

GovComms

MARCH 2017

A newsletter for government and public sector communicators



**BUILDING INTEGRITY IN
LAW ENFORCEMENT**



**KEY ADVERTISING
INDUSTRY TRENDS
FOR 2017**



MOBILE TRENDS FOR 2017

The evolution of the **strategic advisor**

By: *Daniel Munslow

Agility is fast becoming the buzzword for communicators, as the profession seeks to understand how changing business models are impacting communication and the way in which tactics are executed. Downward revisions to the growth forecast of the country have once again meant that budgetary constraints continue to hamper the delivery of many strategic communication initiatives, and put pressure on communicators to find new and innovative ways to communicate and engage with stakeholders.

The best-performing communication programmes need to be business-focused, stakeholder-centric, measurable, and flexible. These are becoming the de facto requirements given the ongoing shift of the role and function of communication from tactical to strategy; and the role of communicators from drafters and crafters to strategic advisors.

Shifts to be on the lookout for in 2017 are around the way in which business communi-

cation chooses to position itself to secure c-suite buy-in for strategic communication imperatives. The last few years have seen dramatic shifts in the tactics around communication, often driven by digital disruption, but the core business approach to communication is now playing catch up.

Shift 1 – Strategic advisor

There must be consensus to advance the role of communication and many organisations are now beginning to rollout communication charters, to define the function within the business. There is also an accelerated shift to discussing communication in more strategic terms, as opposed to addressing purely tactical solutions. At strategy and design level, communication will be designing new programmes, models, selling the function, advising and executing better, not



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to mention delivering more consistent and robust measurement. These are the elements that shift the importance of the role within an organisation.

At problem-solving level, communication will continue to diagnose the business situation and narrative, and provide output communication for clients.

Then at an operations level, ongoing communication delivery – newsletters, intranet, campaigns, PR, etc. – will continue to be executed.

In practice, the balance of powers between the three levels will shift to ensure business communications remain relevant and the function is elevated. For example, businesses that seek to ‘shift culture in two years’ should see their strategic communication advisors acting like ‘agencies from within’ and advising why this is not possible; not simply rolling out tactical plans for no long-term gain.

Shift 2 – Context versus content

While historically communication has been focused on telling the stories and the content of the message, audiences are demanding more authentic communication, requiring a greater focus on the context – the reason something is happening. In terms of storytelling, a gradual shift is taking place, moving away from communicating the business strategy to communicating why a specific business strategy is in place; what it means to the business; what it means to the stakeholder on the receiving end of the communication; and what they must do about it.

Information overload has caught up with communication, as all stakeholders want to have a say, and be communicated with. This has led to more communication which, ironically, has overall reduced the consumption and intake of messages. The trend appears to be, ‘the more you communicate, the less I read’. Because of highly selective consumption patterns, communicators need to reconsider the approach to landing key messages with stakeholders.

Shift 3 – Stakeholder-centric

Communication is becoming more collaborative and dialogue-based versus the traditional transactional and top-down approach. Stakeholders should be at the heart of the communication planning process, and should fo-

cus on what they need to hear, what they want to hear, and how they consume it. The days of providing monologues are over, and stakeholders now expect customised messaging that is relevant, timely and practical; not to mention offer dialogue opportunities.

Organisations are taking more time to map their stakeholders at a qualitative level, to better understand the channel and messaging mix. This level of analysis, while more time-consuming, will achieve a much higher level of return in the medium- to long-term, thereby enhancing the cost benefit ratio of communication delivery.

Shift 4 – Proactive and agile

The days of being able to plan for months before launching a communication programme, platform, or message are over. Agility and proactive engagement are more necessary than ever, as stakeholders need information at their fingertips in real time.

This will be difficult for many organisations that remain inwardly focused on their processes and that choose to continue to communicate the way they want to communicate. It’s all about reaching stakeholders on platforms of their choice. More innovative organisations have already launched platforms like enterprise Facebook and other digital platforms, and have introduced or increased training around leadership communication. On the external front, organisations have already adopted a genuine listening architecture and reconsidered the context stakeholders are looking for.

No matter what the platform, it’s about agility and providing information that stakeholders want to engage with.

Shift 5 – Growth markets

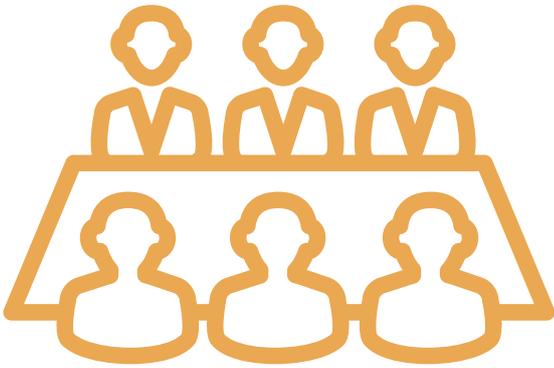
With many organisations moving into Africa, the focus on communicating with increasingly diverse stakeholders is key to engagement and reputation management. A thorough understanding of these markets is key, and it is imperative to know the local communication requirement and needs, and of course take the time and resources to adapt where necessary. Many communication initiatives are failing due to lack of adaptation and authentic stakeholder appreciation. With pressure to deliver against tight resources, it is imperative that markets are clearly understood before communication efforts are launched.

Shift 6 – Crisis to resilience

Organisations are looking for more than a good crisis communi-



cation plan that will help manage stakeholder communication during the crisis period. There is now a shift towards resilience, which is focused on the medium- to long-term goal of re-establishing organisational reputation in the post-crisis phase.



Considering the costs – operationally and reputationally – that are incurred during a crisis, there is a need to restore the status quo as quickly as possible, in a genuine and authentic manner. Resilience also has a great deal to do with crisis readiness and ensuring that communication during crisis is transparent, timely, empathetic, visible, and inclusive.

Shift 7 – Measurement

Outcomes-based measurement and value creation is the next

step in the evolution of the traditional output-based evaluation in use. Measuring the effectiveness of communications is certainly not a straightforward exercise, but is becoming an increasingly vital element of the strategic communication cycle. There are many methods that can be deployed, but establishing baselines and determining empirically what works is critical.

Components to measure are awareness and understanding, but also behaviour change and consequently cost-effectiveness.

Traditionally, measurement is the last thing that people think about, but sharing the results is what is almost always forgotten! Very often, the reason survey numbers are low is due to a historic lack of sharing results. Without this data, executives do not take communication seriously, which heavily compromises budgets and strategic insights.

Conclusion

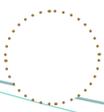
In agile organisations, communicators are alert to early signs that communication is becoming constricted. These can include ambiguity around direction and business priorities, excessive analysis, and consensus building, low trust among stakeholders, and even strained stakeholder relationships. If left unaddressed, these symptoms silo an organisation from within and then on to the outside world. If you are agile, you will pay attention to those early signs and proactively focus on multidirectional communication throughout the organisation and among its constituents.

* **Daniel Munslow**, CPRP, is a director at MCC Consulting; director on the International Association of Business Communicators' International Executive Board for the 2016/18 term; Vice President for IABC Africa (2016/18), and was the 2014/16 IABC Africa Regional Chairperson. He sits on the 2017 Holmes Report Advisory panel.

Daniel has 15 years' experience in business communication consulting, branding, and media; and has worked across multiple industries in numerous African countries as well as in the Middle East, the US, Europe, and AsiaPac.

He specialises in strategic communication and stakeholder engagement, measurement, crisis communication, and skills development for senior communication practitioners and business leaders for a global client base.

Daniel has worked in banking and financial services, energy, aviation, retail, mining, health-care and pharma, motoring, media, paper and pulp, medical, telecommunications, tertiary education, and for the United Nations. He has developed and implemented communication and reputation management strategies by partnering with key decision makers and adopting a participatory approach to stakeholder management; often coaching or sitting with executive committee members as a strategic advisor on communication.



Building integrity in law enforcement

The Gauteng Department of Community Safety has developed an action plan that's geared to improve the integrity of law enforcement agencies in Gauteng and contribute towards making the province safe and secure.

The department conducted a study to measure integrity within law enforcement agencies in Gauteng which led to the development of an action plan.

It contains quick wins and short-, medium- and long-term interventions to improve the integrity of law enforcement agencies in Gauteng, namely the South African Police Service (SAPS), Metropolitan Police Services (MPS) and Gauteng Traffic Police (GTP).

The Gauteng Department of Community Safety has also finalised a concept paper to roll out integrity awareness sessions for staff members and law enforcement agencies in the province.

A culture of integrity

The concept of police integrity is essential in law enforcement agencies and it enhances public trust in the police.

Pillar 7 of the Gauteng Safety Strategy aims to promote integrity management in the public service, especially within law enforcement agencies, to address prevalent fraud and corruption and other forms of misconduct. The department plans to conduct the study annually to determine whether integrity levels are improving.

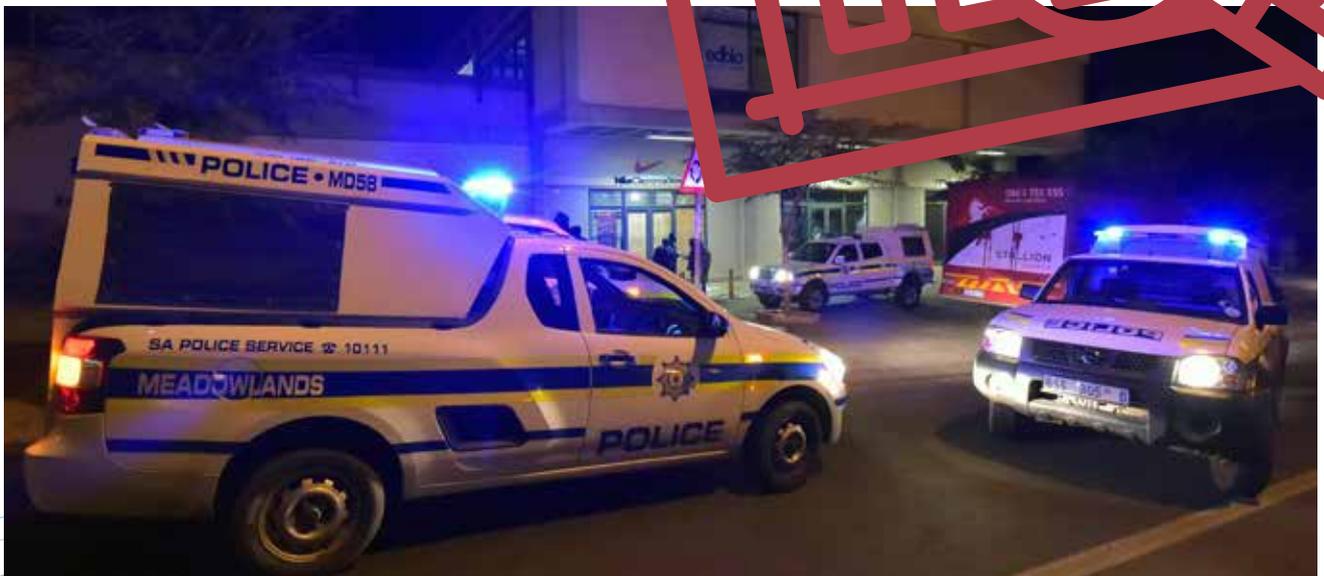
The Victims of Crime Survey (VOCS) (Statistics South Africa,

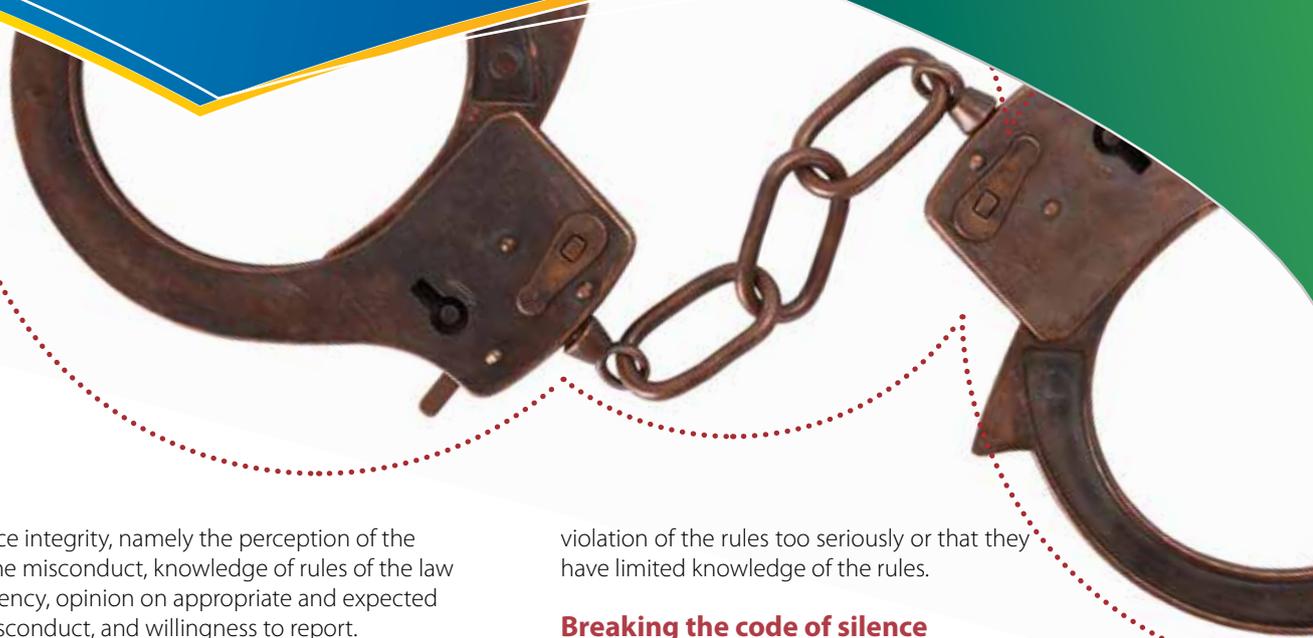
2014) found that 10.2 percent of households were solicited for money, 1.7 percent for favours and 0.9 percent for gifts by government officials for rendering a service they were legally obliged to offer. In Gauteng, 21 percent of respondents indicated that law enforcement officials are corrupt, compared to the national average of 13.1 percent.

The VOCS concluded that law enforcement officials in Gauteng were the most corrupt, and those in the Eastern Cape were the least corrupt.

The study

The department's quantitative study collected data by surveying an overall weighted sample of 884 respondents from the SAPS, MPS and GTP. The questionnaire comprised 11 case scenarios, each describing a misconduct, and respondents were asked to evaluate each scenario by answering seven questions. Responses were grouped into four





contours of police integrity, namely the perception of the seriousness of the misconduct, knowledge of rules of the law enforcement agency, opinion on appropriate and expected discipline for misconduct, and willingness to report.

With the perceived seriousness of the misconduct respondents considered two case scenarios – doing remunerative work outside the public service and receiving gifts in the form of free meals and discounts – and perceived them as not serious violations. Reassuringly, they considered failure to secure a crime scene, receiving a bribe and theft as serious offences.

Officers from the three law enforcement agencies shared a similar understanding of the relative seriousness of the acts of misconduct. However, it is concerning that covering up for a fellow police officer driving under the influence of intoxicating substances was regarded as the least serious transgression across all law enforcement agencies in Gauteng.

When it came to knowledge of the rules of the law enforcement agency, the majority of respondents recognised most of the case scenarios as rules violating behaviour, but there was a sizeable minority that did not regard even the most serious cases as misconduct. The majority of the officers do not consider receiving gifts and kick-backs as misconduct.

Respondents considered only six out of 11 hypothetical cases of misconduct as a violation of the official rules of their agencies. Almost one in every three SAPS members (28.4 percent) surveyed regarded doing remunerative work outside of the public service as not a violation, compared to 56.5 percent of MPS and 53.6 percent of GTP officers. Remunerative work outside the public service must be done with prior approval, as per legislation. In general, SAPS respondents recorded high scores for knowledge of the official rules, whilst GTP had the lowest scores.

When it came to appropriate and expected discipline for misconduct in eight out of 11 (73 percent) case scenarios, respondents believed that disciplinary action taken by their respective agencies would be fair. MPS respondents expected dismissals in six out of 11 (36.3 percent) case scenarios, whilst the SAPS respondents indicated that four out of the 11 scenarios would result in dismissal and GTP indicated three out of 11 (27.2 percent). This suggests that GTP management could be viewed as being generally lenient, that members of GTP don't take the

violation of the rules too seriously or that they have limited knowledge of the rules.

Breaking the code of silence

On the willingness to report misconduct, respondents were asked to report an act of misconduct and also indicate whether their colleagues would report fellow colleagues in the agency. The results revealed that the majority of respondents would report cases they considered serious. The code of silence was strongest in the cases that respondents perceived as not serious at all.

Compared to international standards, the code of silence for the entire sample in the study is high. There is therefore a need to institute measures aimed at weakening the code of silence among law enforcement officers in Gauteng.

Across all three law enforcement agencies, the seriousness of the officers' misconduct is mainly determined by the agency's expected discipline. On the one hand, when the agency is expected to punish misconduct severely, officers regard the misdemeanour as serious. But when the agencies do not punish misbehaviour severely, as was the case with GTP, officers seem to have little knowledge on whether case scenarios are misconduct and the level of seriousness with regard to misconduct.

Looking ahead, recommendations from the study include training, incorporating issues of integrity and ethics in the curricula at training colleges; and a review of the current disciplinary policy and procedures to ensure that disciplinary action is preventative and incorporates corrective remedial learning.

In addition, financial disclosure and permission to perform remunerative work outside the public service should be extended to all government employees; the public should be educated on the negative consequences of corruption and that, due to the strong code of silence amongst law enforcement agencies, it is imperative that the use of technology is considered to monitor police officers' conduct whilst on duty.

It was also recommended that law enforcement agencies create an ethics champion to drive ethics and anti-corruption initiatives and law enforcement agencies ensure enforcement of the Public Sector Integrity Management Framework.

* Ramolobi Matlala, Duxita Mistry and Arnold Phala work for the Department of Community Safety Gauteng.



Key advertising industry trends for 2017

By: * Johanna McDowell

1. Brands will increasingly have to construct campaigns around their consumers – putting their consumers first and if necessary, adapting their brands to suit the new environment. Plan around people not products. Now that consumers have experienced brands such as Uber, AirBNB and Netflix, their expectations are raised towards the more traditional brands which will now need to adapt to those expectations or lose out on any growth among new consumers.

They want the chance to work on a variety of brands – not be limited to one. This trend was identified by a few of the agency leaders who met in the US at Ad Forum. A couple of years ago everyone wanted to go to Facebook, Google, etc., but now, as agencies beef up their digital outputs and develop greater and greater depth to their offerings, digital folk will obtain much more experience and growth by working on a variety of brands and by being part of developing the agency offering.

2. Young talent that went over to the tech side a few years ago is starting to return to digital agencies.

They want the chance to work on a variety of brands – not be limited to one. This trend was identified by a few of the agency leaders who met in the US at Ad Forum. A couple of years ago everyone wanted to go to Facebook, Google, etc., but now, as agencies beef up their digital outputs and develop greater and greater depth to their offerings, digital folk will obtain much more experience and growth by working on a variety of brands and by being part of developing the agency offering.

3. A greater demand for media transparency and an end to “opaque” practices among media agencies and media owners.

This was raised as a big issue two years ago in the US and UK. The American National Advertisers Association (ANA) conducted some research in the market place over several months with independent researchers not linked to the advertising industry. The research revealed some practices which

could be considered unethical. This research was borne out in the UK via the Incorporated Society of British Advertisers (ISBA), which has produced a guideline contracting process for their marketers which will enable those marketers to take greater control of their contracts with media agencies. The trend is also taking place in Australia and we predict that South Africa will follow suit in 2017. As the Independent Agency Search and Selection Company (IAS) we will be writing more report backs on this for industry.

4. Independent agencies are holding on to their independence – refusing to be part of the holding company networks.

Those agencies which are still independent are making sure that they remain so. Locally we know who the strong independent agencies are such as Joe Public and King James – as well as smaller operators which have resisted and will continue to resist the lure of the networks. Agencies such as Mother – one of the world’s leading creative agencies – talk about their independence and about being a place for “refugees from the networks”.

The level of reporting within the network groups can be off-putting for many an entrepreneur who is used to running their own show. We are also predicting that a number of local agency CEOs who sold a few years ago to the various networks such as WPP and Publicis Groupe, will be at the end of their earn-out periods in 2017. We may see some new start-ups during the next 12 months as a result.

5. Even if content is sponsored by brands, it does not diminish the value of the content.

With Internet video expected to account for 79% of global Internet traffic by 2020, 52% of marketing professionals name video as the type of content with the best return on investment (ROI).

In addition, 55% of consumers say that when they learn that content is sponsored by brands, it does not diminish the value of that content as long as it is authentic and relevant. One of the agencies we visited at Ad Forum in Los Angeles believes that “brands will be the next great producers” in terms of short-form and long-form content.



6. Moving to output based contracts rather than time sheet based contracts has been proven to be successful. More marketers will be looking for this in future.

They just need help on how to do this. One of the most successful agencies that has pioneered this along with incentive based or performance based contracts – Anomaly – has enjoyed exponential financial and sustainable growth over the past decade, with net margins easily above 20% and often as high as 25-29%. It is possible.

7. Virtual Reality technology will be used more and more to solve societal problems.

The ability to help minds see things differently. It is predicted that VR will be used in entertainment, education, retail, real estate, as well as marketing.

8. Convergence is happening. Ad agencies are building editorial competence along with digital in house. Traditional ad agency models are now incorporating

large scale editorial competence along with digital in house. This means that true 360 degree thinking is happening well in advance – especially in the PR area.

9. Agencies are actively investing in their in house production facilities – with great success - this continues to increase as the demand for more and more content grows.

Speed to market, familiarisation with brands, etc., are requiring that agencies conduct this activity in house, saving time and costs with new technology.

10. Growth in number of integrated agencies and service offerings.

We identified this need with our recent SCOPEN research. Time poor marketers are working with a variety of agencies and would prefer to find one integrated agency that can do most things – definitely creative and digital – and preferably with media and PR in house. This trend is growing all over the world and is happening slowly here in South Africa but we are anticipating a surge in this during 2017.



*** Johanna McDowell** is Managing Director of the IAS which stands at the forefront of the complex world of agency selection in South Africa and is one of the few experts driving this mediation and advisory service in SA and globally.

McDowell advises and works alongside clients and procurement professionals on agency selection, agency pitching, relationship appraisal, commercial evaluation and benchmarking projects.

As a media commentator, radio show host, prolific public speaker and writer, she offers a great deal of expert knowledge and experience to the marketing, advertising, branding, digital and PR industry and the ever changing trends by which it is affected.

Twice a year she attends Ad Forum Summits as an international consultant which

helps her lead the South African advertising industry and keep in line with international trends and remain competitive.

After graduating in marketing and business studies, her experience since 1974 has spanned leadership positions in large corporates including banking, manufacturing and retail both in the United Kingdom and South Africa, along with a 15-year stint in two of the largest advertising agencies in South Africa and in a medium-sized agency in the UK.

She has held directorship in both South Africa and British advertising agencies and in 1988 was appointed Managing Director of Grey Phillips Advertising. She also built Integrated Communications, a public relations-driven marketing communications company that went from zero base in 1991 to an

R8-million fee turnover by December 2004.

Qualifications:

Johanna McDowell is UK-educated and has a High National Diploma in Business and Marketing, with emphasis on the European Union from Twickenham College of Technology. She has a Diploma in Marketing from the Institute of Marketing in the United Kingdom and is a member of the institute. McDowell also has a Retail Principals Diploma from the City and Guilds of London Institute (City & Guilds).

Associations in SA:

McDowell is a Life Time Member and Fellow of the Institute of Directors, a Board Member of the International Association of Public Relations and past President, Member of Women on Boards UK, SA Non-Executive

Director of the Free Market Association of SA and is on the advisory board of the South African Institute of Taxation Professionals, SAIT where she sits on the procurement board committee. She is also the Present Chairperson of the IPRA 2015 World Congress.



Mobile Trends for 2017

By: *Diane Gantz



Growth of tools that connect with the interactive consumer

Consumers interact with one another on a daily basis with video, images, audio and open commentary (or chat). Researchers who use tools and means of communication that are relevant to consumers will magnify their understanding of consumer motivations and behaviour.

The saying that “a picture speaks a thousand words” has never been so relevant – it is no secret that video and images or pictures are now the new way for consumers to communicate with one another. Mobile can be used to share images and video with consumers, but also to get consumers to share their brand experiences with marketers. For example, ad testing on mobile has been validated to ensure quick consumer feedback in order to avoid unnecessary marketing spend. Mystery shopping is no longer done by interviewers, but instead consumers are commissioned to snap pictures of their favourite products in store, send photos of shop shelf displays to ensure better management of inventory, while brand ambassadors are being scrutinised and kept on their toes with ever-evaluating consumers.

Passive measurement for consumer insight

With smartphone technology comes an array of new products and consumer tracking tools such as apps for passively tracking what consumers do when and where, with whom they do it, and how long they do it – all providing depth of information that can be mined for consumer insight.

The app era

Smartphone technology boosted the development of research apps, evident in the myriad research and insight apps that are popping up everywhere. These are set out to deliver a great experience for consumers and clients that are on this journey. Success largely depends on one’s ability to engage app users sufficiently so they continue to use it on an ongoing basis.

Engagement is king

Consumers are being targeted on their mobile phones with

Mobile is the single most important device that connects consumers with each other, with brands, and products and services. Over the past few years it has demonstrated its power in both marketing and advertising, and as a source of consumer insight.

The GSMA Mobile Economy Sub-Saharan Africa 2015 report predicts a significant uptick of unique subscriber registrations and sim connections throughout this region over the next few years. Mobile broadband, in particular, is set to grow at an anticipated rate of 235% from 2015 to 2020. This growth in smartphone technology opens up more dynamic ways to interact with consumers, and will shape mobile research trends over the next few years.

Amplified use of mobile to understand moments that matter

Mobile delves into moments that matter to brands – in revolutionary ways. Clients and researchers are no longer interested in what consumers did in the past seven days, never mind in the past four weeks. Mobile enables in-the-moment understanding of consumer choices and behaviour. With smart research design, clients will be able to take advantage of this opportunity to grow their brands at the margins.

new product and service promotions, requests for signing up to panels or providing feedback of their most recent brand experience.

In order to cut through the clutter and maintain interest, careful consideration should be given to how best to engage with, and incentivise consumers. If an incentive is too little for the time, effort and cost of completing a mobile survey, consumers will not opt-in to participate. If exorbitant incentives are being paid out, one is at risk of creating consumer research junkies. Incentive schemes will therefore continually be fine-tuned to ensure optimal incentive structures. Gamification methodologies will be employed actively to reduce respondent fatigue. And, best practices for mobile design have been established and will continue to drive improved data quality from mobile surveys.

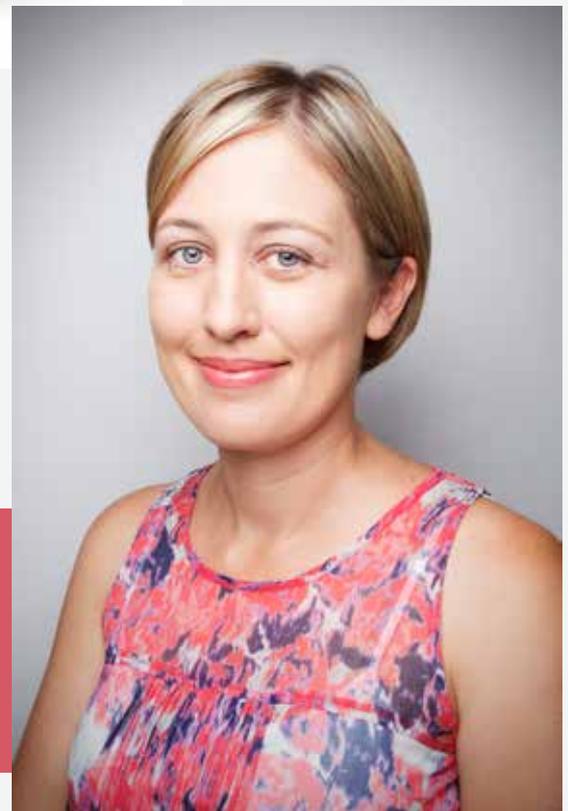
Microsurveys

Microsurveys, as termed by a recent GRIT report, are increasingly used to build up knowledge banks of consumer insight. This trend will continue into 2017, with really short questionnaires being launched in order to obtain instant insight from a relevant target audience. Microsurveys underscore the trend towards agile research and in essence aim to speak to consumers where they are – on mobile, and on their terms – by asking only a few questions that can be completed in minutes.

Streamlined end-to-end solutions

In order to fully enjoy the benefits that mobile research can offer – with respect to speed and efficiency of reporting – 2017 will continue to see the development of advanced streamlined end-to-end solutions. Imagine the impact of a fully integrated knowledge, research and insight solution to a client's bottom line. New bars will be set in this regard for research going forward.

Diane has more than 10 years of marketing research experience, and specialises in mobile research and insights. She's presented at local and international conferences regarding the subject matter, including Insights Innovation Exchange Conference in Amsterdam and SAMRA in South Africa. In her current role Diane is responsible for driving mobile growth throughout West, East and Central Africa.



Driving predictive insights through integrated and bespoke custom solutions

Mobile will increasingly be used as either a complement to, or an integral part of large, integrated research programmes that feed into future-forward strategic decision-making. Versatility and creativity in setting-up these programmes will be key in successful implementation at scale, as will the shift towards integrated knowledge systems in ensuring optimal extraction of consumer insight and the pursuit of predictive insights.

Clients will become mobile confident

As clients embark on and further explore this journey called mobile research they will establish how mobile best fits into their overall research mix. Mobile's success will be showcased through quality data, timely reporting, agile programmes, creative implementation and overall efficiency in using mobile to gain consumer insight.

We are looking forward to seeing how mobile shows off in 2017.



By: Allison Cooper

A new era of radio audience measurement

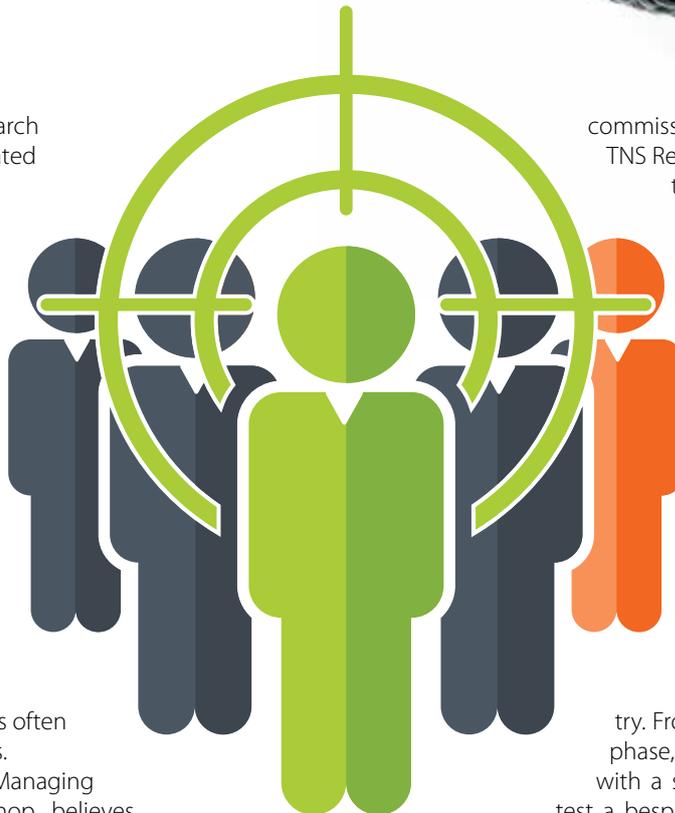


The Broadcast Research Council (BRC) initiated new research into community radio station listenership in 2016 which unveiled some significant changes in audience research and showed a more accurate picture of each station's target audience.

Even though the medium is still showing robust and stable measurement in South Africa and attracts over a quarter of all radio listenership, the community radio sector is often overlooked by advertisers.

Chris Botha, Group Managing Director of The MediaShop, believes that community radio was underrepresented in radio audience research in the past. "This changed in 2016 when the BRC provided new research. Now some community radio stations have audiences that are bigger than some commercial radio stations. It will be interesting to see how this impacts the advertising revenue that these stations attract," he says.

The BRC Radio Audience Measurement (RAM) data,



commissioned by the BRC and conducted by TNS Research Surveys, is a new approach to monitoring radio listening habits and is set to transform the audience measurement system as TNS, with input from specialist demographers IHS, developed a new sample frame with national probability proportionate to size sampling that is giving the media industry a new and more realistic view of the structure of the South African population.

The BRC was established in 2015 to commission and oversee the delivery of radio and television audience measurement research for broadcasters and the advertising and marketing industry. From the outset, and during the set-up phase, the BRC and TNS worked together with a single purpose: to design, build and test a bespoke radio survey which will capably and transparently deliver fresh data for the broadcasting, advertising and marketing industries.

The BRC's fresh approach has signalled a new era in radio audience measurement for South Africa, seeking to accommodate the unique and diverse South African market, while raising the bar on how the needs of radio broadcasters and advertisers will be met.

To achieve this, an improved survey is required, one that is

multi-platform, intuitive and respondent-friendly across all walks of South African life. The tool collects the most accurate data across different geographies and locations, across different languages and across different socio-economic landscapes.

Essentially, the new survey tool consists of two elements: A placement interview, to collect information about each individual in the household and the household itself; and a radio diary, to collect radio listening data for all commercial and community South African radio stations. To ensure accuracy and transparency, only those diaries which have been properly completed are included.

What the research says

From January to September 2016 the sample included 23 329 households, equating to 53 396 individual diaries. The national sample reflects South Africa's 15+ adult population of 38 million people.

Interviews continue every day of the week, across every province and area type. This enables the 60% metro, 20% small urban and 20% rural split required. Stations measured during the fieldwork included 39 commercial and PBS stations and 266 community stations.

According to the data, 64% of listeners are loyal to one radio station. Rural listeners are the most loyal at 67%, followed by small urban at 65% and urban at 60%. Free State has the highest loyalty at 76% followed by the Northern Cape at 72%. Gauteng has the least loyal listeners at 57%.

In any given week there are 35 million people listening to

radio stations in South Africa, with approximately 28.6 million tuning in every day. This penetration and pervasiveness of radio broadcast is across the country, with the lowest tune-in rate (Northern Cape) at 80%.

Interestingly, the most common device used to access radio is portable radio, followed by cellphone, car radio, TV and computer. The most popular location when listening to the radio is at home, followed by in the car, at work and in public areas.

The most popular radio stations at the time the report was issued were UKhozi FM, Umhlobo Wenene FM, Metro FM, Lesedi FM, Thobela FM, Motswedding FM, RSG, Gagasi FM, Jacaranda FM and Ikwekwezi FM.

According to Simon Milne from The Media Connection: "A number of commercial radio media owners were left scratching their heads in 2016 after the BRC research was released. The losses experienced by a number of English broadcasting commercial radio stations will send management back to the drawing board to analyse rate cards, reconsider programming and drive audience building."

In 2017, community radio will leverage off of its impressive BRC showing, offering consistent, targeted markets around the country. "You're likely to see community radio stations combining listeners to offer advertisers bigger audiences than their commercial rivals in the same playing field," says Milne.

The Media Connection anticipates continued growth in 2017. "Community radio is likely to continue its persistent rise in prominence, both as a brand and as an indispensable component of advertising strategy. The past year showed an increase in adver-



tising spend, and notable media heavyweights added their voice to acknowledging the power of the sector," says Milne.

Community radio remains the most preferred medium and one that is in close proximity to the hearts and minds of mass market consumers, not only because of their close partnerships with the stations themselves, but also because of The Brand Connection and the 'on the ground' brand activations and community involvement.

"Through community radio's relevant, nuanced and context specific content, the medium continues to win over hearts and minds of listeners and, as evidenced in the recent BRC RAMS figures, the medium continues to mature and flourish and audiences are finding new ways of accessing their favourite community radio stations," says Milne.

This year The Media Connection will focus on its new division, the TMC Academy. "Through the academy we'll be building a reservoir of talent for the radio industry. The key focus areas of the academy will range from the business of radio through to digital media.

We remain very optimistic and excited by the opportunities that community radio provides and we



will continue to deliver the value proposition of the sector for advertisers."

According to Botha, advertising revenue on radio for now remains focused on the bigger stations. However, The MediaShop believes that community radio stations were under-represented in the past when it came to radio audience research. "This changed towards the middle of 2016, with new research showing a more accurate picture of what we believe the reality is. Now some community radio stations have audiences that are bigger than some commercial radio stations. It will be interesting to see how this impacts the advertising revenue that these stations attract," he says.

Advertisers are attracted to community radio as it has a more dedicated and involved listener. "Community stations talk about matters pertaining to their listeners' direct life and environment and therefore carry massive credibility.

"They also service unique communities that advertisers might want to reach. For example, if I only want to talk to people in Alexandra I might be better served using a smaller community radio station that only broadcasts in that area, instead of using a bigger station that covers the whole province," says Botha.

"Over the years there has been a bigger move to understand and incorporate digital assets into station profiles, especially social media. Looking ahead, there's the change in the research that will put the cat amongst the pigeons in 2017," says Botha.

The BRC will release transparent, stand-alone radio figures four times a year based on six months' worth of data collection.

Interesting facts about radio

- South Africans listen to the radio for four hours and six minutes a day, on average. The Free State has the longest tune-in time of five hours, while Gauteng listens for the shortest time at three-and-a-half hours.
- Sesotho and Swati listeners tune-in the longest at four hours and 36 minutes. English listeners tune-in for the shortest time at three hours 12 minutes.
- More than half of the listeners (52%) are considered 'heavy listeners' – tuning in for more than 20 hours a week.
- Broken down by language, English and Xhosa listeners are the least loyal at 61% and Ndebele the most loyal at 73%.
- Commercial and PBS stations with the highest percentage of exclusive listeners are Ukhozi at 59% and Thobela FM at 56%. At the low end 5FM has 25% loyalty, with YFM at 24% and Good Hope at 27%.
- Community station Kouga has the highest share of exclusive listeners at 59%, followed by Bok Radio at 53% and Moretele at 50%.
- With just under 300 000 listeners, Jozi FM is the most listened-to community station, way ahead of the Eastern Cape-based Unitra FM and Radio Tygerberg in the Western Cape.
- The single largest station in the country, Ukhozi FM, is a Zulu-language station in KwaZulu-Natal.
- Radio is the most accessible medium for many people in both urban and rural areas.