

# Tracking Adspend and Audiences Since Lockdown

A monthly report produced for the Industry

Feb 2020 Release. **Full 2020 Report**





# Introduction

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

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

Adspend for 2020 ended up 8% down on 2019, but the rollercoaster variance was tremendous going from a 31% decline in the second quarter to a 12% increase in the last quarter of 2020. This bodes well for 2021.

This report covers Adspend up until Dec 2020 and Digital & TV Audiences up to Dec 2020 as well. Please note that this analysis excludes Cinema and Direct Mail. Nielsen WizzAd figures change based on media reporting after previous month closing dates, or faults in data supplied by media owners previously. This means that some charts will have changed from earlier reports.

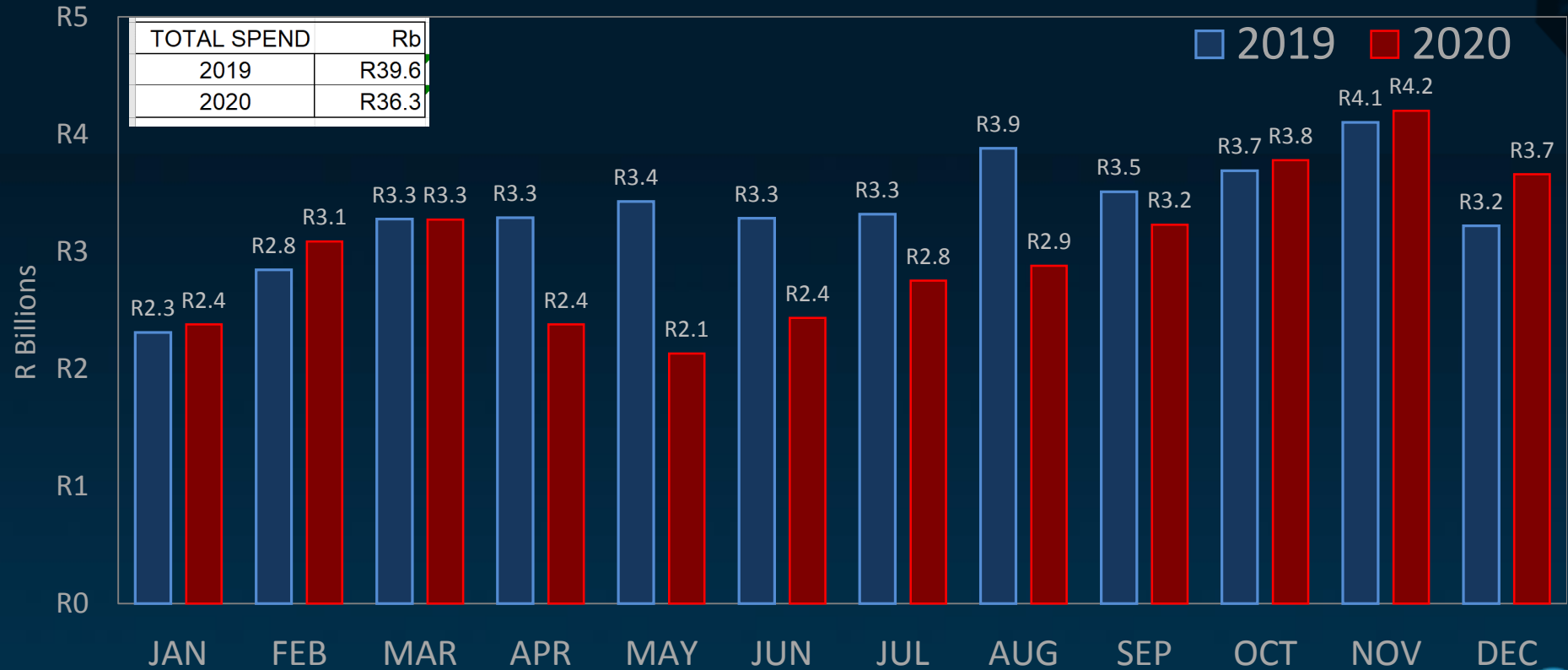




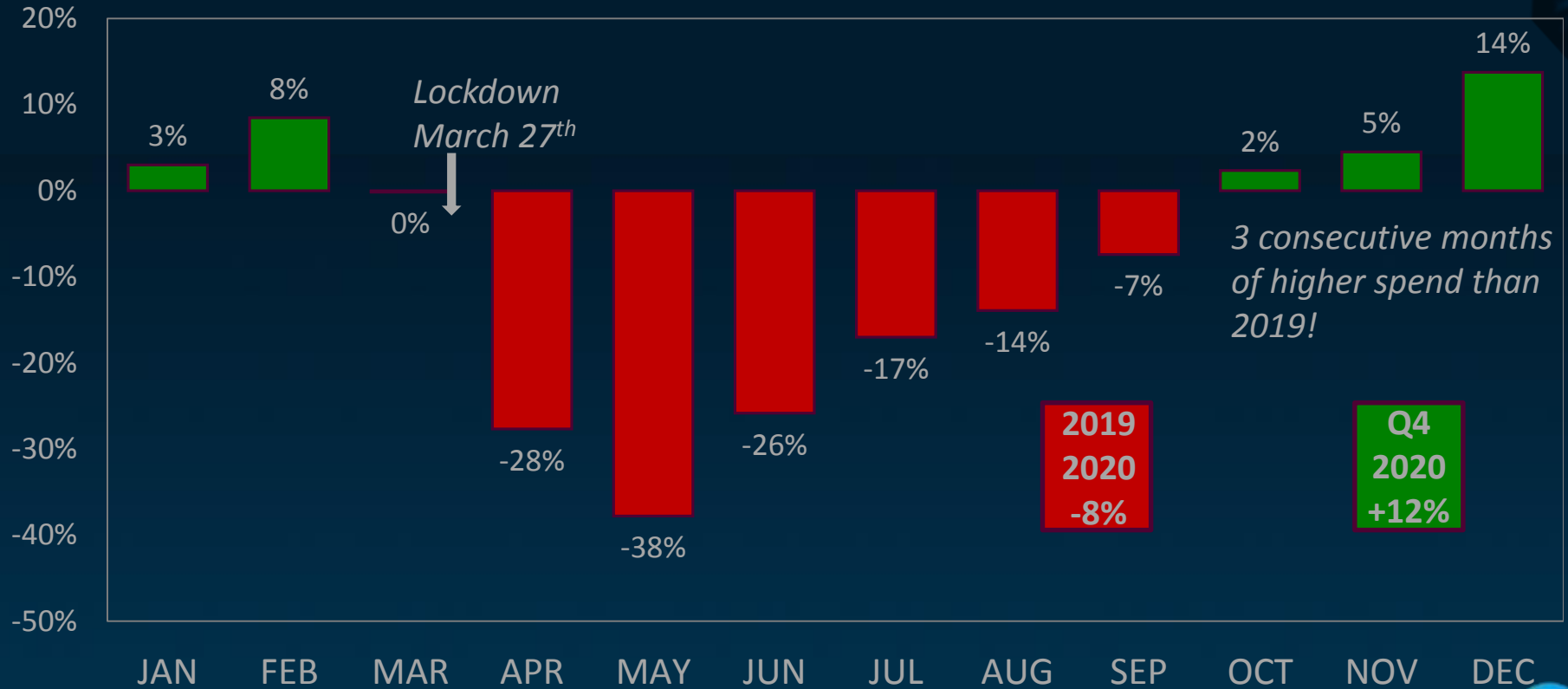
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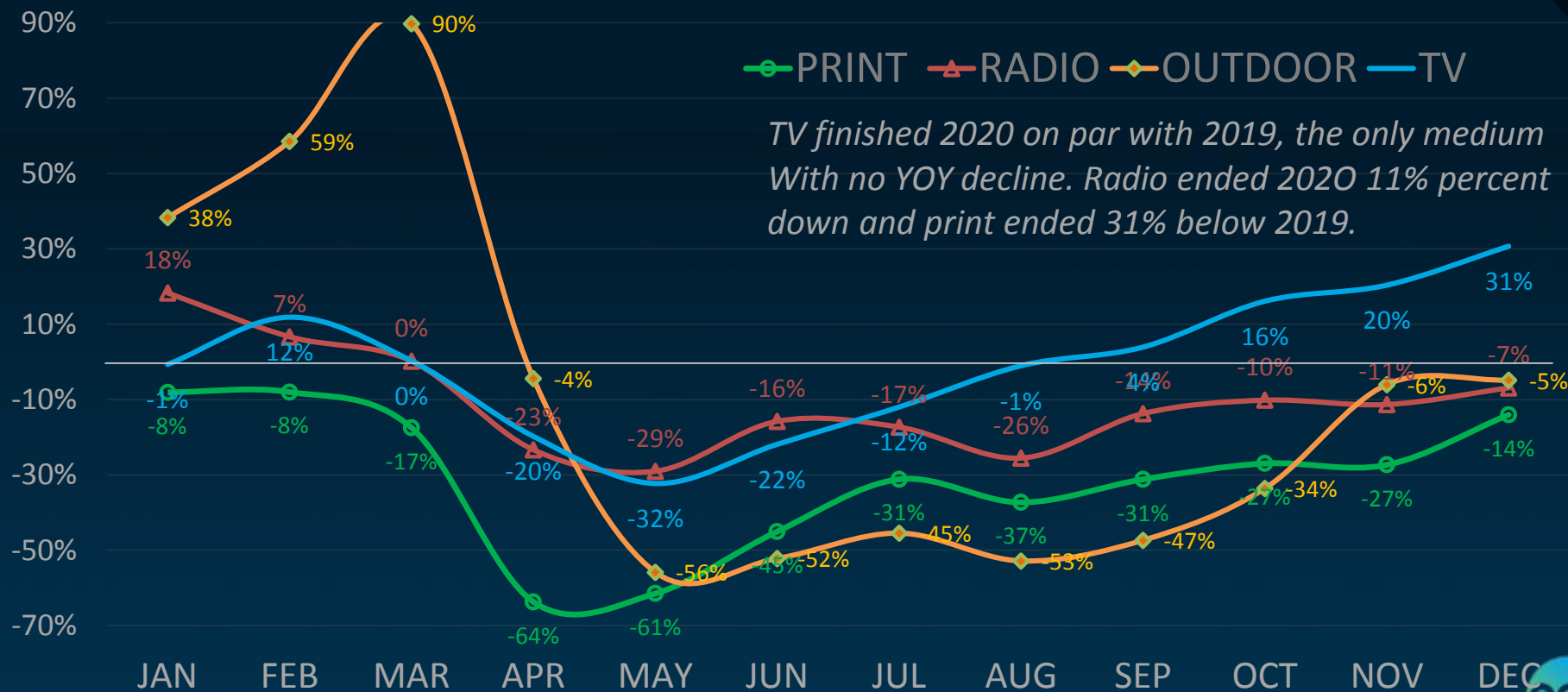
# Total Adspend By Month – R Billions Year on Year



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



# Adspend By Medium – % Change '19 vs. '20



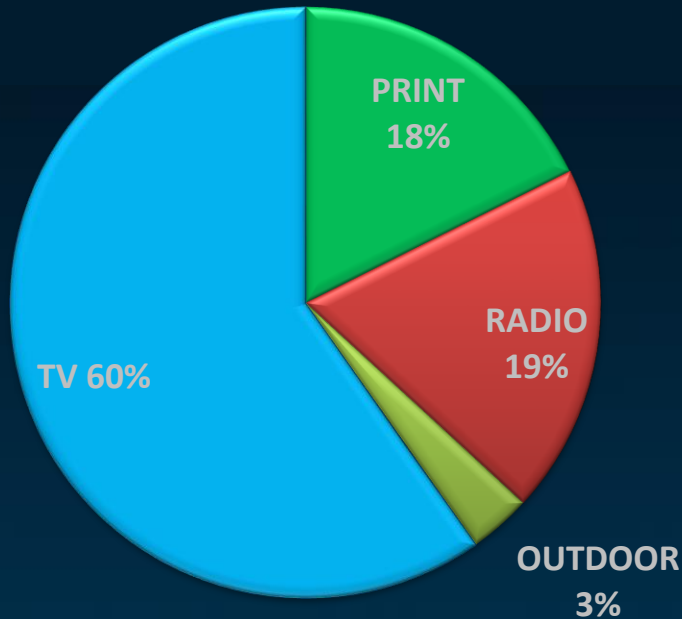
2019 vs. 2020 by Month. Outdoor Q1 reflects new companies being measured by Nielsen – not real growth.



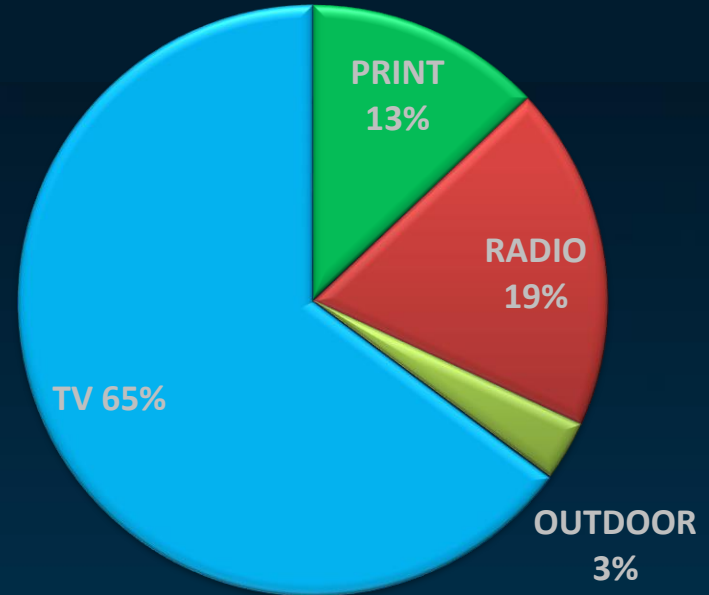


# Adspend Share By Medium – 2019 vs. 2020

*TV Growth at the expense of Print*

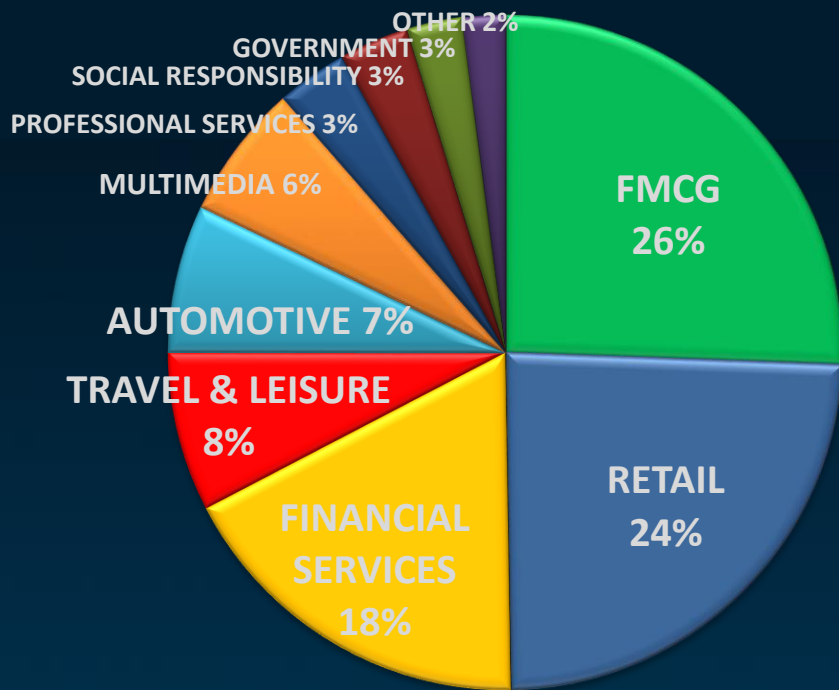


2019

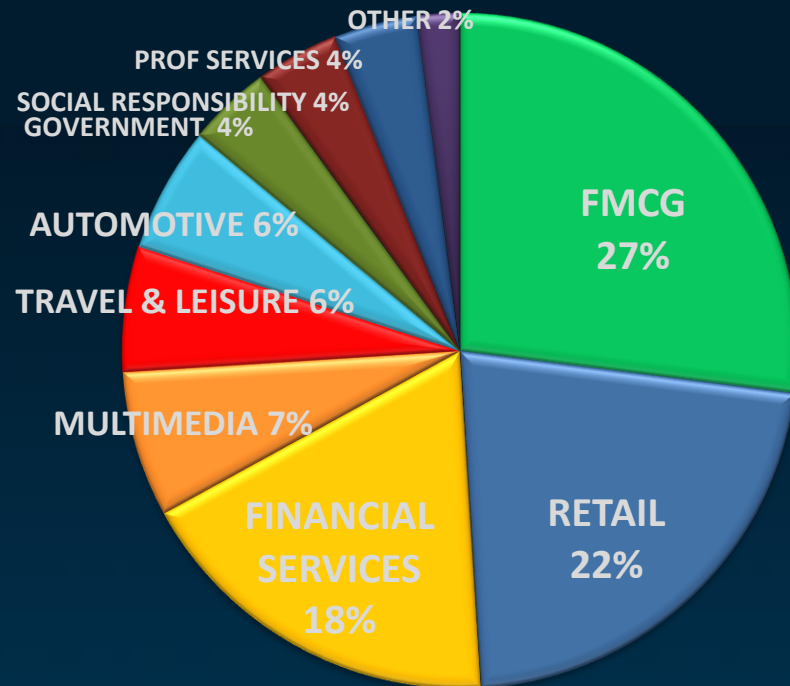


2020

# Adspend Share By Category – 2019 vs. 2020



2019



2020



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

CATEGORY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
SOCIAL RESPONSIBILITY & WELFARE	0%	5%	2%	53%	-41%	-40%	208%	42%	-33%	2%	65%	69%	43%
GOVERNMENT EDUCATION & HEALTH	7%	-10%	-14%	30%	-45%	-21%	8%	36%	83%	39%	42%	47%	15%
BUSINESS TO BUSINESS & INDUSTRIAL	-1%	-4%	-15%	16%	-8%	-13%	-10%	-16%	4%	18%	23%	39%	0%
MULTIMEDIA	6%	18%	-5%	28%	-53%	-28%	-28%	2%	9%	35%	28%	59%	-1%
PROFESSIONAL SERVICES	-33%	-32%	-49%	57%	-72%	-68%	-15%	-5%	4%	21%	17%	2%	-1%
FMCG -TOTAL	57%	2%	52%	18%	-54%	50%	-20%	-11%	1%	17%	24%	31%	-4%
FINANCIAL SERVICES	22%	12%	11%	19%	-32%	-26%	-18%	-17%	-2%	1%	2%	12%	-6%
RETAIL	-18%	6%	-1%	76%	87%	12%	-19%	-24%	-23%	-11%	-5%	2%	-17%
MEDIA ADVERTISING & PROMOTIONS	-6%	13%	-3%	26%	-21%	5%	7%	-39%	-69%	-38%	-40%	89%	-19%
AUTOMOTIVE	-2%	-1%	0%	58%	-73%	-48%	-29%	-17%	-16%	-17%	-14%	4%	-23%
TRAVEL SPORT AND LEISURE	-23%	-4%	5%	-19%	0%	49%	-44%	-37%	-21%	-33%	-38%	-28%	-26%
SMALL DISPLAY ADS	6%	14%	-12%	-178%	-42%	-13%	-55%	-50%	-35%	-3%	-41%	-29%	-47%

# Covid – The Catalyst for Digital Transformation

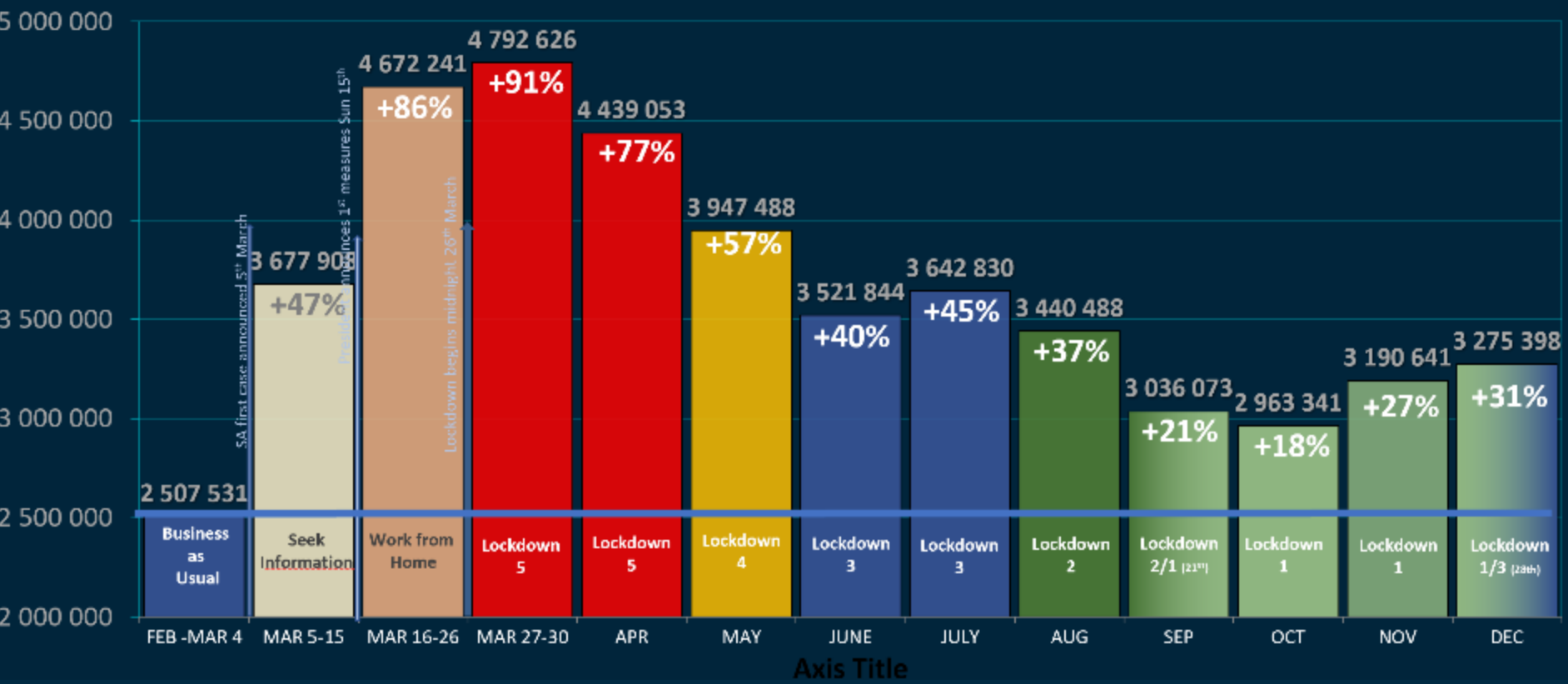
News Sites have increased their monthly and daily audiences by around 33% since pre-Covid February. Page Views are around 13% up as well.

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%
SEPT	34 928 658	116%	3 036 073	137%	274 448 611	100%	02:26	91%
OCT	34 285 013	114%	2 963 341	118%	289 521 495	105%	02:27	91%
NOV	36 700 148	122%	3 190 641	127%	301 812 413	110%	02:30	93%
DEC	40 010 764	133%	3 275 398	131%	311 860 334	113%	02:14	83%



# News Sites Audiences are 31% above Pre-Covid Level

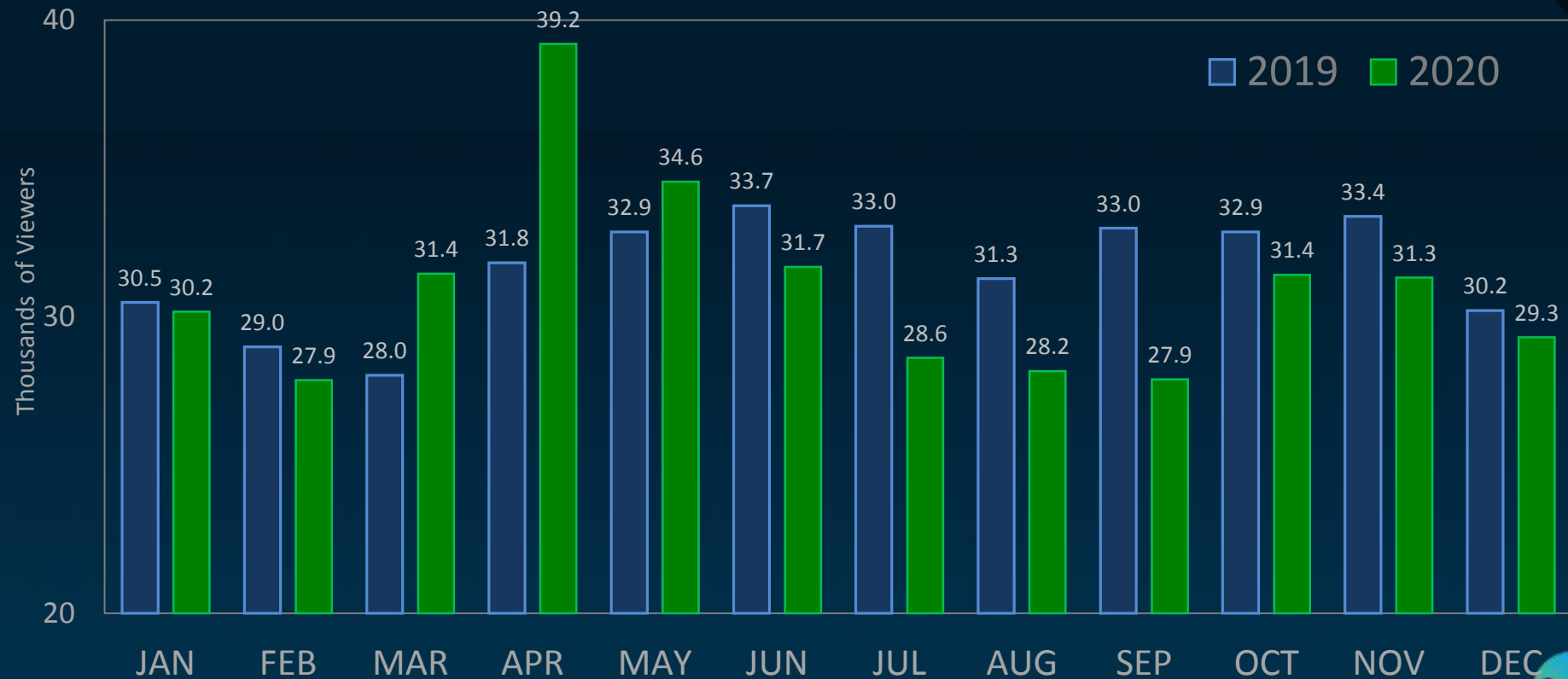
Average Daily Unique Browsers



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, netwerk24.com, news24.com, sowetanlive.co.za, thesouthafrican.com, timeslive.co.za

# Total Average Monthly TV Audience '19 vs. '20

TOTAL ADULTS (15 Years +)

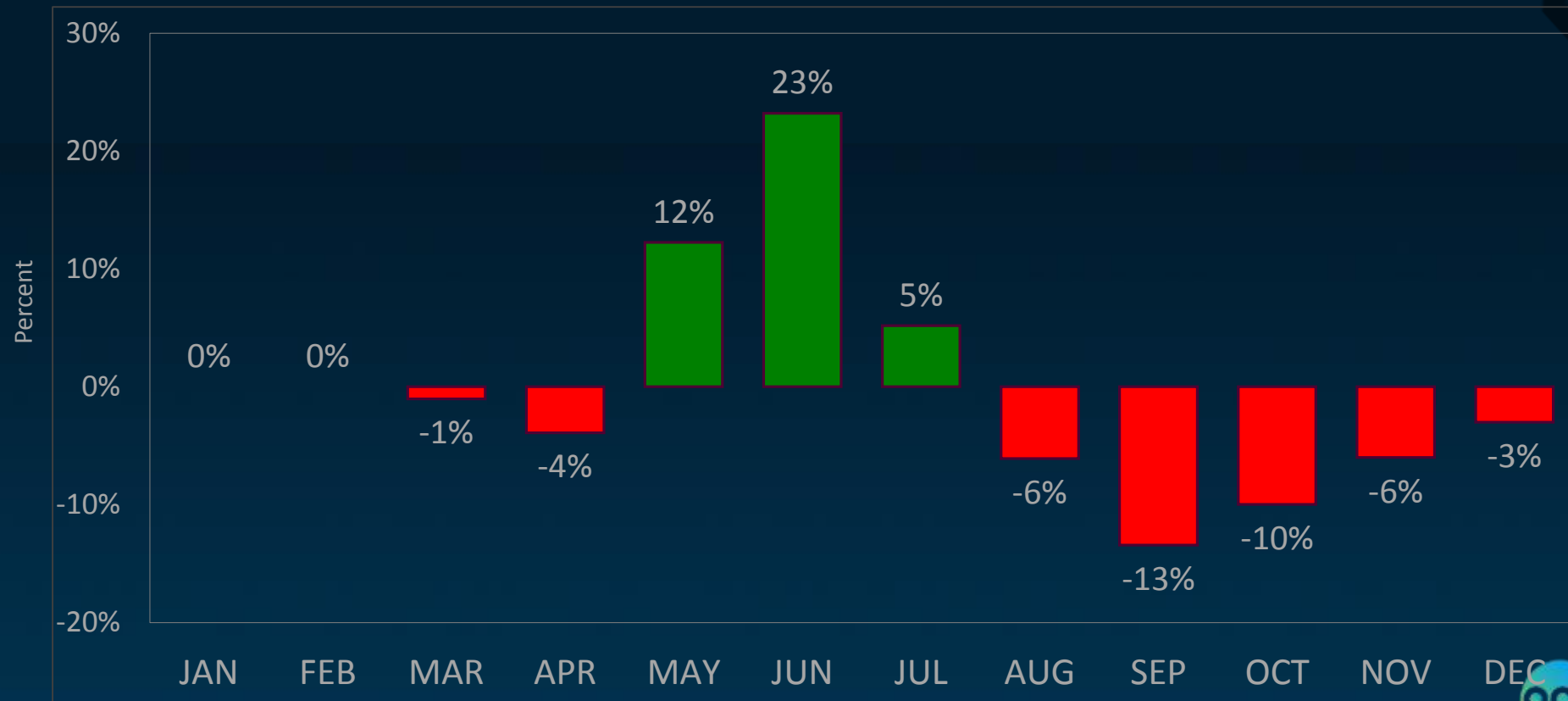


Source: BRC TAMS 2019 Vs. 2020 Average Audience across all channels by all dayparts



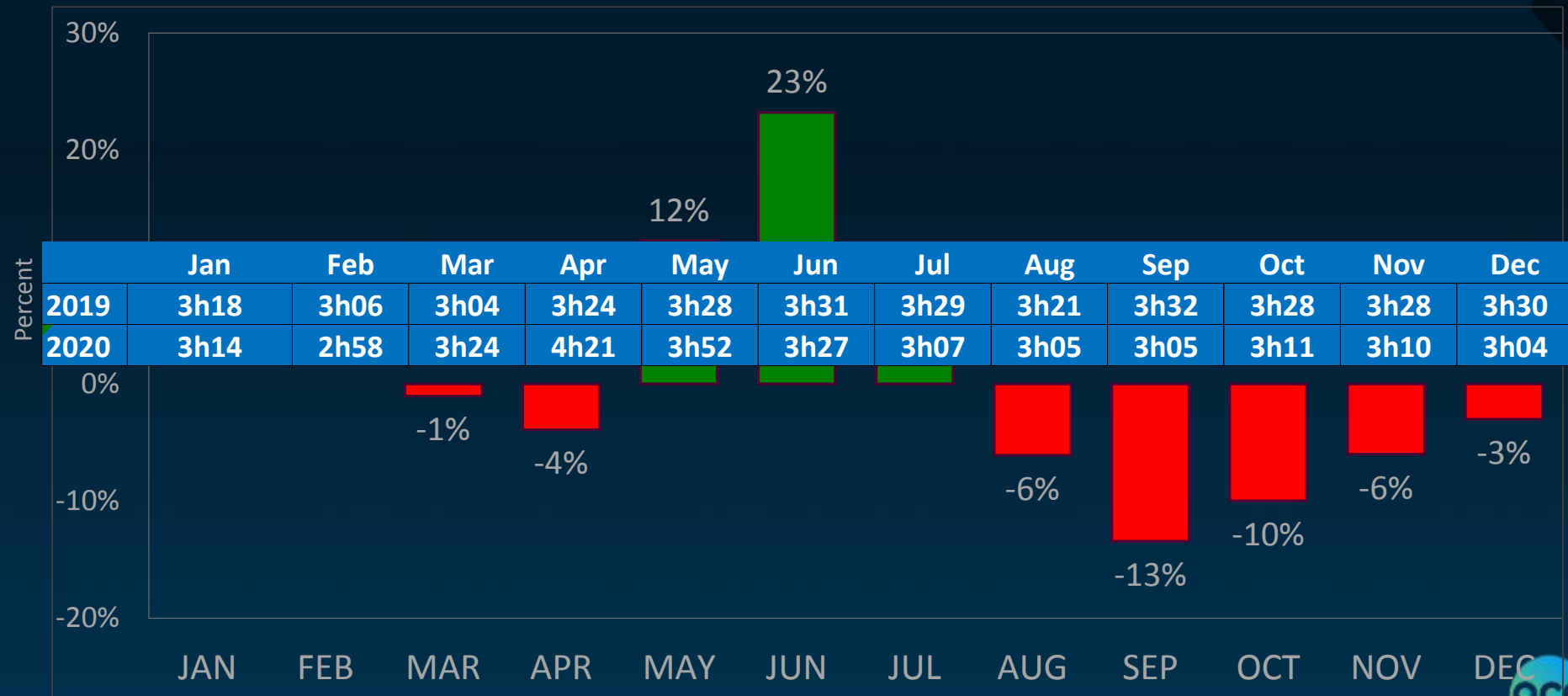
# TV Audiences By Month – % Change '19 vs. '20

TOTAL ADULTS (15 Years +)



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

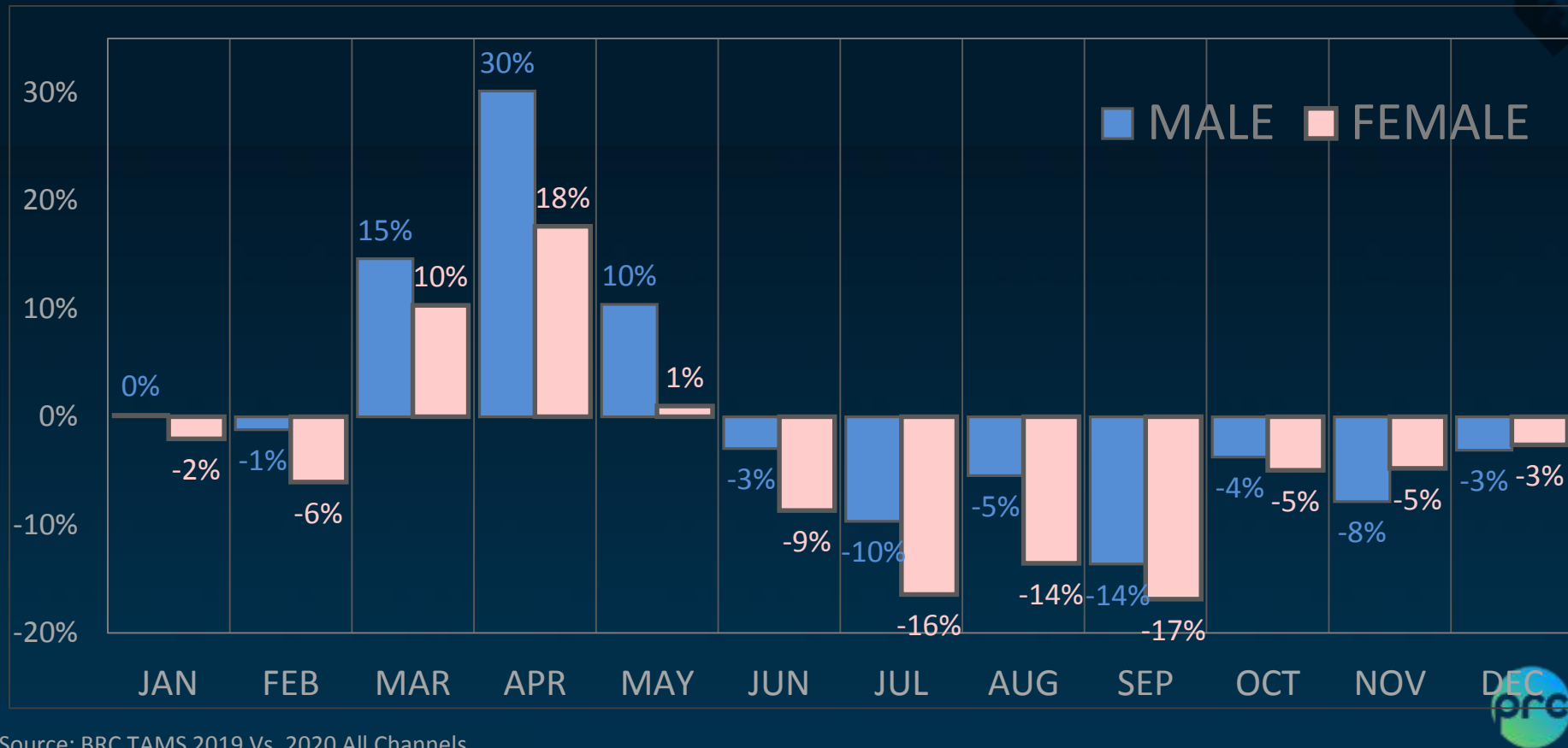
TOTAL ADULTS (15 Years +) VIEWING MINUTES





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

GENDER



Source: BRC TAMS 2019 Vs. 2020 All Channels





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.

All designed to give deeper insights and allow you to make more informed media decisions.

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