

Spark Media's local papers are *alive!* ABC's show an 8% increase in Q4 denoting a positive trajectory

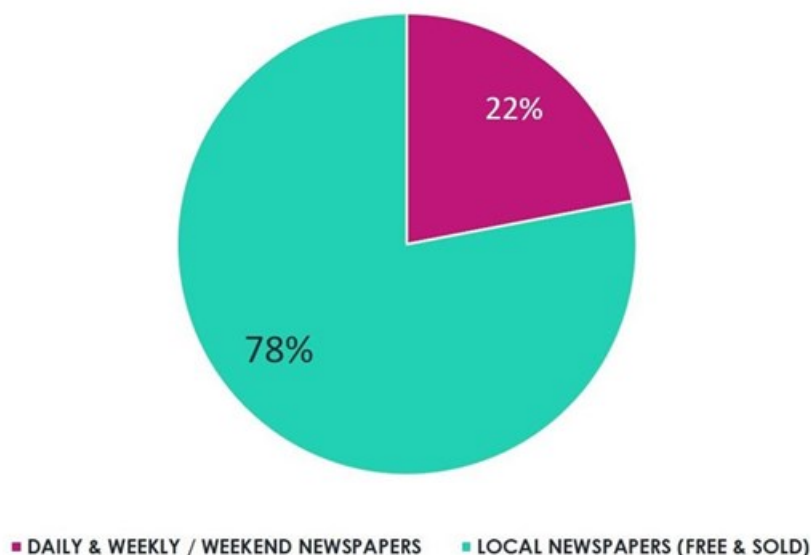
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Free and sold local papers make up just over 78% of the total 6.1 million newspapers in circulation in the last quarter of 2020. Leaving the remaining weekend, weekly and daily titles to make up 22% of the total newspapers in print.

The news headlines regarding ABC's seem to be about the dramatic decreases in 22% of the total category (weekend, weekly and daily newspapers). This leaves the largest component of the category, local papers (which have far less gloomy results) out of the picture.

THE NEWSPAPER CATEGORY IN Q4 2020:



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Since the harsher lockdowns of Q2 and Q3 2020, the local paper category has been steadily increasing back towards their larger print orders, with an overall increase of 8% from Q3 to Q4 showing a positive trajectory.

Q4 2020 ABC release shows an overall 10% recovery in newspaper circulations since Q3 2020. However, a year-on-year analysis still shows newspapers have decreased by 24.4% since Q4 2019.

Weekend newspaper circulations have dropped to 621,820 copies and the category has seen a year-on-year decrease of 36.1%.

Daily newspaper circulations have decreased a further 38.1% since Q4 2019 which places the category at just over 500,000 copies.

South Africa's largest circulating daily newspaper is the Daily Sun which has seen a 42% decrease from Q4 2019 to Q4 2020, now circulating 57,459 copies.

Similarly, the Sunday Times (SA's largest circulating weekend newspaper) has seen a 44% decrease in a year and now

has a circulation of 111,670 copies.

The combined circulation of local papers (free and sold) continues to be strong at 4.8 million copies in circulation every week.

Local papers have seen a 19% contraction in their circulation figures (year-on-year) and have minimised the printed copies that can no longer be distributed to businesses, educational institutions, hospitals and libraries due to Covid-19. These product reviews are most often commercial decisions where a decision is made not to print copies that cannot be distributed in the current lockdown level. The business model still allows for the economically active population to receive their local paper weekly, whether it is free or sold.

A closer look at free local papers

Free local newspaper circulation has declined by 17.8% (1,014,874 copies) year on year.

The -17.8% decline in the category can be attributed to:

- 19 local papers have been discontinued (previously equating to a combined circulation of 379 564 copies in Q4 2019)
- Three local papers ceased publishing (previously equating to a circulation of 69 751 in Q4 2019)
- 11 local papers did not submit VFD figures (previously equating to a combined circulation of 257 670 copies in Q4 2019).

With the discontinuations, papers ceasing to publish and the lack of submissions equating to 70% of the total decline in local papers' circulation, the remaining free local papers are showing their stability in weekly print orders.

As the pandemic continues into 2021, local papers are a valued source of local news and information that affects the lives of all those in the community. The home delivery model of free local papers allows readers and advertisers the knowledge that local content can be safely received in the home.

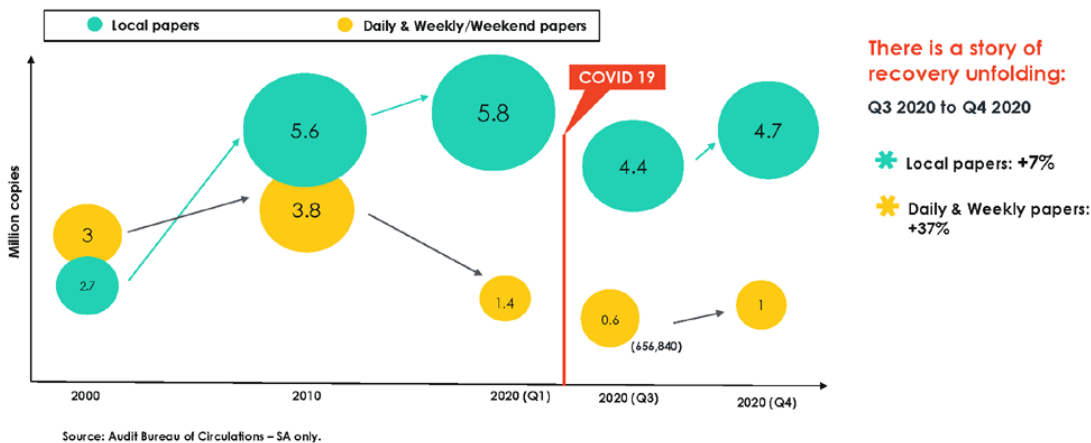
Evaluating sold local papers

Sold local papers have seen a significant decline in circulation figures (-51.8%). This decline is more in line with other sold newspapers, facing similar pandemic pressures as readers try to cope with financial uncertainty and the realities of lockdown living.

It is still evident that in most regional and outlying metros, sold local papers remain the primary reference point for local news and shopping information in the areas they serve. These titles continue to be valuable news sources in their local communities and a viable medium for reaching these geographic markets.

Zooming in on the South African newspaper landscape

LOCAL PAPERS VS OTHER PRINT MEDIA TRENDS OVER THE PAST 2 DECADES:



Across South Africa, local papers offer 4.5 x the circulation of all dailies, weekend & weeklies (combined) – reaching the economically active consumers in their homes, every week.

- " Spark Media 'leaps into local' with comedian Themba Robin 14 May 2024
- " Spark Media 'leaps into local' with new digital ad offering 29 Feb 2024
- " New advertising opportunities for retailers as load shedding changes consumer purchase patterns 30 Jan 2024
- " Spark Media in the 'Big Apple' for Retail's Big Show 8 Mar 2023
- " Local papers continue to dominate as SA's top-performing print media 1 Mar 2023

Spark Media



Spark Media, a division of Caxton & CTP Publishers and Printers Ltd, is South Africa's largest print and digital media solutions sales company. It represents Caxton's 115 local newspapers and 58 local websites, providing location-targeted content for brands and ad agencies at scale in 120 economically-active communities. It also produces ROOTS, SA's leading urban, community-level quantitative survey that provides unequalled demographic and behavioural information on local consumers.

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