KANTAR TNS

Project Media View: evaluation of print media engagement

Research to determine the attitudes and perceptions consumers have of print media

31 March 2017

Publisher Research Council

Workshop agenda

1

Introduction – setting the context

2

The broad media landscape: behavioural dynamics

3

The broad media landscape: attitudinal perceptions

4

The print media narrative

5

Additional support: unpacking print media further

6

Additional support: consumer segments

KANTAR TNS

The need for research

Understanding the dynamic and evolving media industry is key to capturing attention and driving engagement with consumers

Media engagement is intricate and is not the same across the different channels. How we engage with the channels is complex and can be driven by **attention time**, the **quality of attention** and the **relationship** (with a brand or with a channel). The print channel has recently seen lower reach figures and has come under pressure to validate the role that it plays in the overall media landscape

The Publisher Research Council (PRC) wants to drive home the message that print media creates quality engagement with consumers and can be used as an effective channel to deliver a return on investment. Research is required to understand cross-media interactions, evaluate the effectiveness of the different media channels (with focus on print media) and determine the attitudes and perceptions consumers have of print media. This research will provide input on building clearer communication objectives and ensuring campaign success in order to have the optimal effect on equity and share

What aspects of 'engagement' did we cover?

The survey included both attitudinal as well as behavioural variables

Behaviour

Topic	Dimensions
Media consumption	Frequency of consuming media
Media attention	Time spent on media
Quality of attention	Other activities usually doing
Information source	Media used for different types of information

Attitudinal perceptions

Topic	Dimensions
Satisfaction	Overall rating
Depth of information	Deeper understanding rating
Media positioning	Media associations
Media positioning	Advertising associations

Survey input

Questions included in this survey were largely driven by a variety of other studies done overseas

The chief informant of the questions was work done by BMRB in the UK in 2008 – which sought to develop a cross-media engagement framework.

6 clear strands of engagement form the architecture of this framework:

1. Relevance
2. **Trust** in the specific media vehicle
3. **Mindset** and **attention** given to the medium
4. The **advertising** is perceived by consumers to be an **integral** part of the media experience
5. The medium **prompts action**
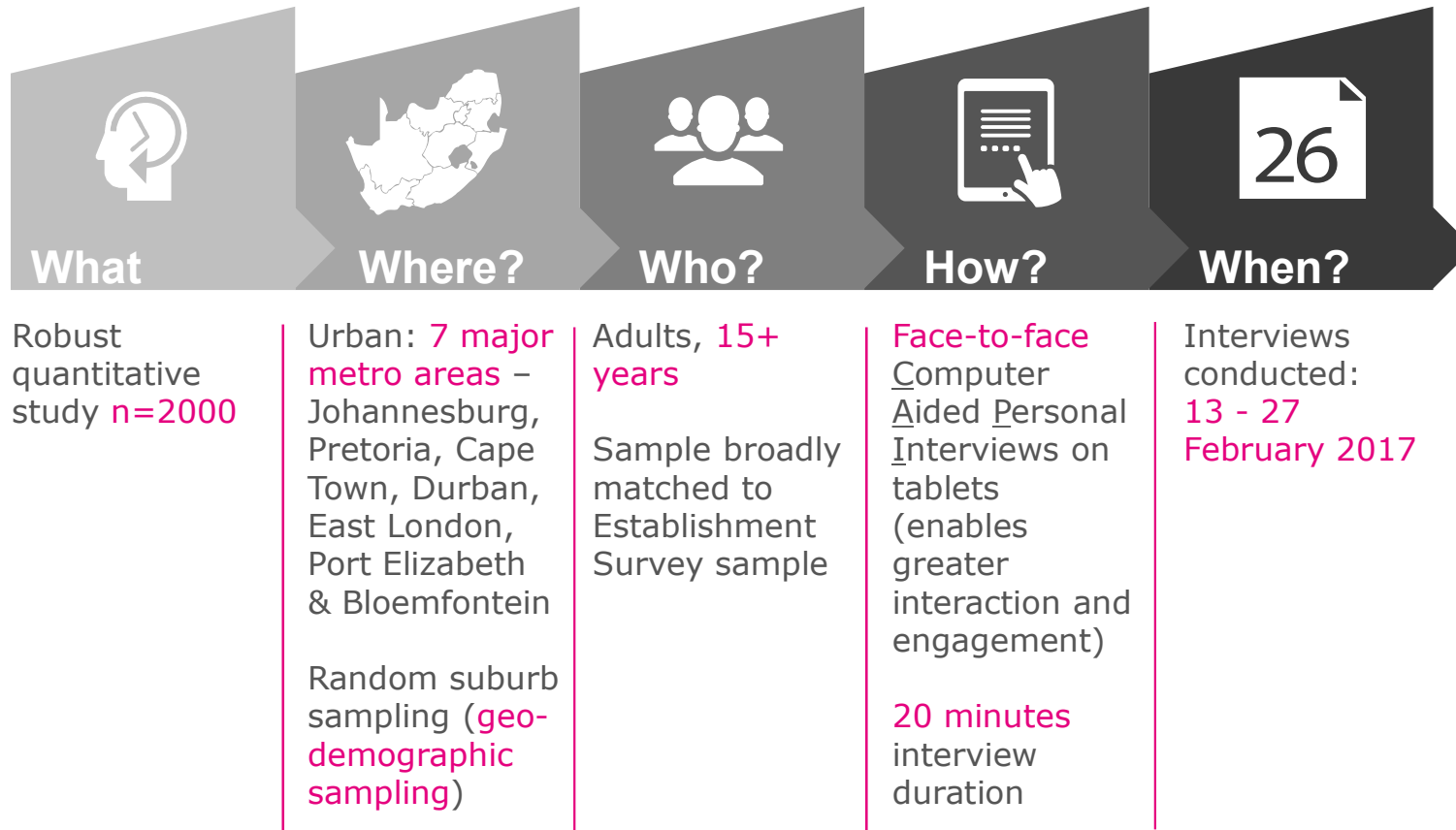6. The medium **fulfils a need state**.

Survey input

34 statements were derived from unpacking each of these strands into further dimensions. Statements were asked over two batteries
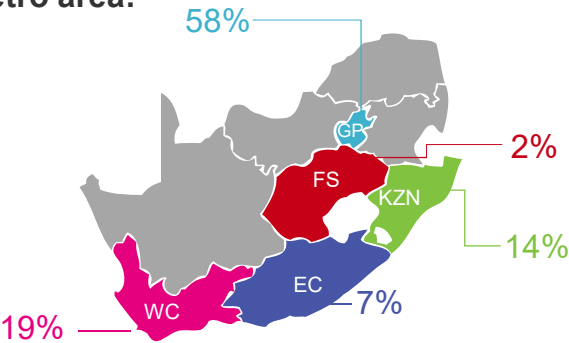
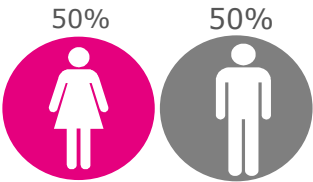| Strand	Dimensions	Specific Measure
Relevance	Identification/personal connection Personal relevance	Ideal media Variety of content
Trust	Trustworthiness/reliability/accuracy Bond/proximity Consistency	Trust it to always provide reliable info; Info is always believable; Operates in ethical manner/best interest at heart n/a n/a
Mindset & Attention	Mindset Attention	Spend quality time; Look forward to it; Enjoy sharing with family/friends Pay close attention/not distracted;
Advertising is integral part	Visibility/attention Credibility Enjoyment Relevance/usefulness Avoidance/irritation Clutter	Notice/pay attention to ads Trust the advertising Like the ads; Advertising is entertaining Advertising is relevant/useful; Able to only look at advertising of interest Advertising is irritating Just enough ads to not get annoyed
Prompts action	Transaction/brand contact Word-of-mouth Inspiration Research	Bought/used product/service as result of advertising; Visited/store outlet result of seeing advertising Discussed brand/product after seeing advertising; Discussed advertising seen/heard n/a Looked for more info about product/brand; Allows price comparison
Fulfills needstate	Information/'feed me' Stimulation Entertainment Escapism/relaxation Social currency Timeout/my time/bonus time	Best way to learn and remember; Makes you better informed than others; Remember things from it; Provides info to make best purchase decision Makes you think/inspires you Fun and entertaining Enjoy it while doing other things Connects you with other people Engage when want time on your own; Engage at own pace and in own time

Study methodology and approach

What	Where?	Who?	How?	When?
Robust quantitative study n=2000	Urban: 7 major metro areas – Johannesburg, Pretoria, Cape Town, Durban, East London, Port Elizabeth & Bloemfontein Random suburb sampling (geo-demographic sampling)	Adults, 15+ years Sample broadly matched to Establishment Survey sample	Face-to-face Computer Aided Personal Interviews on tablets (enables greater interaction and engagement) 20 minutes interview duration	Interviews conducted: 13 - 27 February 2017

KANTAR TNS

Sample profile: personal demographics (broadly matched to ES)

Metro area:

58% (GP)
2%
14% (KZN)
7% (EC)
19% (WC)
FS

Age:

23	35	29	13

- 15-24 years
- 25-34 years
- 35-49 years
- 50+ years
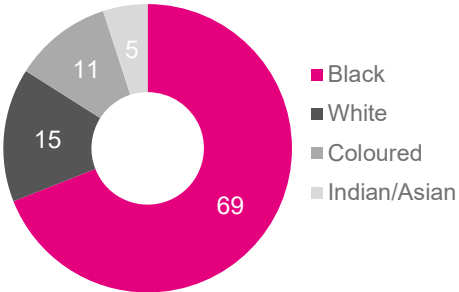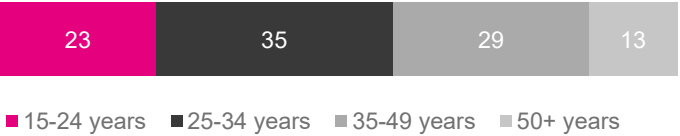
Average age (mean) = **35 years**

Gender:

50%   50%

Influencer*:

32 Influencer
68 Non-influencer

Race:

5
11
15
69

- Black
- White
- Coloured
- Indian/Asian

Language:

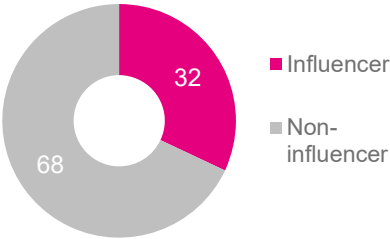|	
IsiZulu/Zulu	27
English	19
IsiXhosa/Xhosa	15
Afrikaans	13
Sesotho/Southern Sotho/Sotho	11
Sepedi/Northern Sotho	6
Setswana/Tswana	5
Tshivenda/Lemba/Venda	2
Xitsonga/Tsonga/Shangaan	2

68% vernacular

KANTAR TNS
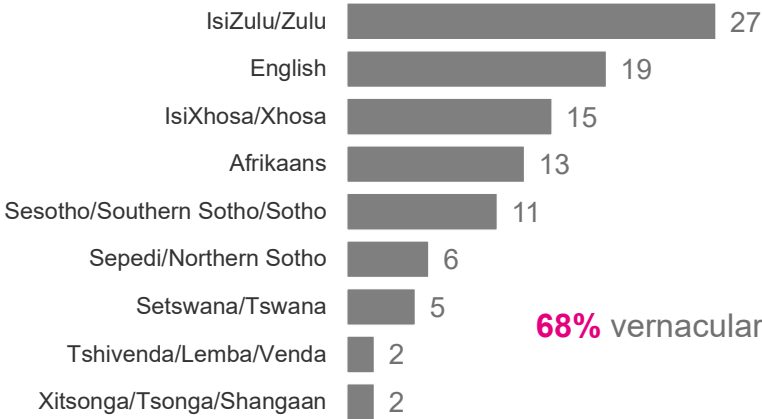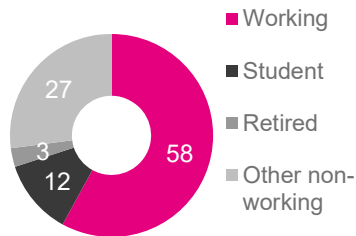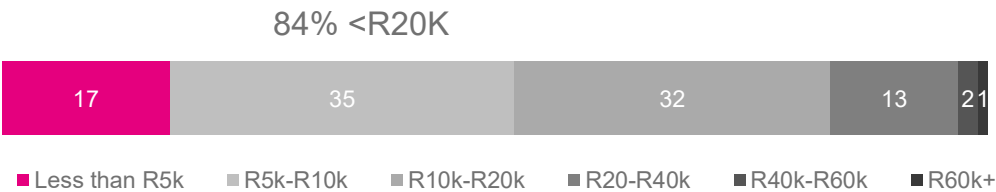
* Respondent rated 4+ 'influence' related statements as 'describing themselves perfectly'

Sample profile: socio-economic demographics (cont'd…)

Work status:

- ■ Working
- ■ Student
- ■ Retired
- ■ Other non-working

27, 3, 12, 58

Monthly household Income:

84% <R20K

| 17 | 35 | 32 | 13 | 21 |

- ■ Less than R5k
- ■ R5k-R10k
- ■ R10k-R20k
- ■ R20-R40k
- ■ R40k-R60k
- ■ R60k+

Average (mean) = **R13.3K**

**Occupation
(Mentions of 5%+):**

Manual worker	23
Administrative/clerical	11
Tradesman	10
Customer service	9
Self-employed in informal sector	8
Sales	6
Retail	6

Education:

5
2
10
57
24
2

- ■ Other post-matric
- ■ Post-graduate
- ■ Some university +
- ■ Matriculated
- ■ Some high school
- ■ Primary school

17% post-matric

SEM:

25, 35, 40

- ■ SEM 1-5
- ■ SEM 6-7
- ■ SEM 8-10

KANTAR TNS

2.
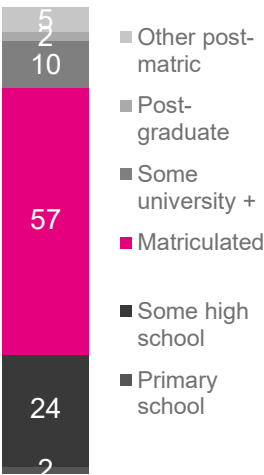
The broad media landscape: behavioural dynamics

Media covered in the survey
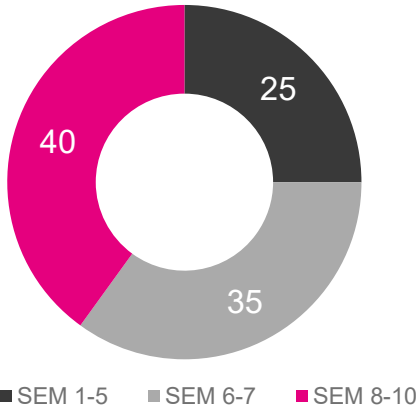
Read or paged through a newspaper on paper OR online
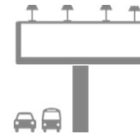
Read or paged through a magazine on paper OR online

Watched TV

Listened to radio

Left your home to go somewhere

Accessed the internet

Went onto social media

Frequency of consuming media: yesterday

One in four consumers claim to have read newspapers yesterday, making the medium the 6th most frequently consumed. TV had almost universal viewing

	Newspaper	Magazine	TV	Radio	OOH	Internet	Social media
Yesterday	25	13	95	66	74	50	58

Legend:
- Never
- > than 12 months
- Past 12 months
- Past 6 months
- Past 3 months
- Past month
- Past week
- Yesterday

80% 80%
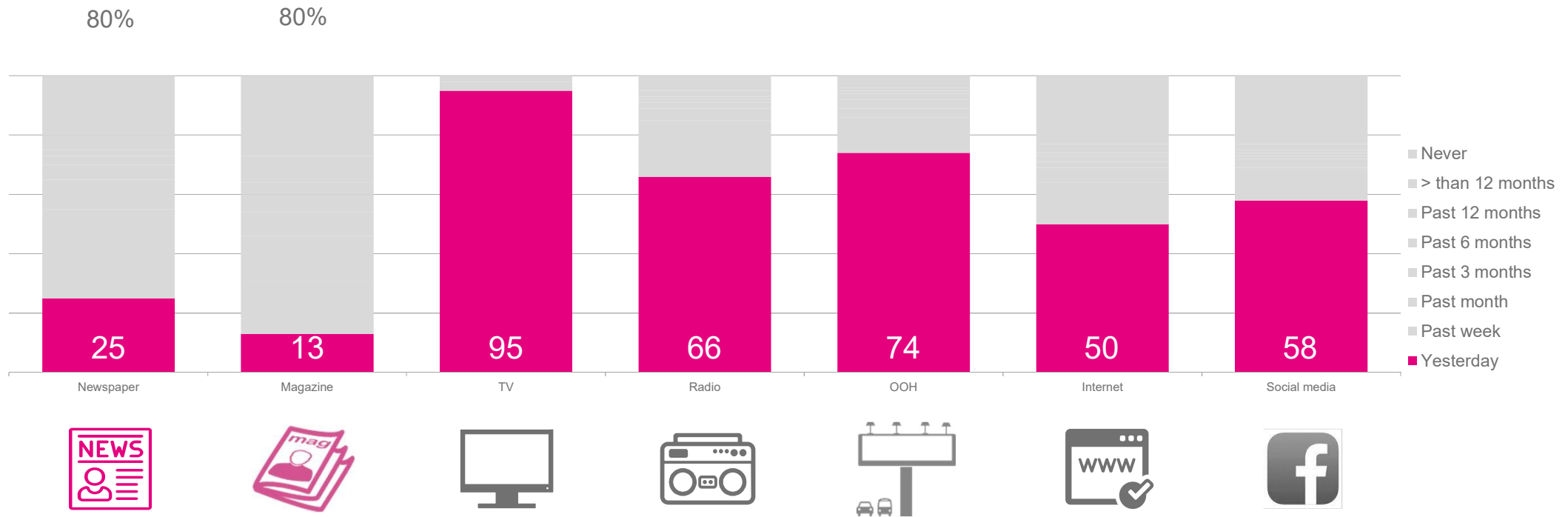
Frequency of consuming media: past week

High weekly readership for newspapers brings past week penetration to over 1 in 2 metro consumers; just under one-third of consumers read magazines in the past week

| 55% | 31% | 98% | 85% | 86% | 64% | 69% |

Legend:
- Never
- > than 12 months
- Past 12 months
- Past 6 months
- Past 3 months
- Past month
- Past week
- Yesterday

Newspaper | Magazine | TV | Radio | OOH | Internet | Social media

KANTAR TNS
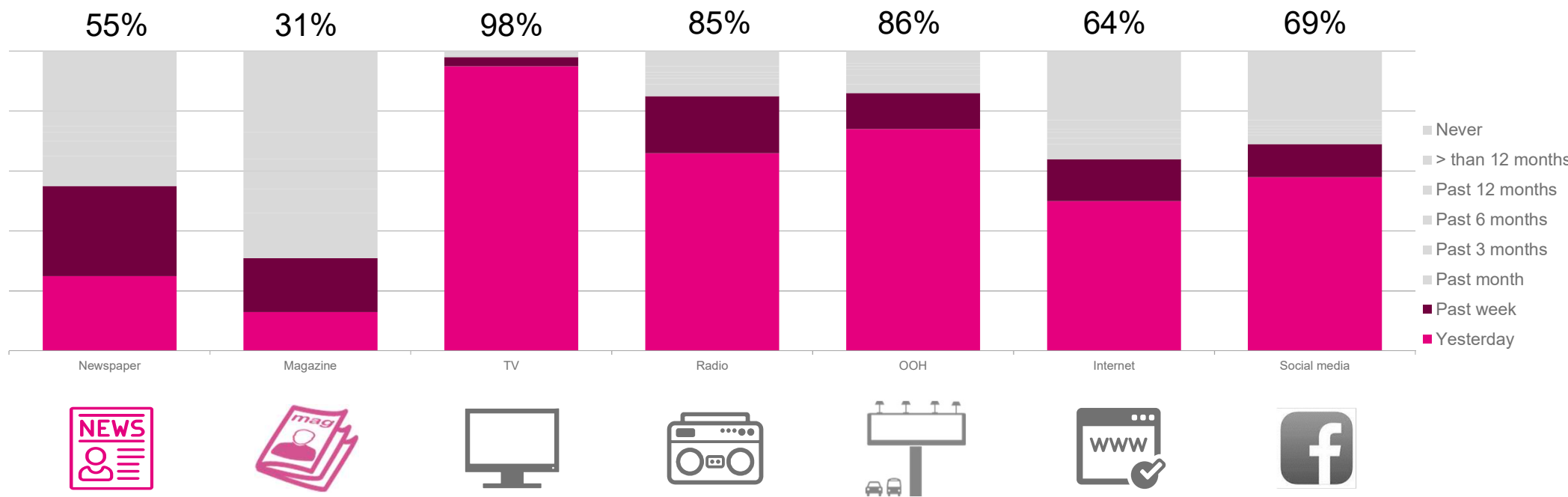
Frequency of consuming media: past month

Monthly newspaper readership climbs to almost two-thirds whilst past month magazine penetration almost reaches 1 in 2 consumers

	Newspaper	Magazine	TV	Radio	OOH	Internet	Social media
	65%	46%	99%	89%	89%	69%	72%

Legend:
- Never
- > than 12 months
- Past 12 months
- Past 6 months
- Past 3 months
- Past month
- Past week
- Yesterday
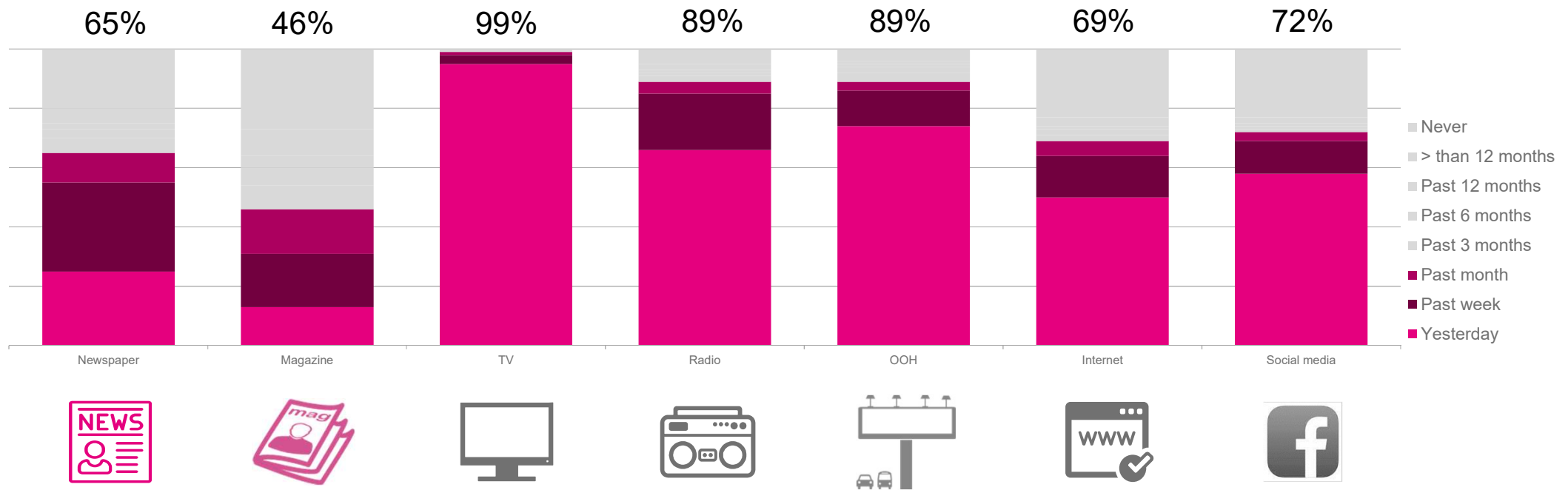
Frequency of consuming media: ever consumed

An additional one in seven consumers claim occasional reading of newspapers, bringing total penetration to 80% - a similar number to internet and social media. Three-quarters claim to read magazines.

Media	Penetration	Never
Newspaper	80%	20
Magazine	73%	27
TV	100%	
Radio	95%	5
OOH	96%	4
Internet	77%	23
Social media	77%	23

Legend:
- Never
- > than 12 months
- Past 12 months
- Past 6 months
- Past 3 months
- Past month
- Past week
- Yesterday
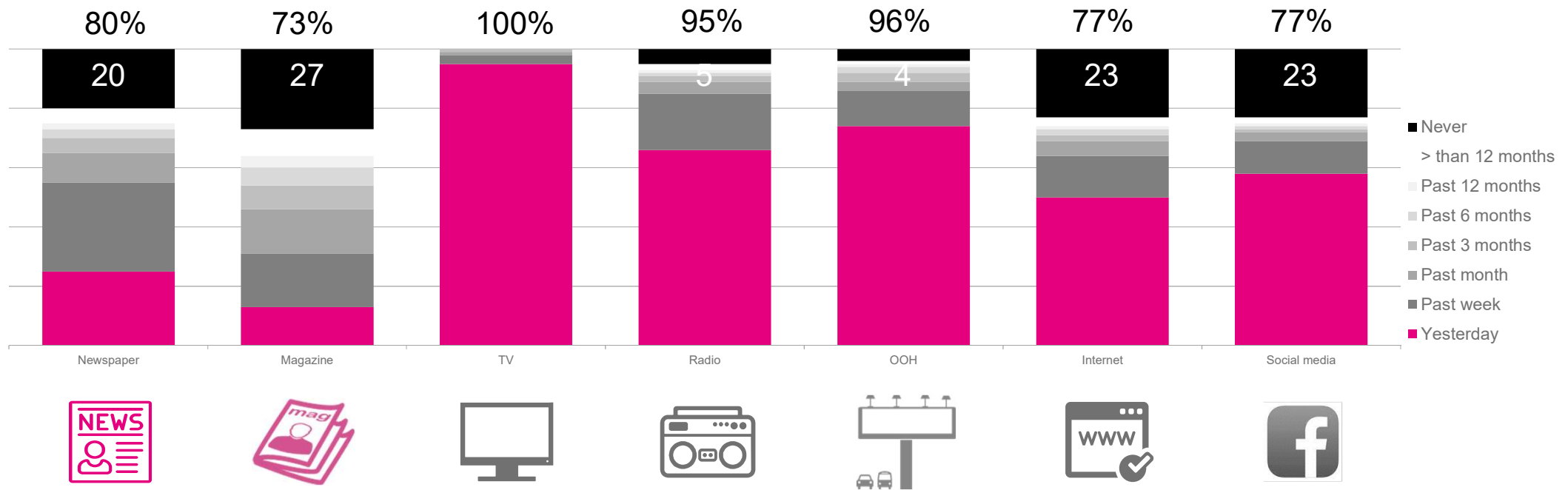
Who is more likely to be a past month reader of newspapers? (Average = **65%**)

Readership is relatively low in the largest metro area Gauteng; Asian/Coloured consumers are more frequent readers as well as English-speaking, older and higher SEM consumers

Metro area:

- Gauteng — 62
- Cape Town — 69
- Durban — 72
- Eastern Cape — 57
- Bloemfontein* — 76

Gender:

- 68% (male)
- 61% (female)

Race:

- A — 79%
- C — 78%
- W — 67%
- B — 61%

Age

15-24 years	25-34 years	35-49 years	50+ years
57	63	69	74

Influencer:

Yes	No
62%	66%

Language:

English	Afrikaans	Sepedi	Tsonga*	Zulu	Setswana	Sesotho	Xhosa
76	68	67	67	64	61	61	53

SEM:

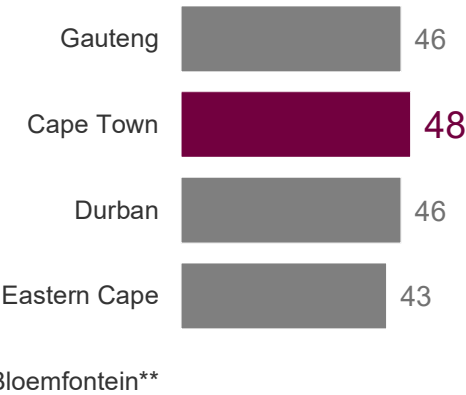| SEM 1-5	SEM 6-7	SEM 8-10
60%	60%	72%

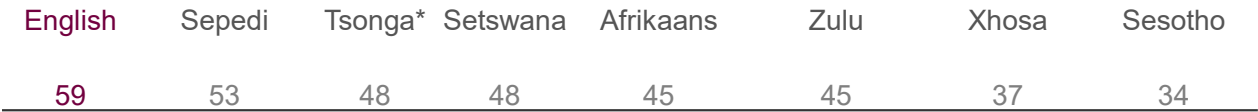*Caution: small base size (n=30-49)

KANTAR TNS

16
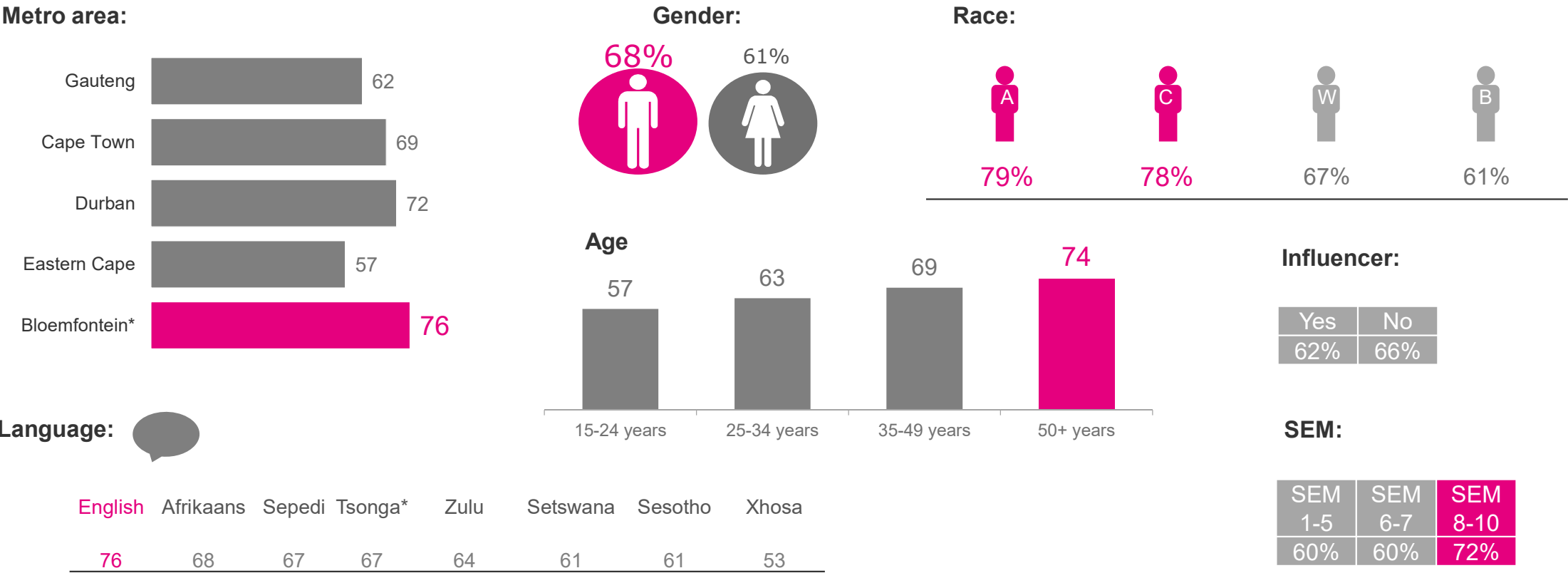
Who is more likely to be a past month reader of magazines? (Average = **46%**)

Readership is slightly higher in Cape Town; Women, Coloured/White consumers are more frequent readers as well as English speakers, 35-49 year olds and higher SEM consumers
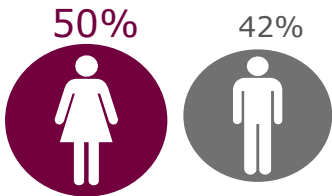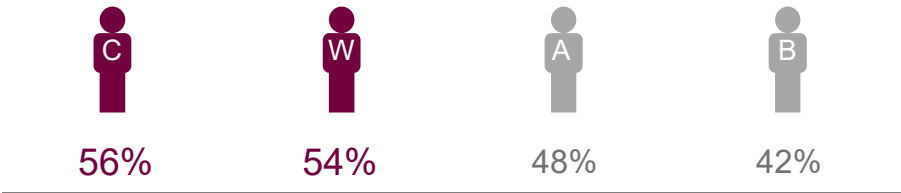
Metro area:

Gauteng	46
Cape Town	48
Durban	46
Eastern Cape	43
Bloemfontein**	

Gender:

50% (Women)   42% (Men)

Race:

C	W	A	B
56%	54%	48%	42%

Age

15-24 years	25-34 years	35-49 years	50+ years
44	45	49	43

Influencer:

Yes	No
48%	45%

Language:

English	Sepedi	Tsonga*	Setswana	Afrikaans	Zulu	Xhosa	Sesotho
59	53	48	48	45	45	37	34

SEM:

SEM 1-5	SEM 6-7	SEM 8-10
40%	40%	54%

*Caution: small base size (n=30-49
** Base size <n=30

KANTAR TNS
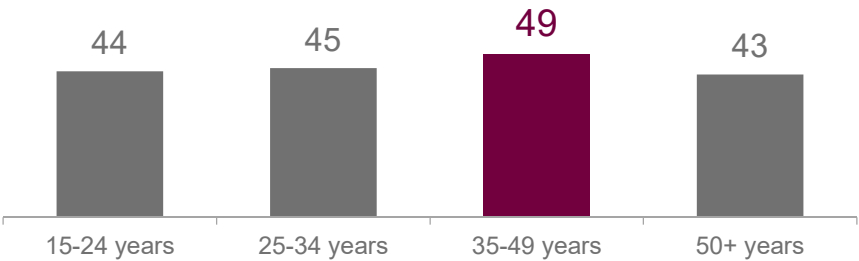
What is cross-usage of past month media consumption?

Metro consumers are consuming over 5 media types on average, with 3 in 10 claiming to consume all the listed media on a monthly basis; magazine readers claim the highest repertoire overall

Repertoire analysis:

Average: **5.3** media/7

1 media	2 media	3 media	4 media	5 media	6 media	7 media
1	3	10	16	23	18	29
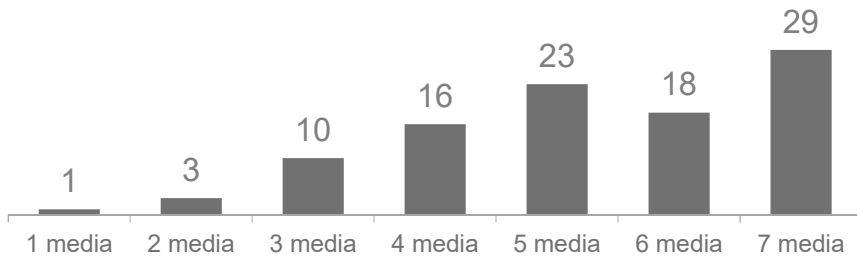
Cross-consumption past month:

	NEWS	mag	TV	Radio	OOH	www	Facebook
Newspapers	100	*88*	65	68	67	69	68
Magazines	*62*	100	46	49	48	54	53
TV	99	99	100	99	99	99	99
Radio	94	95	89	100	90	91	91
OOH	92	93	89	90	100	91	91
Internet	73	82	69	70	70	100	*89*
Social media	75	82	72	73	73	*92*	100
Avg. no.	**6.0**	**6.4**	**5.3**	**5.5**	**5.5**	**6.0**	**5.9**

High cross-usage between print media and internet/social media

Attention: Time spent on media

Self-perceptions of time spent on each media reveal that consumers claim to spend much less time on print media relative to other media

43	33	85	63	27	56	73

Newspaper   Magazine   TV   Radio   OOH   Internet   Social media

- T2B Lot of time
- 3
- B2B Little time

KANTAR TNS
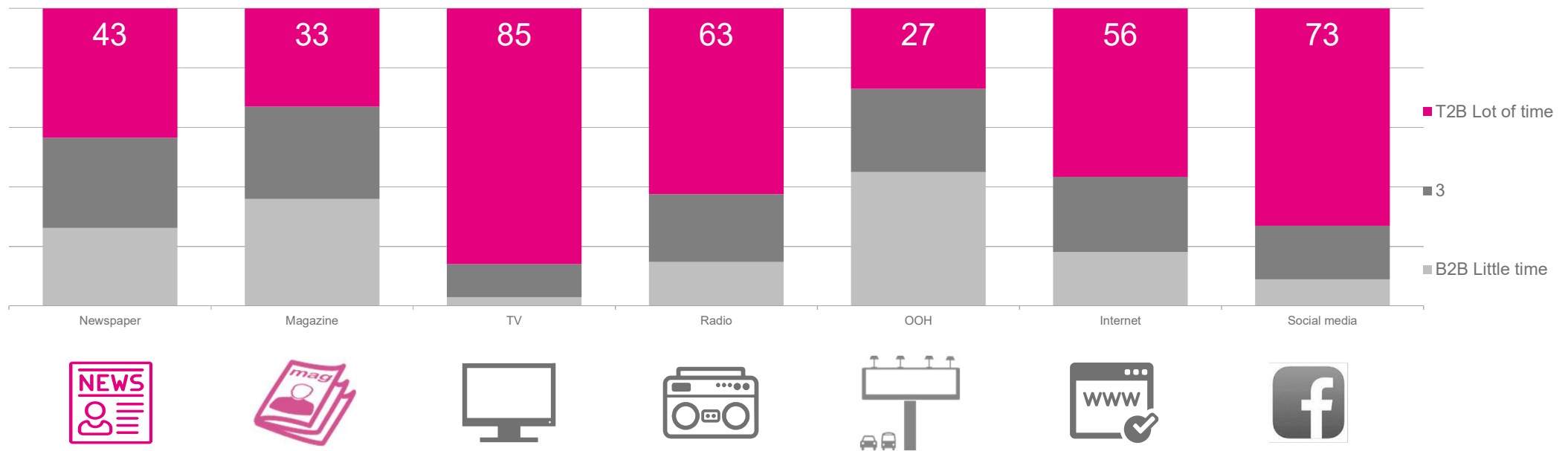
Time spent on reading newspapers (Average spend 'a lot of time' = **43%**)

Consumers claiming to spend more time reading newspapers …

Metro area:

Gauteng	46
Cape Town	32
Durban	53
Eastern Cape	28
Bloemfontein*	40

Gender:

49%   38%

Race:

A 66%   B 45%   W 41%   C 30%

Age

15-24 years	25-34 years	35-49 years	50+ years
36	38	53	48
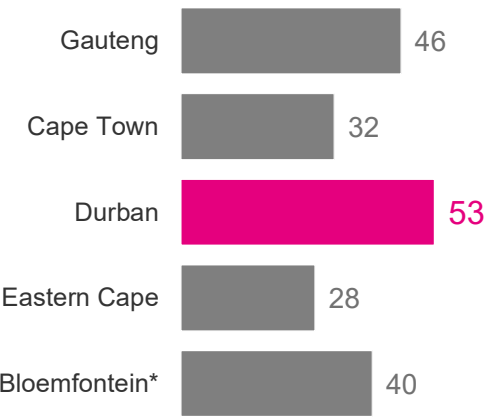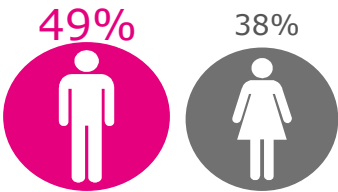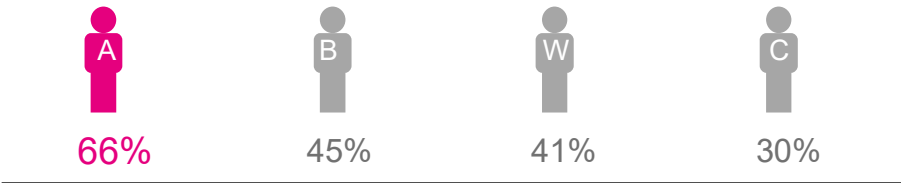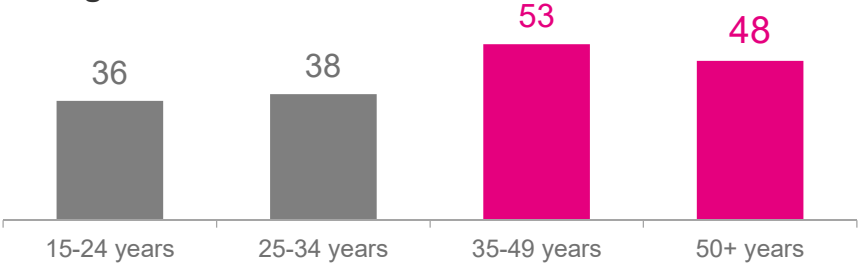
Influencer:

Yes	No
58%	37%

Language:

Tsonga*	Sepedi	English	Zulu	Setswana	Sesotho	Xhosa	Afrikaans
55	53	48	47	44	41	37	31

SEM:

SEM 1-5	SEM 6-7	SEM 8-10
41%	41%	46%

KANTAR TNS

*Caution: small base size (n=30-49)

Time spent on reading magazines (Average spend 'a lot of time' = **33%**)

Consumers claiming to spend more time reading magazines…

Metro area:

Region	Value
Gauteng	38
Cape Town	22
Durban	33
Eastern Cape	18
Bloemfontein**	

Gender:

36%   30%

Race:

B	W	A	C
36%	35%	30%	18%

Age

15-24 years	25-34 years	35-49 years	50+ years
34	34	34	27

Influencer:

Yes	No
45%	27%

Language:

Setswana	Sepedi	Sesotho	Zulu	Xhosa	English	Afrikaans
45	42	40	36	30	29	28

SEM:
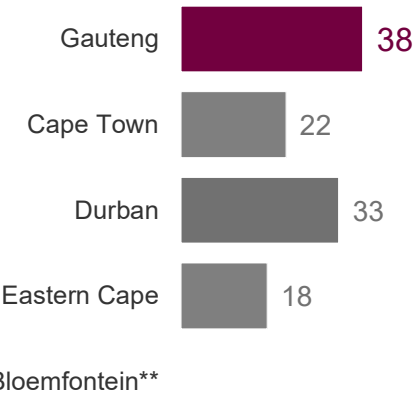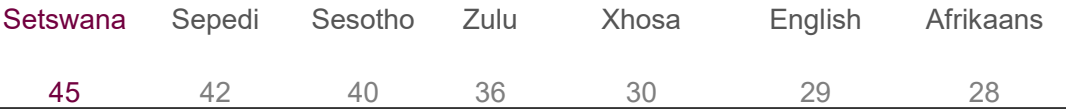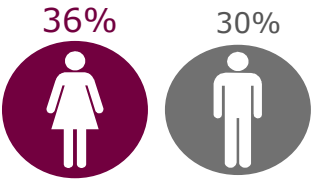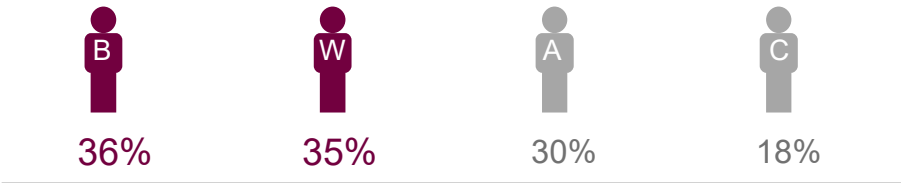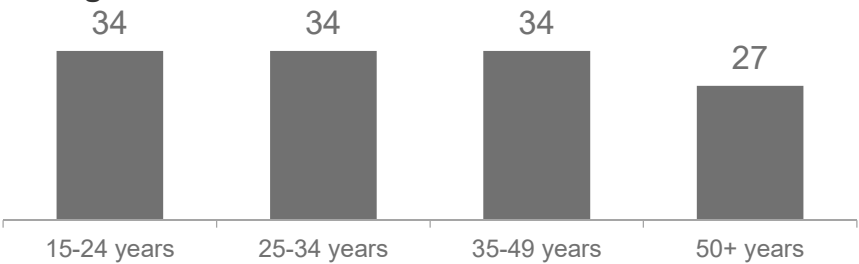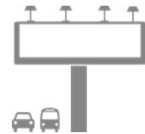
SEM 1-5	SEM 6-7	SEM 8-10
32%	33%	33%

KANTAR TNS

*Caution: small base size (n=30-49
** Base size <n=30

Quality of attention: Focused time spent consuming media

Despite spending less time on print media, consumers are less distracted when reading newspapers or magazines; over one-half of newspaper readers, and a similarly high number of magazine readers say they are focused when reading and aren't doing any other activity simultaneously

	NEWS	mag	TV	Radio	Billboard	WWW	Facebook
Not doing something else	**56**	**50**	24	18	18	37	28
Eating or drinking	**27**	**27**	62	41	6	24	32
Watching TV	12	14	-	6	3	19	35
Listening to the radio	11	13	4	-	4	11	19
Socialising	7	9	20	22	7	16	25
Travelling or driving	4	5	1	25	65	5	12
Activities in the home such as cooking, housework, child care, etc.	3	4	12	27	-	3	6
Accessing social media	3	4	12	8	2	8	-
Using your mobile phone or tablet	2	3	12	11	3	10	16
Working or studying	2	2	2	14	1	10	6
Avg. no. activities	**0.8**	**0.9**	**1.4**	**1.8**	**1.1**	**1.2**	**1.7**

KANTAR TNS₁   Top mentions shown ranked on newspapers; activities over 20% highlighted

What media are used to access information?

Other than for news, weather and sports, newspapers rank second behind TV for accessing information about a wide variety of matters. Magazines perform well for lifestyle topics

	News	Weather	Sports	Sales/deals	Lifestyle	Best price on electronics, cellphones, furniture, etc	More info on expensive items want to buy	Compare prices on everyday items
Do activity:	98%	98%	91%	90%	87%	84%	81%	81%
	TV	TV	TV	TV	TV	TV	TV	TV
	Radio	Radio	Radio	Newspapers	Newspapers	Newspapers	Newspapers	Newspapers
	Newspapers	Internet	Newspapers	Radio	Magazines	Internet	Internet	Radio
	Internet		Internet	Internet	Internet	Radio	Radio	
					Radio	Magazines		
					Social media			

What information do consumers use newspapers and magazines for?

Searching for best prices seems to be newspapers' heartland according to metro consumers

Newspapers	
Sales/deals	48
Compare prices on everyday items	47
News	44
Best price on electronics, cellphones, furniture, etc	39
Sports	35
More info on expensive items want to buy	33
Lifestyle	31
Weather	18

Magazines	
Lifestyle	30
Best price on electronics, cellphones, furniture, etc	20
More info on expensive items want to buy	19
Sales/deals	19
Compare prices on everyday items	16
Sports	12
News	12
Weather	7

Broad media landscape: behavioural dynamics summary

What have we learned so far?

- TV, radio and 'on the go' are the top 3 media consumed by metro consumers

- Just over one-half of consumers claimed to read newspapers past week with a lower one-third reading magazines
  - Key demographic past month skews: **Newspapers** – men, Bloemfontein residents, Asian, Coloured, 50+ years, English, SEM 8-10; **Magazines** – women, Cape Town residents, Coloured, White, 35-49 years, English, SEM 8-10

- There is high cross usage of newspapers and magazines; magazine readers have the highest media repertoire overall

- Twice as many consumers claim to spend 'a lot of time' watching TV than reading newspapers. Magazine reading sessions also tend to be shorter occasions relative to other media
  - Those spending more time with **newspapers** include men, Influencers, Durban residents, Asian, older consumers and Tsonga speakers; Those spending more time with **magazines** include: women, Influencers, Gauteng residents, Black, White and Setswana speakers

- Over one-half of consumers claim to be focused on reading newspapers and magazines and are not conducting any other activity. These levels are the highest for any media indicating quality of attention

- Newspapers are the second media type behind TV for many topics of information, particularly for pricing information. For general news and sports information, newspapers rank higher than the internet, but are still behind the broadcast media

Print engagement performance snapshot of core metrics

Behaviour

Topic	Newspapers	Magazines	Top media
Media consumption (past month)	65%	46%	99%
Media attention	43%	33%	85%
Quality of attention	56%	50%	NEWS
Information source - Top 3	Sales/deals (48%)	Lifestyle (30%)	
	Compare prices on everyday items (47%)	Best price on electronics, cellphones, furniture, etc. (20%)	
	News (44%)	More info on expensive items want to buy (19%)	

KANTAR TNS.

What does this mean for the print media narrative?

Print media uniquely occupies the 'high quality' focused time quadrant

QUALITY OF ATTENTION

TIME SPENT ON MEDIUM

News-papers

Mags

Internet

Social media

TV

Radio

OOH

PM penetration

KANTAR TNS
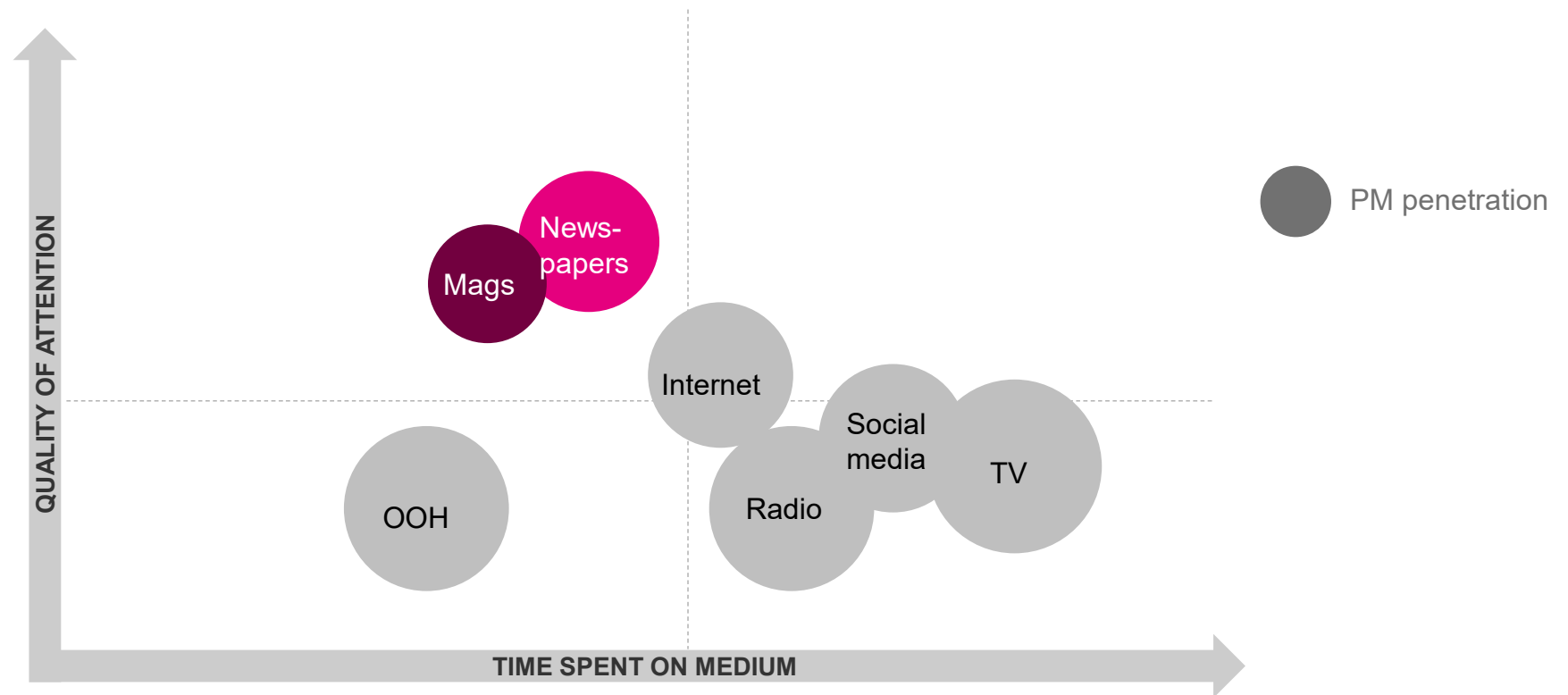
3.
The broad media landscape: attitudinal perceptions
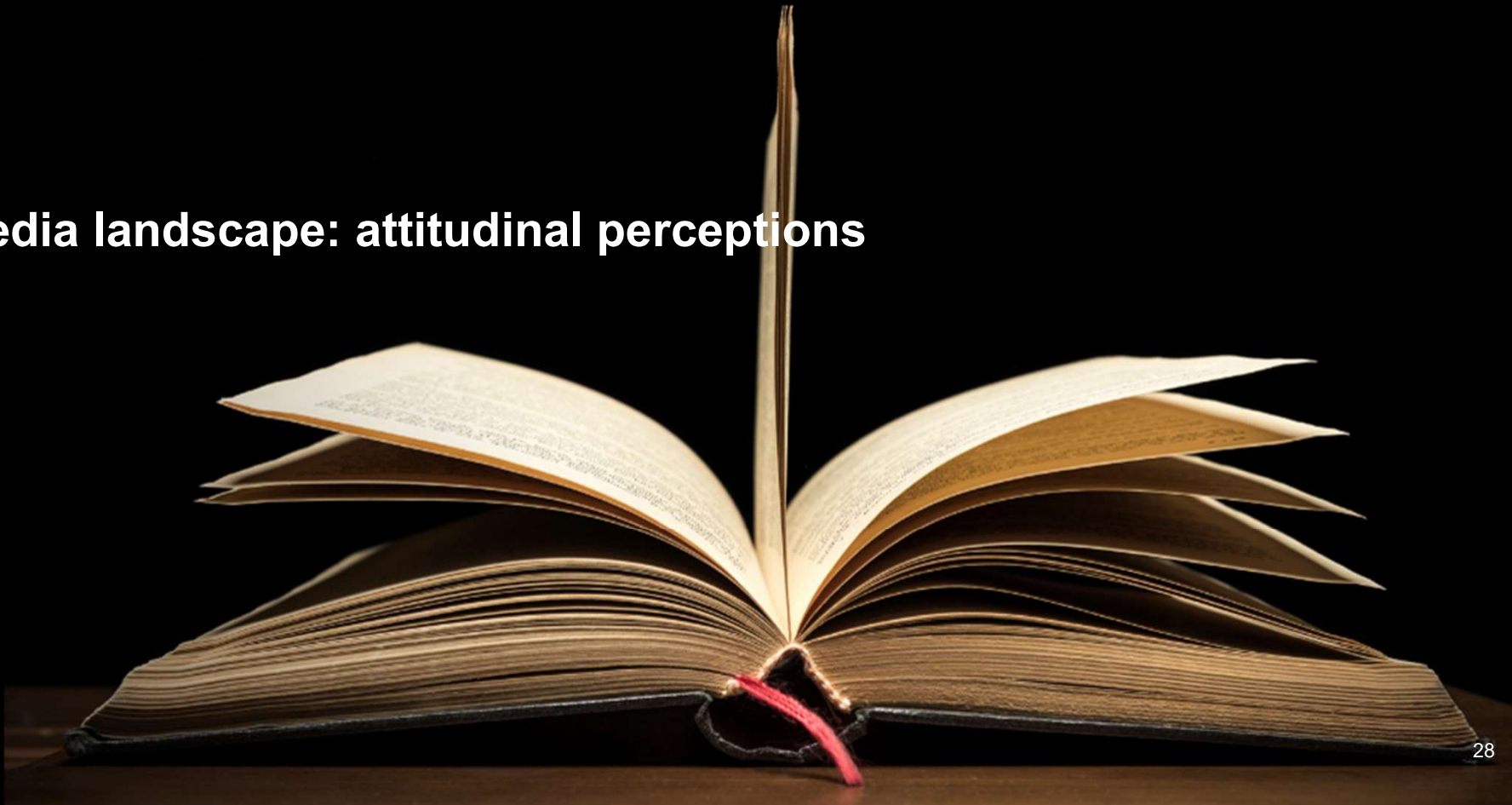
Satisfaction: Overall rating of media used

TV outperforms all other media by a long way in terms of meeting overall needs of a medium. Newspapers achieve an overall score slightly behind that of the internet

7.5	6.8	8.9	8.1	6.4	7.8	8.3
55	43	85	67	33	61	73

Newspaper   Magazine   TV   Radio   OOH   Internet   Social media

Legend:
- ■ T3B Perfect
- ■ 5-7
- ■ B3B Terrib;e

KANTAR TNS
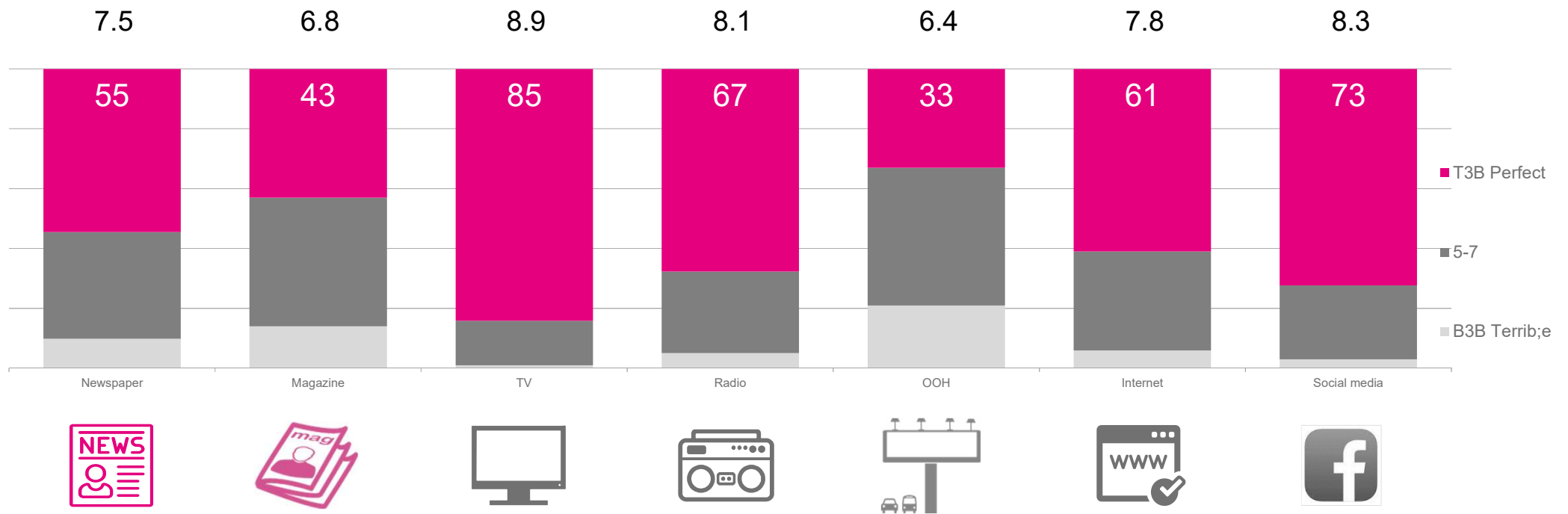
Which consumers are most satisfied with newspapers? (Average = 55% T3B rating)

Asians, older consumers and Influencers are most satisfied currently with newspapers

Metro area:

Gauteng	57
Cape Town	46
Durban	62
Eastern Cape	37
Bloemfontein*	63

Gender:

57%   52%

Race:

A	B	W	C
64%	57%	56%	39%

Age

15-24 years	25-34 years	35-49 years	50+ years
45	54	60	60
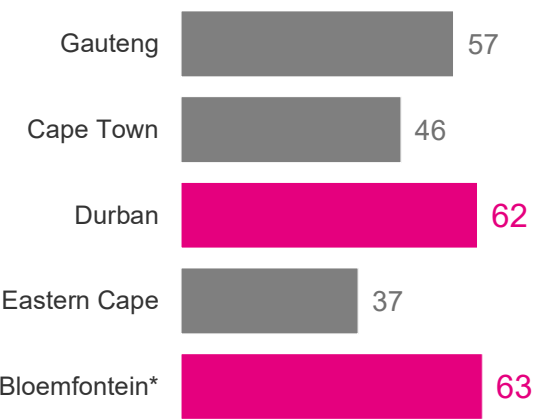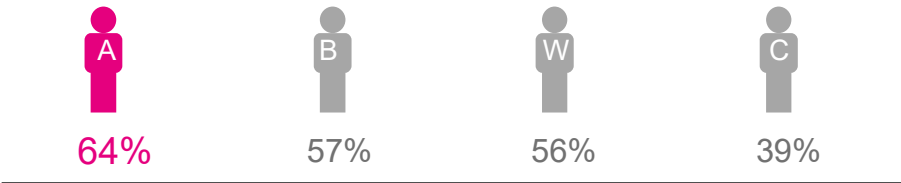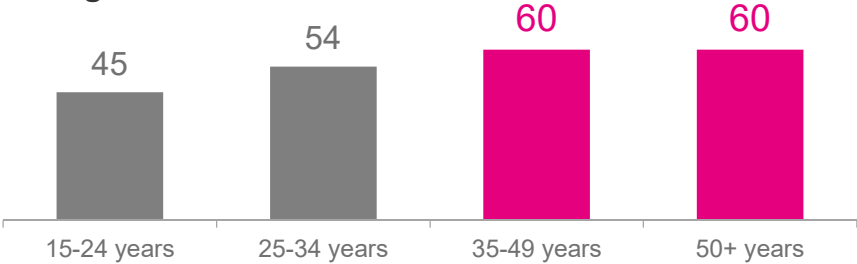
Influencer:

Yes	No
70%	48%

Language:

Tsonga*	Sepedi	Zulu	Xhosa	Setswana	Afrikaans	Sesotho	English
67	61	57	55	53	52	52	51

SEM:
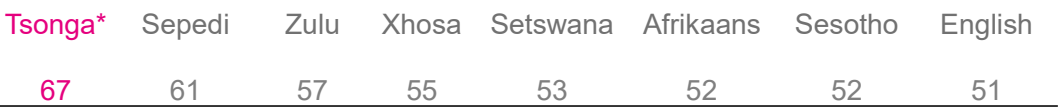
SEM 1-5	SEM 6-7	SEM 8-10
57%	54%	54%

Caution: small base size (n=30-49)

KANTAR TNS

Which consumers are most satisfied with magazines? (Average = 43% T3B rating)

Black and White consumers, Influencers and SEM 6-7 give the highest ratings for magazines

Metro area:
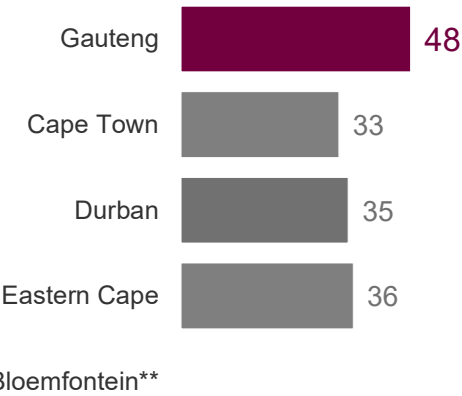
Metro	Value
Gauteng	48
Cape Town	33
Durban	35
Eastern Cape	36
Bloemfontein**	

Gender:

45%   40%

Race:

B	W	A	C
45%	44%	38%	33%

Age

15-24 years	25-34 years	35-49 years	50+ years
42	42	44	43

Influencer:

Yes	No
58%	35%

Language:

Sepedi	Setswana	Xhosa	Afrikaans	Zulu	Sesotho	English
54	52	48	45	41	38	36

SEM:

SEM 1-5	SEM 6-7	SEM 8-10
41%	46%	41%

KANTAR TNS

Caution: small base size (n=30-49)
**Base size too small for analysis
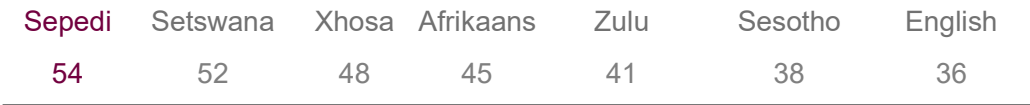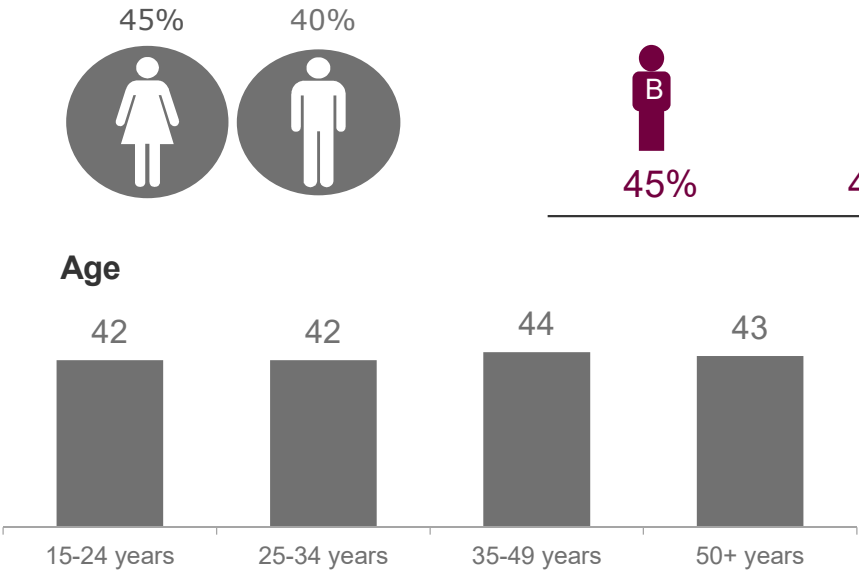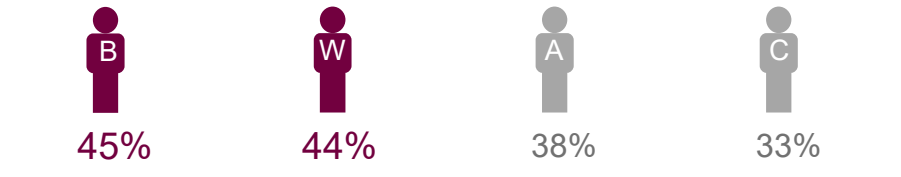
Overall rating of media on when a 'deeper understanding' is required

Ratings echo overall ratings with very little difference between the two questions

7.5	6.8	8.9	8.1	6.4	7.8	8.3
57	43	85	68	36	61	71

Legend:
- ■ T3B Perfect
- ■ 5-7
- ■ B3B Terrib;e

Newspaper · Magazine · TV · Radio · OOH · Internet · Social media

KANTAR TNS
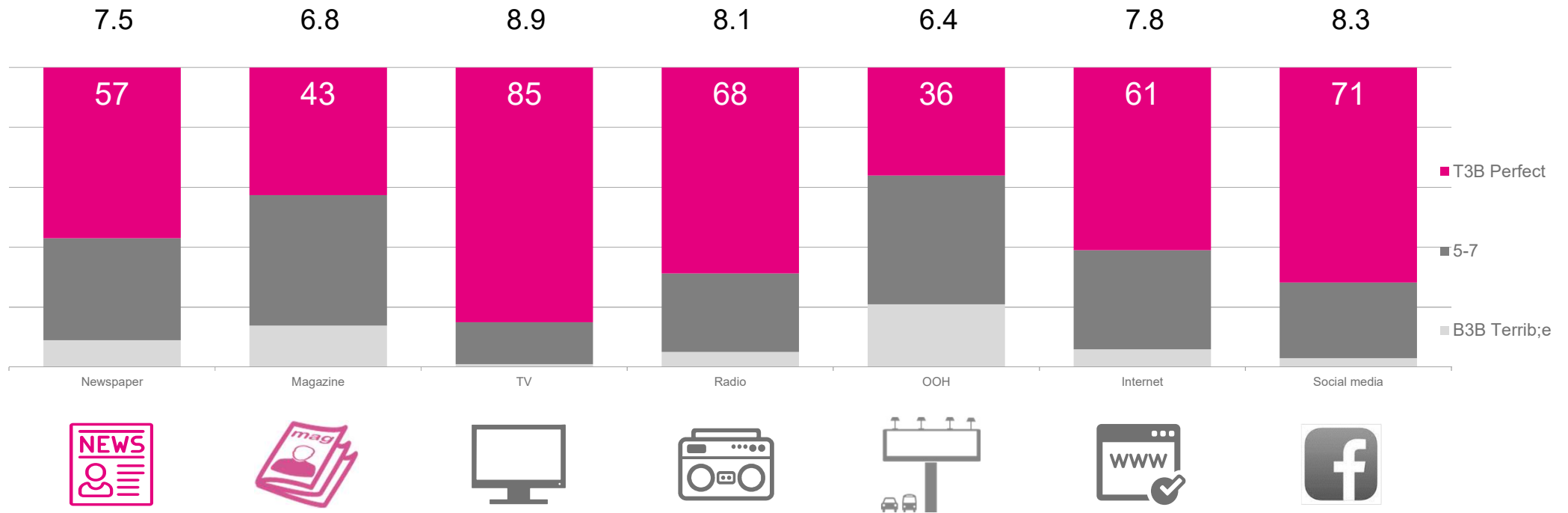
Which consumers see newspapers as meeting needs for a deeper understanding? (Average = 57% T3B rating)

Interestingly, lower SEM's gave slightly higher ratings to newspapers on this dimension than did higher SEM's

Metro area:

Gauteng	59
Cape Town	47
Durban	62
Eastern Cape	46
Bloemfontein*	63

Gender:

59%   55%

Race:

A	B	W	C
71%	58%	56%	46%

Age

15-24 years	25-34 years	35-49 years	50+ years
49	54	62	63

Influencer:

Yes	No
70%	51%

Language:

Tsonga*	Sepedi	Zulu	English	Xhosa	Afrikaans	Sesotho	Setswana
79	64	59	57	55	53	51	48

SEM:

SEM 1-5	SEM 6-7	SEM 8-10
62%	56%	54%

KANTAR TNS

Caution: small base size (n=30-49)
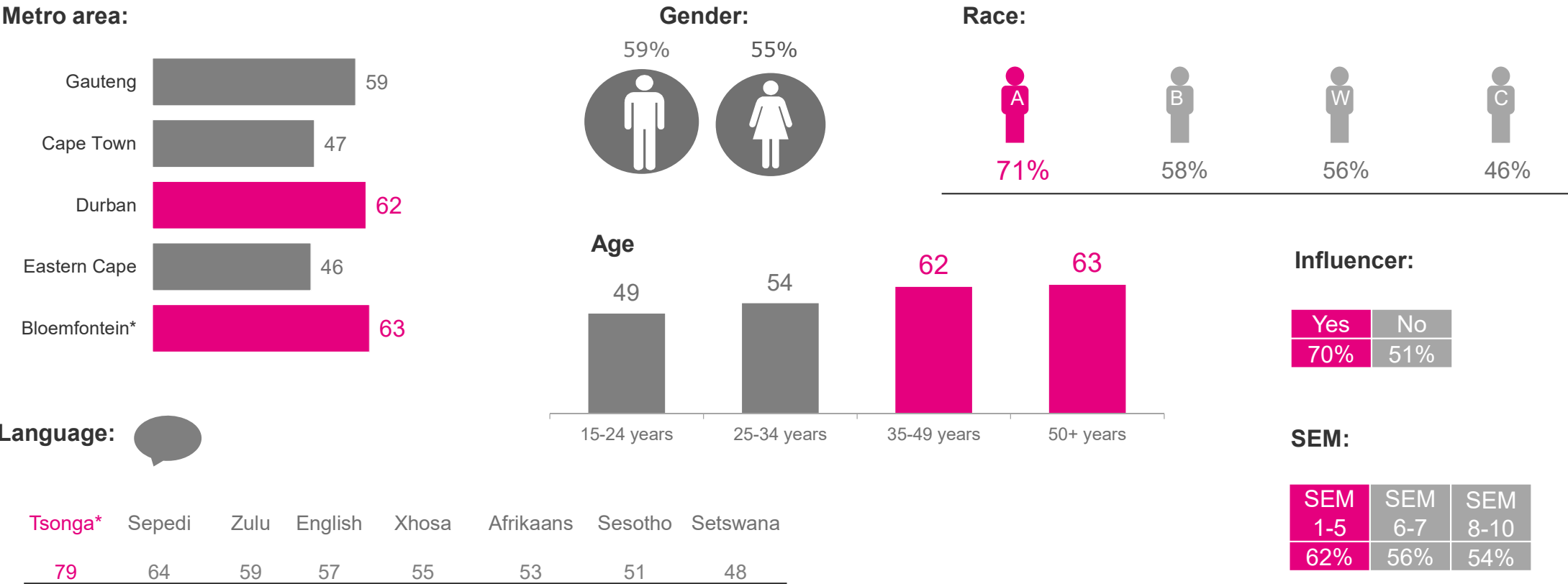
Which consumers see magazines as meeting needs for a deeper understanding? (Average = 43% T3B rating)

Gauteng residents, White, 25-34 year olds, women and Influencers assign higher ratings than their sample counterparts

Metro area:
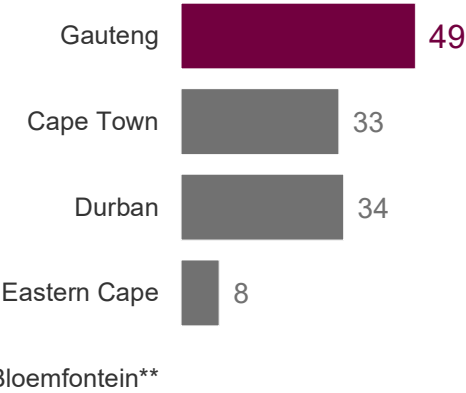
Gauteng	49
Cape Town	33
Durban	34
Eastern Cape	8
Bloemfontein**	

Gender:

46%   39%

Race:

W	A	B	C
47%	46%	44%	29%

Age

15-24 years	25-34 years	35-49 years	50+ years
36	46	43	43

Influencer:

Yes	No
55%	37%

Language:

Sepedi	Setswana	Afrikaans	Xhosa	Sesotho	Zulu	English
53	52	45	44	42	41	38

SEM:

SEM 1-5	SEM 6-7	SEM 8-10
44%	43%	42%

KANTAR TNS

Caution: small base size (n=30-49)
**Base size too small for analysis
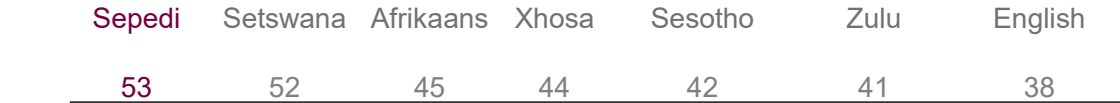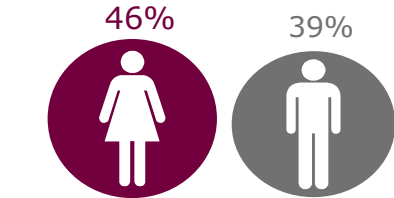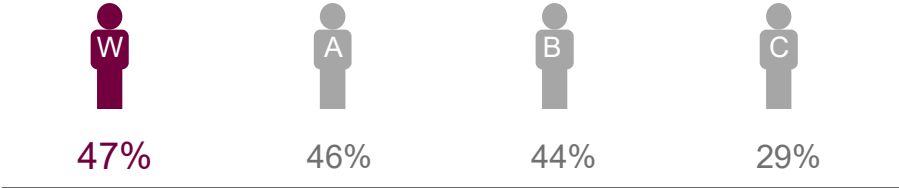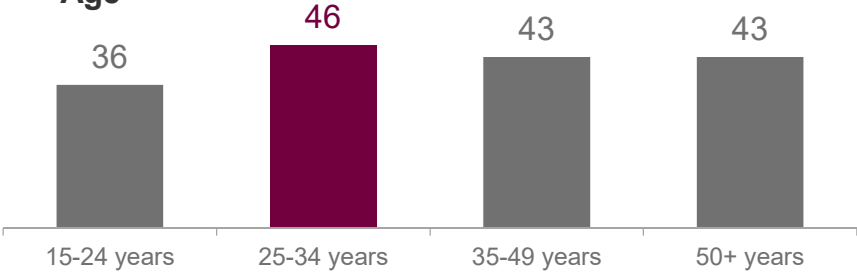
Media imagery

The 34 statements were asked across two batteries – Media association and advertising association:

Strand	Dimensions	Specific Measure		
Relevance	Identification/personal connection Personal relevance	Ideal media Variety of content	➡	Media
Trust	Trustworthiness/reliability/accuracy Bond/proximity Consistency	Trust it to always provide reliable info; Info is always believable; Operates in ethical manner/best interest at heart n/a n/a	➡	Media
Mindset & Attention	Mindset Attention	Spend quality time; Look forward to it; Enjoy sharing with family/friends Pay close attention/not distracted;	➡	Media
Advertising is integral part	Visibility/attention Credibility Enjoyment Relevance/usefulness Avoidance/irritation Clutter	Notice/pay attention to ads Trust the advertising Like the ads; Advertising is entertaining Advertising is relevant/useful; Able to only look at advertising of interest Advertising is irritating Just enough ads to not get annoyed	➡	Advertising
Prompts action	Transaction/brand contact Word-of-mouth Inspiration Research	Bought/used product/service as result of advertising; Visited/store outlet result of seeing advertising Discussed brand/product after seeing advertising; Discussed advertising seen/heard n/a Looked for more info about product/brand; Allows price comparison	➡	Advertising
Fulfills needstate	Information/'feed me' Stimulation Entertainment Escapism/relaxation Social currency Timeout/my time/bonus time	Best way to learn and remember; Makes you better informed than others; Remember things from it; Provides info to make best purchase decision Makes you think/inspires you Fun and entertaining Enjoy it while doing other things Connects you with other people Engage when want time on your own; Engage at own pace and in own time	➡	Media

Drivers of the ideal media type

The 'ideal' media type must be believable, be one that is easy to remember from and that one looks forward to engaging with, and must be fun and entertaining

High

Ideal media type
Info is always believable
Remember things from it
Look forward to it
Fun and entertaining

- -

Moderate

Spend quality time
Best way to learn and remember
Makes you think/inspires you
Makes you better informed than others
Engage when want time on your own
Operates in ethical manner/best interest at heart
Pay close attention/not distracted
Engage at own pace and in own time
Variety of content

- -

Lower

Trust it to always provide reliable info
Enjoy sharing with family/friends
Connects you with other people
Enjoy it while doing other things

Media attributes association: top drivers

Newspapers perform relatively well on most of the top drivers, but fall down on not being 'ideal' or being 'fun & entertaining'

Ideal media type
Info is always believable
Remember things from it
Look forward to it
Fun and entertaining

High

Moderate

Lower

Newspapers
Magazines
TV
Radio
OOH
Internet
Social media

KANTAR TNS

Media attributes association: middle drivers

Strongest performing attributes in the middle tier appear in **information** dimension: better informed, best way to learn and remember; and **stimulation** dimension: make you think and inspire

High

Moderate

Lower

Ideal media type
Info is always believable
Remember things from it
Look forward to it
Fun and entertaining
Spend quality time
Best way to learn and remember
Makes you think/inspires you
Makes you better informed than others
Engage when want time on your own
Operates in ethical manner/best interest at heart
Pay close attention/not distracted
Engage at own pace and in own time
Variety of content

- Newspapers
- Magazines
- TV
- Radio
- OOH
- Internet
- Social media

Newspapers' weakest performance on 'quality time'

KANTAR TNS

Media attributes association

Being able to trust the reliability of information provided is another newspaper strength – though of surprisingly low importance to consumers

High
- Ideal media type
- Info is always believable
- Remember things from it
- Look forward to it
- Fun and entertaining

Moderate
- Spend quality time
- Best way to learn and remember
- Makes you think/inspires you
- Makes you better informed than others
- Engage when want time on your own
- Operates in ethical manner/best interest at heart
- Pay close attention/not distracted
- Engage at own pace and in own time
- Variety of content

Lower
- Trust it to always provide reliable info
- Enjoy sharing with family/friends
- Connects you with other people
- Enjoy it while doing other things

Legend:
- Newspapers
- Magazines
- TV
- Radio
- OOH
- Internet
- Social media

0 10 20 30 40 50 60 70 80 90 100

KANTAR TNS

What is each media type known for?

Each media type is known for slightly different aspects
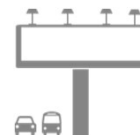
Newspaper	Magazine	TV	Radio	Billboard	Website	Facebook
Info is always believable	Remember things from it	Remember things from it	Enjoy it while doing other things	Info is always believable	Makes you better informed than others	Connects you with other people
Trust it to always provide reliable info	Best way to learn and remember	Fun and entertaining	Info is always believable	Remember things from it	Engage at own pace and in own time	Fun and entertaining
Remember things from it	Info is always believable	Info is always believable	Trust it to always provide reliable info	Trust it to always provide reliable info	Best way to learn and remember	Engage at own pace and in own time
Makes you better informed than others	Variety of content	Trust it to always provide reliable info	Fun and entertaining	Best way to learn and remember	Makes you think/inspires you	Engage when want time on your own
Best way to learn and remember	Engage at own pace and in own time	Look forward to it	Remember things from it		Look forward to it	Spend quality time
	Makes you think/inspires you		Operates in ethical manner/best interest at heart		Variety of content	
	Engage when want time on your own					

Media association perceptions map

ENJOYMENT

- Media types are largely differentiated across these broad dimensions – with the connection/authority dimension explaining most of the positioning of the media types

AUTHORITY

CONNECTION

Axis 1: 56%

LEARNING

Axis 2: 28%

KANTAR TNS

Media association perceptions map

ENJOYMENT

Enjoy it while doing other things

◆ **RADIO**

■ Fun and entertaining

Enjoy sharing with family/friends

Operates in ethical manner/best interest at heart

◆**TV**

AUTHORITY

Info is always believable

Ideal media type

Spend quality time

◆**OOH**

SOCIAL MEDIA ◆

CONNECTION

Look forward to it

Connects you with other people

Axis 1: 56%

Print media's territory:

Trust it to always provide reliable info

Remember things from it

Makes you think/inspires you

Pay close attention/not distracted

Makes you better informed than others

INTERNET ◆

Engage when want time on your own

Variety of content

◆ **MAGAZINES**

Engage at own pace and in own time

Best way to learn and remember

◆ **NEWSPAPERS**

LEARNING

Axis 2: 28%

KANTAR TNS

42

Drivers of the ideal medium for advertising

The 'ideal' media type for advertising must be one in which the ads catch attention, has relevant and enjoyable advertising and contains advertising that can be trusted

High
- Ideal medium
- Notice/pay attention to ads
- Advertising is relevant/useful
- Like the ads
- Trust the advertising

Moderate
- Provides info to make best purchase decision
- Advertising is entertaining
- Able to only look at advertising of interest
- Discussed advertising seen/heard
- Discussed brand/product after seeing advertising

Lower
- Bought/used product/service as result of advertising
- Looked for more info about product/brand
- Allows price comparison
- Visited/store outlet result of seeing advertising
- Just enough ads to not get annoyed

KANTAR TNS

Advertising attributes association

Newspaper ads and leaflets/inserts are perceived similarly by consumers – relevance and trust are big strengths

High
- Ideal medium
- Notice/pay attention to ads
- Advertising is relevant/useful
- Like the ads
- Trust the advertising

Moderate
- Provides info to make best purchase decision
- Advertising is entertaining
- Able to only look at advertising of interest
- Discussed advertising seen/heard
- Discussed brand/product after seeing advertising

Lower
- Bought/used product/service as result of advertising
- Looked for more info about product/brand
- Allows price comparison
- Visited/store outlet result of seeing advertising
- Just enough ads to not get annoyed

Legend:
- Newspaper ads
- Magazine ads
- TV ads
- Radio ads
- Ads on Internet not social media
- Ads on social media (e.g. Facebook)
- Inserts, leaflets and pamphlets

x-axis: 0 10 20 30 40 50 60 70 80 90 100

KANTAR TNS

What is advertising in each media type known for?

Each media type is known for slightly different aspects

NEWS

Allows price comparison

Trust the advertising

Advertising is relevant/useful

Provides info to make best purchase decision

Magazine

Trust the advertising

Able to only look at advertising of interest

Advertising is relevant/useful

Ideal medium

Sale/Catalogue

Allows price comparison

Provides info to make best purchase decision

Visited/store outlet result of seeing advertising

Advertising is relevant/useful

TV

Advertising is entertaining

Trust the advertising

Notice/pay attention to ads

Advertising is relevant/useful

Like the ads

Radio

Trust the advertising

Ideal medium

Advertising is relevant/useful

Advertising is entertaining

Web

Looked for more info about product/brand

Advertising is relevant/useful

Able to only look at advertising of interest

Provides info to make best purchase decision

Trust the advertising

Facebook

Discussed advertising seen/heard

Advertising is entertaining

Media advertising association map

CONTROL

ADS ON SOCIAL MEDIA   ◆ ADS ON INTERNET

◆ ADS ON YOUTUBE VIDEOS

Able to only look at
advertising of interest   ■ Looked for more info about
product/brand

Allows price comparison

Discussed advertising
seen/heard   Provides info to make best
purchase decision

◆ CINEMA ADS

■ Advertising is entertaining   ■ Like the ads   Discussed brand/product
after seeing advertising   ◆ INSERTS, LEAFLETS,
PAMHPLETS

Notice/pay attention to ads

ENTERTAINMENT   INFORMATION

◆ TV ADS   ◆ MAGAZINE ADS   ◆ NEWSPAPER ADS   Axis 1: 69%

Bought/used product/service
as result of advertising

Just enough ads to not get
annoyed   Visited/store outlet result of
seeing advertising

■ Ideal medium

Advertising is relevant/useful

◆ OOH ADVERTISING

◆ RADIO ADS

■ Trust the advertising

TRUST

Axis 2: 12%

KANTAR TNS

46

Broad media landscape: attitudinal perceptions summary

What have we learned so far?

- Overall satisfaction with newspapers and magazines is lower than for the more frequently consumed media
  - Those expressing highest satisfaction with **newspapers** are: Influencers, Durban and Bloemfontein residents, Asian, 35+ years and Tsonga speakers; those happiest with **magazines** are: Influencers, Black, White, Gauteng, SEM 6-7 and Sepedi speakers

- Ratings of media types on when a 'deeper understanding' is required echo overall satisfaction ratings, with newspapers achieving similar ratings to internet

- The 'ideal' media type must be believable, be one that is easy to remember from and that one looks forward to engaging with, and must be fun and entertaining
  - Both newspapers and magazines perform relatively well on these top drivers but fall down on not being perceived as ideal media or being fun & entertaining – both of which constitute TV's domain

- When considered in an overall competitive context, print media's relative differentiation sits in a territory related to reliable information and learning and recall

- Aligned with this, advertising in print media, including inserts, uniquely occupies the territory of specific information provision and call to action benefits

- In both perceptual batteries, print media and broadcast media fall into opposing territories, as they are fulfilling different needstates. This then lends itself to complementary media mix planning with broadcast media filling the entertainment need

KANTAR TNS

Print engagement performance snapshot of core metrics

Attitudinal perceptions

Topic	Newspapers	Magazines	Top media
Satisfaction	7.5	6.8	8.9
Depth of information	7.5	6.8	8.9
Media positioning – Top 3	Info is always believable (39%)	Remember things from it (22%)	
	Trust it to always provide reliable info (38%)	Best way to learn and remember (22%)	
	Remember things from it (36%)	Info is always believable (20%)	
Media positioning	Allows price comparison (35%)	Trust the advertising (18%)	
	Advertising is relevant/useful (34%)	Advertising is relevant/useful (16%)	
	Trust the advertising (34%)	Able to only look at advertising of interest (16%	

KANTAR TNS.

What does this mean for the print media narrative?

Print media uniquely sits in the 'trusted information' territory

Broadcast media

Print media

Entertainment ————————————————————— Information, learning and recall
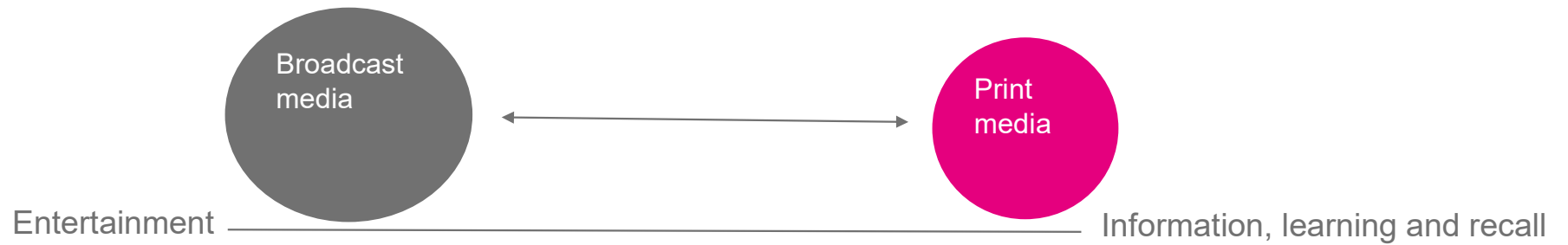
4.
The print media narrative

Print engagement performance snapshot of core metrics

Behaviour

Topic	Newspapers	Magazines	Top media
Media consumption (past month)	65%	46%	99%
Media attention	43%	33%	85%
Quality of attention	56%	50%	NEWS
Information source - Top 3	Sales/deals (48%)	Lifestyle (30%)	
	Compare prices on everyday items (47%)	Best price on electronics, cellphones, furniture, etc (20%)	
	News (44%)	More info on expensive items want to buy (19%)	

Attitudinal perceptions

Topic	Newspapers	Magazines	Top media
Satisfaction	7.5	6.8	8.9
Depth of information	7.5	6.8	8.9
Media positioning – Top 3	Info is always believable (39%)	Remember things from it (22%)	
	Trust it to always provide reliable info (38%)	Best way to learn and remember (22%)	
	Remember things from it (36%)	Info is always believable (20%)	
Media positioning	Allows price comparison (35%)	Trust the advertising (18%)	
	Advertising is relevant/useful (34%)	Advertising is relevant/useful (16%)	
	Trust the advertising (34%)	Able to only look at advertising of interest (16%	

The print media narrative

This initial in-depth look into urban South African consumers' perceptions of media engagement confirms many hypotheses about the role of reading

- Reading newspapers and magazines benefits from more **focused attention** and less distraction
  - This 'deep reading' translates into a better transfer of information to long-term **memory** and clearer **comprehension**
  - The **multi-sensory** experience of holding print media might help enrich **memory** and **recall**
  - Maintaining consistent **structures** within the print content helps consumers **navigate** and to form further memory traces

- Print media and broadcast media sit at opposite ends on a **rational/emotional spectrum**, fulfilling different sets of needstates
  - Broadcast media is **fun and entertaining**, making for an emotional connection; reading print media is **deliberate and controlled**, yielding far more rational behaviour
  - Creating an **integrated campaign** that utilises both sets of needstate fulfilment has been proven to increase ROI*

- Newspapers are the second media source behind TV for many topics of **information**, particularly for **pricing**; similarly, inserts and pamphlets are seen as the top media (behind TV's halo) for **price comparisons** and are differentiated by prompting a **call to action**
  - Clearly, consumers have come to rely on these information vehicles as critically important sources for **purchase decisions**

- Magazines' heartland is in its **varied and inspirational content**; consumers further enjoy being in **control** of reading the content and advertising on their own terms
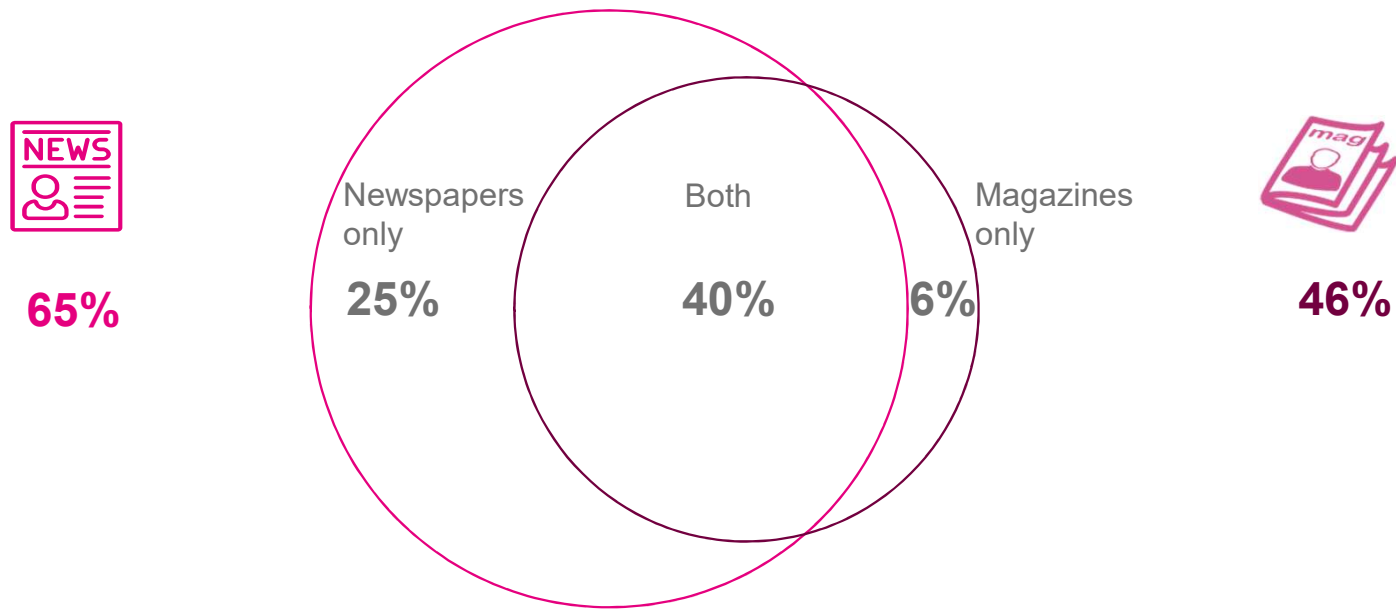
5
Additional
support:
unpacking print
media further

Past month print media profile

High overlap with newspapers and newspaper reading. Very little solo reading of magazines evident

NEWS

65%

Newspapers only

25%

Both

40%

Magazines only

6%

46%

KANTAR TNS

Profile - newspaper readers

Area

Area	Total	Read newspapers
Gauteng	58%	55%
Cape Town	19	20
Durban	14	16
E. Cape	7	6
Bloem	2	3

Age

26

Age	Total	Read newspapers
15-24 years	23%	21%
25-34 years	35	34
35-49 years	29	31
50+ years	13	14

Gender

Gender	Total	Read newspapers
Male	50%	52%
Female	50	48

Race
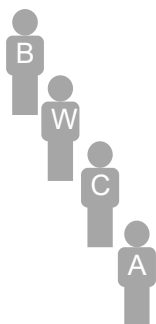
Race	Total	Read newspapers
B	69%	65%
W	15	15
C	11	14
A	5	6

Language

Language	Total	Read newspapers
IsiZulu/Zulu	28%	28%
English	19	23
IsiXhosa	16	13
Afrikaans	14	14
Sesotho	11	10
Sepedi	7	7
Setswana	5	5

SEM

SEM	Total	Read newspapers
SEM 1-5	25%	24%
SEM 6-7	35	33
SEM 8-10	40	43

Profile- magazine readers

Area

	Total	Read magazines
Gauteng	58%	58%
Cape Town	19	19
Durban	14	14
E. Cape	7	7

Age

26

	Total	Read magazines
15-24 years	23%	23%
25-34 years	35	35
35-49 years	29	30
50+ years	13	12

Gender

	Total	Read magazines
	50%	45%
	50	55

Race
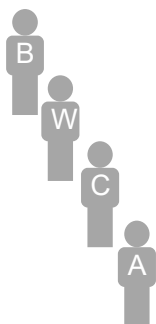
	Total	Read magazines
B	69%	64%
W	15	17
C	11	14
A	5	5

Language

	Total	Read magazines
IsiZulu/Zulu	28%	28%
English	19	25
IsiXhosa	16	13
Afrikaans	14	14
Sesotho	11	8
Sepedi	7	7
Setswana	5	5

SEM

	Total	Read magazines
SEM 1-5	25%	22%
SEM 6-7	35	31
SEM 8-10	40	47

Print occasions

The majority read print publications once, with daily newspapers having the highest number of pick ups

Daily newspapers	Weekend newspapers such as the Sunday Times, Rapport or City Press	Weekly magazines such as Drum, You or Move	Monthly magazines
11 / 34 / 55	6 / 23 / 71	10 / 24 / 66	9 / 30 / 61

■ Once　　■ 2-3 times　　■ 4 or more times
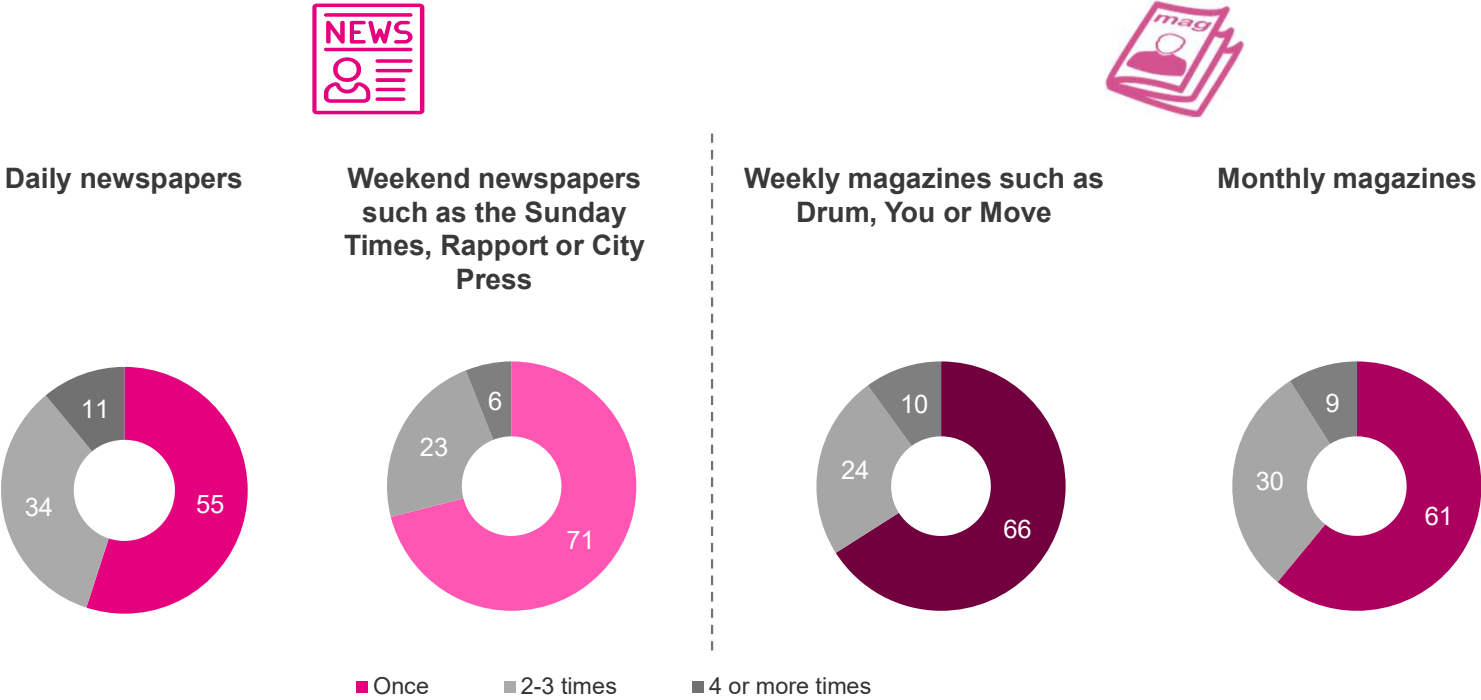
Daily newspaper publications
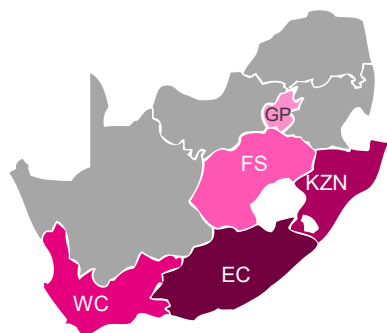
	Total	Bloemfontein*	Cape Town	Durban	East London**	Port Elizabeth
	Daily newspapers	Daily Sun/ Die Volksblad	Die Son/ Daily Voice/ Cape Argus	Isolezwe/ Daily News	Daily Dispatch/ Daily Sun	Herald/ Daily Sun
Once	55	54	58	51	52	66
2-3 times	34	46	34	36	31	26
4 or more times	11	-	8	13	17	8

	E. Rand	Jhb	S. Rand*	Soweto	PTA	W. Rand
		Daily Sun/ Sowetan/ the Star			Daily Sun/ Sowetan/ Pretoria News	Daily Sun/ Sowetan/ Die Beeld
Once	51	55	40	59	56	54
2-3 times	38	30	49	30	34	34
4 or more times	11	15	11	11	10	12

Caution: small base size (n=30-49)
**Caution: Very small base size (20-29)

Monthly magazine publications

Total monthly magazines (n=1192)

9
30
61

■ Once ■ 2-3 times ■ 4 or more times
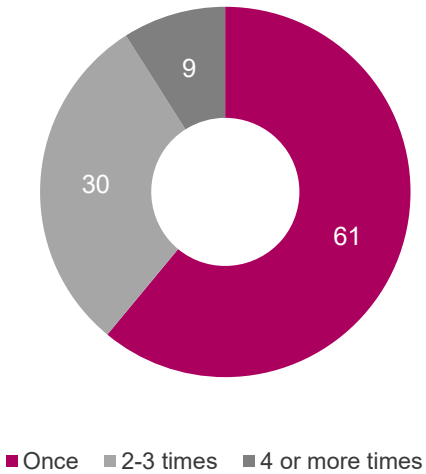
Monthly magazines such as True Love, Bona or Cosmopolitan (n=646)

9
33
58
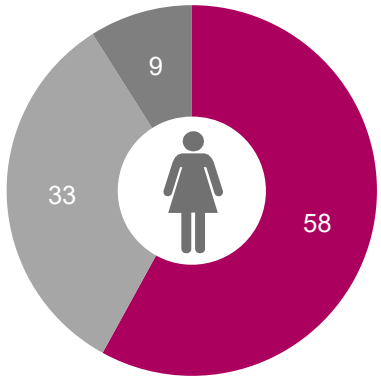
Monthly magazines such as Kick Off, Men's Health or Car Magazine (n=546)

8
26
66
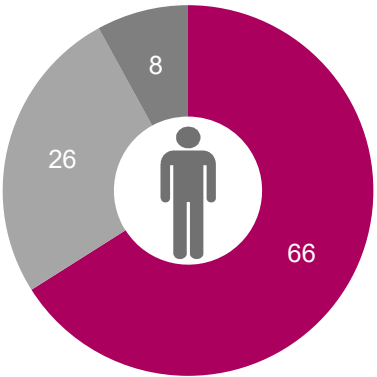
6.
Additional support: consumer segments

Media behaviour segments

In order to understand the media landscape better, we conducted a cluster analysis on past 6 months media usage. Four segments were derived – split by media intensity

4 **Internet Poor**

Intense on radio (and TV)

1 **Media Intense**

Intense on all media (i.e. accessed daily – including magazines and newspapers)

3 **Social media savvy**

Intense on social media, internet and radio – specifically disengaged with Magazines and Newspapers

2 **Media Rich**

Intense on everything except magazines and newspapers where the group is only engaged once a week, or once a month

25

17

17

41

Segmentation profile

%	Total	Media Intense	Media Rich	Social media savvy	Internet poor (radio prime)
Area					
Gauteng	58	56	59	60	53
Cape Town	19	23	15	17	20
Durban	14	14	16	15	12
Eastern Cape	7	4	9	6	10
Bloem	2	3	1	2	5
Age					
15-24 years	23	21	28	30	12
25-34 years	35	40	39	38	25
35-49 years	29	30	25	25	36
50+ years	13	9	8	7	27
Gender					
Male	50	58	43	51	48
Female	50	42	57	49	52
Race					
Black	69	58	65	71	76
White	15	19	18	17	5
Coloured	11	16	12	8	13
Asian	5	7	5	4	6
Language					
IsiZulu/Zulu	28	21	29	30	30
English	19	29	24	18	12
IsiXhosa	16	12	11	17	20
Afrikaans	14	14	14	14	14
Sesotho	11	9	9	12	13
Sepedi	7	9	8	5	6
Setswana	5	6	5	4	5
SEM					
SEM 1-5	25	15	23	24	37
SEM 6-7	35	30	32	37	37
SEM 8-10	40	55	45	39	26

Significantly different vs Total

Media behaviour segments

How do the segments break out by demographics?
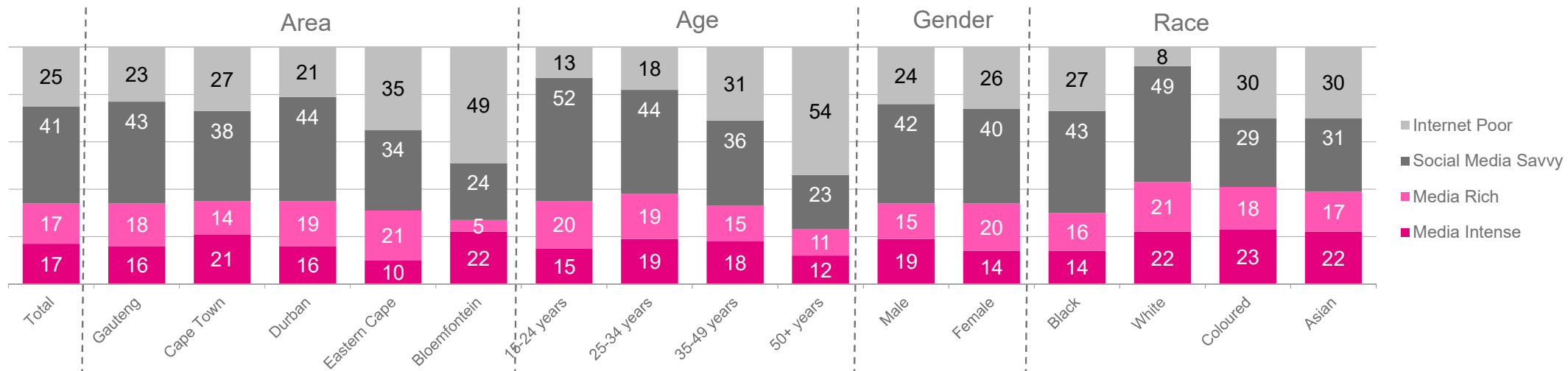
Media behaviour segments

How do the segments break out by demographics?
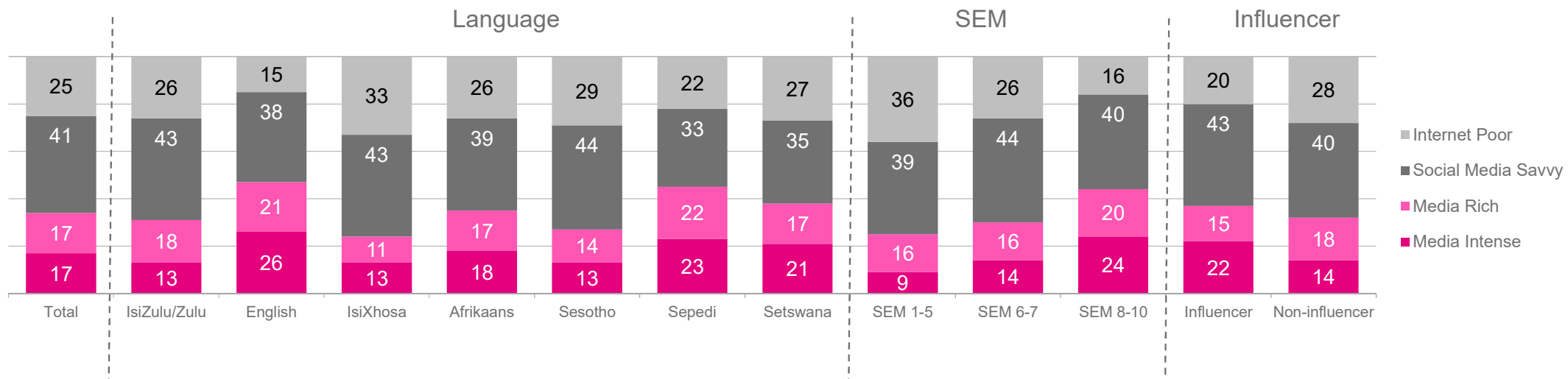
Influencer segment

Respondents rated themselves on nine statements that relate to influence. 'Influencers' were defined as those respondents answering 'perfectly describes me' to 4 or more of the statements

Describes me perfectly

Statement	Value
When I find something new that I like, I recommend it to others	35
I am wholly or partly responsible for the day to day household purchases	35
I like to be kept informed about new products and services	34
I am curious and like to think about how the world works	34
I am the main or joint decision maker when it comes to buying items like TV's, durables, furniture and cars	31
I frequently share information about stuff on social media	28
I am one of the main decision-makers at my place of work when it comes to buying products and services	24
People frequently ask me for my advice	23
I am always one of the first of my friends to try new things	23

'Describes me perfectly' to 4 or more statements = Influencer

KANTAR TNS

65

Influencer profile

	%	Total	Influencer	Non-influencer
Area	Gauteng	58	67	53
	Cape Town	19	14	21
	Durban	14	13	15
	Eastern Cape	7	5	8
	Bloem	2	1	3
Age	15-24 years	23	18	27
	25-34 years	35	36	34
	35-49 years	29	34	26
	50+ years	13	12	13
Gender	Male	50	47	52
	Female	50	53	48
Race	Black	69	73	67
	White	15	14	15
	Coloured	11	8	13
	Asian	5	5	5
Language	IsiZulu/Zulu	28	33	26
	English	19	18	20
	IsiXhosa	16	13	17
	Afrikaans	14	11	15
	Sesotho	11	11	12
	Sepedi	7	7	6
	Setswana	5	7	4
SEM	SEM 1-5	25	26	25
	SEM 6-7	35	33	36
	SEM 8-10	40	41	39

KANTAR TNS

Significantly different vs Total

Influencers

Who is most likely to be an Influencer?

Area / Age / Gender / Race chart:

- Total: 32
- Gauteng: 37
- Cape Town: 24
- Durban: 29
- Eastern Cape: 21
- Bloemfontein: 16
- 15-24 years: 24
- 25-34 years: 33
- 35-49 years: 38
- 50+ years: 30
- Male: 30
- Female: 34
- Black: 34
- White: 31
- Coloured: 24
- Asian: 31

Language / SEM chart:

- Total: 32
- IsiZulu/Zulu: 37
- English: 30
- IsiXhosa: 26
- Afrikaans: 25
- Sesotho: 31
- Sepedi: 37
- Setswana: 42
- SEM 1-5: 32
- SEM 6-7: 31
- SEM 8-10: 33

Non-Influencer / Influencer

KANTAR TNS.

Thank you

Publisher
Research
Council