

# Media landscape questions: South Africa

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## 1. What characterizes the difference between national, regional, and local in relation to media in your country?

The country is a republic inhabited by around 54 million people (Statistics SA). South Africa is a multi-ethnic nation and has diverse cultures and languages. All these groups have political representation in the country's constitutional democracy with a federally structured, three-tier system of government and an independent judiciary, operating in a unique system that combines aspects of parliamentary and presidential systems. Divided into three levels of government—national, provincial and local, these tiers have legislative and executive authority in their own spheres and are defined in the South African Constitution as “distinctive, interdependent and interrelated”.

The provincial governments are structured according to a parliamentary system in which the executive is dependent on and accountable to the legislature. Each provincial government is headed by a Premier. The country is divided into nine provinces. There are also several types of municipalities. South Africa has a total of 278 municipalities, including eight metropolitan municipalities, 44 district municipalities and 226 local municipalities. In South Africa, media content that is distributed on a national scale is produced in Johannesburg, Cape Town and Durban. Some television (SABC and e.tv) and radio stations have branches and bureaus in most capital cities such as Port Elizabeth, Bloemfontein, Polokwane, Nelspruit, Mpumalanga and Rustenburg. SABC, as the public service broadcaster, transmits in most national languages such as English, Xhosa, Ndebele, Sotho, Swazi, Tsonga, Venda, Zulu, Tswana and Afrikaans. Satellite television stations such as MultiChoice (DStv) and Top TV broadcast in English and also has options in Portuguese, German, Afrikaans, Dutch, IsiZulu, Sesotho, Mandarin and Hindi. There are several national, provincial and local (community) newspapers serving a diverse audience. Community televisions such as Soweto TV and Cape Town TV serve their audiences within specific geographic areas. Commercial newspapers in South Africa are independent of government control and are often referred to as the ‘surrogate opposition’ given their anti-government editorial slant. Their middle-class bias has been seen as problematic in a society characterised by massive inequalities, unemployment and poverty especially amongst Africans. While the number of radio and television stations has grown since 1991, the number of daily and weekly newspapers has remained fairly static; while some new newspapers have been launched, especially in the tabloid market, others have ceased publication. Tabloid newspapers such as the Daily Sun have been credited for broadening the mediated public sphere especially by including the voices of the often marginalised sections of society.

## 2. What is the role of newspapers in your society?

The history of newspapers in South Africa dates back to 1800, when the governor of the Cape Colony initiated the publishing of the government-controlled Cape Town Gazette and African Advertiser. The first privately owned newspaper, the SA Commercial Advertiser was published in 1824, with Thomas Pringle and John Fairbairn as editors. The first Dutch language newspaper, De Zuid Afrikaan, was published in 1830, the first African language

newspaper, Umshumayeli Wendaba, in 1837 and the first Afrikaans language newspaper, Die Afrikaanse Patriot, in 1876.

The development of the South African press since the end of apartheid has shown two significant trends: the stagnation and decline of the traditional mainstream newspapers, and the phenomenal growth of papers with a black, working class readership. The stagnation of South Africa's mainstream press, which traditionally had a wealthy white readership, mirrors the trend in established newspapers in developed countries across the world. This stagnation is generally attributed to the growth of the internet since the dotcom crash of 2001, with more and more of those who can choose to find their news online instead of on the printed page.

On the other hand the opposite trend, the remarkable growth of newspaper readership in the lower end of the market, is a phenomenon seen in developing countries such as India and China. This is due to the vast improvement in the living standards in South Africa's poorest communities, the major beneficiaries of change in this country. Their living conditions and general standard of living changed almost overnight as access to housing, electricity, running water, job opportunities and minimum wages came sweeping through under a new democratic government. An estimated 1.3 million newspapers are sold in South Africa daily. There are 23 daily and 18 weekly urban newspapers in South Africa, most published in English.

It has been pointed out that the print media in South Africa is bedeviled by massive media concentration and conglomeration. The South African newspaper market is dominated by one large company, Media24 (owned largely by Naspers), with three smaller companies dominating the rest of the market, namely Independent Newspapers, Times Media Group and Caxton. These big four media groups also display high levels of vertical and horizontal integration, providing much of their own printing and distribution requirements, as well as those of other print media concerns. Caxton, Media24 and Independent Newspapers own 47.1 per cent of the titles in circulation. Caxton alone owns 28.3 per cent of the total newspaper titles in the country. The other titles in circulation are owned by Times Media and a host of smaller publishers. This media concentration which militates against media diversity has made it difficult for people – such as black people and women – who have historically been locked out of the market to gain access to the media as barriers to entry are higher than in markets with a greater plurality of media and suppliers.

Furthermore, newspapers are spread unevenly across the country, with the economic powerhouse of Gauteng accounting for 50.6 per cent of titles, while the Northern Cape and North West have the lowest circulation figures, accounting for 5.6 per cent and 6.8 per cent respectively. The Daily Sun, a tabloid newspaper which was launched in 2002 has taken the newspaper market by storm, as evidenced by its circulation rise from 78 000 in its first year to 513 291 in the first quarter of 2009. Its readership has increased from under half a million to over 5-million for the period between January and December 2010. Daily Sun's success has led to an increasing "tabloidisation" of South Africa's newspaper industry, with a number of new tabloids being launched. These include the Afrikaans-language Die Son and English-language Daily Voice, both targeting working class coloured and, to a lesser extent, white readers in the Western Cape. The current newspaper industry is in a fairly healthy state, although the sector stands accused of being elitist and middle-class bias in its editorial stance. There are also a large number of free (advertising-funded) local and community newspapers in several different languages, as well as a range of general and specialised news websites.

### **3. What characterizes the magazine sector in your country?**

The first niche magazines in South Africa were launched during the early years of the twentieth century with the establishment of specialist magazines in the agricultural field—Farmer's Weekly first appeared in 1911 and Landbouweekblad in 1919 (Claassen, 1998: 125). However the most recent growth in the magazine market was recorded in the 1980s and 2000s. This was followed by the arrival of a South African edition of Cosmopolitan in 1984 which heralded the entry of international titles into the local market (Claassen, 1998: 126). Some of the famous international titles which entered the market in 1990s and 2000s include Elle, Marie Claire, Shape, O, Glamour, Woman and Home, InStyle and Psychologies (Le Roux, 2006).

Given the high development indicators associated with the South African economy especially in Sub-Saharan Africa, it is understandable that the country has a very robust magazine industry with an estimated 600 locally-published and imported magazines available. The explosion of titles in South Africa has created a magazine minefield, where too many titles are chasing for a limited advertising cake. The fragmentation of the magazine market has spawned the mushrooming of niche magazines.

The South African magazine market is dominated by only a few publishers (Naspers, Caxton, CTP Holdings and TML), the specialist consumer and trade and technical sectors are very fragmented and contain a large number of small- and medium-sized publishers in addition to the aforementioned major players. This sector is characterised by definite differences in the readership of magazines amongst the country's different race groups. A decline in traditional mass consumer magazine titles versus the growth of specialist titles also characterizes the industry, as does the growth of magazines specifically aimed at black South Africans, such as Drum. Naspers is the dominant player in the mass consumer magazine sector and sells about two thirds of all the magazines read in South Africa, including imported magazines. The company publishes large national titles such as Fair Lady, Sarie, Insig, SA Sports Illustrated, Kickoff, Huisgenoot, You and Drum. The Afrikaans language family magazine Huisgenoot has the largest circulation of any South African magazine and is followed by You, its English language version. In the fourth quarter of 2012 Huisgenoot's sales had declined from 283,355 to 270,310 and You fell to 155,125 from 172,403.

South Africa's largest selling English and Afrikaans-language women's magazines are Fair Lady and Sarie respectively. Other large mass market publishers are Caxton (Republican Press), CTP Holdings and Times Media. Specialist consumer magazines are also published by the aforementioned publishers, as well as by Primedia Publishing, Kagiso Media and Ramsay Son & Parker. In the trade and technical sector Primedia is the largest publisher. Research shows that most of the successful magazines are playing a major role in the lives of their readers through the creation of an 'emotional bond'. Most of their readers turn to these magazines for information and ideas to help them make decisions and for advice, empathy and solutions to achieve overall wellbeing (Townsend, 2004:79). The closure of several titles in 2006/7 raised questions about the sustainability of the boom, especially in the wake of 2008 global economic downturn, which affected advertising and consumer spending.

**4. What characterizes the radio sector in your country? If your country has community radio as phenomena, please include them. If not, please reflect on how minority groups (ex.: migrant/immigrant diasporas, national groups, language-based groups, etc.) use ICTs for articulation, mobilization, cultural resistance, etc.**

The first station in South Africa was set up by the South African Railways in Johannesburg on December 29, 1923. It was taken over by the Scientific and Technical Club on July 1, 1924. A similar project was started by the Cape and Peninsula Broadcasting Association in Cape Town on September 15, 1924. Another Durban-based organisation began transmitting on December 10, 1924. FM broadcasting service began on September 1, 1961 from the Brixton Tower (Sentech Tower). Radio has always been South Africa's biggest broadcast medium and the sector's deregulation in 1996 led to an even bigger proliferation of radio stations. The industry is regulated by ICASA.

South Africa's mass market stations are led by public station Ukhozi FM (7.7 million listeners per week), focusing on the IsiZulu population, and commercial station Metro FM (6 million listeners per week). Broadcasts range from the country-wide and regional radio stations of the state-owned and funded SABC to fully commercial privately owned stations to community stations that target specific cities, towns, neighbourhoods or ethnic groups. The majority of radio stations broadcast in English, although the other official languages of South Africa are represented on the airwaves as well. Some of the most popular public and commercial radio stations include Five FM, Lesedi FM (Sesotho), Umhlobo Wenene (Port Elizabeth, IsiXhosa), Radio 2000 (Johannesburg, English), Phalapala (Polokwane, Venda), Lotus FM (Durban), 94.7 Highveld Stereo (Johannesburg), East Coast Radio (Durban), KFM 94.5 (Cape Town), Kaya FM 95.9 (Johannesburg), YFM 99.2 (Johannesburg), Classic FM (Johannesburg), Radio Orange (Bloemfontein), Jacaranda 94.2 (Pretoria) and Radio Algoa (Port Elizabeth). There are also talk radios such as Radio 702, 567 Cape Talk and SAFM which focus on current affairs programmes.

Community radio in South Africa began 1994, when the country's broadcasting authority began the continuing process of accessing and granting licence applications from groups as diverse as rural women's cooperatives, Afrikaner communities and a variety of religious groups. The growth of the community radio sector in South Africa is associated with the dismantling of apartheid and the promulgation of the Independent Broadcasting Authority Act of 1993. The Act paved way for the democratisation of the radio broadcasters, through deterring government interference and ownership diversification. Since 1996, community radio stations are allowed four year licensing as opposed to 12 months which was the norm between 1994 and 1995. There are over 100 community radio stations, in all nine provinces which are licensed to broadcast, which includes ethnic and religious stations.

**5. What characterizes the television sector in your country?**

Television was introduced in 1976. The late introduction of television broadcasting was necessitated by the fear within the white minority government, under the National Party, that viewed television as potential threat to its control of the broadcasting media, although the state controlled South African Broadcasting Corporation (SABC) had a virtual monopoly on radio broadcasting. During that time, Prime Minister compared television with atomic bombs and poison gas, claiming that "they are modern things, but that does not mean they are desirable. The government has to watch for any dangers to the people, both spiritual and physical". When television was introduced in 1976, it was funded entirely through license fees and then later diversified into advertising in 1978. In 1981, a second channel was introduced,

broadcasting in African languages such as Zulu, Xhosa, Sotho and Tswana. The monopoly of the SABC was successfully challenged following the launch of a subscription-based service known as M-Net. However this station was censored from broadcasting news programmes through a raft of licensing restrictions. According to the Independent Broadcasting Authority Act of 1993, the country is mandated to have three tiers of broadcasting, these being public, commercial and community. At the dawn of democracy in 1994, the SABC's news coverage moved towards being more objective. The SABC's monopoly on free-to-air terrestrial television was broken with the introduction of privately owned channel e.tv in 1998. This was followed by the introduction of the first 24-hour local business channel, CNBC Africa which was launched in 2007 with eight hours of local programming and the remainder pulled from other CNBC affiliates. Summit TV is another business television station owned by media group Times Media Group, which broadcasts only during evening prime time. In November 2007, ICASA awarded four new broadcast licenses to 'Walking on Water' (a dedicated Christian service), On Digital Media (a broad-spectrum entertainment offering now operating as Top TV), e-sat (now broadcasting as eNCA on MultiChoice platform, satellite service from e.tv) and Telkom Media (owned Telkom Group Ltd). Walking on Water (a Christian broadcaster), On Digital Media and e-Sat (the satellite arm of e.tv) were all expected to start direct-to-home satellite broadcasts in mid-2008. This did not happen as only On Digital Media succeeded in launching its Top TV service. Even Telkom Media which was supposed to operate satellite services as well as IPTV services such as video-on-demand, never took off and was subsequently sold to Shenzhen Media South Africa. On Digital Media is 68% black owned.

The growth of community television has curtailed by insensitive short-term licensing requirements. This situation was changed following the promulgation of a position paper on community television by ICASA, that longer term licenses of up to one year were enabled. Following this reprieve, the first community television to be awarded a one-year licence was Soweto TV in 2007. It serves the southern Johannesburg region and it is also available on MultiChoice platform. It was followed by Cape Town TV, licensed in 2008. It serves the greater Cape Town metro and reaches a monthly audience of about 1.3 million viewers. In terms of satellite broadcasting, there is Top TV which offers a total of 55 channels with 25 channels in its basic offering and MultiChoice (DStv).

Television is the most tightly regulated media sector in South Africa and is (along with radio) regulated by the Independent Communications Authority of South Africa (ICASA). Broadcast rights, especially for television, are issued by invitation only and only two independent television broadcasters have been permitted to operate up to now. Broadcast licenses mandate percentages of local, community and educational content and broadcasters are required to include such content as a condition of their license. As a result, there are only two free-to-air terrestrial television channels in South Africa, the state-owned public broadcaster, South African Broadcasting Corporation (three editorial units namely SABC 1, SABC 2 and SABC 3) and e.tv (which also broadcasts on DStv as eNCA). All broadcasters are subject to the Broadcast Complaints Commission of South Africa. MultiChoice is the oldest provider of pay TV and satellite broadcasting in the country, with one terrestrial pay TV channel, M-Net, and DStv, a digital satellite television network with over 55 local and international channels that broadcasts to over 8 million subscribers throughout Africa. However, MultiChoice's success is currently being affected by the launch of a range of affordable streaming services in South Africa, including the USA's Netflix and Showmax.

**6. Describe the telephony sector in your country. What are the roles and penetration rates of the landlines? What is the role of the mobile telephony sector? How do people commonly use mobile phones (including smartphones and tablets)?**

SA's results of its Census conducted in 2011 shows that the number of cellphones in South Africa increased significantly, while the number of landline telephones plummeted over the last decade. According to the census results, the proportion of household owning cellphones significantly increased from 31.9% in 2001 to 88.9% in 2011. On the other hand, the proportion using landlines decreased from 23.9% to 14.5% in 2011. The proportion of households with a computer increased from 8.5% in 2001 to 21.4% in 2011. South Africa has a vibrant mobile market that has seen rapid uptake since competition was introduced to the sector in the 1990s. Market penetration has surpassed 100% (estimated at around 138% inclusive of dual simcards ownership), driven by separate subscriptions for voice and mobile broadband services, following the launch of third generation (3G) and LTE services. The figure goes down to 66% when one looks at individual subscribers. The major mobile service providers are Vodacom, MTN, Cell C and Telkom SA. In comparison with the rest of Africa, this sector is fairly big and robust. However, it is dominated by the fixed line monopoly Telkom, which has been criticized in recent years for hampering further growth. Telephone and internet access is also available via mobile network operators, such as Vodacom and MTN, but is an even more expensive option. Smartphones are increasingly moving into the mainstream in South Africa. They are popular for web searching, social networking, email, Whatsapp and instant messaging. According to World Wide Worx, around 10 million smartphones have been sold in South Africa. Sales of smartphones grew to 11% in a year on year basis in 2015. Samsung dominates the smartphone market in South Africa with 53% and Apple lies in second place with a successful 2015 sales of the iPhone 6. The tablet market Samsung, Apple and Lenovo dominates.

Whatsapp is the most popular mobile instant messaging application in South Africa, followed by MXit. As is the case with computer-based instant messaging applications, the adoption of MXit and Whatsapp is particularly high amongst the youth (Durando et al., 2007). Some South African youth also use WeChat, Facebook Messenger or Skype Chat. Previously, cellphone ownership in South Africa was for a privileged few, but today it has become an essential part of the adolescent fashion accessory, in addition to being widely available to all social classes, largely as a result of the pay-as-you-go system allowing users to purchase airtime on an ad-hoc basis. This, together with the availability of cheaper handsets or the possibility of purchasing cellphone contracts on credit, has resulted in high cellphone penetration. Similarly, access to the internet is more widespread with the rise of the mobile internet, and online social networking applications are very popular in South Africa, particularly among young people across all social classes. With the rise of the mobile internet in South Africa, more people, youth in particular, are increasingly using the mobiles to access the internet (Donner & Gitau, 2009).

[www.itweb.co.za](http://www.itweb.co.za)

[www.news24.com/SciTech/News/SA-smartphone-penetration-about-16-.html](http://www.news24.com/SciTech/News/SA-smartphone-penetration-about-16-.html)

[www.dmma.co.za/news/inmobi-reveals-the-steady-rise-of-smartphones-in-south-africa.html](http://www.dmma.co.za/news/inmobi-reveals-the-steady-rise-of-smartphones-in-south-africa.html)

[www.mybroadband.co.za/news/cellular/399945-smartphone-penetration-rates-sa-still-low.html](http://www.mybroadband.co.za/news/cellular/399945-smartphone-penetration-rates-sa-still-low.html)

**7. Describe the historical development and current situation of Internet in your country. Also consider: technical infrastructure, digital divide, common uses, influence of Internet content in public debates, etc.**

The first South African IP address was granted to Rhodes University in 1988. On 12 November 1991, the first IP connection was made between Rhodes University's computer centre and the home of Randy Bush in Portland, Oregon. Commercial internet access for business began in June 1992, with the registration of the first .co.za sub-domain. South Africa's internet user base grew 25% from 6.8 million in 2010 to 8.5 million at the end of 2011, which means that penetration is approaching 20% of the population, but access is unevenly spread across the country. Of these internet users 69% are male, and 31% female (MyBroadband statistics; the Internet Society of South Africa). In 2013 South Africa was announced to be the sixth most connected country in Africa in terms of internet penetration (41%), which has now increased to about 49%. Low internet connectivity has been attributed to the state's failed policy of managed liberalization which sought to preserve a central role for state-owned operators in the sector and state shareholding in private companies, while gradually liberalizing the market over a period of time, as well as a decade-long period of policy and regulatory paralysis in the information and communications technology (ICT) sector in which decision-making and administrative justice were ultimately abdicated to the courts. However the liberalisation of the sector in 2006, following the licensing of the fixed-line operator Neotel created competition for Telkom. Growth in the telecommunications sector was also registered following the granting of Electronic Communications Network Service (ECNS) licenses to more than 400 organizations since a landmark August 2008 court ruling that value-added network service (VANS) providers can self-provide facilities. There are several Internet Service Providers (ISPs), Internet Access Providers (IAPs) and mobile service providers such as Vodacom, MTN, Cell C and Telkom South Africa.

South Africa has one of the greatest divides between the rich and the poor in the world and this divide is most evident in the technology area. The ICTs world unwittingly has excluded the masses as technology has raced on leaving many South Africans behind. Socio-economic circumstances, imbalanced educational policies under apartheid regime, as well as language barriers, are some of the factors recognised in this exclusion. In remote areas that are often sparsely populated and located in difficult geographical environments, telecommunications infrastructure is more often than not underdeveloped due to the fact that providing telecommunication services in such areas means low returns on their investment for service providers. This digital exclusion which tends to follow societal cracks and crevices continues to militate against the attainment of universal service and access. The country is divided by racial, ethnic, gender, class and other stratification variables, which results in disparities in access to ICTs.

Freedom on the Net Report 2012 [www.freedomhouse.org/report/freedom-net/2012/south-africa](http://www.freedomhouse.org/report/freedom-net/2012/south-africa)

**8. About the registered domains: what are the most common kinds of websites registered and what are the most accessed kinds of website?**

South Africans are open to using web-based software packages. This is shown in the adaptation to internet banking, the use of blogging software, search engines, social media platforms and online shopping. The most trafficked websites in South Africa are Google South Africa, Facebook, Google, Yahoo, YouTube, Wikipedia, LinkedIn, Gumtree, Blogger, Twitter, Windows Live, News24, FNB, Standard Bank, ABSA, WordPress, MSN, IOL,

Flickr, Bid or Buy, Takealot.com, Instagram and Amazon. In terms of local websites, Bid or buy is ranked top, followed by Gumtree and News24. Other local popular sites include FNB, Standard Bank, and ABSA.

**9. About social media: what social media platforms are the most common (e.x. blogs, social networks, video-sharing websites, etc)? How influent in public debates are issues raised in social media? Does your country follow international patterns of social media usage (ex.: are global platforms like facebook the most popular or are there national/regional/local ones)?**

With the rise of the mobile internet in South Africa, more people, youth in particular, are increasingly using the mobiles to access the internet. Whatsapp is the most popular social network site in South Africa, with more than 16.74 million active users. The second most popular site is Facebook with an estimated 14, 04 million users. Facebook is used by 80.7% of internet users in the country. At approximately 2 million users, Johannesburg has the biggest Facebook-using population in South Africa by far, followed by Cape Town's 860, 000 and Pretoria close behind Cape Town at 840, 000 users. Third is Google Plus with 8.1 million users. Other social network sites include Twitter (7.02 million users), LinkedIn (6.48 million users), Skype (with 5.94 million users), Pinterest (4.86 million users), Instagram (4.32 million users), MXit (4.9 million users) and WeChat (3.78 million users). The main political parties have developed online campaigns to attract young voters and are very active on social media. Various topical issues have made to the social media platforms such as the Brett Murray painting 'The Spear of the Nation', depicting the President Jacob Zuma, the infamous recall of President Thabo Mbeki, the suspension of the ANC Youth League President Julius Malema, and Jacob Zuma's Nkandla-scandal just to name a few. However there are fears that the recent passing of the Protection of State Information Bill, which would make it illegal to publish and access certain state information, will affect the traditional and digital media, bloggers, and internet users. Even the proposed General Intelligence Laws Amendment Bill of 2011, which could potentially legalize the bulk monitoring of internet communications would endanger internet freedom in the country.

My Broadband Statistics: <http://mybroadband.co.za/news/internet/117284-most-popular-social-platforms-in-south-africa.html>