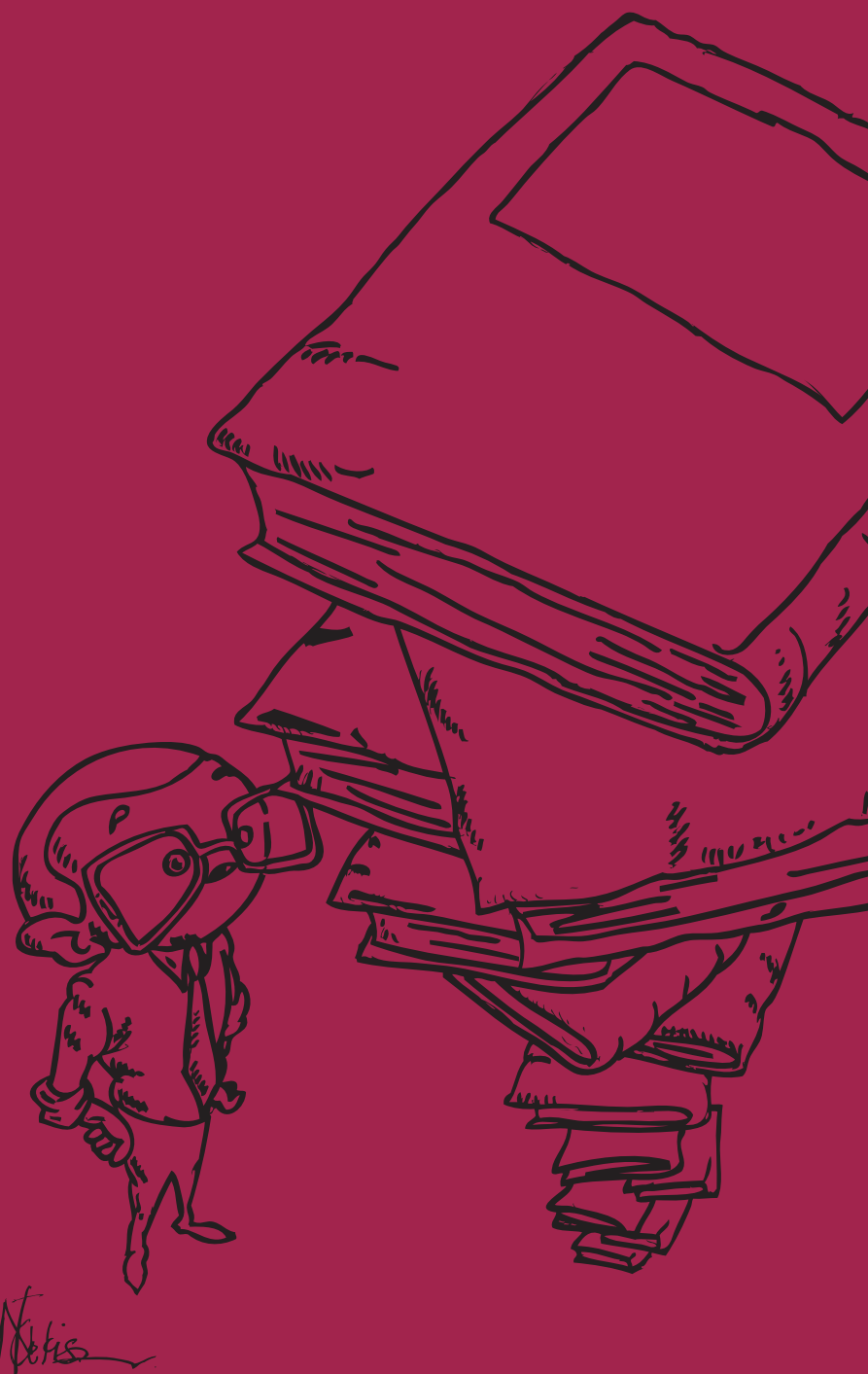


Media Consumption Information from AMPS[®] 2008a



MEDIA CONSUMPTION INFORMATION FROM AMPS® 2008A

Print media results

The previous AMPS® survey saw the print medium heading steadily for a 60% share of South African adults' media consumption. AMPS® 2008A shows the goal a mere 0.1 of a percentage point away – readership of newspapers and magazines is currently at 59.9%, significantly up on the previous period, and resoundingly up on the 55.5% seen in AMPS® 2007A.

In total, 18,750-million adults consume print, with specific gains being made in the Northern Cape and Free State, amongst females and, encouragingly, in the 16-24 age group.

NEWSPAPERS

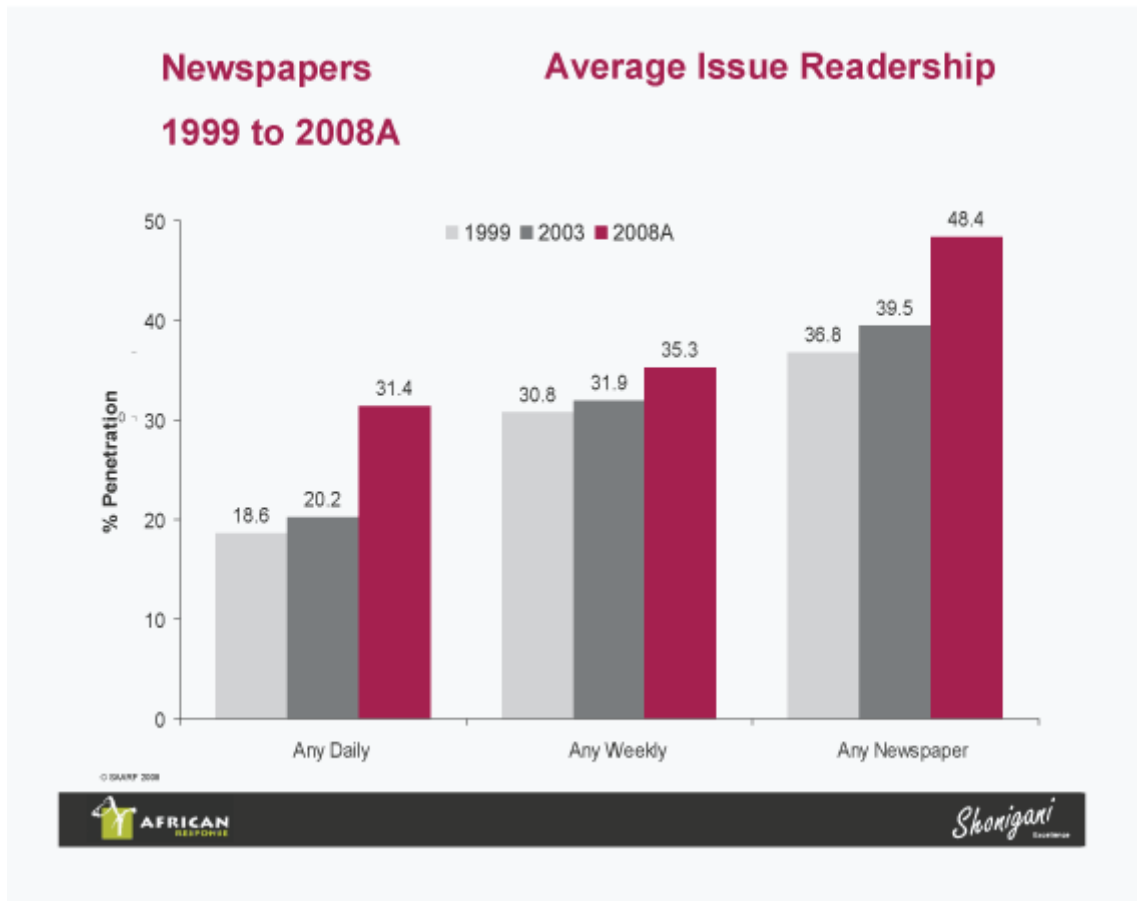
As in the previous AMPS® survey, the newspaper medium has again significantly improved its numbers. The medium in total is up from 46.8% in AMPS® 2007B, and from 44.4% a year ago, to 48.4%, with a total of 15,162-million readers. In the space of a year, newspapers have attracted a further 1,337-million readers (coming particularly from the Free State, Port Elizabeth and Uitenhage, with upped numbers of females and those aged 16-24).

- **UP – Any Daily Newspaper:** From 29.2% in the previous survey, readership of any daily paper is now up significantly to 31.4%. The body of daily readers now numbers close to 10-million, at 9,822-million, up from 9,092-million readers previously. These gains were seen primarily in metro areas, in the Western Cape (Cape Town fringe specifically) and Limpopo, in Welkom, and amongst females.

Newspaper snippets

- Number of daily titles measured: 22 (down from 20, AMPS® 2007B)
- Number of weekly titles: 27
- Average number of titles per reader: 2.52 (up from 2.49)
- Highest reach: Gauteng (68.8%)
- Lowest reach: Eastern Cape (29.3%)
- Wealthiest daily readership (ave. household income): *Business Day*, R20 583.00
- Wealthiest weekly readership: *Beeld Naweek*, R17 044.00
- Top five highest readers per copy, based on ABC Jan-Jun 2008:
 1. *Sowetan*, 15.8
 2. *Daily Sun*, 10.2
 3. *The Herald*, 9.7
 4. *Daily Dispatch*, 9.0
 5. *The Citizen*, 7.6

- **STABLE – Any Weekly Newspaper:** despite having several titles posting significant growth, the reach of this newspaper sector remains stable over AMPS® 2007B. Reach is 35.3%, with a total audience of 11,050-million readers. Gains were made in the Free State and KwaZulu-Natal, but losses were seen in the Western Cape (especially in Cape Town and the fringe areas), and in the Northern Cape.



The growth of newspapers since 1999

Newspapers boosting their figures

Over the previous AMPS[®] release, it is the weekly titles which have shown the most growth.

Amongst the **dailies**, the only title to have grown has been – as is becoming the norm – the **Daily Sun**. In the previous AMPS[®] release, SAARF predicted that the paper had the 5-million readership mark firmly in its sights, and the title hasn't disappointed.

Daily Sun has grown its audience of 4.755-million in AMPS[®] 2007B, shooting over 5-million to 5,140-million. The paper now reaches 16.4% of the South African adult population, up from 15.3% in AMPS[®] 2007B. Growth has occurred specifically in Limpopo.

The only other changes in this newspaper sector have been the following demographic shifts:

- *Pretoria News*: down on the Vaal, and amongst males, and those aged 25-34 (previously, this age group accounted for 40.8% of readers, down now to 19.3%).
- *Sowetan*: gains in Welkom.

Although **weeklies** as a group have not shown any growth, half a dozen titles have attracted significantly more readers than in AMPS[®] 2007B.

First up is the **Citizen's** Saturday edition, which has grown its reach from 1.8% to 2.2%, giving it a readership of 673 000, firmly up from the 546 000 seen in the previous survey. The paper has seen gains in small towns and villages, in the Free State, and amongst the 16-24 age group (which now makes up 25.0% of the paper's readers, up from 17.3% in AMPS[®] 2007B).

Both editions of KwaZulu-Natal's Zulu paper, *Ilanga* and *Ilanga Langesonto* (on Sunday) have grown. *Ilanga*'s national reach is up from 1.9% to 2.8%, taking its readership from 604 000 to 873 000. This growth occurred specifically in small towns/villages, in the Eastern Cape and KwaZulu-Natal, and amongst the 16-24 age group (which accounts for 30.8% of total readers, up from 21.7%) and those aged 50+.

Ilanga Langesonto now reaches 2.5% of adult South Africans, 772 000 in total (up from 1.8%). These additional readers came primarily from KwaZulu-Natal, are both male and female, and aged 25-34 and 50+.

Sunday World has also done well, growing from 4.7% in AMPS[®] 2007B to 6.1% in 2008A. Its readership now stands at 1,897-million. The title has fared well particularly in Limpopo and rural areas and settlements, and amongst the 16-24, 25-34, and 50+ groups.

Nguni title, *Umafrika*, has boosted its audience from 0.4% to 0.6%, with a readership of 187 000. Gains were made in KwaZulu-Natal, and amongst 25-34 year-olds.

Soccer Laduma completes the list of weeklies in ascent. The soccer paper is heading for 2,5-million readers, with a reach which has risen from 7.0% to 8.0%. Readers now number 2,496-million, and the increase is specifically among males, and people aged 35-49.

Readership of the *Saturday Dispatch* has declined, from 0.5% previously to 0.3% (151 000 to 97 000 readers). These losses were seen mainly in the Eastern Cape, in rural areas and settlements, and amongst males.

The following weekly newspapers saw various segments of their readership either growing or declining:

- *City Press*: losses in Gauteng, amongst males, and in the 50+ age group. The title grew in KwaZulu-Natal.
- *Rapport*: down in the Northern Cape and Free State.
- *Sunday Sun* has grown in the Free State.
- *Sunday Times* has gained more 16-24 year-old readers.
- *Volksblad Saturday*: down in the Eastern Cape and Gauteng.

MAGAZINES

AMPS[®] 2008A does not have good news for magazines overall, which have remained stable over the previous survey. While the current reach of 40.4% may not be a significant improvement over AMPS[®] 2007B, it is however a significant increase over the previous year, when magazine reach was 37.5%. Total magazine readership is 12,632-million, boosted primarily by growth in the Northern Cape, amongst females, and those aged 16-24.

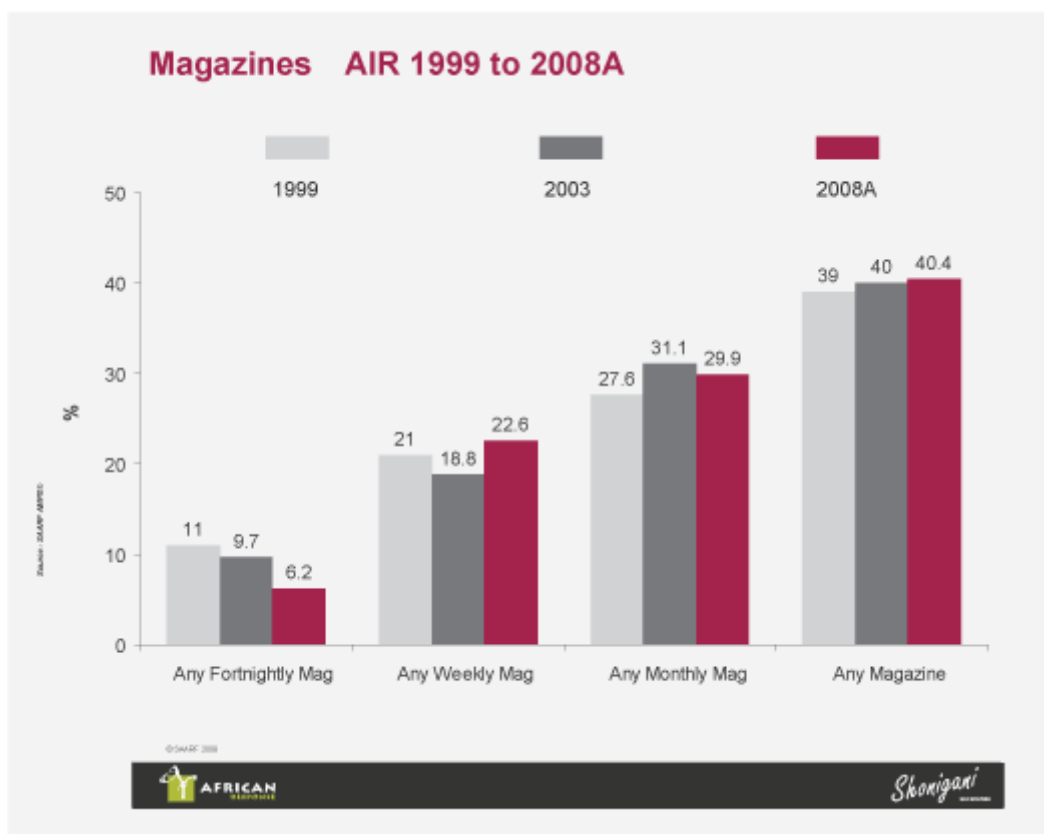
- **UP – Any weekly**: from 6,466-million readers to 7,074-million, weekly magazines have grown their stake of the reading public. The sector reaches 22.6% of South African adults, compared to 20.8% in AMPS[®] 2007B, and 19.2% a year ago. Growth in metro areas, Limpopo, and amongst

Magazine snippets

- **Number of magazines measured: 123 (129 in AMPS[®] 2007B)**
- **Average number of magazine publications per reader: 4.06 (down from 4.25)**
- **Highest reach: Western Cape (60.3%)**
- **Lowest reach: Eastern Cape (26.7%)**
- **Magazine with the wealthiest readership (ave. household income): *Finweek*, R21 608.00**
- **Top five highest RPC (readers per copy), based on ABC Jan-Jun 2008:**
 1. Amakhosi, 40.1
 2. Kickoff, 36.8
 3. Topcar, 25.0
 4. Auto Trader, 24.0
 5. Bona, 23.5

females, and the 16-24 and 35-49 age groups, is largely responsible for these gains.

- **STABLE – Any monthly:** as in AMPS® 2007B, this magazine sector remains unchanged, with a reach of 29.9%, and 9,355-million readers in total.
- **STABLE – Any alternate monthly:** despite positive growth in PE and Uitenhage, this magazine sector has remained stable, with a reach of 8.4%, and 2,642-million readers.
- **STABLE – Any newspaper subscriber magazine:** at 21.7%, with 6,792-million readers. There was growth for this sector amongst females, in small towns and villages, the Free State, and PE and Uitenhage, but there were fewer readers from Cape Town.
- **STABLE – Any quarterly:** at 1.9%, with 591 000 readers, and some growth in Port Elizabeth and Uitenhage.



The growth of magazines since 1999

A mixed bag for the monthly magazines

Eleven monthlies have significantly changed their readerships since AMPS® 2007B, but not all of these changes have been positive.

Mirroring the growth being seen for DStv in the TV environment, the satellite platform's print presence is also up. Its *Dish/Skottel* magazine has boosted its reach from 2.5% to 3.0%. Readership is now at 944 000, up from 780 000 previously. Gauteng has delivered significantly more readers for the title, and there are also more male readers.

Like its DStv sister, *Magic/M* has grown, from 0.4% reach to 0.7% currently, with 218 000 readers. Increases can be seen in metro areas, small towns and villages, Greater Joburg and the Northern Cape. More young people too (16-24) read the title.

Two women's general titles showed significant movements over AMPS® 2007B. **'O' – the Oprah Magazine SA** now has 663 000 readers, and a reach of 2.1%, up from 1.7% in the previous survey. Females and those aged 16-24 have driven this growth, as well as people from Limpopo.

Fairlady's declines in the Free State and North West and amongst the 25-34 age group, has contributed to the title's overall loss of readers. Its reach has fallen from 3.1% to 2.6%. Male readership is also down, but still makes up 25.0% of the total audience.

The property market may be down, but **Property: The Property Magazine** is not. The title has improved its reach from 1.0% to 1.3%, with 419 000 readers in total.

In the motoring sector, **Speed and Sound Mag** is up to 665 000 readers, from 523 000 in the previous survey. Its reach is currently 2.1%.

The **Foschini Group's Club Magazine** is down, from 4.2% reach to 3.6%, with declines in metro areas, Limpopo, Cape Town, and amongst the 35-49 age group.

Losses were seen for **Home/Tuis**, down from 1.2% to 0.7%. These declines came through mainly from metro areas, the Western Cape and Gauteng, and amongst those aged 35 and up.

SA Computer Magazine is down from 0.8% to 0.4% (119 000 readers), especially in metro areas, Gauteng, and Greater Joburg, as well as the 16-24 and 35-49 age groups.

Finally, two travel and tourism mags have lost readers. **Go!/Weg!** is down from 1.2% reach to 0.9%, with declines in the Western Cape and amongst males. **SA Country Life's** reach is down from 0.6% to 0.4%. Total readership is now 119 000.

While not changing their readership in total, these monthly titles have seen changes in specific demographic segments:

- *Bona*: gains in the Northern Cape, but losses in KwaZulu-Natal and amongst males.
- *Compleat Golfer* has more readers aged 50+.
- *Computeractive* has more 16-24 year-old readers.
- *Cosmopolitan* has fewer Free State readers.
- *Food and Home Entertaining*: up amongst 16-24s.
- *Ideas* has fewer 50+ readers.
- *Jet Club*: up in the Free State, PE and Uitenhage.
- *Leisure Wheels* (which was previously an alternate monthly): more female readers.
- *Sarie*: down in the Cape fringe.
- *Topcar* has seen growth in Limpopo.
- *True Love* has lost Northern Cape readers.
- *Woman & Home* has more readers in small towns and villages.

Weekly magazines on the move

Three weekly magazines have done well in this AMPS[®] survey. *Landbou Weekblad* is enjoying greater reach, up from 0.7% to 1.0%, thanks to 82 000 new readers since AMPS[®] 2007B, giving it a total audience of 300 000. The Western Cape and male markets are the main source of this growth.

Staying true to its name, *Move* is moving up in the magazine world, improving on the growth seen in the previous survey. The title has pushed its audience past the 1-million mark – from 773 000 readers in AMPS[®] 2007B, to 1,070-million currently (2.5% to 3.4% reach). Several demographic groups are responsible for these gains: metro areas as well as rural areas and settlements, Limpopo and Gauteng, females, and the 16-24 and 25-34 age groups.

People Magazine continues to gain in readership. Like *Move*, it too has now attained a seven digit audience size, with its readership of 1,085-million up by 181 000. *People Magazine's* reach is currently 3.5% (up from 2.9%) with gains being seen mainly in the Western Cape, Limpopo, and amongst females.

Demographic shifts were seen in the following weekly titles:

- *Autotrader* lost readers in the Eastern Cape.
- *Drum*: down in the Free State, but up in Limpopo, amongst females, and those aged 50+.
- *Farmers Weekly*: up in the Western Cape.
- *Huisgenoot* is down in the Free State, while *You* has more Northern Cape readers.
- *Mense* has more 25-34 year-old readers.
- *Time* has lost numbers amongst its 25-34 year-old audience.
- *Vrouekeur* attracted more Western Cape readers.

Alternate monthlies and quarterlies

Two of the magazines published on a longer timeline have shown significantly improved numbers over AMPS[®] 2007B.

Alternate monthly *Hype* has gained 75 000 new readers, taking its readership to 305 000, and its reach from 0.7% to 1.0%.

In House Club has grown from 1.2% reach to 1.6%, with 503 000 readers. These gains came through mainly from KwaZulu-Natal, and amongst females and those aged 16-24.

Demographic shifts were seen in the following titles within these sectors:

- *Clicks Clubcard*: down in the Western Cape (and CT and fringe suburbs in particular).
- *De Kat*: down in metro areas.
- *Vuk'uzenzele* has more 35-49 year-old readers.
- *Visi*: down in metro areas.