10 things you need to know about radio in South Africa

Wits Radio Conference 2015
Main sources

- futurefact: psychographic and media survey
- AMPS: All media and products survey
- RAMS: Radio diaries
I. The South African radio landscape
The size of the radio market in SA

Total number of radio listeners
33.6 million
87%

Source: RAMS Oct 14/Mar 15
There are as many radio listeners as TV viewers.

There are 3X as many radio listeners than Facebook users.

There are twice as many radio listeners than newspaper readers.
Radio over the last 10 years
(the radio market according to RAMS)

<table>
<thead>
<tr>
<th></th>
<th>PBS*</th>
<th>Commercial</th>
<th>Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of stations</td>
<td>12 → 13</td>
<td>19 → 23</td>
<td>104** → 239**</td>
</tr>
<tr>
<td>Reach</td>
<td>74% → 65%</td>
<td>48% → 42%</td>
<td>19% → 23%</td>
</tr>
</tbody>
</table>

*PBS : All SABC African Language Stations, RSG, SAfm and Lotus

**36 individual stations reported on RAMS

**66 individual stations reported on RAMS

Source: RAMS Aug/Nov 2004 & Oct 14/Mar 15
Listenership by province

- **Limpopo**
  - PBS: 80%
  - Commercial: 34%
  - Community: 26%

- **North West**
  - PBS: 76%
  - Commercial: 34%
  - Community: 26%

- **Mpumalanga**
  - PBS: 82%
  - Commercial: 33%
  - Community: 18%

- **KwaZulu-Natal**
  - PBS: 70%
  - Commercial: 45%
  - Community: 14%

- **Eastern Cape**
  - PBS: 71%
  - Community: 29%
  - Commercial: 23%

- **Gauteng**
  - Commercial: 60%
  - PBS: 54%
  - Community: 20%

- **Free State**
  - PBS: 83%
  - Community: 36%
  - Commercial: 29%

- **Northern Cape**
  - PBS: 73%
  - Community: 40%
  - Commercial: 29%

- **Western Cape**
  - Commercial: 46%
  - PBS: 34%
  - Community: 32%

Source: RAMS Oct 14/Mar 15
2. Time spent listening to radio (and other activities)
On average we are spending 33% less time listening to the radio compared to 10 years ago

*Number of hours spent per day*

<table>
<thead>
<tr>
<th>Population Type</th>
<th>2004 Hours</th>
<th>2014/15 Hours</th>
<th>Percentage Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population</td>
<td>4.9 hrs</td>
<td>3.3 hrs</td>
<td>-33%</td>
</tr>
<tr>
<td>LSM 1-4</td>
<td>4.8 hrs</td>
<td>3.5 hrs</td>
<td>-28%</td>
</tr>
<tr>
<td>LSM 5-6</td>
<td>5.3 hrs</td>
<td>3.6 hrs</td>
<td>-33%</td>
</tr>
<tr>
<td>LSM 7-8</td>
<td>4.8 hrs</td>
<td>3.1 hrs</td>
<td>-36%</td>
</tr>
<tr>
<td>LSM 9-10</td>
<td>4.4 hrs</td>
<td>2.6 hrs</td>
<td>-40%</td>
</tr>
<tr>
<td>Settlements/rural</td>
<td>4.7 hrs</td>
<td>3.4 hrs</td>
<td>-27%</td>
</tr>
<tr>
<td>Small towns/villages</td>
<td>5.0 hrs</td>
<td>3.4 hrs</td>
<td>-33%</td>
</tr>
<tr>
<td>Cities/large towns</td>
<td>5.3 hrs</td>
<td>3.4 hrs</td>
<td>-36%</td>
</tr>
<tr>
<td>Metro areas</td>
<td>4.9 hrs</td>
<td>3.1 hrs</td>
<td>-37%</td>
</tr>
</tbody>
</table>

Source: RAMS Aug/Nov 2004 & Oct 14/Mar 15
And there are differences in the age groups

**Number of hours spent per day on radio**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total Population</th>
<th>16-24 (15-24)</th>
<th>25-34</th>
<th>35-49</th>
<th>50+</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>'04 4.9 hrs</td>
<td>'14/15 3.3 hrs</td>
<td>'04 4.9 hrs</td>
<td>'14/15 2.9 hrs</td>
<td>'04 4.8 hrs</td>
</tr>
<tr>
<td></td>
<td>'14/15 3.3 hrs</td>
<td>'14/15 2.9 hrs</td>
<td>'14/15 3.3 hrs</td>
<td>'14/15 3.3 hrs</td>
<td>'14/15 3.3 hrs</td>
</tr>
<tr>
<td>Difference</td>
<td>-33%</td>
<td>-41%</td>
<td>-37%</td>
<td>-29%</td>
<td>-26%</td>
</tr>
</tbody>
</table>

Source: RAMS Aug/Nov 2004 & Oct 14/Mar 15
Comparing the number of hours spent per day…. 

**on radio**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>15-24</th>
<th>25-34</th>
<th>35-49</th>
<th>50+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2.90</td>
<td>3.30</td>
<td>3.40</td>
<td>3.40</td>
</tr>
</tbody>
</table>

**on TV**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>15-24</th>
<th>25-34</th>
<th>35-49</th>
<th>50+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2.01</td>
<td>2.13</td>
<td>2.49</td>
<td>3.22</td>
</tr>
</tbody>
</table>

**on social media***

<table>
<thead>
<tr>
<th>Age Group</th>
<th>18-24</th>
<th>25-34</th>
<th>35-49</th>
<th>50+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>4.60</td>
<td>4.30</td>
<td>3.80</td>
<td>2.40</td>
</tr>
</tbody>
</table>

* If they have access to the internet

3. Listening to the language of your heart

Illustration: wwwlivebreatherdiscover.com
“If you talk to a man in a language he understands, that goes to his head. If you talk to him in his language, that goes to his heart.”

Nelson Mandela

futurefact finds that there is a very strong correlation between mother tongue and what people describe as the language of their innermost thoughts (the language of the heart?).
A strong correlation between language of innermost thoughts & radio language preference

- 84% prefer Afrikaans radio (Afrikaans mother tongue)
- 93% prefer English radio (English mother tongue)
- 85% prefer Nguni radio (Nguni language mother tongue)
- 80% prefer Sotho radio (Sotho language mother tongue)

Source: futurefact 2014
The dilemma of English: the language of the head

• At the same time there is a recognition of the importance of English (the language of the head?): around 8 in 10 South Africans say: “You need to speak English well to get a good job”.

• And of course, being able to speak English well enough to get that job, highlights the conflict parents face between preserving their home language (and culture) while wanting to do the best for their children by having them educated in English at school.

62% say they are concerned about the future of their own language (up from 45% in 2011)

Source: futurefact 2014
Preferred language for listening to the radio

84% prefer Afrikaans radio
93% prefer English radio
85% prefer Nguni radio
80% prefer Sotho radio

Also like English radio

71% Afrikaans mother tongue
63% English mother tongue
69% Sotho language mother tongue

English comes to the fore more on TV than on radio

Source: futurefact 2014
4. Digital has little impact on radio listening
Level of internet access: total population

Internet access:
- 15.7 million
- 42%

No internet access:
- 22 million
- 58%

*Internet access = accessed the internet in the past 4 weeks

Source: AMPS 2014
Commercial radio more likely to have to take digital into account

base: accessed the internet in the past month

<table>
<thead>
<tr>
<th>Radio Type</th>
<th>No internet access</th>
<th>Internet access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total radio</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Commercial radio</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>Community radio</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>PBS</td>
<td>35%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Source: AMPS 2014
Traditional methods of listening to the radio far prevail over digital devices

- **78%** use a normal radio set/Hi fi
- **35%** use a car radio
- **19%** use a cell phone/tablet
- **1%** use a computer/laptop

Access to more devices encourages radio listening and doesn’t detract from it.

Devices have some impact on downloading podcasts

- With a tablet: 15%
- With a PC: 9%
- With a smartphone: 6%

Source: futurefact 2014
But streaming radio is relatively low

Base: have access to the internet

Regular activities

Download music  Stream radio

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Download Music</th>
<th>Stream Radio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>52%</td>
<td>6%</td>
</tr>
<tr>
<td>18-24</td>
<td>74%</td>
<td>7%</td>
</tr>
<tr>
<td>25-34</td>
<td>58%</td>
<td>7%</td>
</tr>
<tr>
<td>35-49</td>
<td>39%</td>
<td>5%</td>
</tr>
<tr>
<td>50+</td>
<td>14%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: futurefact 2014
5. Need for media as a corruption fighter - with responsibility and balance
The media perform a balancing act…
People want them to be corruption fighters for politics & business…
but expect them to be trustworthy

- **It is the duty of the media to expose corruption among politicians and business people:**
  - Agree: 81%
  - Disagree: 17%
  - Don't know: 2%

- **I think the media in South Africa are much too negative about South Africa - they don't show the good things that are happening:**
  - Agree a lot: 45%
  - Agree a little: 35%
  - Disagree: 18%
  - Don't know: 3%

- **Journalists often harm people's reputations because they don't check their information sufficiently:**
  - Agree a lot: 45%
  - Agree a little: 35%
  - Disagree: 17%
  - Don't know: 4%

Source: futurefact 2014
Corruption in SA

Corruption levels are so high in SA that I have lost hope about stopping it 78%

BUT...9 out of 10 South Africans believe initiatives like Crime Line, and whistle-blowing are a good idea and around 8 out of 10 support Lead SA

Source: futurefact 2014
6. Trust and confidence in journalists and commentators
Trust and confidence in the media growing

- Attacks on media result in greater trust in journalists
- Trust and confidence scores increasing
- Also for satirists and comedians
- FAR higher than for the P’s:

  President, Parties and Politicians.
Confidence scores

Media

To put this in perspective:
- ANC = 120
- Thuli Madonsela = 262
- ConCourt = 288
- SAPS = 152
- Jacob Zuma = -6

Source: futurefact 2014
Confidence scores

The digital space

Social media like Facebook & Twitter
- Total pop: 95
- Connected: 233
- Not connected: -70

The Internet
- Total pop: 151
- Connected: 278
- Not connected: -0.5

Source: futurefact 2014
7. A brand status and conscious society
Brands are important to radio listeners and often define who they are (*regardless of whether they listen to commercial, community or PBS radio*).
When I shop I carefully check prices (89%)
I always try to shop where I know prices are cheapest (82%)
There are shops I avoid because of their bad service (72%)
I'm a person who loves to shop (62%)

Source: futurefact 2014
The power of advertising: no significant differences among different types of radio listeners

- If a company sponsors a sport I am really interested in, I am more likely to support them by buying their products (65%)
- I'll often buy a new brand to see what it's like (64%)
- I am more likely to buy brands that I see or hear advertised (61%)
- If a brand does not seem to speak to me, then I will not use it - even if the product or service meets my needs (59%)

Source: futurefact 2014
Radio listeners’ levels of brand status

- Only 17% of radio listeners have no brand status concerns.
- On the other hand 39% are heavily brand conscious.
- The remaining 44% are quite brand conscious.

Source: futurefact 2014
8. Media synergy is the advertising game

...for optimising OTS irrespective of category of purchase

Media planners will need to consider the synergistic effect of plans as media platforms become more and more merged.
While radio’s share of total world media expenditure is in decline, South Africa’s is on the rise.

South African radio’s share of total media expenditure:

- 2007 12.7%
- 2014 15.5%

South Africa is one of only a handful of global markets to have seen consistent growth in share from 2007 to 2014.
While radio is not the most useful medium for information, it has an important place in enhancing the media mix.

Those more likely to obtain information from radio are: black South Africans, those under LSM 8 and those in the working class.

* Buying houses, cars, furniture, appliances, laptops, cellphones, tablets, investing money, changing banks, buying insurance, buying groceries & toiletries, clothing, shoes, accessories, cosmetics & perfume

Source: futurefact 2014
Media synergy is the advertising game for optimising OTS irrespective of category of purchase.

Useful media when deciding to change banks...

- TV = 36%
- Radio = 21%

In combination:

TV + Radio = 41%

Source: futurefact 2014
Media synergy is the advertising game
……for optimising OTS irrespective of category of purchase

Useful media when deciding to take out insurance…

= 24%

= 22%

In combination……..

Internet + Radio

= 40%

Source: futurefact 2014
9. The changing research landscape in SA
The end of single source audience research

- OOH survey
- Radio survey
- TV Panel
- Readership survey
- Establishment survey
- Digital survey
- Products & brands survey

Intermedia comparative data
Global media research agency TNS has won the tender to supply South Africa’s radio audience measurement service from 2016.
10. Radio critical for the political arena
The political frame is more fluid than before

Political camps

- 36% ANC camp
- 17% DA camp
- 8% EFF camp
- 2% Swing voters
- 8% Support none
- 4% Don't know

Regularly listen to the radio

- 97% EFF camp
- 86% DA camp
- 89% ANC camp

Source: futurefact 2014
Social media are also critical for the political arena

Regularly access social media

EFF Camp: 43%
DA Camp: 42%
ANC Camp: 37%
'Swing' voter: 39%
No party camp: 49%

Source: futurefact 2014
Finally...

Radio can be a conversation and a constant companion but it is also a place where the voice of the people can be heard.

It is a trusted crime and corruption fighter together with other media in our complex society.

Together with other media it enhances the advertising mix.

And most interestingly in these digital times and the proliferation of devices, there is little negative impact and in fact radio is more accessible than ever before.
THANK YOU