

# Know what Zimbabweans read, watch, listen to and buy

The results of the Zimbabwe All Media and Products Survey's national research of 2,000 people in the last quarter of 2012 were released in February 2013 and showed that the lives of rural people living on or near the poverty datum line have improved by 10% over the same period the previous year. All other Living Standard Measurements remain with a percentage point.

The quantitative survey, carried out every three months by the Zimbabwe Advertising Research Foundation, contains over a million facts on what people in urban and rural areas read, watch, listen to and buy. Widely regarded as the most authoritative piece of research, this is the 17th year that ZAMPS has been conducted.

## What Zimbabwe is watching and listening to

Despite the reduction in the free-to-air footprint, satellite TV viewership rose three points to 41% of the population. Urban homes with a satellite dish rose from 68 to 70%. People watching ZBC 2 increased significantly, rising from 4 to 9% nationally and from 8 to 17% in towns and cities.

Audiences watch the news most - 16% nationally and 17% in towns - after which they enjoy local drama, watched by 7% of the population. SABC channels remain the most popular satellite ones, down 3% to 29%. Satellite TV is watched by half the urban population and 16% of rural folk. SuperSport enjoyed a 2% rise to 7% of Zimbabweans.

Overall, there has been a percentage point increase in the number of people who listen to the radio during the past month, now at 61%. This is similar across rural and urban listeners. The growth has come from the new stations, with 8% of the country listening to Star FM and 6% to Zi FM.

In urban areas, 15% tune into Star and 9% to Zi: out of town both enjoy listenership of 4%. Power FM remains the most popular urban station, with 37% of the market, while Radio Zimbabwe captures 45% of rural listeners. Urban people tuning into this station has grown by 4% to 31%.

21% of people living in rural areas now listen to the radio on their cellphone, up from 9% a year ago. This corresponds with their improvement in living standards.

Radio, however, is used by 70% of Zimbabweans, down from 74% a year ago.

This ties in with the growth in cellphone ownership, up 10 points at 85% nationally. It is followed by colour television at 52% and satellite dishes, showing a 1% growth to 31%. 92% of city dwellers have a TV and 92% own a cellphone.

## Newspapers

At 63%, more than half the people living in cities read a daily newspaper and 33% of rural ones do. The Herald remains the market leader with 25% national readership, while H Metro continues its meteoric growth, rising from 14 to 17% of national newspaper readers and 27% of urban ones. Daily News and NewsDay both have 13% of national readers, 23 and 20% of urban ones respectively while the Daily News, at 9 %, is more popular with rural people than NewsDay at 7%, a figure it shares with The Chronicle, whose overall readership is 8%.

The Zimbabwe Independent and Financial Gazette enjoy the same share of the national and rural markets, at 1%. Financial Gazette has 3% of urban readership, compared with Zimbabwe Independent's 2%.

The Sunday Mail remains the most popular weekly paper, with 16% of the national market, rising to 27% of the urban one. It is followed by Manica Post, Sunday News, The Standard and B Metro.

## Magazines

3% of Zimbabweans claim to read monthly magazines, rising to 6% in cities. There is little differentiation between the titles, whose readership is around 1% of the population, rising to 2% of urban readers for M-Net Guide and Outpost. Regional publications have a higher readership with People, at 11%, the most popular, followed by Drum, at 5%.

## Other media and products

Other forms of advertising - billboards, on vehicles, roadshow and posters - are almost as effective as TV and radio for reaching both urban and rural people. 58% of all Zimbabweans see outdoor advertising: it reaches 52% of rural people. There has been a 5% increase in the number of people who watch advertisements in cinemas, now standing at 11%.

The four most effective types of outdoor advertising are billboards, seen by 23% of Zimbabweans, hoardings, posters, 18%, 15% and on the sides of vehicles, 14%.

Urban internet use is growing fast: 42% of us access it, up from 34% a year ago. Total internet access is 22%, a 4% rise. The most common vehicle is smartphones: 16% nationally and 32% in towns.

Facebook is the most popular site, visited by 15% of Zimbabweans and 31% of city dwellers, followed by Google (10%) and Yahoo (4%). Local sites visited are The Standard, Daily News, Fingaz, ZimIndependent, H-Metro, NewsDay, Classifieds, NewZimbabwe and Zimbabwe Situation.

Cellphone usage continues to grow - 85% of Zimbabweans have one and rural access has increased to 80% from 66% in the same quarter in 2012. Nokia remains the most popular handset: Blackberry and iPhone were not mentioned. Econet remains the most popular provider, with 74% of the market, followed by Telecel with 22%.

Increasingly we are putting our money in the bank, with 17% of us choosing commercial banks and 4% building societies. The most popular products are ATM cards (68%) and savings accounts (77%). CBZ has grown its market share from 17 to 24%; POSB's share has increased to 18% from 14%. CABS continues to dominate the building society market, with 79 % of the total market.

A new section for ZAMPS is who is using mobile money transfer systems: 81% of us have heard of them, 80% of us know of Ecocash and 33% have used it, followed by 9% who know Textacash: 2% have used it.

The insurance market is growing: 17% of the population has some form of insurance: 8% have funeral insurance and five% are part of a burial society.

Overall, Zimbabweans are spending more on groceries, while generally they are spending less on media. Many - 43%, up

from 40% - buy from general stores. OK remains the most popular outlet at 43%, a 3% increase on last year, followed by TM at 31% and Spar at 26%. Most households spend less than \$50 a month on groceries.

The Zimbabwe All Media and Products Survey is funded by a 1.5% levy on all advertising placed in Zimbabwe. The research house is selected by open tender every two years and the quarter 4, 2012 survey was done by Research Bureau International. It hopes to return to the field shortly for the Q1 2013 urban survey, finances permitting.

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