushmen: 3%; Other: 3%
<b>Seychelles</b>	0.1 million (1.5%)	0-14: 22.8%; 15-64: 70.1%; +65: 7.1%	Mixed French, African, Indian, Chinese, and Arab
<b>South Africa</b>	48.7 million (1.7%)	0-14: 28.9%; 15-64: 65.8%; +65: 5.4%	Black African: 79%; White: 9.6%; Colored: 8.9%; Indian: 2.5%
<b>Swaziland</b>	1.2 million (1.4%)	0-14: 39.4%; 15-64: 56.9%; +65: 3.7%	African: 97%; European: 3%
<b>Tanzania</b>	42.5 million (2.9%)	0-14: 43.0%; 15-64: 54.1%; +65: 2.9%	Mainland: African: 99% (mainly Bantu from over 130 tribes); Asian, European, and Arab: 1%; Zanzibar: Arab, African, mixed Arab and African
<b>Zambia</b>	12.6 million (2.5%)	0-14: 45.1%; 15-64: 52.6%; +65: 2.3%	African: 99.5%; European and other: 0.5%
<b>Zimbabwe</b>	12.5 million (0.1%)	0-14: 43.9%; 15-64: 52.2%; +65: 3.9%	Shona: 82%; Ndebele: 14%; Other Black: 2%; Mixed/Asian: 1%; White: under 1%



<b>Languages</b>	<b>Literacy % 15+ can read/write</b>	<b>Share of income of highest 10% (lowest 40%)</b>	<b>Population % urban (% in 1m cities)</b>	<b>HIV/Aids % adult prevalence</b>
Portuguese (official), Bantu and other African languages	Total: 67.4%; Male: 82.9%; Female: 54.2%	N/A (N/A)	53% (17%)	2.1%
Setswana: 78%; Kalanga 8%; Sekgalagadi: 3%; English (official): 2%; Other 9%	Total: 81.2%; Male: 80.4%; Female: 81.8%	51.0% (9.2%)	57% ( - )	23.9%
French (official), Lingala (a lingua franca trade language), Kingwana (dialect of Kiswahili), Kikongo, Tshiluba	Total: 67.2%; Male: 80.9%; Female: 54.1%	N/A (N/A)	32% (17%)	4.2%
Sesotho, English (official), Zulu, Xhosa	Total: 84.8%; Male: 74.5%; Female: 94.5%	48.3% (5.8%)	19% ( - )	23.2%
Chichewa (official) 57.2%; Chinyanja: 12.8%; Chiyao 10.1%; Chitumbuka: 9.5%; Other: 10.4%	Total: 62.7%; Male: 76.1%; Female: 49.8%	31.8% (17.8)	17% (N/A)	11.9%
Creole: 80.5%; Bhojpuri: 12.1%; French: 3.4%; English (official); 1%; Other: 4%	Total: 84.4%; Male: 88.4%; Female: 80.5%	N/A (N/A)	42% ( - )	1.7%
Emakhuwa: 26.1%; Xichangana: 11.3%, Portuguese (official; spoken by 27%: 8.8%; Elomwe: 7.6%; Cisena: 6.8%; Other: 39.4%	Total: 47.8%; Male: 63.5%; Female: 32.7%	39.4% (14.7%)	35% (7%)	12.5%
English (official): 7%; Afrikaans (common language of most of the population/ 60% of Whites) German: 32%; Indigenous languages (Oshivambo, Herero, Nama)	Total: 85%; Male: 86.8%; Female: 83.5%	64.5% (4.4%)	35% ( - )	15.3%
Creole: 91.8%; English (official): 4.9%; Other: 3.3%	Total: 91.8%; Male: 91.4%; Female: 92.3%	N/A (N/A)	N/A (N/A)	N/A
Zulu: 23.8%; Xhosa: 17.6%; Afrikaans: 13.3%; Pedi: 9.4%; English: 8.2%; Tswana: 8.2%; Sotho: 7.9%; Tsonga: 4.4%; Other: 7.2%	Total: 86.4%; Male: 87%; Female: 85.7%	44.7% (9.8%)	59% (30%)	18.1%
English (official, government business conducted in English), siSwati (official)	Total: 81.6%; Male: 82.6%; Female: 80.8%	40.7% (12.5%)	24% ( - )	26.1%
Kiswahili (official), English (official, language of commerce, administration, and higher education), Arabic, many local languages	Total: 69.4%; Male: 77.5%; Female: 62.2%	26.9% (19.3%)	24% (7%)	6.2%
English (official); Major vernaculars: Bemba, Kaonda, Lozi, Lunda, Luvale, Nyanja, Tonga, plus some 70 other indigenous languages	Total: 80.6%; Male: 86.8%; Female: 74.8%	38.8% (11.5%)	35% (11%)	15.2%
English (official); Shona; Sindebele (Ndebele); Numerous minor dialects	Total: 90.7%; Male: 94.2%; Female: 87.2%	40.3% (12.7%)	36% (12%)	15.3%

Sources: World Bank/CIA World Book

## [ sadc key facts: economy ]

	<b>GDP US\$ 2008 (growth)</b>	<b>Exports FOB US\$</b>	<b>Export Partners (%)</b>	<b>Exports</b>
<b>Angola</b>	83.4 billion (14.8%)	40.0 billion (2009 est)	China (33), USA (29) France (6), South Africa (5)	Oil, diamonds, gas, coffee, sisal, fish, timber, cotton
<b>Botswana</b>	13.0 billion (-1.0%)	3.0 billion (2009 est)	European Free Trade Assoc., Southern African Customs Union, Zimbabwe	Diamonds, copper, nickel, soda ash, meat, textiles
<b>Democratic Republic of the Congo</b>	11.6 billion (6.2%)	6.1 billion (2007 est)	China (47), Belgium (15), Finland (10)	Diamonds, copper, oil, coffee, cobalt, gold
<b>Lesotho</b>	1,6 billion (3.9%)	0.9 billion (2009 est)	Excl. South Africa: USA (59), Belgium (37)	Clothing, footwear, vehicles, wool and mohair, food, live animals
<b>Malawi</b>	4.3 billion (9.7%)	0.9 billion (2009 est)	South Africa (14), Germany (6), Egypt (10), Zimbabwe (9), USA (7)	Tobacco (53%), tea, sugar, cotton, coffee, peanuts, wood products, clothing
<b>Mauritius</b>	8.7 billion (5.3%)	2.1 billion (2009 est)	UK (31), France (15), USA (9)	Clothing and textiles, sugar, cut flowers, molasses
<b>Mozambique</b>	9.7 billion (6.5%)	1.9 billion (2009 est)	Netherlands (56), South Africa (9)	Aluminum, prawns, cashews, cotton, sugar, citrus, timber, bulk electricity
<b>Namibia</b>	8.6 billion (2.7%)	3.5 billion (2009 est)	South Africa, US	Diamonds, copper, gold, zinc, lead, uranium; cattle, processed fish, karakul skins
<b>Seychelles</b>	0.8 billion (2.8%)	0.4 billion (2009 est)	UK (21), France (19), Mauritius (10)	Canned tuna, frozen fish, cinnamon bark, copra, oil products (re-exports)
<b>South Africa</b>	276.8 billion (3.1%)	67.9 billion (2009 est)	Japan (11), USA (11), Germany (8), UK (7), China (6)	Gold, diamonds, platinum, other metals and minerals, machinery and equipment
<b>Swaziland</b>	2,6 billion (2.5%)	1.6 billion (2009 est)	South Africa, EU, US, Mozambique	Soft drink concentrates, sugar, wood pulp, cotton yarn, refriger- ators, citrus and canned fruit
<b>Tanzania</b>	20.5 billion (7.5%)	2.7 billion (2009 est)	India (9), Japan (7), China (6), Netherlands (6), Germany (6), UAE (6)	Gold, coffee, cashew nuts, manufactured goods, cotton
<b>Zambia</b>	14.3 billion (6.0%)	4.4 billion (2009 est)	China (14), South Africa (8), Dem. Rep. Congo (8)	Copper/cobalt (64%), cobalt, electricity, tobacco, flowers, cotton
<b>Zimbabwe</b>	3.4 billion (-5.3%)	1.1 billion (2009 est)	South Africa (32), Dem. Rep. Congo (10), Botswana (9), China (6)	Platinum, cotton, tobacco, gold, ferro-alloys, textiles/ clothing

<b>Imports FOB US\$</b>	<b>Import partners (%)</b>	<b>Imports</b>	<b>Currency (symbol) US\$ 1 = (year)</b>
12.8 billion (2009 est)	Portugal (17), China (15), USA (11), Brazil (10), S. Korea (7)	Machinery, electrical equipment, vehicles, medicines, food	Kwanza (AOA) 77.2 (2009)
3.7 billion (2009 est)	Southern African Customs Union, EFTA, Zimbabwe	Food, machinery, electrical goods, transport equipment, textiles, fuel, wood and paper products, metal	Pula (BWP) 7.4 (2009)
5.2 billion (2007 est)	South Africa (28), Belgium (10), Zambia (7), Zimbabwe (6)	Food, mining and other machinery, transport equipment, fuel	Congolese Franc (CDF) 464.69 (2006)
1.8 billion (2009 est)	Excl. South Africa: China (43), Taiwan (20), South Korea (14), India (10)	Food, building materials, vehicles, machinery, medicines, fuel	Loti (LTL) 9.8 (2009)
1.6 billion (2009 est)	South Africa (41), India (8), China (7)	Food, fuel, semi-manufactured goods, consumer goods, transportation equipment	Malawian kwacha (MWK) 159.16 (2009)
3.6 billion (2009 est)	India (24), France (11), South Africa (10), China (8)	Manufactured goods, capital equipment, foodstuffs, fuel, chemicals	Mauritian rupee (MUR) 32.62 (2009)
3.0 billion (2009 est)	South Africa (27), Netherlands (16), China (4)	Machinery and equipment, vehicles, fuel, chemicals, metal products, food, textiles	Metical (MZM) 27.4 (2009)
4.4 billion (2009 est)	South Africa, US	Food, fuel, machinery and equipment, chemicals	Namibian dollar (NAD) 8.54 (2009)
0.7 billion (2009 est)	Saudi Arabia (17), Germany (11), Singapore (12), France (10), Spain (8)	Machinery and equipment, food, fuel, chemicals	Seychelles rupee (SCR) 14.2 (2009)
70.2 billion (2009 est)	Germany (11), China (11), USA (8), Saudi Arabia (6)	Machinery and equipment, chemicals, fuel, scientific instruments, food	Rand (ZAR) 8.54 (2009)
1.6 billion (2009 est)	South Africa, EU, Japan	Vehicles, machinery, transport equipment, food, fuel, chemicals	Lilangeni (SZL) 10.5 (2009)
5.5 billion (2009 est)	China (14), India (13), South Africa (7), Kenya (6),	Consumer goods, machinery and transportation equipment, industrial raw materials, oil	Tanzanian shilling (TZS) 1,317.5 (2009)
4.1 billion (2009 est)	South Africa (52), UAE (8), China (7)	Machinery, transportation equipment, oil products, electricity, fertilizer, food, clothing	Zambian kwacha (ZMK) 5,237.4 (2009)
2.0 billion (2009 est)	South Africa (60), China (4), Botswana (4)	Machinery and transport equipment, other manufactured products, chemicals, fuel	Zimbabwean dollar (ZWD) eliminated

Sources: World Bank/CIA World Book

## SADC countries in the World

Country	GDP US\$ billion 2008	Rank	GDP growth 2008	Pop millions 2008	Rank	GN Income US\$ per capita 2008	Rank
<b>World</b>							
United States	14204.3	1	1.1	304.1	3	47580	14
Japan	4909.3	2	- 0.7	127.7	10	38210	30
China	4326.2	3	9.0	1325.6	1	2770	130
Germany	3652.8	4	1.3	82.1	14	42440	22
France	2853.1	5	0.4	62.0	21	42250	23
United Kingdom	2645.6	6	0.7	61.4	22	45390	18
Canada	1400.1	11	0.4	33.3	36	41730	25
India	1217.5	12	7.1	1140.0	2	1070	163
Australia	1015.2	14	3.7	21.4	50	40350	27
Finland	271.3	33	0.9	5.3	108	48120	13
Malaysia	194.9	42	4.6	27.0	43	6970	85
New Zealand	130.7	53	- 1.6	4.3	120	27940	41
<b>Africa</b>							
South Africa+	276.8	32	3.1	48.7	25	5820	93
Nigeria	212.1	39	5.3	151.3	8	1160	157
Algeria	173.9	45	3.0	34.4	35	4260	108
Egypt	162.8	50	7.1	81.5	15	1800	147
Angola+	83.4	60	14.8	18.0	56	3450	120
Kenya	34.5	79	3.6	38.5	33	770	174
Tanzania+	20.5	94	7.5	42.5	30	430	188
Ghana	16.1	102	6.2	23.6	46	670	179
Gabon	14.4	107	2.1	1.7	144	7240	83
Zambia+	14.3	108	6.0	12.6	67	950	169
Botswana+	13.0	111	- 1.0	1.9	143	6470	86
Congo, Dem. Rep.+	11.6	116	6.2	64.2	20	150	209
Mozambique+	9.7	121	6.5	21.8	48	370	199
Mauritius+	8.7	126	5.3	1.3	150	6400	88
Namibia+	8.6	127	2.7	2.1	139	4200	109
Malawi+	4.3	145	5.3	14.3	63	290	203
Zimbabwe+	N/A		N/A	12.5	68	N/A	
Swaziland+	2.6	153	2.5	1.2	151	2520	134
Lesotho+	1.6	159	3.9	2.0	142	1080	161
Seychelles+	0.8	169	2.8	0.09	191	10290	73
Sub-Saharan Africa	987.1		5.0	818.0		1082	
World low income	568.5		6.4	972.8		524	
World middle income	16826.9		6.2	4650.7		3211	
World high income	43189.9		0.8	1068.5		39345	
World	60587.0		2.0	6692.0		8579	

+ SADC countries

**This table reads:** According to the World Bank, South Africa's Gross Domestic Product in 2008 was US\$276.8 billion (rank 32), its population 48.7 million (rank 25) and the average Gross National Income per capita was US\$5820 (rank 93).

Source: World Bank/World Development Indicators 2009

## SOUTH AFRICA

### Provinces and capitals



### Provinces & Capitals

Province	Capital	Area* Sq Km	%	Population# '000	%	GDP+ %
Eastern Cape	Bhisho	169580	13.9	6649	13.5	8.1
Free State	Bloemfontein	129480	10.6	2902	5.9	5.5
Gauteng	Johannesburg	17010	1.4	10531	21.4	33.3
KwaZulu-Natal	Pietermaritzburg	92100	7.6	10449	21.2	16.7
Mpumalanga	Nelspruit	79490	6.5	3607	7.3	6.8
Northern Cape	Kimberley	361830	29.7	1148	2.3	2.2
Limpopo	Polokwane	123910	10.2	5227	10.6	6.7
North West	Mafikeng	116320	9.5	3450	7.0	6.3
Western Cape	Cape Town	129370	10.6	5357	10.9	14.4
<b>Total</b>		<b>1219090</b>	<b>100</b>	<b>49321</b>	<b>100</b>	<b>100</b>

**This table reads:** Eastern Cape has 13.9% of the area of South Africa, 13.5% of its population and 8.1% of its GDP.

\* Pre-2006 boundaries # Mid 2009 estimates based on 2001 Census with original boundaries. + Regional analysis of GDP last conducted 2004.

Source: Statistics SA/South Africa Yearbook 2008/9

## Gross Domestic Product (GDP) by Economic activity 2005 vs 2009

R millions at constant year 2005 prices Activity	2005		2009		% inc
	R millions	%	R millions	%	
<b>Primary sector</b>					
Agriculture, forestry, fishing	34787	2.6	39290	2.2	12.9
Mining, quarrying	99069	7.6	92477	5.2	-6.7
<b>Secondary sector</b>					
Manufacturing	222579	17.1	265650	14.9	19.4
Electricity, water	28597	2.2	35472	2.0	24.0
Construction	26410	2.0	57371	3.2	117.2
<b>Tertiary sector</b>					
Wholesale, retail trade, hotels, restaurants	161503	12.4	213565	12.0	32.2
Transport, communication	102874	7.9	162765	9.1	58.2
Finance, real estate, bus. services	216747	16.6	381731	20.1	76.1
Personal services	75735	5.8	104521	5.9	38.0
General government services	191340	14.7	254850	14.3	33.2
<b>Total value at basic prices</b>	<b>1157441</b>	<b>88.9</b>	<b>1595691</b>	<b>89.5</b>	<b>37.9</b>
Taxes less subsidies	144129	11.1	186368	10.5	29.3
<b>GDP</b>	<b>1301813</b>	<b>100</b>	<b>1782059</b>	<b>100</b>	<b>36.9</b>

**This table reads:** Agriculture, forestry and fishing accounted for R34787m (2.6%) of GDP in 2005. In 2009 it accounted for R39290m (2.2%) – an increase of 12.9% at constant year 2005 prices.

Source: Statistics SA as at Q4 2009 estimates

## Profile of Households with R750,000 pa 2008

<b>% of total households</b>	<b>2</b>
Black	10
Indian	5
Coloured	4
White	81
<b>Province</b>	
Gauteng	52
Western Cape	13
KwaZulu-Natal	11
Free State	5
Other	19

**This table reads:** Households with a combined income of over R750,000 pa (2%) of all households are predominantly white (81%) and Gauteng (52%).

Source: Bureau of Market Research, UNISA

## Household Expenditure by Population

Group	Black	Coloured/ Indian	White
<b>Share of population</b>	<b>79.4%</b>	<b>11.4%</b>	<b>9.2%</b>
Food and non-alcoholic beverages	62,1	13,6	24,3
Alcoholic beverages and tobacco	49,1	19,7	31,2
Clothing and footwear	62,2	13,8	24,0
Housing, water, electricity/fuel	39,8	14,5	45,7
Furnishings, household equip., maint.	49,1	10,4	40,5
Health	37,3	10,2	52,5
Transport	36,7	13,0	50,3
Communication	39,6	14,0	46,4
Recreation and culture	32,2	13,7	54,1
Education	47,1	10,4	42,5
Restaurants and hotels	43,1	11,1	45,8
Miscellaneous goods and services	37,1	11,0	51,9
<b>Total consumption expenditure</b>	<b>44,3</b>	<b>12,8</b>	<b>42,9</b>

**This table reads:** According to Statistics SA in 2005/6 Black households accounted for 62.1% of food and non-alcoholic beverage consumption expenditure, Coloured/Indian households for 13.6% and White households for 24.3%.

Source: Statistics SA Income & Expenditure of Households 2005/6.



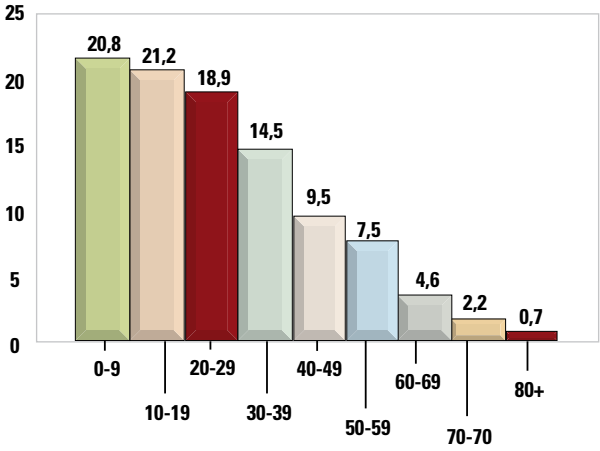
## Population Profile Adults 16+

Demographic	'000	%
<b>Total</b>	<b>31523</b>	<b>100</b>
<b>Race</b>		
Black	23807	75.5
Coloured	2784	8.8
Indian	836	2.7
White	4097	13.0
<b>Sex</b>		
Male	15716	49.9
Female	15808	50.1
<b>Age</b>		
16-24	8309	26.4
25-34	7575	24.0
35-49	8460	26.8
50+	7180	22.8
<b>Household income pm</b>		
R1-799	1800	5.7
R800-1399	5400	17.1
R1400-2499	4614	14.6
R2500-4999	5982	19.0
R5000-7999	4345	13.8
R8000-10999	3207	10.2
R11000-19999	3261	10.3
R20000+	2916	9.2
<b>Community</b>		
Major metropolitan	10881	34.5
Cities/large towns	4158	13.2
Small towns/villages	3989	12.7
Settlements/rural	12495	39.6
<b>Province</b>		
Western Cape	3124	9.9
Northern Cape	781	2.5
Free State	2011	6.4
Eastern Cape	4704	14.9
KwaZulu-Natal	6412	20.3
Mpumalanga	2343	7.4
Limpopo	3406	10.8
Gauteng	6665	21.1
North West	2079	6.6
<b>Metro area</b>		
Durban	1878	6.3
Pietermaritzburg	339	1.1

Demographic	'000	%
Johannesburg/Soweto	1917	6.1
Reef	2598	8.2
Pretoria	1305	4.1
Vaal	670	2.1
Cape Town	2041	6.5
Cape fringe	295	0.9
Port Elizabeth/Uiten.	859	2.7
East London	391	1.2
Kimberley	147	0.5
Bloemfontein	295	0.9
<b>Read/Understand</b>		
Yes	30319	96.2
No	1204	3.8
<b>Highest education</b>		
No school	1479	4.7
Some primary	2118	6.7
Primary completed	2255	7.2
Some high	12546	39.8
Matric	9404	29.8
Technikon degree	1597	5.1
University degree	949	3.0
Other post matric	1176	3.7
<b>Living Standards Measure (LSM)</b>		
Group 1	1092	3.5
Group 2	2314	7.3
Group 3	2466	7.8
Group 4	4476	14.2
Group 5	4782	15.2
Group 6	6140	19.5
Group 7	3214	10.2
Group 8	2386	7.6
Group 9	2668	8.5
Group 10	1986	6.3
<b>Employment</b>		
Work full time	8849	28.1
Work part time	3059	9.7
Do not work	19615	62.2

**This table reads:** According to AMPS 2009, the adult population is 31.523 million. Of these 23.807 million (75.5%) are Black, 2.784 million (8.8%) are Coloured. (Rounding-off occurs)

Source: AMPS 2009 (A)



## Population distribution by Age

Age	'000	%
0-9	10,254	20.8
10-19	10,462	21.2
20-29	9,344	18.9
30-39	7,171	14.5
40-49	4,703	9.5
50-59	3,684	7.5
60-69	2,261	4.6
70-79	1,101	2.2
80+	341	0.7
Total	49,321	100.0

**This table reads:** The 0 to 9 age group population is 10.3 million (20.8% of the total) according to the 2001 Census, adjusted mid 2009 (rounding off occurs)

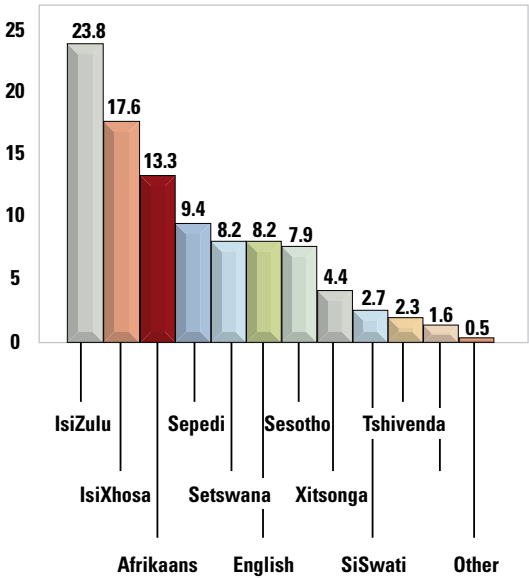
Source: Statistics SA Census 2001 adjusted mid 2009

## Population by Home Language

Language	1996 %	2001 %
IsiZulu	22.9	23.8
IsiXhosa	17.9	17.6
Afrikaans	14.4	13.3
Sepedi	9.2	9.4
English	8.6	8.2
Setswana	8.2	8.2
Sesotho	7.7	7.9
Xitsonga	4.4	4.4
SiSwati	2.5	2.7
Tshivenda	2.2	2.3
IsiNdebele	1.5	1.6
Other	0.6	0.5

**This table reads:** IsiZulu home language speakers were 22.9% of the 1996 Census and 23.8% of the 2001 Census.

Source: Statistics South Africa Census 1996 and 2001



## Access to Media

	All Races	Black	Coloured	Indian	White
Population '000	31523	23807	2784	836	4097
	%	%	%	%	%
<b>Any of AMPS newspapers</b>					
Dailies (21)	28.6	24.9	42.8	36.8	38.9
Weeklies (28)	35.2	31.4	34.7	63.0	52.0
Any AMPS newspaper	47.0	42.1	56.4	71.2	64.0
<b>Any of AMPS magazines</b>					
Weeklies (13)	24.0	17.2	39.0	29.6	52.4
Fortnightlies (2)	14.0	14.1	18.8	11.4	10.7
Monthlies (77)	36.2	31.8	38.9	45.3	58.0
Alternate monthlies (20)	9.3	8.2	8.0	5.8	17.1
Any AMPS magazine	47.8	41.3	57.2	56.5	76.8
<b>Any AMPS newspaper/magazine</b>	62.4	55.7	74.2	82.3	89.2
<b>Cinema/Drive-in</b>					
Past 3 months	10.0	6.5	11.6	32.4	25.0
<b>Radio</b>					
Last 7 days	90.0	89.7	88.0	92.7	92.5
<b>TV</b>					
Last 7 days	85.3	82.1	94.1	95.2	95.8
<b>Internet</b>					
Accessed last 4 weeks	11.0	6.1	11.8	24.5	36.4
<b>Ads on Outdoor last 4 weeks</b>					
Billboards	85.9	84.9	84.5	91.0	91.3
In-store	91.2	91.3	92.1	93.0	90.1
Bus shelters	57.6	54.1	62.1	75.2	71.4
Taxis/minibuses	84.4	84.1	86.6	90.0	83.1
Trailer Ads	60.6	57.2	62.1	76.7	75.4

**This table reads:** According to AMPS 2009 (rolling 12 months survey), 28.6% of all adults were reached by the average issue of all 21 daily newspapers monitored by the survey. Penetration was highest among the Coloured population (42.8%) and lowest amongst the Blacks (24.9%).

Source: AMPS 2009A

## Access to Telecommunications

Telephone mainlines per 100 people	9.7	Price basket for fixed line (US\$ per month)	20.8
Mobile subscribers per 100 people	88.4	Price basket for mobile (US\$ per month)	13.9
Population covered by mobile	100%		
Internet users per 100 people	8.3	Price basket for internet (US\$ per month)	28.2
PC's per 100 people	8.5	Internet hosts	1.7 million
Broadband % of internet subscribers	3.9%	Country code	.za

Source: ICT at a Glance (research 2007 republished by World Bank 2009), CIA World Book

## Above-the-line Adspend in R'millions

Category	Year 1999 R'm	%	2008 R'm	%	2009 R'm	%
Daily newspapers	1241.5	15.6	3487.4	14.2	3266.8	13.4
Weekend newspapers	505.5	6.3	1555.6	6.3	1573.2	6.4
Black/Coloured/Asian papers	164.6	2.1	inc. in other cat.			
Community newspapers	453.3	5.7	1520.7	6.2	1536.3	6.3
Consumer magazines	780.2	9.8	2206.7	9.0	2041.9	8.4
Trade, technical, financial	337.0	4.2	531.4	2.2	484.6	2.0
Total print	3482.2	43.7	9301.8	37.9	8902.8	36.4
TV	3236.6	40.7	9964.7	40.5	10487.6	42.9
Radio	925.7	11.6	3344.8	13.6	3041.0	12.4
Cinema	66.1	0.8	357.4	1.5	299.4	1.2
Out-of-Home	250.4	3.1	1079.9	4.4	1075.1	4.4
Direct mail (unaddressed)	not monitored		150.5	0.6	151.2	0.6
Internet	not monitored		375.9	1.5	468.9	1.9
<b>Total</b>	<b>7961.0</b>	<b>100</b>	<b>24575.0</b>	<b>100</b>	<b>24426.1</b>	<b>100</b>

Rounding off occurs. **Important note:** 2008 revised upwards from original data published in 2009 Media Facts. Excludes self-promotion by media.

**This table reads:** According to Multimedia, TV accounted for R3236.6 million (40.7%) of the R7961.0 million spend on media in 1999. TV rose to R9964.7 million (40.5%) in 2008 and R10487.6 (42.9%) in 2009.

Source: Nielsen Media Research's Multimedia

## Growth of Media Opportunities

Medium	Dec 1991	Dec 2000	Dec 2004	Dec 2006	Mar 2008	Mar 2009	Mar 2010
TV stations	7	56	67	74	85	92	100
Radio stations (separate buys)	34	105	117	115	135	137	138
Daily newspapers	22	17	18	20	21	21	21
Major weeklies	25	21	25	28	29	27	26
Consumer mags & newspapers	250	480	550	610	690	660	655
Business to business print	300	580	640	725	775	735	700
Community newspapers & mags	N/A	260	330	375	475	470	470
Internet web pages		1.4 Bn	+8 Bn	9.7 Bn	+12 Bn	#	#

**This table reads:** There were 7 TV channels in 1991. In March 2010 there were 100. **Comment: TV:** Includes DStv commercial and non-commercial stations. **Radio:** Estimated to be actively broadcasting at any one time.

**Print media:** Dailies and weekends exclude regional supplements/business editions. Consumer and Business to Business is estimated total opportunities offered.

**#Internet:** Estimated web pages indexed internationally by Google search engine. Google stopped providing estimate in 2006 and since then widely different estimates of size of the internet and page indexing render any figures meaningless. In 2009 a Google users blog boasted Google carries over 1 trillion URL addresses. Cuil.com, a new Google competitor, claimed to index 120 billion web pages. WorldwideWebSize estimated 25.4 billion pages.

Source: Media Manager

## Key indices 2001 to 2009

Year	CPI % incr.	GDP % incr.	Rand to US\$	Prime Rate %	Adspend % incr.
2001	6.6	2.7	8.61	13.00	8.3
2002	9.3	3.7	10.54	17.00	16.8
2003	6.8	2.9	7.58	11.50	17.7
2004	4.3	4.6	6.46	11.00	23.3
2005	3.9	5.3	6.38	10.50	15.8
2006	4.6	5.6	6.78	12.50	17.2
2007	6.5	5.5	7.06	14.50	16.4
2008	11.3	3.7	8.26	15.00	5.0
2009	7.1	-1.9	8.31	10.50	-0.6

**This table reads:** In year 2001 the Consumer Price Index (CPI) rose by 6.6% over 2000. The Gross Domestic Product (GDP) rose by 2.7%, the US\$ bought R8.61, the Prime lending rate was 13.00% and adspend increased by 8.3%.

Source: Nedcor Economic Unit/Nielsen Media Research's Multimedia. Note: Previously published CPI and GDP data changed. In line with new practices CPI changed to CPIX (metro & other urban) 2001 to 2008 and GDP updated.

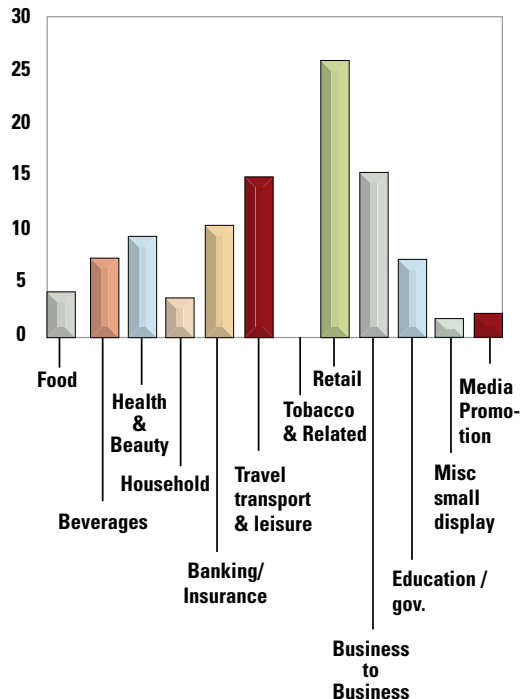
## Above-the-line Adspend by Category

	2009 R'm	%
Food	1074.0	4.4
Beverages	1716.8	7.0
Health & beauty	2091.3	8.6
Household	901.4	3.7
Banking/insurance	2521.2	10.3
Travel, transport & leisure	3460.3	14.2
Tobacco & related	12.0	0.0
Retail	6337.4	25.9
Business to Business	3679.2	15.1
Education/government etc	1770.0	7.2
Misc small display	260.0	1.1
Media promotion	602.3	2.5
<b>Total</b>	<b>24426.1</b>	<b>100</b>

**This table reads:** According to Nielsen's Multimedia, above-the-line expenditure on Food was R1074.0 million in 2009 (4.4%) out of the total of R24426.1 million.

**Note:** Excludes self-promotion. Rounding off occurs.

Source: Nielsen Media Research's Multimedia



**The market:** ODM, a new pay TV competitor with 55 channels, to be launched May 2010.

**Viewership trend:** Continues in flux as stations jostle for audience via programming opportunities.

Station	Ownership/ Language	Comment	Last 7 days viewership ex AMPS 2009				
			Total '000	% of population			
				Black	Coloured	Indian	White
SABC 1	SABC All official languages	Free-to-air	23359	78.3	76.0	81.6	46.6
SABC 2	SABC All official languages	Free-to-air	20473	60.9	88.2	80.4	69.4
SABC 3	SABC All official languages	Free-to-air	16797	48.7	71.0	84.9	61.7
eTV	eTV Mainly English	Free-to-air	19476	58.6	79.1	83.2	64.3
MNet	M-Net Mainly English	Analogue/digital pay TV station, predominantly upper income audience. M-Net only analogue subscriber base under 120,000 and shrinking in favour of DSTv digital package	2181	3.0	8.9	13.5	27.3
DSTv	Multichoice Mainly English	Digital satellite pay station, over 100 channels (plus inter-active offerings) 39 of which carry advertising sold by sales house Oracle. Subscriber base over 2 million (SA only) and growing. Larger channels include:	6831	15.8	21.5	41.0	52.0
		Supersport 3	2464	6.7	9.5	16.5	11.4
		M-Net Movies 1	2285	3.6	9.4	18.2	24.7
		M-Net Movies 2	2236	3.5	9.2	18.2	24.5
		Channel O	1982	6.7	5.8	9.2	3.4
		Supersport 2	1770	2.3	8.1	13.6	21.7

**This table reads:** SABC1 is owned by the SABC and broadcasts free-to-air in all official languages. Its last 7 days viewership ex AMPS 2009 (Jan-Jun) is 23.4 million adults. It reaches 78.3% of all black adults and 46.6% of all white adults.

Source: AMPS 2009 (Jan-Jun)



## Top 5 Programmes

Station	Programme	Genre	Day	AMR	Time
SABC1	Generations	Soap	Mon	28.0	20h00-20h30
	Zone 14	Drama	Mon	21.9	20h30-21h00
	Society	Drama	Tue	20.5	20h30-21h00
	Home Affairs	Drama	Thu	20.4	20h30-21h30
	Zulu News	News	Fri	18.0	19h30-20h00
SABC2	Muvhango	Drama	Tue	13.1	21h00-21h30
	Gospel Time	Religion	Sun	10.4	20h00-21h00
	Moferere Lenyalong	Sitcom	Sun	10.4	19h00-19h30
	7de Laan	Soap	Tue	9.6	18h30-19h00
	Mopheme	Drama	Fri	9.6	21h00-21h30
SABC3	Days of Our Lives	Soap	Mon	6.8	16h45-17h30
	Isidingo	Soap	Thu	5.5	18h30-19h00
	Oprah Winfrey	Magazine	Thu	5.3	17h30-18h30
	News	News	Thu	5.2	19h00-19h30
	Isidingo	Soap	Tue	5.2	18h30-19h00
e-TV	Dr Dolittle II	Movie	Sat	11.4	20h00-22h00
	Rhythm City	Drama	Wed	11.2	18h30-19h00
	News	News	Thu	10.4	19h00-19h30
	Scandal	Drama	Thu	10.2	19h30-20h00
	WWE Wrestling Raw	Sport	Sun	9.2	17h00-18h00
M-Net	Carte Blanche	Magazine	Sun	1.8	19h00-20h00
	Valkyrie	Movie	Sun	1.4	20h00-22h00
	82nd Academy Awards	Variety	Mon	1.3	19h30-22h30
	Binnelanders	Soap	Mon	1.3	18h00-18h30
	The Mentalist	Drama	Wed	1.2	20h30-21h30

**This table reads:** SABC1's leading programme week commencing 8th March 2010 was Monday's Generations broadcast between 20h00 and 20h30. It achieved 28.0 AMR (TV ratings) against all adults.

W/C 8th March, 2010. Base: all adults

## TV Performance

Station Cost 20x30" spots Performance in AR	SABC1 R536000	SABC2 R450500	SABC3 R486000	eTV R534000	M-Net R422500	Total R2429000
All adults	164.0	89.8	65.0	104.2	12.0	435.0
English/other	43.3	72.5	123.4	88.5	28.8	356.5
Afrikaans/both	46.3	137.1	82.4	103.5	36.1	405.4
Nguni	230.4	66.4	43.3	96.1	1.9	438.1
Sotho	146.5	84.1	40.8	102.6	0.4	374.4
Income high	60.7	68.8	64.6	57.3	38.1	289.5
Income medium	171.5	89.3	58.2	110.3	2.7	432.0
Income low	182.4	86.0	53.5	108.5	2.1	432.5

Spots spread 15h00-23h00 Mon-Sun week commencing 8th March 2010. Channels per Media Inflation Watch package. Rates per rate card; significant discounts may be negotiated.

**This table reads:** 20 spots on SABC1 spread 15h00 to 23h00 Mon-Sun cost R536,000 without negotiation. The schedule yielded 164.0 AR (TV ratings) against all adults and 230.4 against Nguni speaking adults.

Analysis: via Telmar

**The market:** The medium is in a state of flux as stations vie for audience and revenue. New regional stations have intensified regional competition.

**Listenership trend:** Audience fragmentation and fluctuation with total listening time trending downwards.

Category/Station	Language/ Owner or control	Format/Target	Audience all adults Past 7 days AMPS 2009A	
			000	%
National stations				
5fm	English SABC	Popular music format to all major metropolitan areas countrywide.	2372	7.5
Metro FM	English SABC	Contemporary black-orientated music, news and talk shows targeted to trendy sophisticated blacks in major metropolitan areas.	4840	15.4
SAfm	English/SABC	Public service content "for the well informed."	654	2.1
RSG (RadioSondergrense)	Afrikaans/SABC	Public service national community/cultural station.	1864	5.9
Radio 2000	Eng/Afr/SABC	Mainly sports. Audience fluctuates with events covered.	693	2.2
Radio Pulpit/Kansel	Eng/Afr (+ others) Radio Pulpit	Religious.	195	0.6
Regional/inter-regional stations				
702 Talk Radio	English Primedia	Mainly talk and news format to greater Gauteng and beyond.	512	1.6
94.7 Highveld Stereo	English Primedia	Adult contemporary music format with humour, news & sports bulletins to Gauteng.	1520	4.8
Classic FM 102.7	English Classic FM	Classic, good music and news. Gauteng based. Plus netcast.	199	0.6
Kaya FM 95.9	English Primedia/others	Adult contemporary and smooth music for urban blacks in greater Johannesburg.	1627	5.2
99.2 YFM	English/HCI	Youth station (mainly black) to greater Johannesburg.	1596	5.1
94.2 Jacaranda	Eng/Afr Kagiso	Contemporary music format with news, sports bulletins & morning talk to Gauteng and beyond.	2118	6.7
North West FM	Setswana/Eng Various	Adult contemporary to NW Province and surrounds. Launched Feb 2008.	559	1.8
M-Power FM	Mainly English Various/AME	Adult contemporary to Mpumalanga and surrounds. Launched Dec 2007.	99	0.3
Capricorn FM	Mainly English Various	Adult contemporary to Limpopo and surrounds. Launched Dec 2007.	1310	4.2
567 Capetalk	Eng/Primedia	Talk & news for Cape metro areas. Linked with 702.	174	0.6
Good Hope FM	Eng/Afr SABC	Adult contemporary music format with news and sports bulletins to Western Cape.	750	2.4
Heart	English Makana Trust/Kagiso	Adult contemporary music format broadcasting to Western Cape metropolitan area.	670	2.1
94.5 Kfm	Eng/Afr Primedia (+Broadcape)	Adult contemporary music with news, sports and entertainment info to Western Cape metropolitan area.	1282	4.1
East Coast Radio	English Kagiso	Adult contemporary music with news and sport to KwaZulu-Natal.	1936	6.1

Category/Station Language	Language/ Owner or control	Format/Target	Audience all adults Past 7 days AMPS 2009A	
			000	%
Gagasi 99.5	Eng/Zulu Makana Trust/Kagiso	Adult contemporary music format broadcasting to KwaZulu-Natal metropolitan area.	2237	7.1
Algoa FM	Eng/Afr AME	Adult contemporary music with news, sports and talk to Eastern Cape.	868	2.8
OFM (Oranjé)	Eng/Afr AME (+Kagiso)	Adult contemporary music with news, sports and talk to Free State, N. Cape and NW Province.	444	1.4
Lotus FM	Eng/Indian SABC	Community/cultural station for Indian communities in KwaZulu-Natal, Gauteng & other areas.	439	1.4

#### African language stations

Ukhozi FM	Zulu SABC	Full service station for Zulu speakers in KwaZulu-Natal, Gauteng, Mpumalanga and other areas. Has split broadcast facility.	5650	17.9
Umhlobo Wenene FM	Xhosa SABC	Full service station for Xhosa speakers in Eastern Cape, Gauteng, S. Free State and other areas.	4267	13.5
Motsweding FM	Setswana SABC	Full service station for Setswana speakers in NW Province, N. Cape, NE Free State & Mpumalanga.	2755	8.7
Lesedi FM	Sesotho SABC	Full service station for Sesotho speakers in Free State, Gauteng, N. & E. Cape, NW Province & Mpumalanga.	3202	10.2
Thobela FM	N. Sotho SABC	Full service station for N. Sotho speakers from the Free State, through Gauteng to Limpopo.	2628	8.3
Munghana-Lonene FM	Tsonga SABC	Full service station for Tsonga speakers in Limpopo, NW Province & Gauteng.	801	2.5
Phalaphala FM	Venda SABC	Full service station for Venda speakers in far N. Limpopo & Gauteng.	501	1.6
Tru FM	Eng/Xhosa SABC	Music station for Xhosa speakers in East London/former Ciskei.	330	1.0
Ikwekwezi FM	Ndebele SABC	Full service station for Ndebele speakers in Mpumalanga, Gauteng & Limpopo.	1624	5.2
Ligwalagwala FM	Swazi SABC	Full service station for Swazi speakers in Mpumalanga & Gauteng.	1262	4.0
<b>Community</b> Various	Various Independent/ international	Community appeal, from niche geographic, retail and religious interest. Over 130 community/special stations monitored in AMPS 2009A.	6959	22.1

**This table reads:** 5fm is an English language station owned by the South African Broadcasting Corporation (SABC). It has a popular music format with 2.4 million listeners (7.5% of the population) over the past 7 days (AMPS 2009A).

## [ newspapers: dailies ]

**The Market:** Traditionally each major urban centre has had its own set of competing English and/or Afrikaans dailies. The last few years has seen the surge in popular journalism with the launch and massive success of *Daily Sun*. Revenue is under extreme pressure

**Circulation trend:** Most dailies are experiencing moderate to severe circulation decline.

**Readership trend:** Larger English dailies exhibit a Black readership in excess of 50%, blurring editorial appeals between 'Black' and 'White' categories.

Area/Title	Group	Lang.	Appears	ABC Circ. Oct-Dec '09 000	Readers AMPS '09A 000	Col Cm. BW Exc VAT	Col Cm. FC Exc VAT
<b>Bloemfontein</b>							
Volksblad	Media24	Afr	AM	26.0	133	R60.89*	R90.78*
<b>Cape Town</b>							
Cape Times	INC	Eng	AM	44.5	247	R98.00	R156.80
Cape Argus	INC	Eng	PM	58.1	334	R111.00	R177.60
Daily Voice	INC	Eng	AM	N/A	525	R88.00	R140.80
Burger	Media24	Afr	AM	74.5	447	R137.87*	R194.31*
Kaap/Cape Son (Mon-Fri)	Media24	Afr/Eng	AM	124.6	609	R135.48*	R214.32*
<b>Durban</b>							
The Mercury	INC	Eng	AM	34.3	246	R79.71	R127.54
Daily News	INC	Eng	PM	36.8	512	R93.61	R149.78
Isolezwe	INC	Zulu	AM	104.3	769	Per FC	R93.67
East London							
Daily Dispatch	Avusa	Eng	AM	30.7	298	R52.00	R99.00
<b>Johannesburg</b>							
Business Day	BDFM	Eng	AM	37.1	109	R144.00	R204.00
Citizen	Caxton	Eng	AM	61.7	443	R85.00	R115.00
Daily Sun	Media24	Eng	AM	492.1	4398	R290.00*	R385.00*
Sowetan	Avusa	Eng	AM	123.0	1495	R160.00	R265.00
Star	INC	Eng	AM/PM	148.8	799	R194.50	R311.20
Times	Avusa	Eng	AM	133.1	N/A	R136.00	R193.00
Beeld	Media24	Afr	AM	91.1	513	R159.73*	R223.92*
<b>Kimberley</b>							
Diamond Fields Adv.	INC	Eng	AM	9.6	77	R26.25	R42.00
<b>Pietermaritzburg</b>							
Witness	Media24	Eng	AM	20.5	143	R44.79*	R89.57*
<b>Port Elizabeth</b>							
Herald	Avusa	Eng	AM	22.5	232	R63.00	R116.00
<b>Pretoria</b>							
Pretoria News	INC	Eng	PM	24.8	191	R56.70	R90.72

**This table reads:** Bloemfontein's Volksblad is published by Media24 in Afrikaans, mornings Mon-Fri. Its ABC circulation Oct-Dec 2009 is 26,000 (rounded). Its all adults readership ex AMPS 2009A (12 months) is 133,000. A single column centimetre BW is R60.89 and FC is R90.78 (Wed-Fri, to 30th Sep 2010 exc VAT).

\* Wed-Fri, to 30th September 2010.

**The market:** Most large urban centres have a Saturday/Sunday edition of relevant dailies. Nationals grew from Johannesburg. Recent movements include name changes and new launches, especially the emergence of Afrikaans popular journalism. Revenue is under extreme pressure.

**Circulation trend:** Most titles are declining. **Readership trend:** per dailies.

Area/Title	Group	Lang.	Appears	ABC Circ. Oct-Dec '09 000	Readers AMPS '09A 000	Col Cm. BW Exc VAT	Col Cm. FC Exc VAT
<b>National</b>							
City Press	Media24	Eng	Sun	168.0	2046	R252.00*	R356.00*
Mail & Guardian	M&G Media	Eng	Fri	46.9	496	R230.00	R238.00
Rapport	Media24	Afr	Sun	284.4	1433	R393.00*	R600.00*
Soccer Laduma	Media24	Eng	Wed	270.6	2733	Per FC	R290.00*
Sondag	Media24	Afr	Sun	34.0	247	R64.00*	R86.00*
Sunday Independent	INC	Eng	Sun	34.3	191	R138.23	R221.17
Sunday Sun	Media24	Eng	Sun	217.1	2623	R145.20*	R192.50*
Sunday Times	Avusa	Eng	Sun	464.4	3977	R540.00	R861.00
Sunday World	Avusa	Eng	Sun	160.0	1863	R120.00	R164.00
<b>Bloemfontein</b>							
Volksblad Saterdag	Media24	Afr	Sat	22.7	98	R41.16*	R69.47*
<b>Cape Town</b>							
Burger	Media24	Afr	Sat	95.4	383	R135.29*	R190.68*
Son Op Sondag	Media24	Afr	Sun	57.8	N/A	R55.08*	R96.12*
Weekend Cape Argus	INC	Eng	Sat/Sun	86.4	Sat: 291/Sun: 213	R123.00	R196.80
<b>Durban</b>							
Ilanga	Mandla-Matla	Zulu	Mon/Thu	100.3	765	R76.47*	R134.22*
Ilanga Langesonto	Mandla-Matla	Zulu	Sat/Sun	86.1	800	R39.23*	R66.68*
Independent on Saturday	INC	Eng	Sat	50.1	261	R92.18	R147.49
Isolezwe ngeSonto	INC	Zulu	Sun	59.8	653	Per FC	R73.92
Post	INC	Eng	Wed	44.3	395	R51.58	R82.53
Sunday Tribune	INC	Eng	Sun	91.0	784	R151.44	R242.30
<b>Johannesburg</b>							
Citizen	Caxton	Eng	Sat	47.1	550	R60.00	R95.00
Naweek Beeld	Media24	Afr	Sat	82.8	227	R135.06*	R188.09*
Saturday Star	INC	Eng	Sat	104.8	493	R133.42	R213.47
<b>Port Elizabeth</b>							
Weekend Post	Avusa	Eng	Sat	24.7	205	R63.00	R113.00

**This table reads:** City Press is published by Media24 in English on Sundays. Its ABC circulation Oct-Dec 2009 is 168,000 (rounded) and its AMPS 2009A readership is 2,046,000 adults all races. A single column centimetre BW is R252.00 and FC is R356.00 (to 30th Sep 2010 exc VAT).\* To 30th Sep 2010

**The Market:** SA has over 400 newspapers and magazines targeted to local communities. Those in urban areas tend to be free distribution and large circulating. Those in country areas tend to be sold and smaller circulating. **Circulation trend:** Many urban newspapers have increased circulation in line with the increase in local population/urbanisation. Small "grassroot" publishers are entering the market.

Area/Title	Group	Lang.	Appears	Circulation Oct-Dec '09 000	Col Cm. BW Exc VAT	Col Cm. FC Exc VAT
<b>Gauteng: Greater Johannesburg</b>						
Alberton Record	Caxton	Eng(+Afr)	Weekly	38.0 free	R54.24	R81.36
Boksburg Advertiser	Caxton	Eng(+Afr)	Weekly	41.4 free	R57.35	R86.03
Germiston City News	Caxton	Eng(+Afr)	Weekly	29.3 free	R43.30	R64.95
Krugersdorp News	Caxton	Eng/Afr	Weekly	30.3 free	R47.69	R71.54
Randburg Sun (N&S)	Caxton	Eng	Weekly	66.6 free	R74.63	R111.95
Rodepoort Record	Caxton	Eng/Afr	Weekly	53.6 free	R63.91	R95.87
Sandton Chronicle	Caxton	Eng	Weekly	55.4 free	R66.29	R99.43
Southern Courier	Caxton	Eng(+Afr)	Weekly	39.6 free	R41.16	R61.74
<b>Gauteng: Pretoria</b>						
Record Centurion	Caxton	Afr/Eng	Weekly	50.5 free	R70.26	R105.39
<b>Gauteng: Vaal</b>						
Vanderbijlpark Ster	Media24	Eng/Afr	Weekly	25.8 free	R48.03	R72.05
<b>North West</b>						
Potchefstroom Herald	Media24	Afr(+Eng)	Weekly	8.6 sold	R34.13*	R51.19*
Rustenburg Herald	Caxton	Eng/Afr	Weekly	23.0 sold	R39.20	R58.80
<b>Mpumalanga</b>						
Lowveldier	Caxton	Eng/Afr	Tue & Fri	15.9 sold: Fri	R32.45	R48.56
<b>Free State</b>						
Ons Stad	Media24	Afr/Eng	Weekly	36.9 free	R33.64*	R53.22*
Vista	Media24	Afr(+Eng)	Weekly	37.2 free	R36.73*	R56.31*
<b>KwaZulu-Natal: Durban</b>						
Highway Mail	Caxton	Eng	Weekly	51.4 free	R57.23	R84.85
Northglenn News	Caxton	Eng	Weekly	27.4 free	R41.24	R61.86
<b>KwaZulu-Natal: North/South Coast</b>						
South Coast Herald	Caxton	Eng	Weekly	16.0 sold	R34.80	R52.20
Zululand Observer	Caxton	Eng/Afr	Tue & Fri	14.0 sold: Fri	R38.47	R57.71
<b>Eastern Cape: Port Elizabeth</b>						
P. E. Express	Media24	Eng(+Afr)	Weekly	89.8 free	R49.98*	R85.05*
<b>Western Cape: Cape Town</b>						
Constantiaberg Bulletin	INC	Eng	Weekly	31.3 free	R45.60	R71.96
Southern Suburbs Tatler	INC	Eng	Weekly	48.7 free	R46.50	R74.40
Tygerburger (12 editions)	Media24	Afr(+Eng)	Weekly	285.5 free	R237.42*	R294.09*
<b>Western Cape: Boland</b>						
District Mail	Media24	Eng/Afr	Weekly	13.4 sold	R35.75*	R55.40*
Eikestadnuus	Media24	Afr(+Eng)	Weekly	7.8 sold	R30.26*	R45.34*

**Circulation verification:** Free: ABC; Free Distribution; Sold: ABC.

**This table reads:** Alberton Record is published by Caxton in English plus some Afrikaans. Its latest circulation (ABC: Free Distribution) is 38,000 (rounded). A column centimetre BW is R54.24 and FC is R81.36 (2010 exc VAT). \* To 30th Sep 2010.



**The Market:** SA has well over 400 consumer orientated titles, most of which are small circulating and highly niched. Churn of titles is high. The top 5 publishers totally dominate circulation and adspend.

**Circulation trend:** Depends on the category, but average title is declining. The important Women's sector is under pressure from the large number of options allied to consumers reducing the range of titles purchased.

**Readership trend:** Like circulation, generally softening. Most English, seemingly White editorial focus titles show significant, if not dominant, Black readership.

Subject/Title	Group	Lang	Appears	ABC Circ. Latest 000	Readers AMPS '09A 000	FP FC Exc VAT
<b>Celebrity news</b>						
Heat	Upper Case*	Eng	Weekly	51.6	532	R46900
People	Caxton	Eng	Weekly	85.5	1369	R24100
<b>Consumer Computing</b>						
PC Format	Panorama	Eng	Monthly	18.6	221	R23760
<b>Current Affairs</b>						
Time Magazine	Time Warner	Eng	Weekly	59.6	345	R32700
<b>General Interest/TV</b>						
Bona +	Caxton	Eng+3	Monthly	82.7	2833	R32000
Drum +	Media24	Eng	Weekly	118.6	2179	R36385
Huisgenoot	Media24	Afr	Weekly	320.9	2085	R71875
Reader's Digest	Reader's Digest Aus.	Eng	Monthly	47.8	483	R19300
Dish/Skottel TV Guide	Multichoice	Eng/Afr edit.	Monthly	1361.5	1176	R75060
TV Plus	Media24	Eng/Afr edit.	Fortnightly	117.5	1721	R32400
You	Media24	Eng	Weekly	190.9	2071	R47590
<b>Lifestyle/Entertainment</b>						
Country Life, SA	Caxton	Eng	Monthly	34.9	147	R22800
Longevity	Avusa	Eng	Monthly	18.0	85	R28800
Wine	Ramsay\$	Eng	Monthly	10.7	186	R19600
<b>Men's Interest</b>						
FHM	Upper Case*	Eng	Monthly	61.2	713	R62900
GQ	Conde Naste	Eng	10xpa.	26.0	259	R36120
Mens Health	Touchline*	Eng	Monthly	71.0	861	R59950
<b>Motoring</b>						
Bike SA	Bike SA	Eng	Monthly	32.1	233	R19210
Car	Ramsay\$	Eng	Monthly	82.3	1022	R48200
Speed & Sound	OverDrive	Eng	Monthly	44.2	744	R24453
Topcar	Media24	Eng	Monthly	21.4	622	R36890
<b>Music/Youth</b>						
Hype	Panorama	Eng	6xpa	20.3	529	R24530
Seventeen	8 Ink*	Eng	10xpa	34.0	287	R26500
<b>Newspaper Supplements</b>						
My Tyd - Rapport	RCP Media*	Afr	Weekly	see Rapport	1186	R54900
S. Times Magazine	Avusa	Eng	Weekly	see S. Times	3326	R76393

Subject/Title	Group	Lang	Appears	ABC Circ. Latest 000	Readers AMPS '09A 000	FP FC ExcVAT
<b>Travel/Adventure</b>						
Getaway	Ramsay\$	Eng	Monthly	52.0	540	R35350
<b>Retailer's titles</b>						
Edgars Club Mag.	New Media*	Eng/Afr edit.	Monthly	870.3	2445	R62300
Jet Club +	Publishing Part.	Eng	10xpa	1102.9	5866	R54660
<b>Sport</b>						
Amakhosi +	Backpage	Eng	Monthly	22.6	1722	R30325
Compleat Golfer	Ramsay\$	Eng	Monthly	22.5	107	R26600
Kickoff +	Touchline*	Eng	Fortnightly	46.9	2924	R45375
Sport's Illustrated, SA	Touchline*	Eng/Afr edit.	Monthly	30.6	337	R41128
Stywe Lyne/Tight Lines	Stywe Lyne	Afr(+Eng)	Monthly	29.8	133	R12500
<b>Women's/Home Interest</b>						
Cosmopolitan	Associated	Eng	Monthly	97.9	984	R56800
Elle	Avusa	Eng	Monthly	41.3	353	R40800
Essentials	Caxton	Eng	Monthly	38.7	166	R24000
Fair Lady	Media24	Eng	Monthly	75.3	927	R44113
Finesse	Carpe Diem\$	Afr	Monthly	93.0	276	R24000
Food & Home Entertaining	Caxton	Eng	Monthly	36.8	575	R23500
Garden & Home, SA	Caxton	Eng	Monthly	54.6	638	R37000
Glamour	Conde Naste	Eng	Monthly	90.0	549	R49235
House & Garden	Conde Naste	Eng	Monthly	46.7	346	R41560
House & Leisure	Associated	Eng	Monthly	35.7	209	R35750
Ideas/Idees	Media24	Eng/Afr edit.	Monthly	78.0	204	R34703
Living & Loving	Caxton	Eng	Monthly	36.1	598	R23500
Marie Claire	Associated	Eng	Monthly	36.7	258	R40400
Move! +	Thought24*	Eng	Weekly	119.6	1765	R19974
O The Oprah Mag	Associated	Eng	Monthly	51.0	565	R42550
Rooi Rose	Caxton	Afr	Monthly	105.3	858	R30000
Sarie	Media24	Afr	Monthly	75.3	788	R44113
Shape	Touchline*	Eng	Monthly	44.3	186	R42500
True Love +	Thought24*	Eng	Monthly	81.8	2943	R48989
Vroukeur	Caxton	Afr	Weekly	77.5	423	R16300
Woman & Home	Caxton	Eng	Monthly	97.5	335	R44500
Your Baby	Media24	Eng	Monthly	23.8	224	R19700
Your Family	Caxton	Eng	Monthly	63.8	443	R27500

+ Predominantly Black editorial focus \* Part of Media24 (Naspers). \$ Part of Caxton. Monthly includes 11xpa.

**This table reads:** Heat is published by Upper Case Media (part of Media24 Group) weekly in English. Its latest ABC circulation is 51,600 (rounded) and its AMPS 2009A readership is 532,000 adults all races. A full page full colour is R46,900 (2010 exc VAT).

**The Market:** SA has over 650 trade, technical and professional journals & annuals, most of which are small circulating and highly niched. Turnover of titles is high. The two big financial weeklies together with Engineering News dominate adspend. **Circulation trend:** Pressure on printing and distribution (ie, postage) costs forces publishers to continually cut non-core market circulation. Publishing costs and pressure on revenue is driving titles online.

Subject/Title	Group	Lang.	Appears	ABC/Circ Latest 000	Readers AMPS '09 000	FP/FC A4/FC Exc VAT
<b>Agriculture</b>						
Farmers Weekly	Caxton	Eng	Weekly	13.0	116	R9100
Landbouweekblad	Media24	Afr	Weekly	41.6	324	R27715
<b>Architecture/Building</b>						
Leading Arch. & Design	Media24	Eng	6xpa	5.6		R11300
SA Builder	Malnor	Eng/Afr	Monthly	6.0*		R11180
Built	Avusa	Eng	6xpa	4.2		R9700
<b>Automotive/Transport</b>						
Auto Forum	Swift	Eng	Monthly	14.0		R14950
Automobile	Future Pub.	Eng(+Afr)	Monthly	8.0		R17200
FleetWatch	Newslink	Eng	Monthly	4.9		R16200
<b>Aviation</b>						
African Pilot	Wavelengths	Eng	Monthly	6.8		R8000
<b>Business/Management</b>						
Accountancy SA	Inst. Chartered Acc.	Eng	Monthly	36.6		R23600
Financial Mail	BDFM	Eng	Weekly	26.2	231	R47655
Finweek	Media24	Eng/Afr	Weekly	29.5	70	R45900
<b>Business Startup/Emerging</b>						
BigNews	BDFM	Eng	Monthly	72.2		R32940
Entrepreneur	Smart Business	Eng	Monthly	30.2	148	R29800
Succeed	Succeed	Eng	Monthly	19.2	110	R22800
<b>Catering/Hotels</b>						
Hospitality	Avusa	Eng	6xpa	5.3*		R9800
Hotel & Restaurant	Ramsay	Eng	Monthly	8.0		R17880
<b>Computers/IT</b>						
iWeek	IT Web	Eng	Weekly	9.3		R14700
<b>Conservation</b>						
Urban Green File	Brooke Patrick	Eng	6xpa	3.1		R11900
<b>Electrical/Electronics</b>						
Electricity + Control	Crown	Eng	Monthly	4.8		R15285
Vector	EE Pub.	Eng	Monthly	6.3		R15285

Subject/Title	Group	Lang.	Appears	ABC/Circ Latest 000	Readers AMPS '09 000	FP/FC A4/FC Exc VAT
<b>Human Resources</b>						
HR Future	Osgard Media	Eng	Monthly	7.7		R16500
<b>Industry</b>						
Civil Eng. Contractor	Brooke Pattrick	Eng	Monthly	3.0		R13300
Construction World	Crown	Eng	Monthly	4.7		R12950
Engineering News	Creamer Media	Eng	Weekly	13.7		R18900
<b>Marketing</b>						
AdVantage	Media24	Eng	Monthly	3.6		R16000
Marketing Mix	Systems	Eng	Monthly	3.4		R12000
The Media	Wag The Dog	Eng	Monthly	3.7		R15000
<b>Medical</b>						
Modern Medicine	IHS	Eng	Monthly	5.9		R15500
SA Medical Jnl	SA Medical Assoc.	Eng/Afr	Monthly	14.4		R19166
<b>Mining</b>						
Mining Mirror	Brooke Pattrick	Eng	Monthly	3.0		R13300
Mining Weekly	Creamer Media	Eng	Weekly	13.6		R16600
<b>Municipal/Government</b>						
Government Digest	Malnor	Eng	Monthly	5.0*		R11180
IMIESA	3S	Eng/Afr	Monthly	5.3		R13400
<b>Pharmacy</b>						
Modern Pharmacy	IHS	Eng	Monthly	3.3		R13200
SA Pharmaceutical Jnl	Medpharm	Eng/Afr	Monthly	4.8		R14000
<b>Printing</b>						
Graphix	IHS	Eng	Monthly	2.4*		R14920
<b>Property</b>						
Property Professional	Future Pub.	Eng	6xpa	14.7*		R16600
<b>Retail</b>						
Wholesale Business	Supermarket & Ret.	Eng	6xpa	13.5		R25550
Supermarket & Retailer	Supermarket & Ret.	Eng	Monthly	7.7		R25550
<b>Travel &amp; Tourism</b>						
SA's Travel News Weekly	Now Media	Eng	Weekly	6.7		R31628

Monthly includes 10 & 11xpa., \* Claimed circulation

**This table reads:** Farmers Weekly is published by Caxton weekly in English. Its ABC circulation Oct-Dec 2009 is 13,000 (rounded) and its AMPS 2009A readership is 116,000 adults all races. A full page full colour (2010, exc. VAT) is R9100.

**The Market:** Cinema chains are continually building, upgrading and revitalising cinema houses.

**Attendances:** In recent years have been under pressure, fluctuating with the offers of Hollywood/Bollywood.

Although rates are under extreme pressure, very significant discounts may be negotiated and packages bought. The following is a sample of movie houses. Foyer, sampling, branding and other opportunities are offered.

Area	Centre	Screens	Chain	Capacity	Av Weekly Attendance	Rate 30" non-peak
<b>Gauteng</b>						
Sandton	Cine	11 (1x3D)	Ster-Kinekor	1744	11799	R17500
Fourways	Montecasino	15 (3x3D)	Nu Metro	3361	17594	R32000
Hyde Park	Hyde Park	10 (1x3D)	Nu Metro	1494	5737	R19500
Rosebank	Nouveau	10	Ster-Kinekor	1011	5243	R15000
Randburg	Brightwater Commons	10	Nu Metro	1714	2920	R11000
JHB CBD	Carlton Cine	5	Ster-Kinekor	713	4009	R7500
Bedfordview	Bedford Centre	8 (1x3D)	Nu Metro	1562	4842	R12000
Rooodepoort	Westgate	10	Ster-Kinekor	1402	6406	R15000
Boksburg	East Rand Mall	9 (1x3D)	Ster-Kinekor	1205	6324	R14500
Pretoria CBD	Arcadia Sterland	13	Ster-Kinekor	2688	10392	R19500
Menlyn Park	Menlyn Park	15 (1x3D)	Nu Metro	2601	14627	R27000
<b>North West</b>						
Klerksdorp	Klerksdorp	5	Nu Metro	765	1900	R6000
<b>Limpopo</b>						
Polokwane	Savannah Mall	6	Ster-Kinekor	1064	4670	R9000
<b>Mpumalanga</b>						
Secunda	Secunda	3	Independent	458	1706	R3000
<b>Western Cape</b>						
Waterfront	V&A	11	Nu Metro	1499	11118	R18500
Cavendish	Cineplex	8 (1x3D)	Ster-Kinekor	1490	10110	R13000
Tokai	Blue Route	6	Ster-Kinekor	803	5715	R9000
Canal Walk	Canal Walk	17 (1x3D)	Nu Metro	3004	15179	R30500
Bellville	Tygervalley	10	Ster-Kinekor	1474	7888	R15000
Somerset West	Mall Cine	8	Ster-Kinekor	1341	7274	R12000
Stellenbosch	Eikestad Cine	6	Ster-Kinekor	842	3226	R9000
Worcester	Mountain Mill	5	Nu Metro	788	2540	R6000
<b>Eastern Cape</b>						
Port Elizabeth	Greenacres Bridge	8	Ster-Kinekor	1097	8078	R12000
Port Elizabeth	Walmer Park	8	Nu Metro	1237	4593	R9000
East London	Vincent Park	5	Ster-Kinekor	724	4734	R7500
<b>Free State</b>						
Bloemfontein CBD	Mimosa Mall	7	Ster-Kinekor	912	5975	R10500
<b>KwaZulu-Natal</b>						
Durban CBD	The Wheel	9	Ster-Kinekor	1912	5465	R13500
Suncoast	Casino	8	Independent	1501	17823	R12500
Westville	Pavilion	12 (1x3D)	Nu Metro	1786	14625	R22500
Musgrave	Musgrave Cine	7	Ster Kinekor	1046	9892	R10500
Umhlanga	Gateway Cine	18 (1x3D)	Ster-Kinekor	4086	22731	R28000

**This table reads:** Sandton's Cine complex consists of 11 individual movie screens and is owned by Ster-Kinekor. Its capacity is 1744 seats and in an average week in Jan-Dec 2009 11,799 tickets were sold. A 30-second spot (flat rate, effective Jul 2009 exc VAT) on all 11 screens costs R17,500 per week.

**The market:** South Africa has a very vibrant and entrepreneurial outdoor media sector. Contractors provide many different variants of the medium, from skywriting to A4 ads placed in public washrooms. The following variants are numerically/strategically important.

Variant/format	Comment	Base Rate per unit per month excl. production
<b>Spectaculars/Supersigns/ Building Wraps</b>  Large format, landscape or portrait, mainly illuminated	Wraps placed on strategic buildings on permanent basis. Large format hordings placed around building sites on a temporary basis. Used as a broadcast medium.	Building wrap: R40000-R300000 Construction site: R60000-R300000
<b>Nightlife</b>  Static floodlit units and mobile projections onto building	Located where people congregate at night. Used as impact broadcast medium.	Projections: R5000-R65000
<b>Airports</b>  Many formats including wraps, billboards, electronic boards, smaller units, washrooms	Units located all over airports in both public and secure areas. Used to target business and tourist travellers.	Wrap: R100000-R360000 Washrooms: from R114000 package
<b>Shopping mall media</b>  Many formats including banners, billboards, shopping trolleys and aisles in-store	Banners placed in mall aisles and escalators, billboards in parkades, ads placed on shopping trolleys/trolleys "modified" and aisle advertising in-store. Used as point-of-purchase reminder.	Hanging banner: R15000-R85000 Parkade billboard: from R37000
<b>96 sheet billboard</b> 3m deep x 12m wide	96 & 48 sheet billboards are the dominant outdoor variant in terms of number of sites in the rural environment. Available nationally.	@ R5000 pm non-illuminated
<b>48 sheet billboard</b> 3m deep x 6m wide		@ R3000 pm non-illuminated
<b>12 sheet billboard</b> 1,5m deep x 3m wide		@ R1150 non-illuminated
<b>Portrait units</b> 9m x 6m 6m x 4m	Smaller formats often placed near transport and shopping hubs, important in rural areas.	@ R12000 pm non-illuminated @ R7200 pm non-illuminated
<b>CitiLites/Primelites</b> 3m x 6m		R28000 per face
<b>Street Pole Ads</b>		R1174 per face premium sites to R420 lower traffic routes



Variant/format	Comment	Base Rate per unit per month excl. production
<b>Electronic bulletin boards</b> Many different formats including LCD screens	Growing fast, digital out of home is available in various environments ranging from roadside, campuses, malls, retail including pharmacies etc.	10-30 seconds in pharmacies/ from R34900 package
<b>Bus shelters</b> Various formats depending on contractor and municipality.	Located along urban bus routes. Many close to schools and en-route to main shopping hubs.	@ R3267 illuminated @ R1630 non-illuminated
<b>Washroom/indoor media</b> Frames and mirrors	Located in traffic areas including bars, gyms, cinemas, campuses, clinics, retail fitting rooms, shopping malls. Used to focus targets/messages.	Packages from R62000
<b>Airplanes/Trains/Buses/Taxis</b> External & internal advertising opportunities. Ranging from full wraps to internal window strips.  Number of different opportunities at railway stations and taxi ranks for kiosks and promotional units.	Available in major metropolitan areas. Often used as alternative out of home medium where other formats not available, eg Cape Town & Durban. Airplane opportunities range from seat displays to full exterior paint jobs.	<u>Trains:</u> R600 for 4 panels per coach  <u>Buses:</u> Metro @ R13200 fully branded double decker @ R8800 fully branded single decker Buses : Putco @ R4210 pm @ R1600 back of Putco bus  <u>Taxis:</u> R1225 Mega taxi, R1850 Quantum taxi
<b>Trailer Ads</b> Normally adaptations of 3 x 6m sites to fit on trailer towed by car	Available in all major metropolitan areas. Often used for area specific or short term campaigns.	@ R20000 pm plus out-of-town mileage.
<b>Brand Activation</b> Engage and involve consumers, most usually at point-of-purchase.	Range of activities designed to drive results.	On quotation

Medium now main-stream. SA has many hundreds of sites that accept or would like to accept commercial advertising. Bigger sites have sub-communities to attract specialist targets. A selection of some of the larger sites follows (all members of Online Publishers' Association):

Category/site	Address/owner	Comment	Unique browsers (Pg impressions)+	Base rate*
<b>Business &amp; finance</b>				
Business Day Online	www.businessday.co.za Bdfm	Online companion to daily.	171.6 (1082.0)	R0.25
Fin24	www.fin24.co.za Media24	Online companion to weekly.	458.2 (2711.5)	R0.22
Moneyweb	www.moneyweb.co.za Moneyweb Holdings	Independent business & financial site.	157.4 (1558.5)	R0.25
<b>Motoring</b>				
Wheels24	www.wheels24.co.za Media24	Feeds from group's daily & weekly newspapers.	209.1 (1110.8)	R0.22
<b>News/current affairs</b>				
Mail & Guardian Online	www.mg.co.za Mail & Guardian	Mail & Guardian online.	502.8 (3683.6)	R0.35
The Times/ Sunday Times	www.timesalive.co.za Avusa	Community zones: inc business, sport, lifestyle, jobs.	927.9 (4967.7)	R0.30
<b>Communities</b>				
Independent Online	www.iol.co.za Independent News & Media	Feeds from group's daily & weekend newspapers.	1145.6 (1168.4)	R0.11
M-Web Network	www.mweb.co.za Mweb	From major service provider.	772.3 (20476.6)	R0.22
MSN ZA	http://za.msn.com Microsoft	From international giant.	1283.9 (14059.5)	R0.35
News24	www.news24.com Media24	Feeds from group's newspapers & magazines.	1928.9 (22759.7)	R0.22
<b>Industry</b>				
Engineering News	www.engineeringnews.co.za Creamer Media	Online edition of weekly magazine.	176.5 (445.1)	R2900 pw.
<b>Marketing</b>				
BizCommunity	www.bizcommunity.com Biz Community	Media, advertising & marketing community.	296.3 (2507.0)	R0.25
<b>Sport</b>				
Supersport Zone	www.supersport.co.za Supersport Holdings	Community of sites for various sport codes. DStv companion.	720.1 (10890.7)	R0.35
<b>Technology/Telecommunications</b>				
IT Web	www.itweb.co.za IT Web Group	Internet, computer and telecommunications.	108.3 (386.5)	R7300 pw.
MyBroadband	www.mybroadband.co.za MyBroadband	Internet, computer and telecommunications.	743.2 (4590.6)	R0.27
<b>Women</b>				
Women24	www.women24.com Media24	Feeds from group's major magazines.	245.6 (1356.3)	R0.22

+ Nielsen Online Ranking ave month Q4 2009 in 000 as released by Online Publishers' Association. \* Per impression for standard 468x60 (sometimes 120) pixel/max 12k banner run-of-site or equivalent. Excludes volume discounts or additions for targeting. Other sizes, keywords and rich media, sponsorship etc opportunities usually available.



## Angola

### State of the media

A rapidly growing media sector in a rapidly growing economy. Government grappling with concept of free media.

### Telecommunications

Telephone mainlines per 100 people	0.6	Mobile subscribers per 100 people	29.3
		Population covered by mobile	40%

### Research availability

No recent accurate or comprehensive media performance data exists. Some earlier research conducted by TV station.

### Television

TV per 100 households: 9

6 TV stations plus international satellite services. Most important are:

TPA1 & 2 (Portuguese/mainly urban/supervised by Government)

TV Zimbo (Portuguese/mainly urban/private)

TV Globo (Portuguese/broadcasts Brazil and Angola/popular for soaps)

DStv (English/satellite broadcast from SA)

### Radio

Radios sets per 100 people: 6.8

Stations: AM (24+), FM (6), Shortwave (7). Important medium:

Canal A (Multi-lingual/national)

Radio LAC (Portuguese/national/commercial & vibey music with youth target)

Radio Cinco (Portuguese/regional around Luanda)

RNA (network of regional stations)

### Print

Dailies (5), Weeklies (8), Magazines (14+) Pan-African titles circulated.

Jornal de Angola (Portuguese/national daily newspaper/government)

Novo Jornal (Portuguese/daily newspaper)

Semanario (Portuguese/official daily newspaper)

Folha 8 (Portuguese/daily/private)

A Capital (Portuguese/daily/Luanda/private)

Angolense (Portuguese/weekly newspaper/private)

Vida (Portuguese/weekly magazine)

Economia & Mercados (Portuguese/quarterly business magazine)

### Cinema

Too few cinemas exist to be a viable medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	2.9	Internet hosts	
PC's per 100 people	0.7	Broadband % of internet subscribers	
Country code	.ao		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Botswana

### State of the media

A vibrant albeit small media sector concentrated around Gaborone.

### Telecommunications

Telephone mainlines per 100 people	7.3
Mobile subscribers per 100 people	61.2
Population covered by mobile	99%

### Research availability

BAMPS produced in 2006. Plus academic research conducted earlier.

### Television

TV per 100 households: 9

2 TV stations (1 government, 1 private) plus 8 international satellite services:

Botswana TV (BTV/English & Setswana/national government owned)

GBC TV (English & Setswana/mainly regional around Gaborone)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 16

Stations: National (2 government), Regional (2 private), plus overspill from South Africa. Most important are:

Radio Botswana 2 (English & Setswana/national)

GABZ FM (English & Setswana/regional around Gaborone)

Yarona FM (English & Setswana/mainly youth regional around Gaborone)

Duma FM (English & Setswana/regional around Gaborone)

### Print

Dailies (3), Weekly (12), a few magazines. South African and pan-African magazines circulated.

Daily News (English & Setswana/daily newspaper/government)

Mgegi/The Reporter (English & Setswana/national daily newspaper/private)

Mgeni/Monitor (English & Setswana/national weekly newspaper/private)

Midweek Sun (English & Setswana/weekly newspaper/private)

Northern Advertiser (English & Setswana/weekly newspaper/private)

Kutlwano (English & Setswana/monthly general interest magazine/government)

### Cinema

Too few cinemas exist to be a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	5.3	Internet hosts	7,341
PC's per 100 people	4.8	Broadband % of internet subscribers	N/A
Country code	.bw		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Congo, Democratic Republic of

### State of the media

A vast country with massive challenges but a surprisingly large and comprehensive media industry. Huge potential.

### Telecommunications

Telephone mainlines per 100 people	0.0	Mobile subscribers per 100 people	10.6
		Population covered by mobile	50%

### Research availability

Some research conducted in 2007.

### Television

TV per 100 households: 4

Stations: over 75 in total: 3 national/almost national (1 government, 2 private), 72 regional (10 government, 62 private). Includes a large number of church stations. Some important DRC commercial stations:

Radio Television Nationale Congolaise (RTNC1 & 2/French & others/almost national/cultural/govt)

Raga Plus (French & others/regional around Kinshasa/entertainment/private)

Raga TV (French & others/regional around Kinshasa/entertainment inc soccer/private)

### Radio

Radio sets per 100 people: 35.8

Stations: over 300 including community: 7 national, 13 government owned, balance private. State of flux. Important stations are:

Radio Television Nationale Congolaise (French & others/national/government owned)

Raga FM (French & others/virtually national/private)

Radio Top Congo (French & others/regional/private)

Radio Tele Kin Malebo (RTKM/French & others/regional/music & entertainment/private)

RTGA (French & others/main centres/general interest/private)

RTEA (French & others/main centres/Christian/private)

### Print

An elastic situation with an estimated 150 newspapers of all types, down from over 500 in 2002 (many politically orientated titles ceased after the election). Plus French and pan-African magazines circulated.

Les Palmes (French only/daily newspaper/mainly Kinshasa)

Le Potentiel (French only/daily newspaper/mainly Kinshasa)

Congo News (French only/weekly newspaper/multi-regional)

Mwangaza (French only/weekly newspaper/multi-regional)

Inter Media Magazine (French/monthly magazine)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	0.4	Internet hosts	3,015
PC's per 100 people	0.0	Broadband % of internet subscribers	3.2%
Country code	.cd		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Lesotho

### State of the media

A small, poor country with rudimentary local media industry. Much overspill from South Africa.

### Telecommunications

Telephone mainlines per 100 people	2.7	Mobile subscribers per 100 people	22.7
		Population covered by mobile	55%

### Research availability

No data exists.

### Television

TV per 100 households: 13

Stations: 1 station, government owned plus international satellite services.

Lesotho TV (Sesotho & English/national broadcaster/cultural & social upliftment)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 3.3

Stations: 8 stations (1 government, 7 private). Important stations are:

Radio Lesotho (Sesotho & English/national/government owned)

Ultimate FM (English only/regional/private)

Kingdom of Joy (English mainly/largely national/social upliftment/private)

### Print

12 weeklies, few magazines produced for the local market.

Public Eye (English & Sesotho/weekly newspaper/largely national/private)

The Mirror (English & Sesotho/weekly newspaper/major centres/private)

Mololi (Sesotho & English/weekly newspaper/major centres & citizens in SA/private)

Lesotho Times (English/weekly newspaper/major centres)

Family Mirror (English only/quarterly magazine/female target with social issues/private)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exist. Serviced mainly by South African contractors.

<b>Online</b>			
Internet users per 100 people	3.5	Internet hosts	127
PC's per 100 people	0.3	Broadband % of internet subscribers	1.8%
Country code	.ls		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Malawi

### State of the media

Rather rudimentary media industry. Radio very important.

### Telecommunications

Telephone mainlines per 100 people	1.3
Mobile subscribers per 100 people	7.5
Population covered by mobile	93%

### Research availability

MAMPS conducted in 2006.

### Television

TV per 100 households: 5

Stations: 1 station, government owned plus international satellite services:

Television Malawi (TVM/English & Chichewa/major centres/government)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 22.6

Stations: 9 stations (2 government, 7 private). Some important stations are:

Malawi Broadcasting Corp 1 (MBC1/Chichewa & others/national/mainly educational talk/government)

Malawi Broadcasting Corp 2 (MBC2/English & Chichewa/national/entertainment/youth/government)

Capital FM (English/regional in south/contemporary music and news/private)

Power 101 (English & Chichewa/south & central areas/music & community upliftment/private)

### Print

12 newspapers, a few magazines produced for the local market.

The Nation (English & Chichewa/daily newspaper/major urban areas/

Daily Times (English & Chichewa/daily newspaper/major urban areas/private)

The Nation on Sunday (English & others/weekly newspaper/major centres/private)

Malawi News (English & Chichewa/weekly newspaper/major centres/private)

Pride Magazine (English only/monthly magazine/general interest)

Malawi First (English only/quarterly magazine/business & inflight magazine)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	1.0	Internet hosts	741
PC's per 100 people	0.2	Broadband % of internet subscribers	1.9%
Country code	.mw		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Mauritius

### State of the media

Despite the relatively low population, its high education and income standards are served by a diverse media industry. Print is particularly active.

### Telecommunications

Telephone mainlines per 100 people	28.6	Mobile subscribers per 100 people	73.7
		Population covered by mobile	99%

### Research availability

MAMPS conducted 2006.

### Television

TV per 100 households: 96

Stations: 4 stations, government owned. Plus international satellite services:

MBC1 (French & English/national/general interest/government)

MBC2 (French & English/major urban areas/general interest/government)

MBC3 (French & English/national/community upliftment & general interest/government)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 35

Stations: 11 stations (2 government, 10 private). Some important stations are:

Radio 1 (French only/regional around Port Louis/family, music & talk/private)

Top FM (English & French/regional around Port Louis/family, pop & talk/private)

World Hot Radio (English/regional around Port Louis/family, pop & talk/private)

Radio Plus (French & English/regional around Port Louis/family/private)

### Print

6 dailies, 9 weeklies, over 10 magazines produced for the local market.

L' Express (French & English, Creole/daily & weekend newspaper/major centres/private)

Le Matinal (French & English/daily newspaper/regional around Port Louis/private)

Le Mauricien (French & English, Creole/daily newspaper/major centres/private)

Le Defit Plus (French & English/weekly newspaper/major centres/private)

Weekend (French & English, Creole/weekly newspaper/major centres/private)

Weekend-Scope (French & English/weekly magazine/major centres/private)

Business Magazine (French & English, Creole/weekly business magazine/major centres/private)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Served by local and South African contractors.

### Online

Internet users per 100 people	27.0	Internet hosts	22,813
PC's per 100 people	17.6	Broadband % of internet subscribers	37.0%
Country code	.mu		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files





## Mozambique

### State of the media

A rapidly growing entrepreneurial media industry evolving with the country. North is particularly active.

### Telecommunications

Telephone mainlines per 100 people	0.3	Mobile subscribers per 100 people	15.4
		Population covered by mobile	44%

### Research availability

Limited data exists.

### Television

TV per 100 households: 9

Stations: 1 national & 4 regional (government) and over 34 private/NGO/community stations. Plus international satellite services. Some important commercial services:

TV Miramar (Portuguese/regional around Maputo)

TVM (Portuguese/major centres/general interest & sport/government)

STV (Portuguese/major centres/general interest & sport/private)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 4.6

Stations: 1 national, 11 regional, 1 sports stations (government). Plus dozens of private/NGO/community stations. Some important commercial stations:

Radio Mozambique Antena Nacional (Portuguese/network covering country/government)

Radio Cidade (Portuguese/regional around Maputo/youth & entertainment)

RM Desporto 93.1 (Portuguese/regional around Maputo/youth & entertainment)

9 FM Maputo (Portuguese/regional around Maputo/music and vibey)

### Print

2 dailies, 11 weeklies, some magazines produced for the local market. Plus a number of fax distribution newspapers.

Noticias (Portuguese/daily newspaper/major centres)

Diario de Mozambique (Portuguese/daily newspaper/Maputo & Beira)

Domingo (Portuguese/Sunday newspaper/major centres)

Jornal Campeao (Portuguese/weekly newspaper/major centres/mainly sport)

Tempo (Portuguese/monthly magazine/major centres/general interest & sport)

Africa Hoje (Portuguese/monthly magazine/official business title)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Served by local and South African contractors.

### Online

Internet users per 100 people	0.9	Internet hosts	21,388
PC's per 100 people	1.4	Broadband % of internet subscribers	0.0%
Country code	.mz		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Namibia

### State of the media

A large country with a small, diverse population. Media industry relatively mature.

### Telecommunications

Telephone mainlines per 100 people	6.6	Mobile subscribers per 100 people	38.5
		Population covered by mobile	95%

### Research availability

Namibian All Media & Products Survey (NAMPS) was conducted up to 2001. Since then no industry wide data has been released.

### Television

TV per 100 households: 41

Stations: 1 state owned, 2 private free-to-air stations. Plus international satellite services.

Namibian Broadcasting Corporation (English Afrikaans, German & others/national/government)

One Africa TV (English/free-to-air/main centres)

DETV (English/free-to-air/main centres)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 13.7

Stations: 1 national, 10 language/regional community (government). Plus number of private stations. Some important commercial stations:

NBC National Radio (English/national/government)

Radio Energy (English and others/national/youth orientated)

Radio Oshiwambo (Oshiwambo & English/national/largest of NBC language stations)

Radio 99 (English/major centres/youth & general interest/private)

### Print

4 dailies, some 6 weeklies, some magazines produced for the local market.

Allgemeine Zeitung (German/daily newspaper/major centres)

Die Republikein (Afrikaans, English and others/daily newspaper/major centres)

The Namibian (English/daily newspaper/major centres)

Onyika/Lanterna (Portuguese and Oshiwambo & English/tabloid newspaper/mainly in north)

Namibian Economist (English/weekly newspaper/major centres/business)

Windhoek Observer (English/weekly newspaper/major centres)

The Big Issue (English/monthly magazine/major centres/entertainment & lifestyle)

### Cinema

Limited number of cinemas in main centres.

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	4.9	Internet hosts	17,840
PC's per 100 people	24.0	Broadband % of internet subscribers	0.3
Country code	.na		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Seychelles

### State of the media

A very small population highly geared to tourism supports a similarly sized media industry.

### Telecommunications

Telephone mainlines per 100 people	26.7	Mobile subscribers per 100 people	90.9
		Population covered by mobile	98%

### Research availability

No data exists.

### Television

TV per 100 households: 86

Stations: 1 national station. Plus international satellite services.

Seychelles TV (French plus English & Creole/major islands/government)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 49.0

Stations: 2 stations:

AM Radio Seychelles (French plus English & Creole/larger islands/youth orientated)

Paradise FM (French plus English & Creole/larger islands/general interest)

### Print

1 daily plus a few politically orientated weekly newspapers. Limited magazines.

Seychelles Nation (French plus English & Creole/daily newspaper/all islands)

Regar (English plus French & Creole/weekly newspaper/main islands)

The People (English plus French & Creole/weekly newspaper/main islands)

Isola Bella (English & French/monthly general interest magazine/main islands)

### Cinema

Not a viable advertising medium.

### Outdoor

Range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	37.6	Internet hosts	324
PC's per 100 people	21.2	Broadband % of internet subscribers	60.2%
Country code	.sc		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Swaziland

### State of the media

A small poor country with a media industry to match. Much overspill from South Africa.

### Telecommunications

Telephone mainlines per 100 people	3.9	Mobile subscribers per 100 people	33.1
		Population covered by mobile	90%

### Research availability

No data exists.

### Television

TV per 100 households: 18

Stations: 2 TV stations. Plus international satellite services.

Swazi TV (English, Siswati & Zulu/all major centres/national broadcaster)

Channel Swazi (English & Siswati/larger centres/younger, upmarket target)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 15.0

Stations: 3 government stations. Plus 1 private religious station:

Radio Swaziland National Service (Siswati/national/traditional orientation)

Radio Swaziland English Service (English/national/youth & entertainment)

### Print

3 dailies, a few weeklies and magazines produced for the local market.

Swazi Observer (English & Siswati/daily newspaper/national)

Times of Swaziland (English/daily newspaper/national)

Tikhatsi Temaswati (Siswati/daily/national)

Swazi News (English/weekly newspaper/major centres)

Weekend Observer (English & Siswati/weekly newspaper/major centres)

Nation Magazine (English/monthly magazine/urban/official magazine)

Destiny Magazine (English/monthly magazine/urban/business & tourism)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	3.7	Internet hosts	2,609
PC's per 100 people	3.7	Broadband % of internet subscribers	0.0%
Country code	.sz		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Tanzania

### State of the media

A large poor country with a high population. Fuelled by development in Kenya, it supports a remarkably diverse and relatively strong media industry.

### Telecommunications

Telephone mainlines per 100 people	0.4	Mobile subscribers per 100 people	20.6
		Population covered by mobile	65%

### Research availability

Steadman Group has conducted commercial media audience surveys since 2002.

### Television

TV per 100 households: 7

Stations: 15 licenced stations: 4 near national (1 government, 3 private), 11 regional stations. Plus 2 local cable networks and international satellite services. Some important commercial services:

ITV (Independent Television/Kiswahili & English/major centres/private)

TVT (Telvison ta Taifa/Kiswahili & English/national/government)

Channel 10 (English & Kiswahili/regional around Dar-es-Salaam/private)

Channel 5 (Kiswahili & English/coastal areas/music & documentaries/private)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 45.0

Stations: almost 50 in total: 1 national, 2 regional (government), 4 national, 32 private, 6 international and the balance community. Some important commercial stations:

RFA (Radio Free Africa/Kiswahili & English/urban areas/entertainment/private)

Radio One (Kiswahili & English/urban/information & education/private)

Radio Tanzania (Kiswahili/national, mainly rural/family/government)

Clouds FM (Kiswahili & English/entertainment & music/private)

### Print

15 dailies, 27 weeklies, some magazines produced for the local market. Plus Pan-East African and international titles.

Nipashe (Kiswahili/daily & Sunday newspaper/major centres)

Dar Leo (Kiswahili/daily newspaper/national)

Business Times Tanzania (English & Kiswahili/weekly business newspaper/major centres)

Mwananchi (Kiswahili/weekly newspaper/popular content/major centres)

Bang Magazine (English & Kiswahili/6 x pa/showcases E. Africa & educational)

### Cinema

Not a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Served by local and South African contractors.

### Online

Internet users per 100 people	1.0	Internet hosts	24,724
PC's per 100 people	0.9	Broadband % of internet subscribers	0.0
Country code	.tz		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Zambia

### State of the media

The range of media available is limited because the State controlled main-stream media until recent years.

### Telecommunications

Telephone mainlines per 100 people	0.8	Mobile subscribers per 100 people	22.1
		Population covered by mobile	50%

### Research availability

Some local media audience research (mainly Steadman Group).

### Television

TV per 100 households: 23

Stations: 1 national (government), 2 regional (private) and 2 foreign satellite stations:

ZNBC Television (English & vernacular/urban/government)

Muvi TV (English/urban/private)

DStv (English/satellite broadcast from SA)

### Radio

Radio sets per 100 people: 20.0

Stations: 26 stations: 1 national, 1 regional (government), 1 national, 6 regional (private),

2 international, 14 community (Catholic church dominant). Some important commercial stations:

Radio Phoenix (English & vernacular/urban/general interest/private)

Zambia Radio 2 (English & vernacular/major centres/upper income interests)

Zambia Radio 1 (Nyanja & other vernaculars/national/government)

Hone FM (English/regional/general interest)

Choice (English/major centres incl. Lusaka/private)

### Print

3 national dailies, 4 national, 3 regional weeklies, a few magazines produced for the local market:

The Post (English/daily newspaper/major centres/private)

Times of Zambia (English/daily newspaper/major centres/government)

Zambian Daily Mail (English/daily newspaper/major centres/government)

Zambian Financial Mail (English/weekly supplement to Daily Mail/national/government)

Beauty Zambia Magazine (English/monthly magazine/major centres/general interest, health, music)

Zambia Business Review (English/monthly magazine/urban/official business title)

### Cinema

6 cinemas operated by Ster-Kinekor (South Africa).

### Outdoor

Full range of conventional outdoor opportunities exists. Serviced by local and South African contractors.

### Online

Internet users per 100 people	4.2	Internet hosts	14,951
PC's per 100 people	1.1	Broadband % of internet subscribers	25.8%
Country code	.zm		

Sources: African Extension, BBC, CIA World Book, World Bank/ICT, own files



## Zimbabwe

### State of the media

State domination of media ownership together with a chronic operating and economic environment has shrunk the industry. Zimbabwe Media Commission launched in 2009 is attempting media reforms and licensing of new media.

### Telecommunications

Telephone mainlines per 100 people	2.6	Mobile subscribers per 100 people	9.1
		Population covered by mobile	75%

### Research availability

Zimbabwe Advertising Research Foundation (ZARF) produced research until recent years.

### Television

TV per 100 households: 32

Stations: 1 national (government). Plus international satellite services:

ZTV (English plus Shona & Ndebele/urban areas/government)

DStv (English/satellite broadcast from SA/paid with foreign currency)

### Radio

Radio sets per 100 people: 10.5

Stations: 4 national (government). Plus 4 international stations broadcasting into Zimbabwe:

National FM (Shona & other vernaculars/national/rural appeal/government)

Spot FM (English/urban/upmarket appeal/government)

Power FM (English/major centres/youth appeal/government)

Radio Zimbabwe (Ndebele & Shona/national/government)

### Print

Shrinking numbers. Dailies (2), Weeklies (8). Government owns/controls most newspapers. A few consumer and special interest magazines produced for the local market. Overspill of magazines from South Africa.

The Chronicle (English/daily newspaper/major centres/government)

The Herald (English, Shona & Ndebele/daily newspaper/major centres/government)

The Sunday Mail (English/Sunday newspaper/major centres/government)

The Financial Gazette (English/weekly newspaper/major centres/business, news & politics/private)

Zimbabwe Independent (English/weekly newspaper/urban centres/investigative style/private)

### Cinema

No longer a viable advertising medium.

### Outdoor

Full range of conventional outdoor opportunities exists. Served by local and South African contractors.

### Online

Internet users per 100 people	10.1	Internet hosts	29,094
PC's per 100 people	6.5	Broadband % of internet subscribers	15.3%
Country code	.zw		

Sources: African Extension, BBC, CIA World Book, Media 360, World Bank/ICT, own files

## [ useful contacts ]

### INDUSTRY INTEREST BODIES

#### Advertising Media Forum (AMF)

Web: [www.amf.org.za](http://www.amf.org.za)  
C/O Ebony & Ivory,  
Private Bag X2, GREENSIDE, 2034.  
Tel: +27 011 327 6871,  
Fax: +27 011 327 6875,  
E-mail: [paul@ebonyivory.co.za](mailto:paul@ebonyivory.co.za)  
Contact: Mr. Paul Middleton (JHB Operations)  
CT: Ms. Karen Phelan (Chair)  
Tel: +27 021 526 6258,  
E-mail: [Karen@fcm.co.za](mailto:Karen@fcm.co.za)

#### Association for Communication & Advertising (ACA)

Web: [www.acasa.co.za](http://www.acasa.co.za)  
PO Box 2302, PARKLANDS, 2121.  
Tel: +27 011 781 2772, Fax: +27 011 781 2797, E-mail: [ceo@aaaltd.co.za](mailto:ceo@aaaltd.co.za)  
Contact: Ms. Odette Roper (CEO),  
Ms. Levonah Wingyip (PA)

#### The Creative Circle

Web: [www.creativecircle.co.za](http://www.creativecircle.co.za)  
C/O East Block Dunkeld Crescent,  
Cnr Jan Smuts Avenue & Albury Road, HYDE PARK  
Tel: +27 011 912 0062, E-mail: [arlene@creativecircle.co.za](mailto:arlene@creativecircle.co.za)  
Contact: Mrs Arlene Donnenberg (Administrator)

#### Southern African Marketing Research Association (SAMRA)

Web: [www.samra.co.za](http://www.samra.co.za)  
PO Box 1713, RANDBURG, 2125.  
Tel: +27 011 886 3771,  
Fax: +27 011 886 9721,  
E-mail: [info@samra.co.za](mailto:info@samra.co.za)  
Contact: Ms. Nadia Cassim (Senior Office Administrator)

### MEDIA OWNER BODIES

#### National Association of Broadcasters (NAB)

Web: [www.nab.org.za](http://www.nab.org.za)

PO Box 412363, CRAIGHALL, 2024.  
Tel: +27 011 325 5741,  
Fax: +27 011 325 5743,  
E-mail: [lois@nabsa.co.za](mailto:lois@nabsa.co.za)  
Contact: Mr. Johann Koster (Executive Director)

#### Out of Home Media SA (OHMSA)

Web: [www.ohmsa.co.za](http://www.ohmsa.co.za)  
PO Box 1894, PARKLANDS, 2121.  
Tel: +27 011 781 9367,  
Fax: +27 011 781 8963,  
E-mail: [info@ohmsa.co.za](mailto:info@ohmsa.co.za)  
Contact: Mr. Les Holley (General Manager)

#### Print Media SA (PMSA)

*Incorporates Newspaper Association of South Africa (NASA), Magazine Publishers Association of South Africa (MPSA), Association of Independent Publishers of Southern Africa (AIP).*  
Web: [www.printmedia.org.za](http://www.printmedia.org.za)  
PO Box 47180, PARKLANDS, 2121.  
Tel: +27 011 551 9600,  
Fax: +27 011 551 9650, E-mail: [printmediasa@printmedia.org.za](mailto:printmediasa@printmedia.org.za)  
Contact: Mrs. Ingrid Louw (CEO),  
Ms. Monica Morotolo (PA)

### MEDIA INDUSTRY BODIES

#### Advertising Media Association of SA (AMASA)

Web: [www.amasa.org.za](http://www.amasa.org.za)  
JHB: C/O FGI PO Box 302, RIVONIA 2128. Tel: +27 011 562 6802,  
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E-mail: [brada@fgi.co.za](mailto:brada@fgi.co.za)  
Contact: Mr. Brad Aigner (Chairperson)  
CT: Ms. Kim Alberts (Chairperson)  
Tel: +27 021 880 1037, E-mail: [kim.alberts@onedigitalmedia.com](mailto:kim.alberts@onedigitalmedia.com)

#### Audit Bureau of Circulations (ABC)

Web: [www.abc.org.za](http://www.abc.org.za)

PO Box 47189, PARKLANDS, 2121.  
Tel: +27 011 551 9700,  
Fax: +27 011 551 9720,  
E-mail: [abc@abc.org.za](mailto:abc@abc.org.za)  
Contact: Mr. Mishack Nekhavhambe (Admin. Manager)

#### Online Publishers Association (OPA)

Web: [www.opa.org.za](http://www.opa.org.za)  
PO Box 23820, CLAREMONT, 7735.  
Tel: +27 011 454 3534,  
Fax: +27 011 454 3534,  
E-mail: [tvitale@opa.org.za](mailto:tvitale@opa.org.za)  
Contact: Ms. Theresa Vitale (Secretary)

#### SA Advertising Research Foundation (SAARF)

Web: [www.saarf.co.za](http://www.saarf.co.za)  
PO Box 98874, SLOANE PARK, 2152.  
Tel: +27 011 463 5340,  
Fax: +27 011 463 5010,  
E-mail: [saarf@saarf.co.za](mailto:saarf@saarf.co.za)  
Contact: Dr. Paul Haupt (CEO)

### INDUSTRY CONTROL BODIES

#### Advertising Standards Authority (ASA)

Web: [www.asasa.org.za](http://www.asasa.org.za)  
PO Box 41555, CRAIGHALL, 2024.  
Tel: +27 011 781 2006,  
Fax: +27 011 781 1616,  
E-mail: [executive@asasa.org.za](mailto:executive@asasa.org.za)  
Contact: Ms. Thembi Msibi (CEO)

#### Independent Communications Authority of SA (ICASA)

Web: [www.icasa.org.za](http://www.icasa.org.za)  
Private Bag X10002, SANDTON, 2146.  
Tel: +27 011 566 3000/3001,  
Fax: +27 011 566 3086,  
E-mail: [info@icasa.org.za](mailto:info@icasa.org.za)  
Contact: Mr. Karabo Motlana (CEO)



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