



## RADIO LISTENERSHIP TRENDS DURING LOCKDOWN

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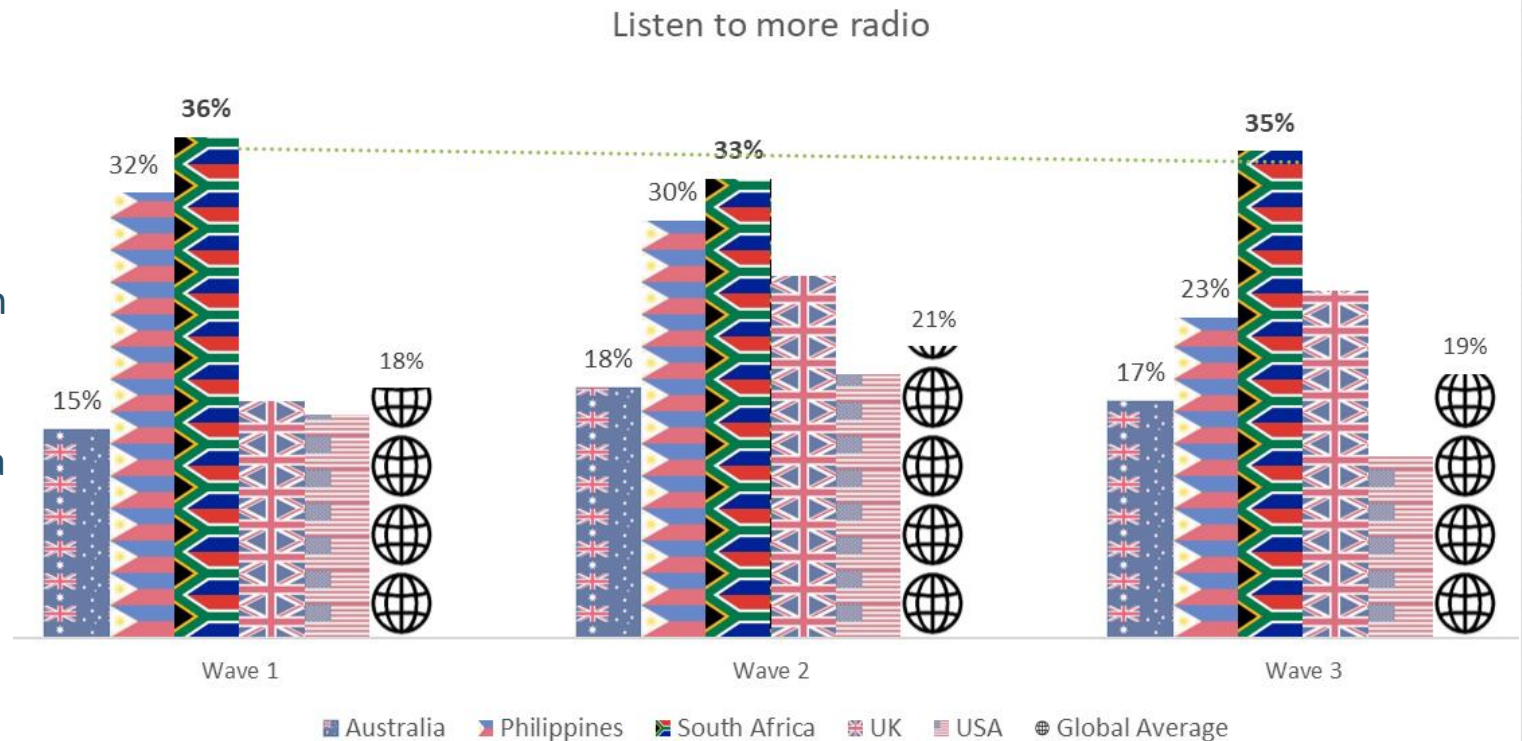
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## GLOBAL AND LOCAL MEDIA CONSUMPTION INSIGHTS

## GLOBAL MEDIA CONSUMPTION: RADIO

- » **Radio listenership** has grown during the global lockdown.
- » Average global growth of 19% on radio.
- » Radio listenership in South Africa is consistently **higher** than the global average.

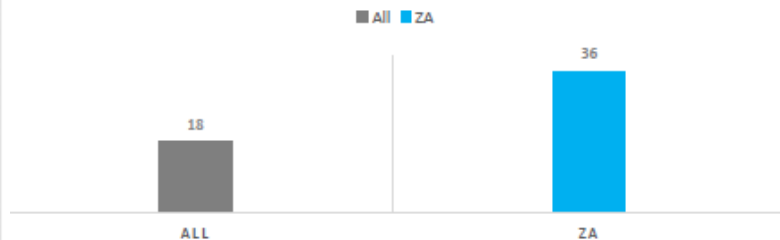


Source: Global web index, wave 1: mid-March; wave 2: early April; wave 3: end April 2020

## LOCAL MEDIA CONSUMPTION: RADIO

Since the beginning of lockdown, people are consuming more media not only across the world but in South Africa as well

**% WHO SAY THEY'VE BEEN DOING THE FOLLOWING AT HOME BECAUSE OF THE CORONAVIRUS/COVID-19 OUTBREAK: LISTENING TO MORE RADIO**



South African radio stations have reported that they are expecting more people to listen to radio during Covid-19, and as a result, phone calls and WhatsApp messages to the shows have gone up. Web traffic and streaming are already up by between 25% and 35%

South Africans listening to more radio during the Covid-19 outbreak is higher than the global average. Listeners are interested in staying informed, so topics like news will be higher up in terms of consumption

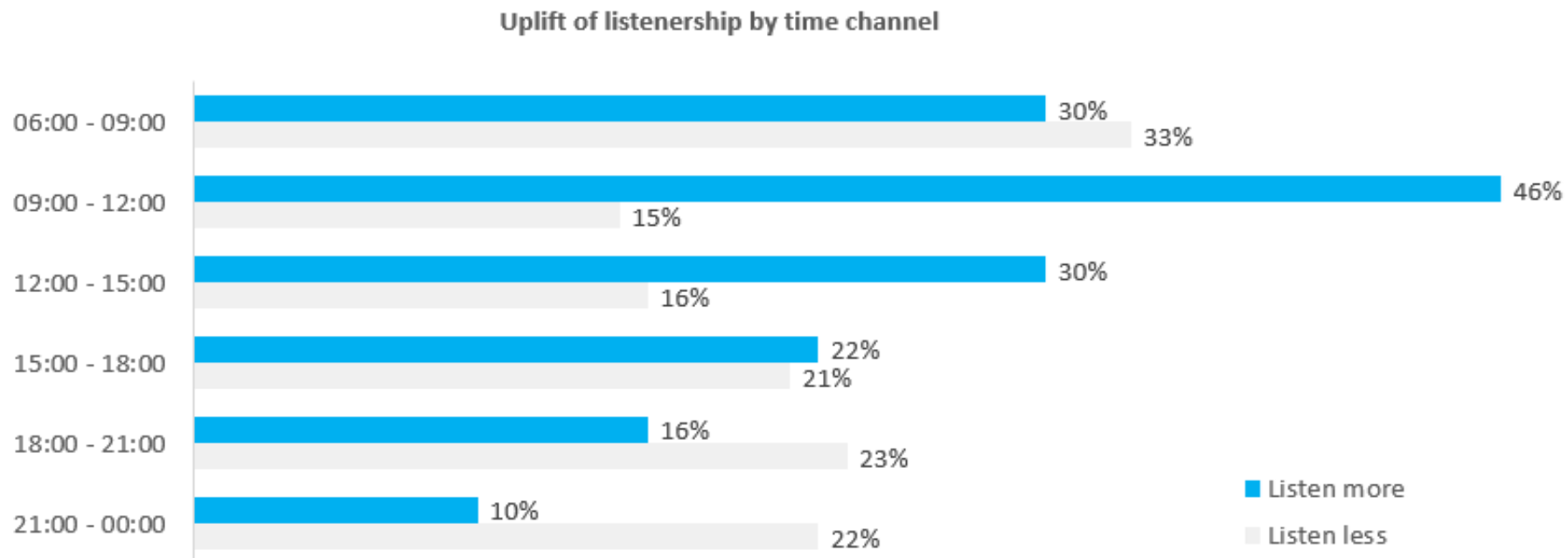
With that said, listeners need news they can trust and they need it regularly. Radio stations understand their job is to curate the news and eliminate the fake



## RADIO REMAINS RELEVANT

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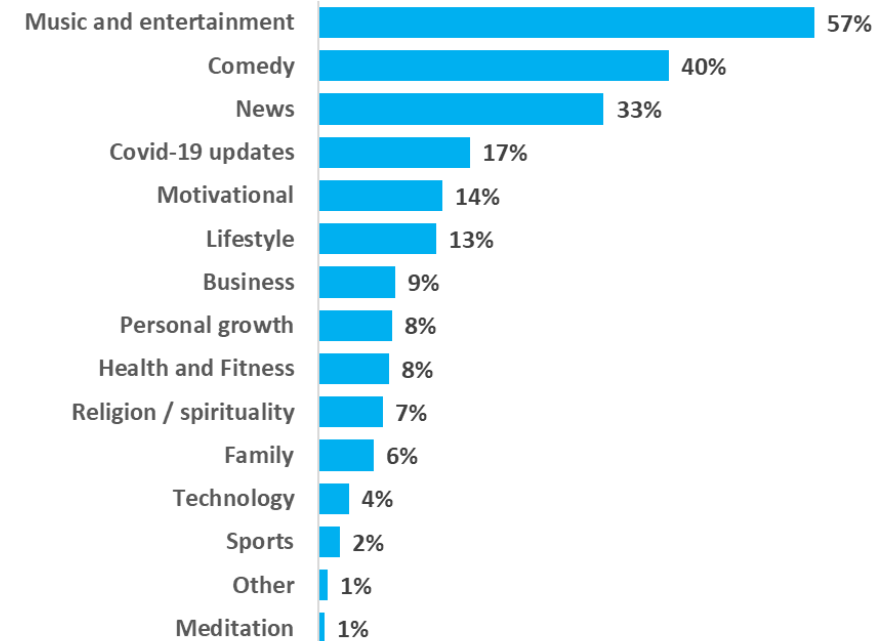
- » **Listenership patterns** have shifted but audience loyalty to radio remains strong. The biggest uplift in mid-morning and lunchtime.
- » Radio stations **receptive** and implemented programming line-up changes.



## RADIO CONNECTS ON-AIR AND ONLINE CONTENT

- » Over 60% of listeners interested in **station webinars**.
- » **Music, entertainment and comedy** are the most popular content.

Content of interest for station webinars





## TOPLINE MEDIAMARK RADIO STATION INSIGHTS: LISTENING PATTERNS AND CONTENT CONSUMPTION





## AUDIENCE SURVEY INSIGHTS

Radio unequivocally remains one of the strongest mediums during this global pandemic. As such, Jacaranda FM, East Coast Radio, Kaya FM, Gagasi FM and Heart FM conducted a survey on listener attitudes and habits during the Covid-19 pandemic. The survey results reiterate that radio remains one of the strongest mediums amid the global pandemic.

With more than 20 000 participants taking part across all our stations, the survey has shown that communities are increasingly relying on radio to bring them reliable news, information and tips to help deal with the virus and its effects.



89% of the Jacaranda FM audience that responded to the survey agree that they are listening more to radio now during lockdown than before.



Apart from being a trusted source of up to date information, radio is also seen by many people as a companion during the self isolation phase we are currently in at home



Content that listeners are in favour of during this period of lockdown, are health safety tips, updates on contamination and statistics from around the world.



Tips on how to adjust to the new normal, as well as activities to keep children entertained and occupied are also consumed.



32% of the respondents tune in to news updates regularly, which is indicative of listeners wanting to receive solid, trusted and unbiased facts and opinion from their favourite radio station

## East Coast Radio listeners remain loyal to radio during the lockdown period. 90% of respondents listen more to the radio now than they did before



East Coast Radio listeners remain loyal to the radio medium during the lockdown period, indicating that they (47%) consume more radio than before. On weekdays the most increase is noted during the 09h00-19h00 timebands, whereby listenership lifted by 22% - 46%.



A massive 90% of East Coast Radio listeners also consume more video content across different platforms than they did when lockdown began, with radio also benefiting through its digital platforms



Over half (55%) of East Coast Radio listeners indulge in long form video content such as movies, series and documentaries, while more than two thirds (69%) have increased their short video (informative videos, funny clips, inspirational clips etc.) consumption



East Coast Radio audiences are technology savvy and live in homes with internet connection, 56% use WiFi while at home to watch video content which they are able to share with their whole families like family-friendly workout videos

## Radio remains the most relevant medium that provide listeners with real time updates during lockdown



92% of the Kaya FM listeners say that they are listening to more radio during this lockdown



Radio and TV are the number one sources for this audience to get information on the latest news around Covid-19



32% of the listeners tune into the radio for news updates now, more than they did before the Covid-19 outbreak



During this lockdown, the listeners are finding more time to spend with their families, as 62% say that is how they are using this lockdown period

## Gagasi FM time spent listening (TSL) significant increase during the different levels of lockdown



85% of Gagasi FM listeners have indicated that they consume more radio during the lockdown than they did before, with only 9% saying they listened less.



68% of the Gagasi FM listeners have stated that during level 4-5 of lockdown, they've consumed at least 3-4 hours of radio.



Less than 6% of the Gagasi FM listeners say they listened for under an hour of the station.



78% of the audience on Gagasi FM tune in for news updates to keep them informed, but also enjoy music and engaging with the station over different social media platforms including the station's APP.



## 82% of Heart FM listeners say they prefer radio as a medium of choice over any other medium



36% of Heart FM listeners say they have been listening to the station for longer, spending more than 5 hours tuned in to the station.



39% of the listeners say that they mainly listen to the radio for the entertainment as well as the continuous updates the station provides with regards to the outbreak.



With the different restrictions that have been imposed on movement, Heart FM listeners see the station as a companion as 21% say that they have a deep connection with the station as well as the djs.



20% of listeners prefer receiving updates from the station than on any other platform.

## SUMMARY

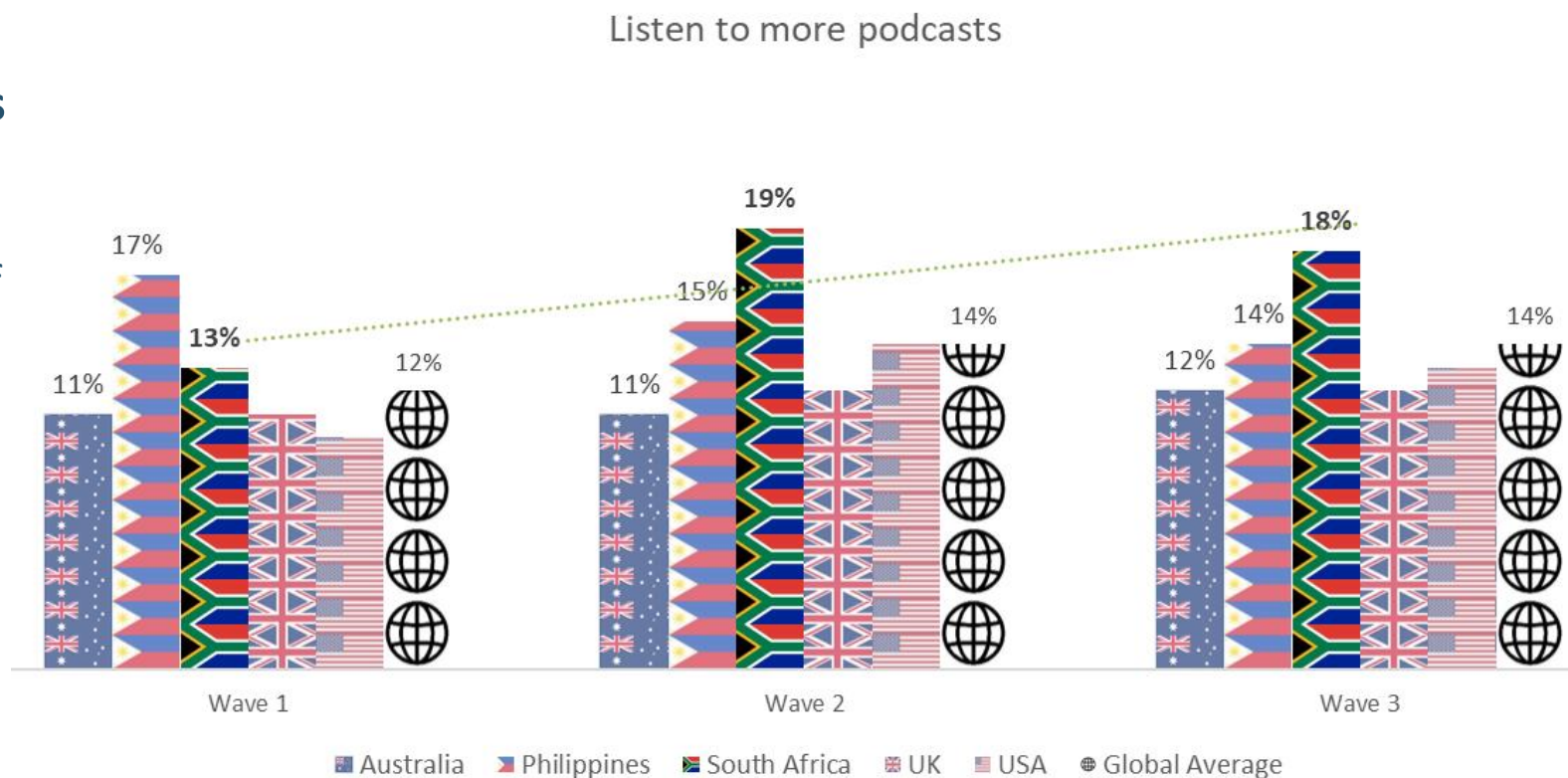
- Radio is still one of the most credible mediums even during the pandemic, which is why radio listenership has increased even globally
- Our listeners remain loyal to their favourite stations during lockdown, and use the stations as sources of information
- News is an important source of information across all our stations and listeners continue to consume more of this content
- Consumption of video content has also increased since the lockdown began, with more of the audience watching more on demand programming
- Our digital platforms have seen an uplift since lockdown began, as more of the audience explore more of the stations content online



**DIGITAL INSIGHTS: PODCAST AND STREAMING**

## GLOBAL MEDIA CONSUMPTION: PODCASTS

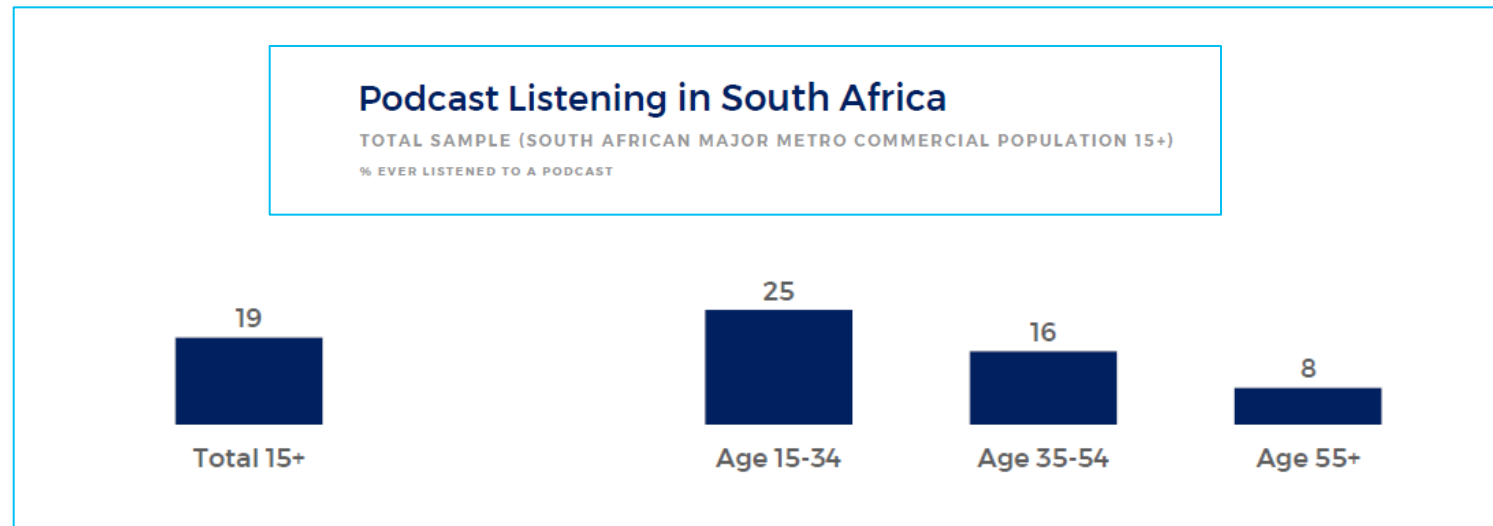
- » Listenership to **podcasts** have increased.
- » Average global growth of 14% on podcasts.
- » Podcast listenership in South Africa is **higher** than the global average.



## Podcasts are the fastest growing sector of media consumption in South Africa

Podcasts have exploded in popularity in recent years, with an estimated 1 in 3 people globally listening to episodes every month. In South Africa, media companies who are looking for ways to diversify their revenue, would benefit from seriously exploring podcasts.

Podcasting is an emerging medium in South Africa and Africa at large. With this reality it will take a lot more time to have the numbers and listens, in order to justify traditional ad spend on podcasts. However, it is a massive opportunity for forward thinking brands that see the opportunity to engage in an innovative medium with an engaged audience.

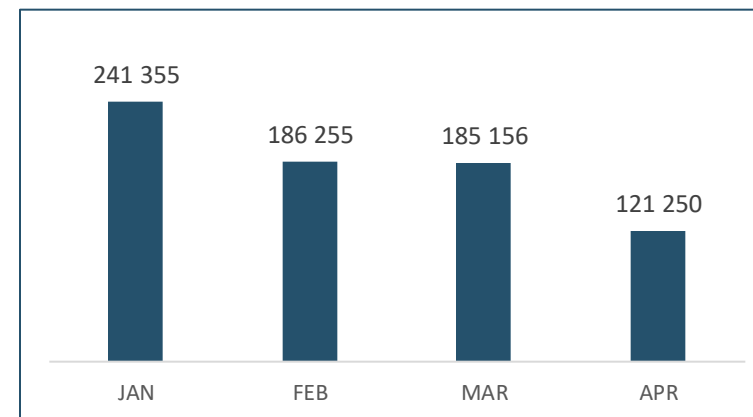




A quarter of the respondents on Jacaranda FM's audience survey have consumed podcasts during since lockdown began. The majority focused on news, comedy, entertainment, music and art. It is evident that listeners are keeping up to date with the latest happenings, but at the same time, are enjoying escapism through listening to music and comical entertainment.

Channel	Jan	Feb	Mar	Apr
Breakfast with Martin Bester	177 964	140 999	118 634	93 464
Jacaranda FM News interviews + soundbytes	34 969	21 056	36 556	16 452
The Scenic Drive with Rian	23 574	19 415	25 111	7 885
Traffic	1 917	1 894	2 154	273
Jacaranda FM News	1 532	1 524	958	1 423
Love Songs with Danny Painter	755	881	1 028	819
The Workzone with Elana Afrika-Bredenkamp	271	61	277	127
Mack Rapapali Nights	98	58	117	251
Jacatainment NOW	78	80	125	117
Barney & Friends	46	41	52	35
Station Interviews	45	10	32	17
Barney Simon	43	39	52	42
The Kriya Gangiah Show	35	25	15	17
The Late Show with Carla Mackenzie	25	45	37	25
Jacaranda FM Sport	3	2	1	1

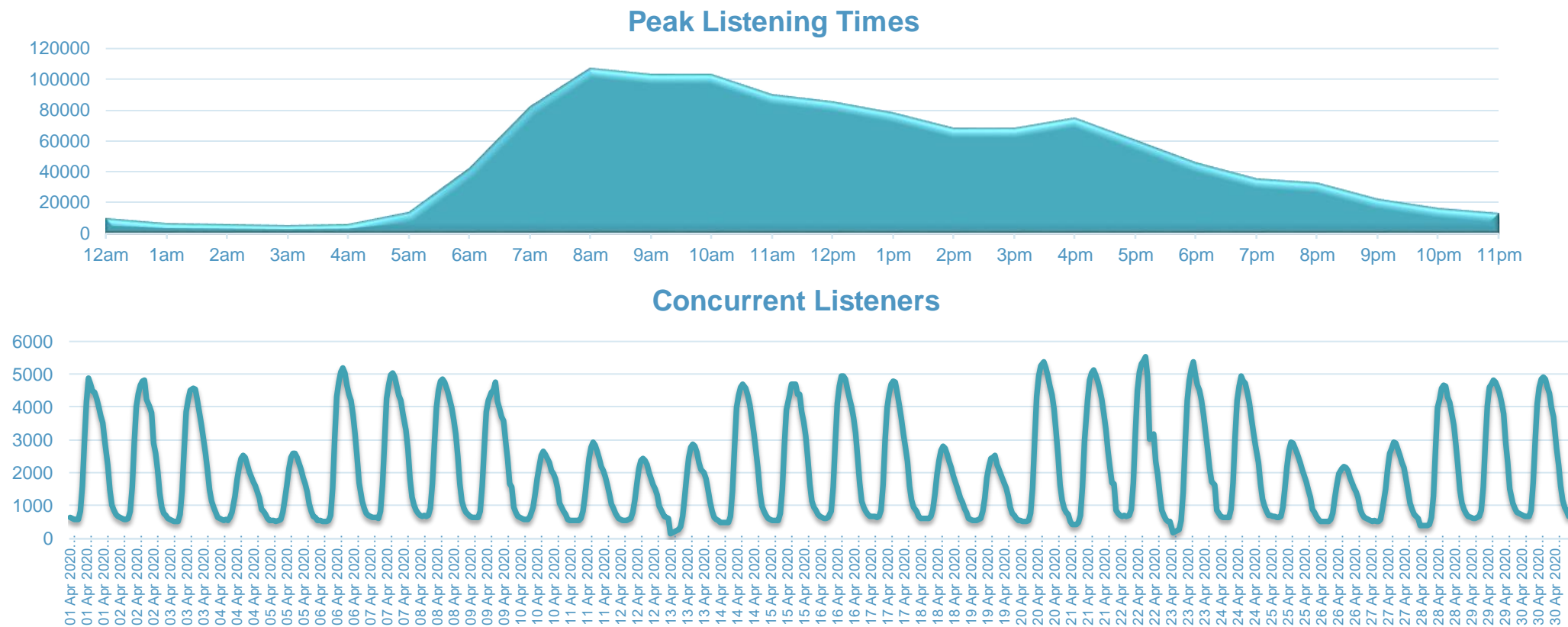
#### Overall Monthly Podcast



- Breakfast with Martin Bester is still the most accessed show in 2020
- Jacaranda FM News interviews and sound bytes saw a significant increase of 74% in March
- The audiences mostly consumes entertainment and news related podcasts

More than 60% of listeners are interested in **live streaming** content from their favourite **radio** station, via platforms such as Facebook live, YouTube live, etc.

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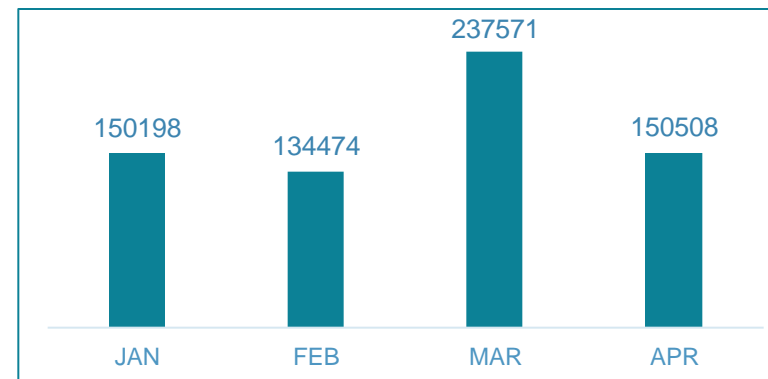


Digital Audio – April Unique Connections: 1 177 465

The East Coast Radio listenership interest is not limited to Covid-19 specific news as mentioned by those who consumed podcasts since lockdown began. Other genres such as news, entertainment and comedy are of great interest to them during this lockdown period as they bond with loved ones and pass time by keeping themselves entertained

Channel	Jan	Feb	Mar	Apr
East Coast Radio Newswatch	32 405	27 244	85 014	71 060
ECR Sport	42 020	30 725	26 418	13 750
East Coast Breakfast with Darren Maule	22 394	12 128	16 958	11 513
ECR Traffic	12 142	15 179	13 206	285
East Coast Drive	21 882	10 790	35 813	10 898
ECR Newswatch interviews and soundbytes	2 906	2 217	22 499	5 562
Snake Rescue		21 331	13 607	2 945
KindnessCan	4 384	5 035	3 484	2 510
Stacey Norman	1 023	749	2 369	562
Thandolwethu	1 510	1 392	2 453	14 131
ECR Consumerwatch	2 729	2 385	1 494	5 371
Khuluma Nathi	1 264	1 484	1 443	1 260
e-learning			5 457	6 520

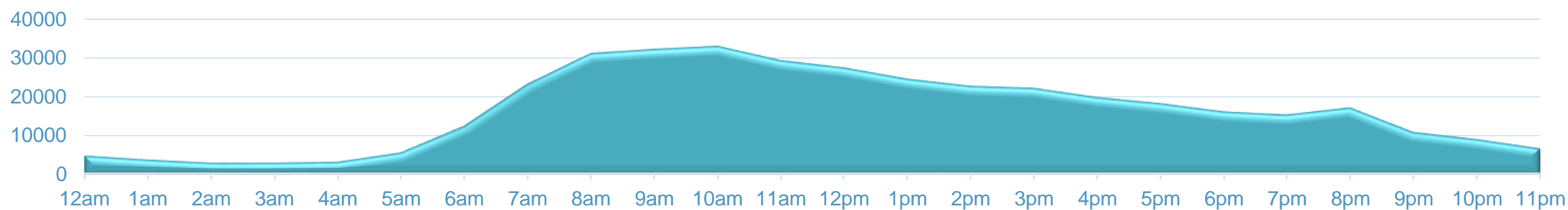
Overall Monthly Podcast



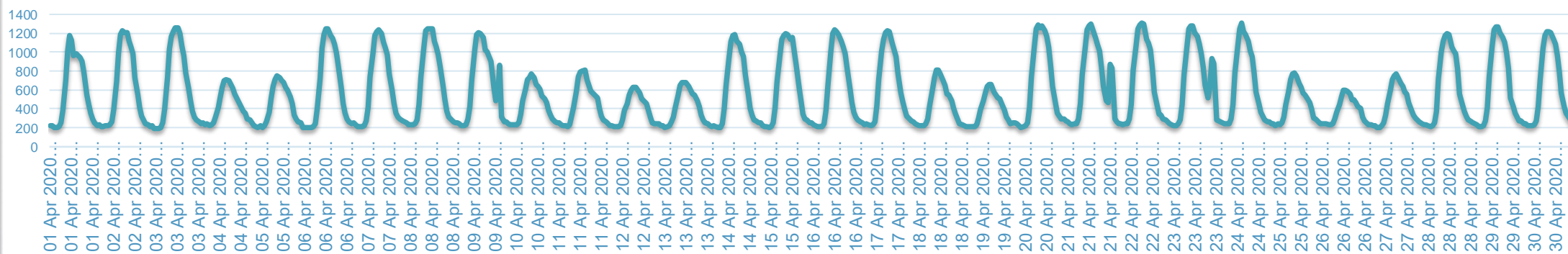
- March received the highest number of podcast access resulting in an 77% increase.
- East Coast Radio Newswatch has seen a notable of increase of 212% in March.
- The significant increase shows the audience's appetite for news content during this pandemic

East Coast Radio listeners are tech-savvy and Internet enabled. Almost 60% have Wi-Fi connections in their homes, while 42% use mobile data either on their phones or laptops.

**Peak Listening Times**



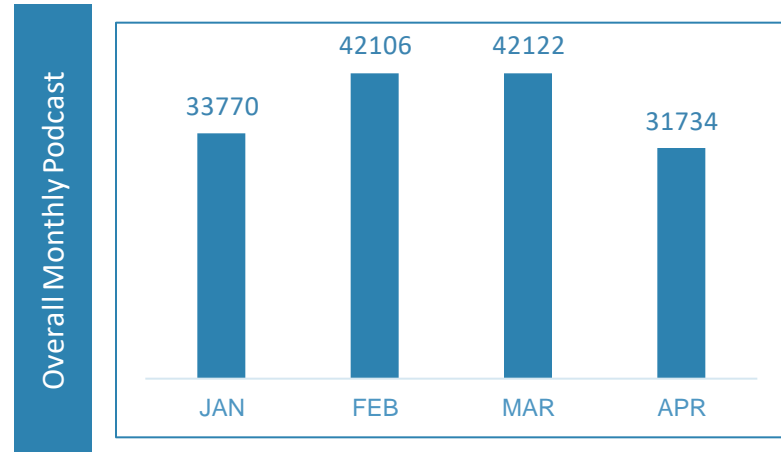
**Concurrent Listeners**



**Digital Audio – April Unique Connections:– 397 838**

10% of the respondents say they are audio streaming more now during lockdown than they had done before

Channel	Jan	Feb	Mar	Apr
Good Friday	20 085	23 492	21 270	19 165
The Best T in the City	4 239	7 245	7 155	2 682
Uncaptured	1 857	2 805	4 285	1 857
Sidebar with Sindi	1 433	2 705	2 851	1 272
Kaya Breakfast	1 165	1 308	1 751	1 538
Umoya: On African Spirituality	859	761	591	676
Today with John Perlman	782	494	564	501
Life with Kojo	400	353	381	373
Kaya Bizz	374	712	556	622
Home with Mapaseka	366	487	615	1 269
The Law Report	326	264	336	99
Saturdays with Jenny	312	305	216	160
Homestraight	243	97	89	351

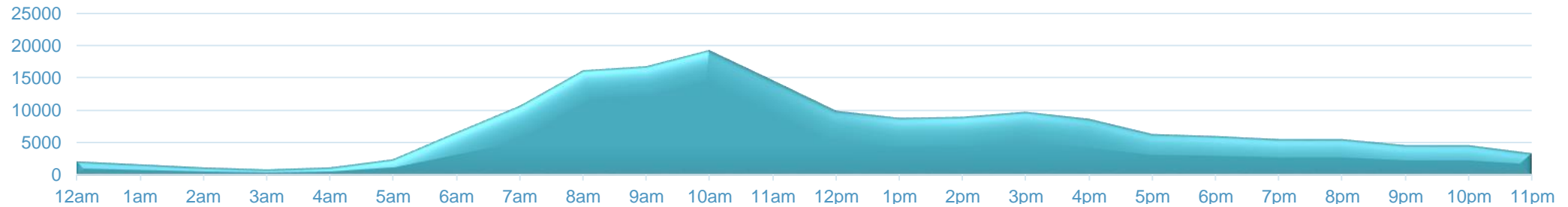


- March received the highest number of podcast access for Kaya FM
- Home with Mapaseka received the highest increase in April of 106%
- The channel breakdown illustrates that the Kaya FM audience is looking to consume current affairs shows as well as entertainment shows

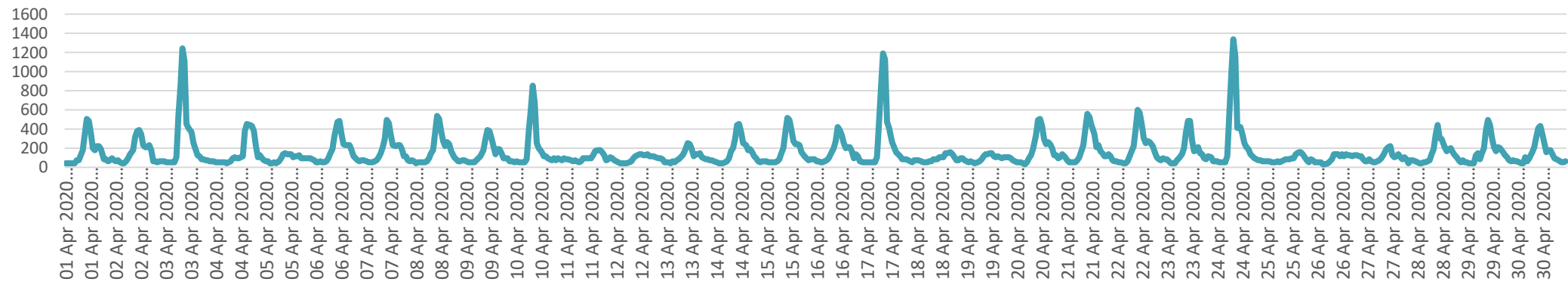


12% of the respondents say that they stream radio online now more than they did before the Covid-19

Peak Listening Times



Concurrent Listeners



Digital Audio – April Unique Connections: 177 220



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