

Tracking Adspend and Audiences Since Lockdown

A monthly report produced for the Industry

Sept 2020 Release





Introduction

The Covid pandemic and subsequent lockdown have had an unprecedented impact on economic activity and advertising expenditure.

This tracker aims to show a top line summary of expenditure, and where possible, audience changes with the comparable period in 2019.

We hope this helps you to contextualise your own situation and business.
Please don't hesitate to contact the PRC, should you need further information.

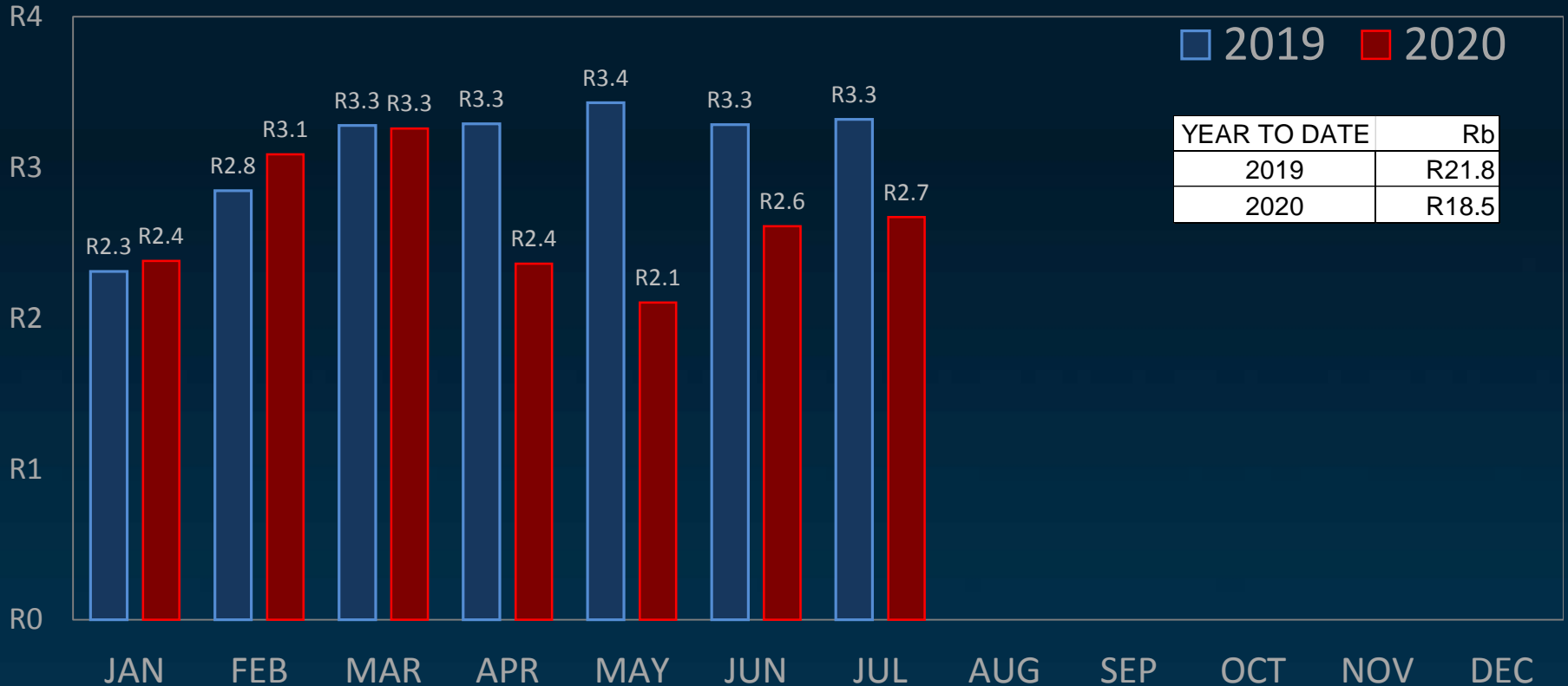
This report covers Adspend up until July 2020 and Digital & TV Audiences up to August 2020.



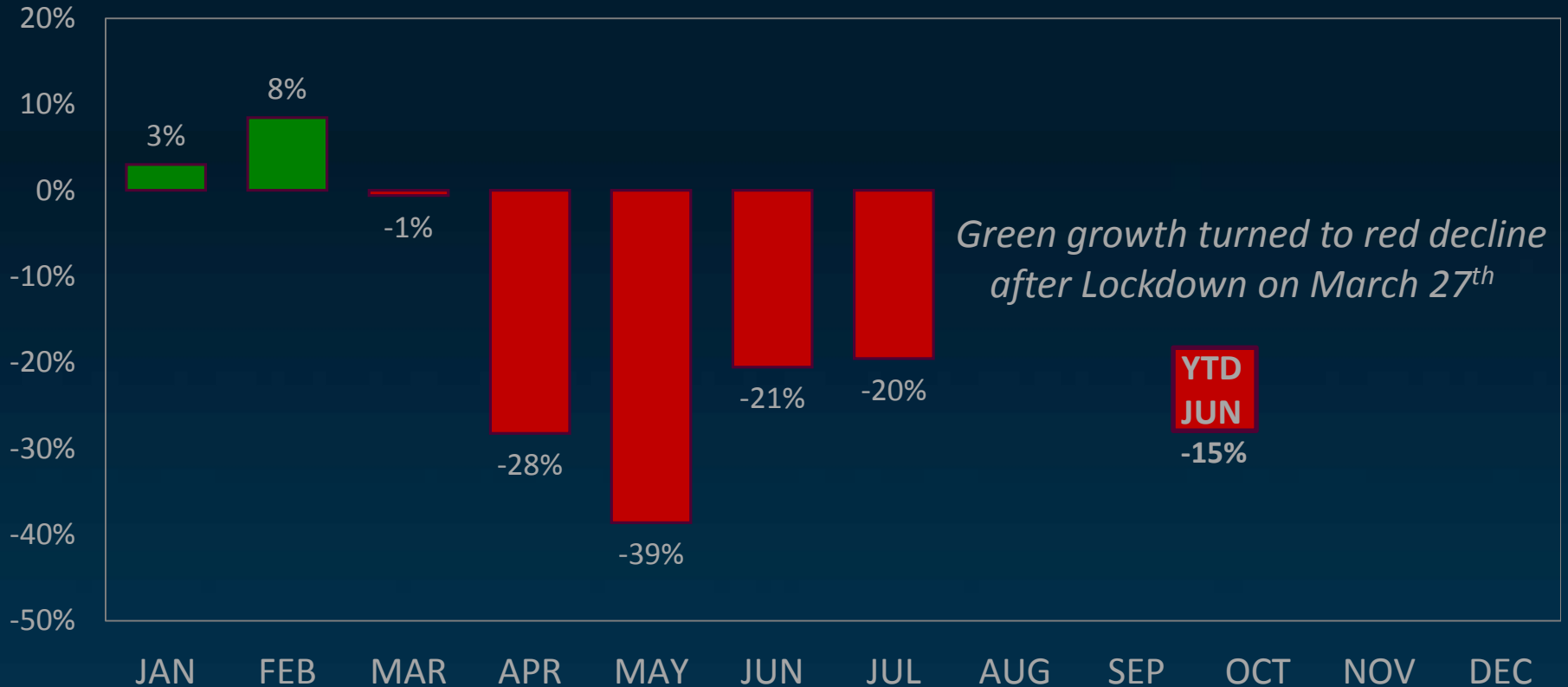
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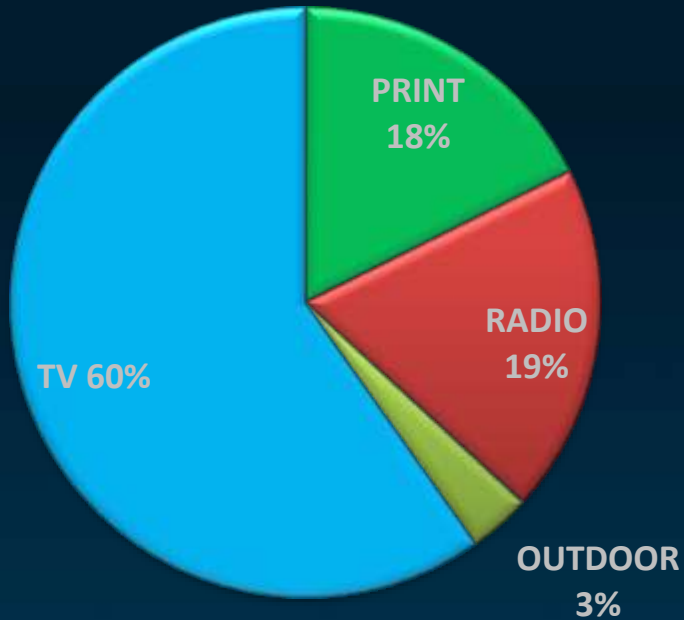
Total Adspend By Month – R Billions Year on Year



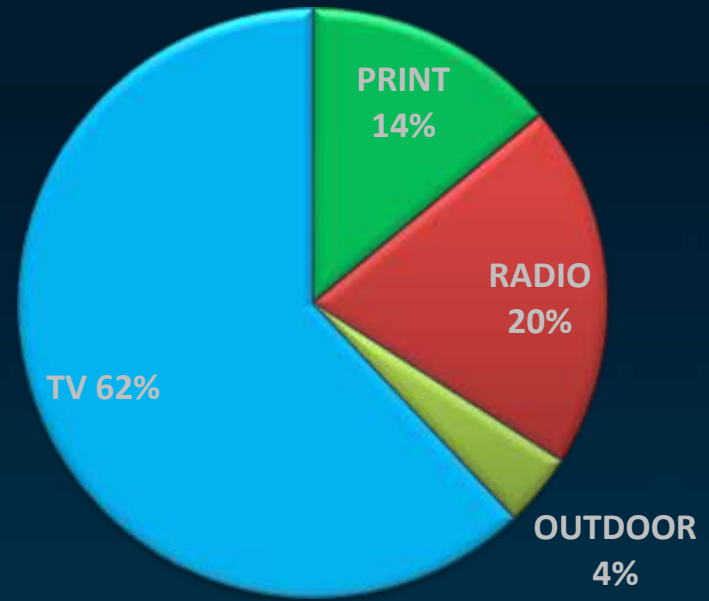
Total Adspend By Month – % Change '19 vs. '20



Adspend Share By Medium – 2019 vs. YTD JUN '20

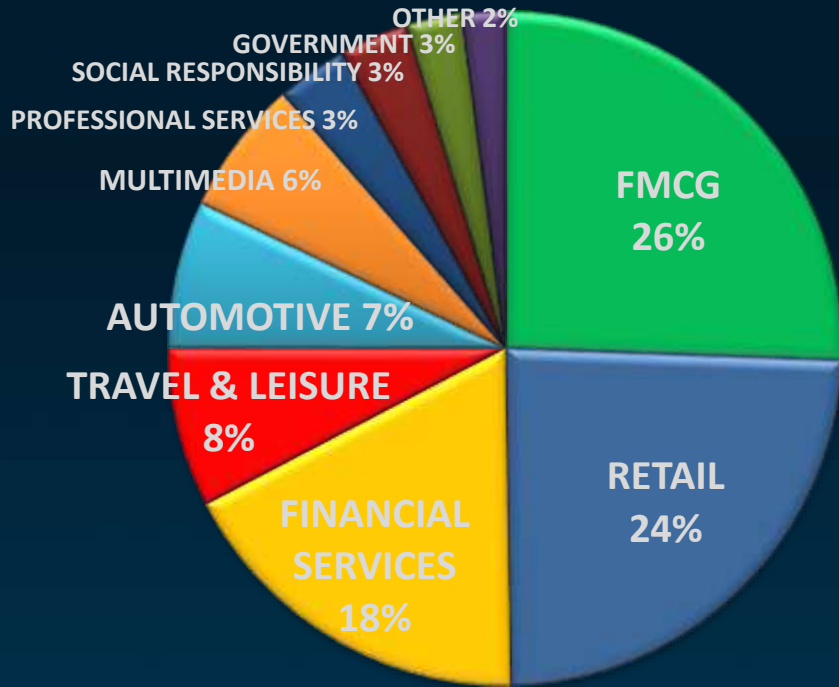


2019

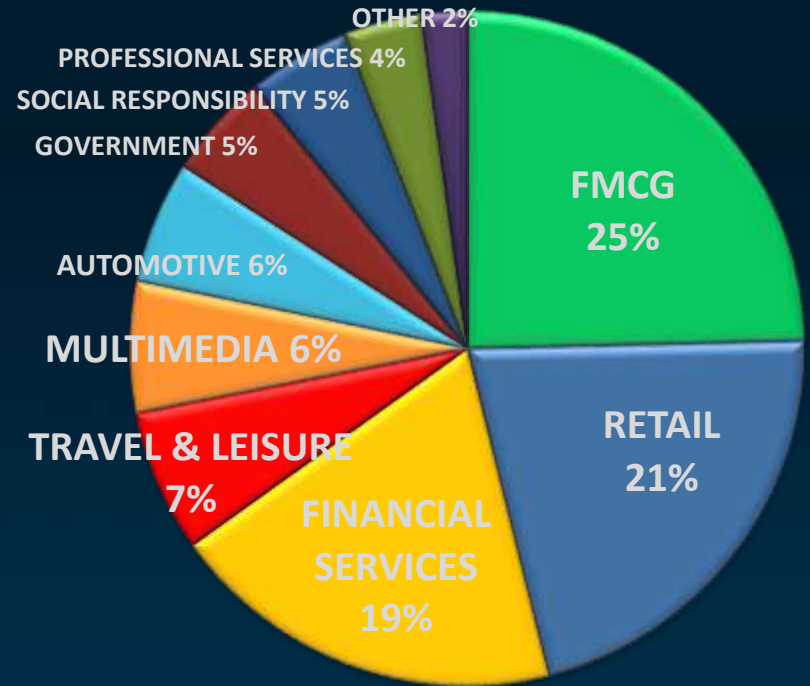


2020 YTD
JUL

Adspend Share By Category – 2019 vs. YTD JUN '20



2019



2020 YTD

JUL

Adspend By Category – % Change '19 vs. '20

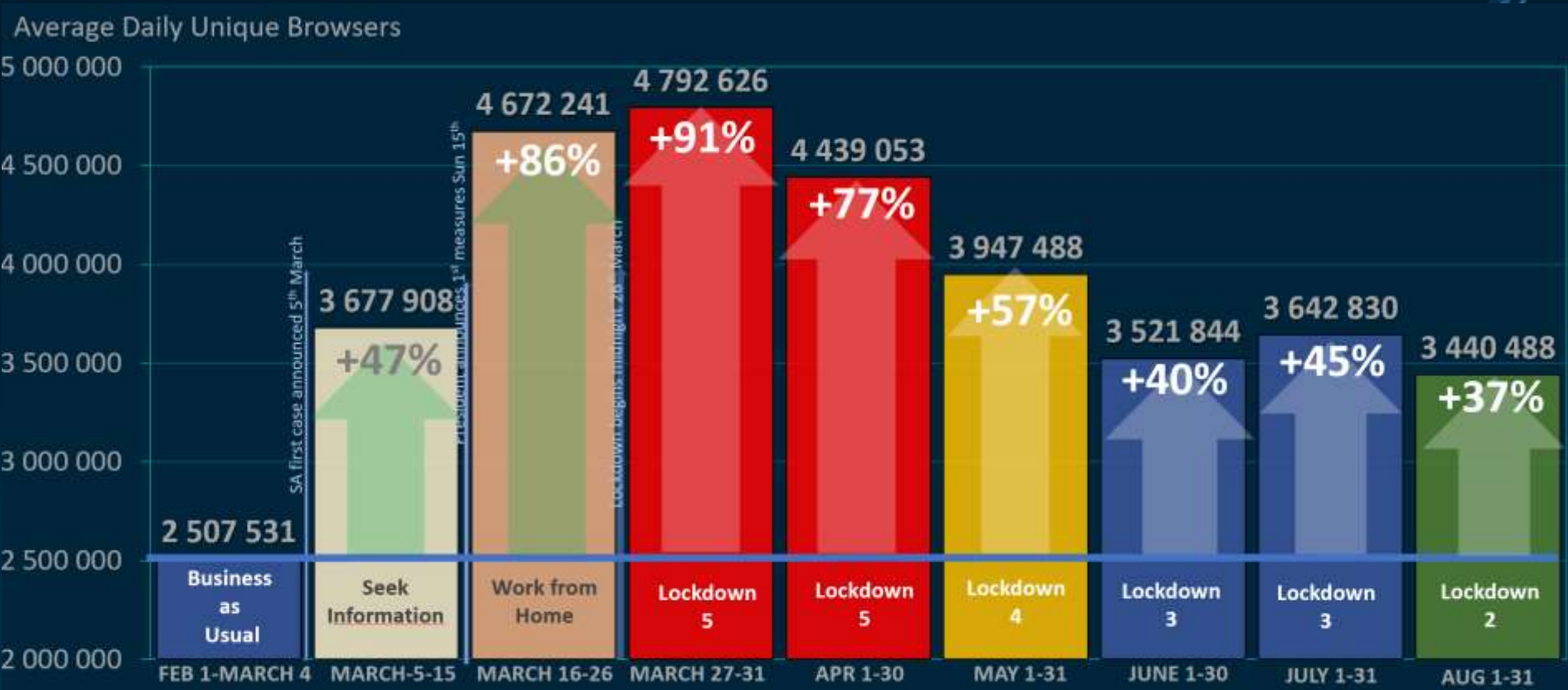
CATEGORY	JAN	FEB	MAR	APR	MAY	JUN	JUL
SOCIAL RESPONSIBILITY & WELFARE	-18%	6%	-2%	177%	85%	12%	67%
MEDIA ADVERTISING & PROMOTIONS	57%	2%	51%	-32%	-58%	42%	6%
GOVERNMENT EDUCATION & HEALTH	-23%	-4%	4%	-20%	-2%	166%	4%
BUSINESS TO BUSINESS & INDUSTRIAL	-1%	-4%	-15%	-17%	-9%	8%	-15%
PROFESSIONAL SERVICES	-6%	13%	-3%	-29%	-24%	3%	-20%
FINANCIAL SERVICES	22%	12%	11%	-19%	-32%	-20%	-23%
FMCG -TOTAL	0%	5%	2%	-16%	-41%	-40%	-26%
RETAIL	6%	18%	-5%	-58%	-54%	-24%	-26%
MULTIMEDIA	7%	-10%	-14%	-27%	-45%	-16%	-40%
AUTOMOTIVE	-2%	-2%	0%	-58%	-73%	-49%	-42%
TRAVEL SPORT AND LEISURE	6%	13%	-12%	-53%	-42%	-13%	-79%
SMALL DISPLAY ADS	-33%	-32%	-51%	-80%	-75%	-70%	-136%

Covid – The Catalyst for Digital Transformation

News Sites have increased their monthly and daily audiences by around 37% since pre-Covid February. Average visit duration is down slightly by 9%.

MONTH	MONTHLY UB'S		DAILY UB'S		PAGE VIEWS		AVG. VISIT DURATION	
	NUMBER	INDEX	NUMBER	INDEX	NUMBER	INDEX	TIME	INDEX
FEBRUARY	30 036 778	100%	2 505 232	100%	275 093 536	100%	02:41	100%
MARCH	44 171 834	147%	4 061 428	162%	429 247 075	156%	02:47	104%
APRIL	47 015 920	157%	4 438 782	177%	429 279 079	156%	02:38	98%
MAY	43 145 663	144%	3 947 425	158%	384 065 551	140%	02:28	92%
JUNE	37 465 482	125%	3 521 949	141%	324 318 157	118%	02:35	96%
JULY	38 979 715	130%	3 642 830	145%	354 055 043	129%	02:32	94%
AUGUST	40 820 326	136%	3 440 488	137%	341 388 069	118%	02:26	91%

News Sites Audiences are 37% above Pre-Covid Level

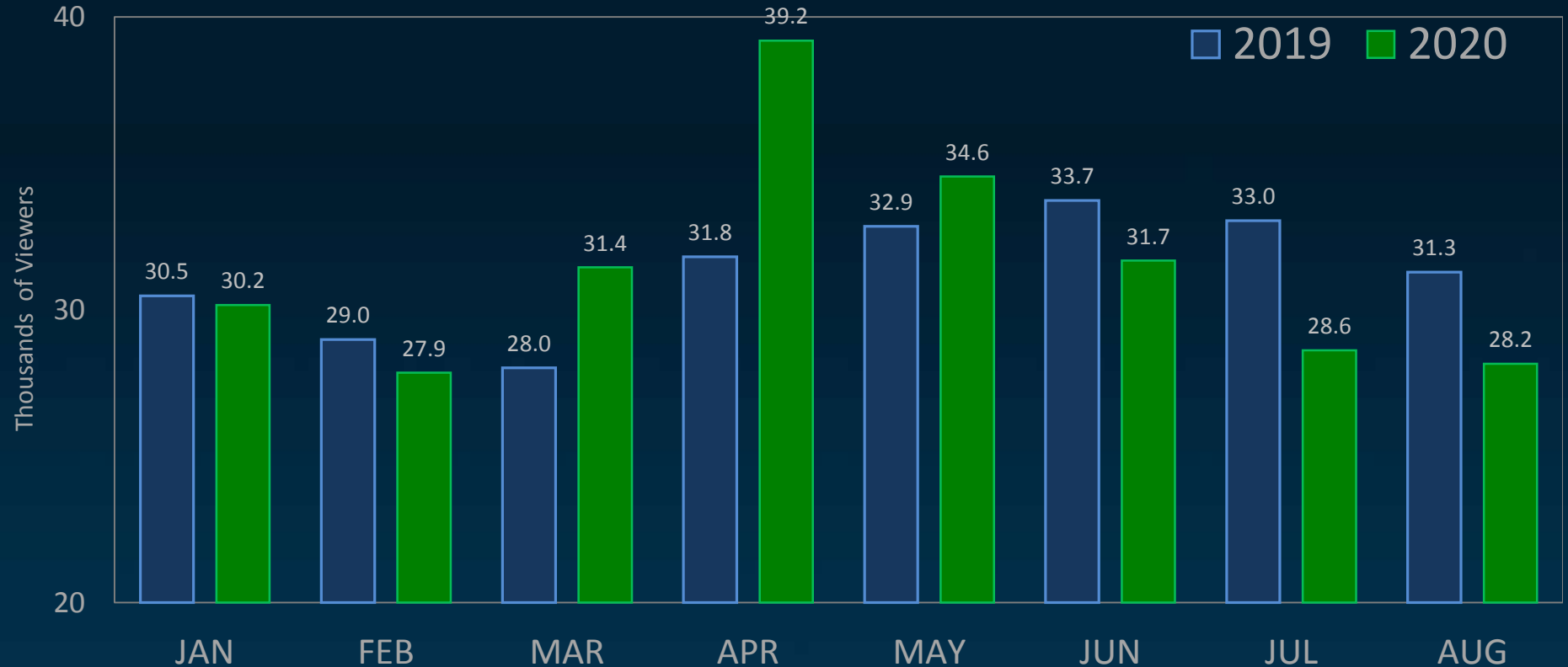


Source: IAB NarrativeData businesslive.co.za, citizen.co.za, City Press, dailymaverick.co.za, dailysun.co.za, enca.com, ewn.co.za, fin24.com, iol.co.za, maroelamedia.co.za, mg.co.za, moneyweb.co.za, msn.com, network24.com, news24.com, sowetanlive.co.za, thesouthafrican.com, timeslive.co.za



Total Average Monthly TV Audience '19 vs. '20

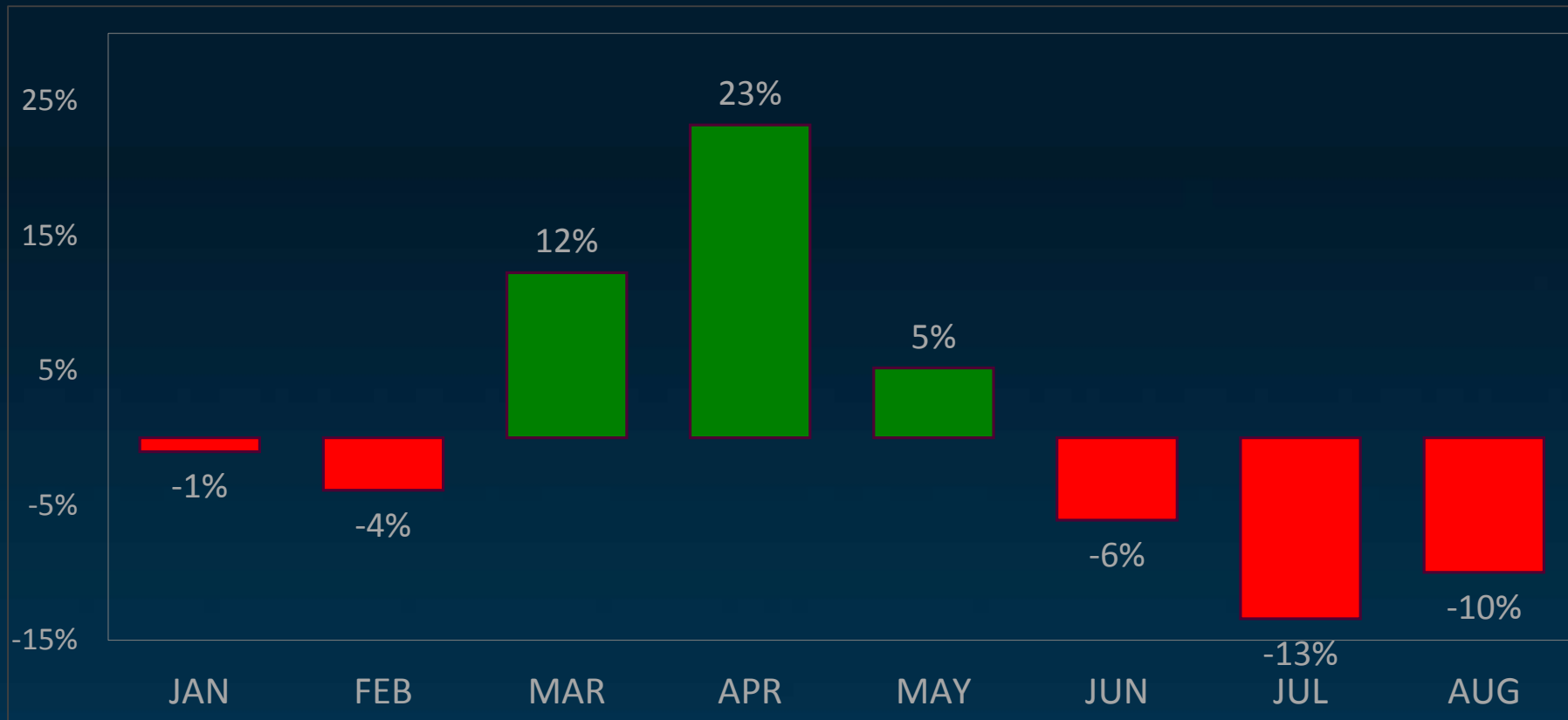
TOTAL ADULTS (15 Years +)



Source: BRC TAMS 2019 Vs. 2020 Average Audience across all channels by all dayparts

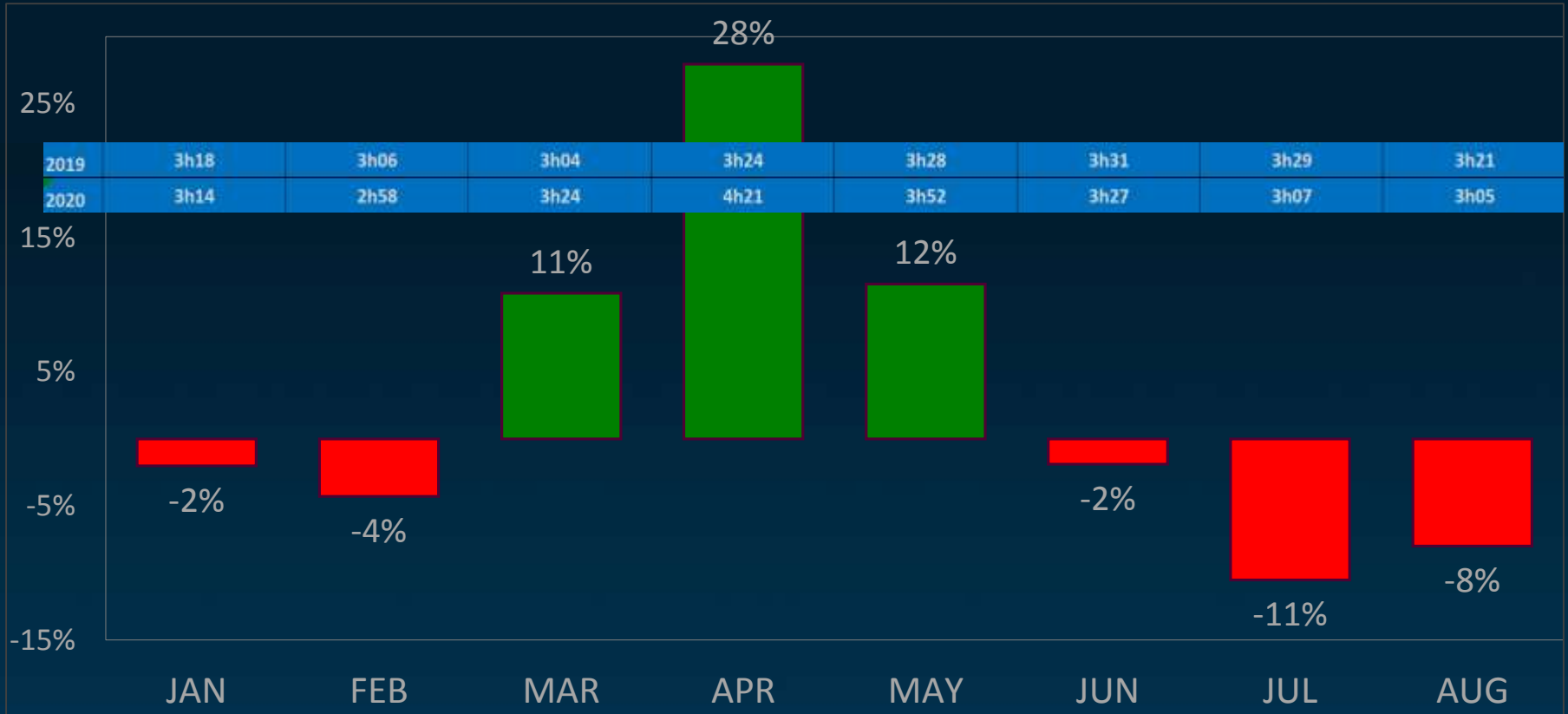
TV Audiences By Month – % Change '19 vs. '20

TOTAL ADULTS (15 Years +)



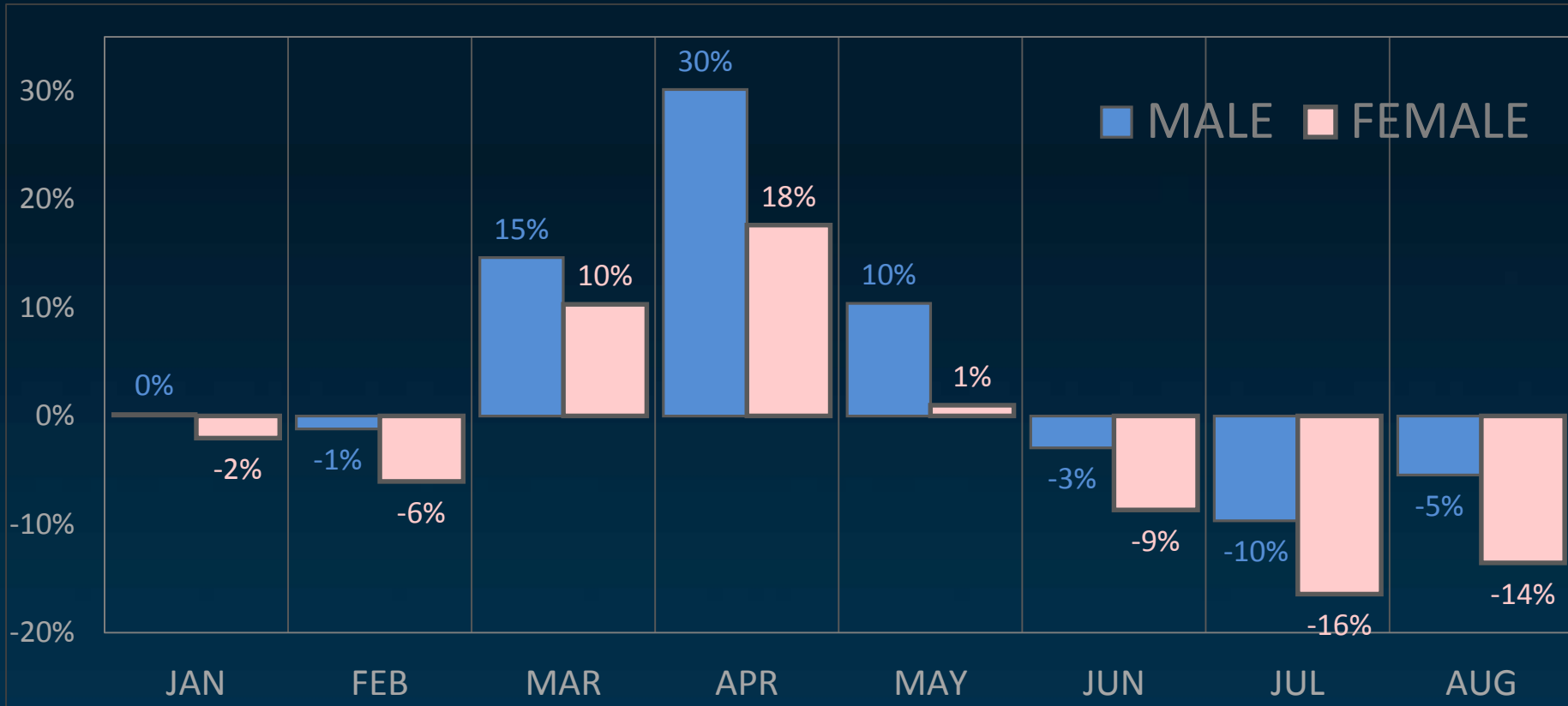
TV Avg Viewing Minutes – % Change '19 vs. '20

TOTAL ADULTS (15 Years +)



TV Audiences By Month – % Change '19 vs. '20

GENDER





The PRC have been at the forefront of media research in South Africa since being established in 2016. With innovations such as readership flooding, fusion, multi-method currencies, income weighting and oversampling and geosegmentation we are firmly committed to delivering the most accurate and representative data to the industry.

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