MEDIA DEVELOPMENT & DIVERSITY AGENCY

Trends of Ownership and Control of Media in South Africa

Prepared for:

Media Development and Diversity Agency (MDDA)

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EXECUTIVE SUMMARY

INTRODUCTION

The MDDA commissioned Z-Coms to conduct a research study into trends of the existing ownership and control of media in South Africa, with particular focus on categorising trends by province and where possible by district municipality. The main objectives of the project are:

1) To take stock of the number of print and broadcast media in the country on a national, provincial and district municipality basis;

2) To outline the ownership and control of media in the country on a national, provincial and district municipality basis;

3) To establish and assess the extent to which the previously disadvantaged communities are taking up ownership and control of media;

4) To assess the progress made to date in ensuring diversity in media ownership and control;

5) To establish (in respect of journalistic content online) who owns the most popular South African news sites;

6) To establish who owns the space on cell phone content, in order to understand whether there is diversity in this space, whether opportunities exist for new players and the role of cell phone companies (if any); and

7) To provide a tool that would enable the final report to be posted on the MDDA website where it can be updated from time to time.

This report should be read in conjunction with the database that has been compiled from various sources and includes the primary research. The summary of this database is shown in Appendix B.

The summary is presented under the headings:

- Overview of the South African Media Industry;
- Analysis of Results; and
- Conclusion

OVERVIEW OF THE SOUTH AFRICAN MEDIA INDUSTRY

South Africa has a dynamic media industry and is one of Africa's major media players.

Government censorship during the apartheid era (i.e. pre 1994 democratic elections) severely hampered the media industry; ensuring that it "towed the line" in terms of the apartheid government's policies.

Post 1994 saw the enactment of a new constitution with a Bill of Rights guaranteeing that every citizen has the right to freedom of expression. The Bill of Right includes freedom of the press.

The Independent Broadcasting Authority (IBA) was established in January 1994 in terms of the Independent Broadcasting Authority Act (No. 153) of 1993. The introduction of an independent regulator with constitutionally guaranteed independence was a significant step forward for the industry.

The IBA later merged with the South African Telecommunications Regulation Authority (SATRA) in June 2000 to become the Independent Communications Authority of South Africa (ICASA). In 2005 there was an alignment between broadcasting and telecommunications as the Electronics Communication Act (ECA) 36 of 2005 made provision to promote convergence of the broadcasting; broadcasting signal distribution and telecommunications sectors. In terms of the ECA, all electronic broadcasters must adhere to the ICASA regulations and the Advertising Standards Authority (ASA) Code as determined and administered by the ASA.

The media industry can be categorised into three distinct sub-sectors:

1) Broadcast Media - consisting of Radio and Television (free to air and subscription);

2) Print Media - consisting of Newspapers, Magazines and Knock-and-drop; and

3) New Media - which consists of Online Media (Internet) and mobile phone media.

1) Broadcasting Media

1.1) Radio

A high number of the radio and television audience is found in Gauteng and KwaZulu-Natal provinces, which is proportional to the population distribution. Northern Cape Province has the lowest radio and television audience.

There are 3 types of radio stations:

- Public radio stations;
- Private commercial radio stations and
- Community radio stations.

Public Radio Stations

The radio industry is dominated by the South African Broadcasting Corporation (SABC) in terms of number of radio stations. SABC has 18 radio stations, of which 15 are public broadcasting service (PBS) stations, broadcasting in all eleven official languages; and 3 are public commercial services (PCS) stations. The SABC accounts for about 41.6% of the total radio audience in the country according to AMPS 2008.

Private Commercial Radio Stations

There are 13 private commercial radio stations which are all regional or provincial stations. According to AMPS 2008, these have 16.5% of the total radio adult audience. ICASA also licensed 3 other commercial radio station in areas they called "secondary markets". These 3 radio stations are majority owned by HDI (Historically Disadvantaged Individuals).

Community Radio Stations

According to ICASA, there are 126 community radio stations, of which 87 stations are on air. According to AMPS data, community radio audience represent 4.6% of total radio audience[1].

1.2) Television

There are 11.1 million TV households in South Africa[2].

There are 3 kinds of television stations:

- Public television stations;
- Private commercial television stations and
- Community television radio stations.

Public Television Stations

The SABC has 3 terrestrial television channels (SABC1, 2 and 3) with total viewership accounting for 69.3% of the total television audience. The SABC did broadcast a television channel called SABC Africa through DStv, but this was discontinued in August 2008. The SABC channels are also distributed via the DStv satellite bouquet and on the Sentech Vivid platform.

[1] *Note that not all community radios are included in AMPS 2008 data. Only34 community radio stations out of about 86 stations which are on air are included in AMPS 2008 data.*
[2] *As per Amps 2008*

Private Commercial Television Stations

E.tv is the only privately owned free-to-air commercial terrestrial television station with audience of 18.1 million, representing 22.3% of the viewing audience.

MultiChoice had been the only provider of pay TV and satellite broadcasting services in the country for 12 years until 2007, when ICASA licensed 4 other satellite broadcasters. MultiChoice owns M-Net (Pty) Ltd which broadcasts terrestrially an M-Net premium channel and the Community Services Network (CSN) which targets special interest communities and Sports; and the digital satellite bouquet on DStv.

The issuing of the 4 new licences in 2007 increased the number of potential and current satellite broadcasters to 5. None of the newly licensed satellite operators have launched yet. The newly licensed e-Sat decided to produce a 24 hour news channel now carried on the DStv platform.

The current audience for DSTV is at 4.76 million and for M-Net it is 1.97 million people. Until recently MultiChoice's target audience has always been LSM 8 to 10. MultiChoice has broadened its offering to include target audiences from all LSMs through low cost services like the "compact decoder". However, the majority of its subscriber base is on the premium full DSTV bouquet.

Community Television Stations

The past 10 years have seen a slow evolution of community television in South Africa, and now it is poised to become a really important media player.

There are 4 licensed community television stations in South Africa: Soweto Community TV in Johannesburg; Bay Television Station in Durban; Cape Town Community TV and The Trinity Broadcasting Network (TBN) licensed for terrestrial broadcasting in the Eastern Cape and also distributed by satellite on DStv.

2) Print Media

The South African print media industry has experienced good growth in terms of revenue and available titles, despite the growth in broadcasting and new media which are in direct competition for adspend.

The print media value chain starts from content production (journalism or news sources) through to production (printing) and distribution. In most cases, the print media houses prefer to control the full value chain as in the case of Naspers.

In terms of the newspapers and magazine titles owned, the print industry is dominated by a few large companies who own and control a large number of national newspapers, local newspapers and magazines across the country. Most of these companies have their head offices in Gauteng Provinces with the exception of Naspers which is headquartered in Cape Town, Western Cape Province.

There are several independently-owned newspapers. However the majority are owned by 4 large publishing groups: Avusa Publishing, Naspers (Media24), Independent News and Media and Caxton / CTP.

2.1) Newspapers

The national newspaper readership is 15.2 million[3]. Gauteng audience reach accounts for 69% of this figure, followed by Northern Cape at 64%. In numbers the province with most newspaper readers is Gauteng (4.4 million readers) followed by KwaZulu-Natal (2.6 million readers).

2.2) Magazines

The magazine readership now stands at 12.6 million[4] when this is broken down by province, it shows that the majority of readers are in the Western Cape (60%) followed by Gauteng province

[3] *AMPS 2008*

(55%) and then the North West at 38%. However in absolute terms the highest magazine readership is in Gauteng at 3.5 million readers followed by KZN at 1.9 million readers.

3) New Media

New Media includes Online Media (Internet websites) and Mobile based media (mobisites). New Media is growing rapidly, and increasingly gaining a significant portion of advertising spend. This research found that most print media (mainstream national newspapers and magazines in particular) are also represented in the New Media platform.

The most popular news sites [5]on the internet are news24.com, IOL news, news24 South Africa and The Times in that order.[6]

Summary of the South African Media Industry Landscape

The South African Media Industry is relatively open, with various participants active in newspapers, television, magazines, radio, film, books, advertising, music and public relations.

Press freedom has strengthened the industry and made it more dynamic and influential.

South Africa's many broadcasters and publications reflect the diversity of the population in that all the eleven official languages are represented. However, English is the most commonly used language.

Radio is the most accessible media in South Africa, with 94.1% of the adult population having access.

[4] *AMPS 2008*
[5] *Top five online news sites as of last quarter of 2008 according to AC Nielsen.*
[6] *Nielsen //Netrating*

Television has a reach of over 83.8% of the adult population, while newspaper cover 48% of the adult population and magazine has a 40% reach. Low literacy levels may account for low print media population reach.

Organisations that dominate the South African media industry are: Avusa, Caxton / CTP, Naspers (Media24), the Independent Newspapers Group, Kagiso Media and Primedia.

Naspers who is the biggest media company in South Africa (based on media assets and market capitalisation) dominates the print media industry.

ANALYSIS OF RESULTS

The results have been analysed by sub-sectors:

(1) Broadcast Media – Radio and Television

(2) Print Media - Newspapers, Magazines, Publishers and Printers

(3) New Media - Online Media (Internet) and mobile phone media.

1) Broadcast Media

1.1) Radio

Radio is South Africa's biggest broadcast medium and the sector's deregulation in 1996 led to an even bigger proliferation of radio stations.

The SABC has a total of 18 radio stations. There are 15 PBS radio stations broadcasting in all 11 official languages; a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English and a Community station broadcasting in the !Xhu and Kwe languages of the Khoisan people of the Northern Cape. The other 3 radio stations are PCS radio stations, and these are 5FM, MetroFM and Good Hope FM.

There are 13 private commercial and 3 secondary market radio stations in South Africa.

Ownership and control of radio station is strictly regulated by ICASA. An average of 58.3% of all private commercial and secondary market radio stations is owned by HDI. Kagiso Media and Primedia own the majority of radio broadcasting media with 6 and 4 radio stations respectively.

There are 126 licensed community radio stations in South Africa[7], broadcasting in all the nine Provinces in different languages.

1.2) Television

This study found that an average of 64.6% per television station is owned by HDI. This came about as a result of a strict regulation of the broadcasting industry by ICASA with emphasis on ownership by HDIs as one of the criteria to qualify for licensing.

Foreign ownership is low, at an average of 6.2% per television station.

An average of 8.3% per television station is listed on the JSE.

2) Print Media

Print media consists of newspapers, magazines and newsletters. Newsletters do not form part of this report.

The print media in South Africa can be divided into two broad categories: the major media players and the independent publishers (Members of Association of Independent Publishers).

South African print media is concentrated among four major media players: Naspers through its subsidiary Media24; Caxton; Avusa and the foreign owned Independent Newspapers.

[7] *Based on ICASA data obtained by Z-Coms from the Licensing department*

2.1) Newspapers

Newspapers in South Africa are printed in English, Afrikaans and the vernaculars. About 940 million newspapers per annum circulate in South Africa. This number includes mainstream (or commercial); local; small commercial and community newspapers.

Again, four large media companies dominate the print media space in terms of the number of titles they own as well as the readership of these newspapers. Caxton / CTP has most newspaper titles with 130 identified titles (89 wholly owned and 41 co-owned). Naspers through its print media subsidiary Media24 follows with more than 64 titles; the foreign owned Independent Newspapers group owns 35 titles; then Avusa (formerly known as Times Media Limited and then Johnnic Communications) with 22 titles.

In terms of circulation, Media24 has the largest number of newspapers, followed by Independent Newspapers.

Provinces such as Gauteng, Western Cape and KwaZulu-Natal, which are economically strong, receive about 71.9% of the newspaper titles circulating in South Africa, accounting for 69% of the total newspaper readership – a total of 6.6 million people.

In terms of newspaper titles available: Gauteng Province accounts for 26.6%; Western Cape Province 19.8% and KwaZulu-Natal 25.5%. Northern Cape and North West Provinces receive the lowest number of newspaper circulation - below 10%.

In terms of readership the following table is useful as it gives the national audience total and then the audience per province and the total provincial newspaper readership[8]. For example, the Western Cape audience of 3.1 million readers is 10% of the total audience and the readership of 1.99 million is 64% of the Western Cape audience.

Total Readership (000)	W Cape	N Cape	Free State	E Cape	KZN	Mpuma-langa	Limpopo	Gauteng	NW

[8] *AMPS 2008*

31,303	**3,099**	**775**	**2,005**	**4,658**	**6,385**	**2,329**	**3,375**	**6,442**	**2,236**
% Audience	10%	2%	6%	15%	20%	7%	11%	21%	7%
Total Newspapers	1989	300	803	1363	2656	931	1634	4419	1066
% Readership	64%	39%	40%	29%	42%	40%	48%	69%	48%

In terms of media ownership, major print media players such as Media24 and Avusa have some degree of HDI ownership. Avusa has at least a 25.5% HDI shareholding as a result of Mvelaphanda Holdings acquiring part of Allan Gray's stake in the company.

The City of Johannesburg Metropolitan Municipality has the most number of newspaper titles with 66 newspaper titles in circulation. This is equivalent to 14.4% of the 459 newspaper titles circulating in the country.

The Ethekwini, City of Cape Town and the City of Tshwane Metropolitan Municipalities each have 64, 55 and 51 titles in circulation respectively, which is nearly 6% of titles in circulation.

Urban areas' district municipalities attract dense population with high disposable income compared with rural areas' sparser populations and lower incomes. Hence, in order to pursue maximum return on investment for shareholders, newspaper owners focus on urban areas. Therefore rural areas receive less newspaper circulations because it is less economically viable to distribute newspapers in such areas.

2.2) Magazines

At the time of writing this report at least 504 magazine titles were identified. Media24 owns 55 magazine titles and also has a 50% shareholding in New Media Publishing, the company with the second largest number of titles at 34. This implies that Media24, as the largest single shareholder in New Media Publishing has control over at least 89 magazine titles.

Avusa has the third largest number of magazine titles under its wings with about 23 titles.

Caxton Limited has at least 17 titles, but the company also has a 30% shareholding in Ramsay, Son and Parker which controls 9 magazine titles.

Caxton is followed closely by Highbury Safika Media with 17 titles.

Primedia Publishing has 15 titles under its control.

Putting the magazine sector of media into perspective, the following table compares readership by province:

Total Readership (000)	W Cape	N Cape	Free State	E Cape	KZN	Mpuma-langa	Limpopo	Gauteng	NW
31303	3099	775	2005	4658	6385	2329	3375	6442	2236
% Audience	10%	2%	6%	15%	20%	7%	11%	21%	7%
Population[9] 2001 :44819.78	4524.34	822.73	2706.78	6436.76	9426.02	3122.99	5273.64	8837.18	3669.35
% Population	10%	2%	6%	14%	21%	7%	12%	20%	8%
Total Readership	1869	437	692	1243	1909	843	1244	3536	857
% Readership	60%	56%	35%	27%	30%	36%	37%	55%	38%

The highest magazine readership as a percentage of the provincial audience is in the Western Cape (60%) followed by Gauteng (55%). These figures can also be compared with the total population of these provinces as a percentage of the total national population. The provincial population as a percentage of total population shows the correlation between the readership and the total population.

[9] *STATSSA2001 census*

2.3) Publishers

The large publishing houses are owned by the major media houses: Naspers' subsidiary Media24 owns more publishing houses compared with the rest of the media owners. Naspers owns 85% of Media24 Magazines and has an 85% share in Touchline Publishing which has 11 magazine titles and an additional 4 through its wholly owned subsidiary Atoll Media (Pty) Ltd.

2.4) Printers

Media24 and Caxton provide much of their own printing needs and also provide to other newspaper and magazine media entities. In 2006, Caxton / CTP became the largest publisher and printer of books, magazines, newspapers and commercial print in South Africa.

The Paarl Media Group, a Media24 subsidiary, is one of the most extensive commercial printing operations in South Africa. This national, multi-faceted Group has 6 specialised printing plants that provide a comprehensive range of printing facilities. These are Paarl Print; Paarl Web; Paarl Gravure; Paarl Coldset and Paarl Gravure. The broad spectrum of products offered range from high volume magazine and commercial printing; heat set and cold set offset web book; bible and label printing to high quality sheet fed products.

Newspaper and Magazine distribution is done mainly by the big media players. Caxton's RNA and Media24's NND24 and NLD24 are used by them as do many other media companies.

Many small to medium sized companies outsource this service to RNA and NND. They are the organisations that are most quoted by various newspapers and magazines when asked how they distribute. Others quote the Post Office or CNA. Most magazines and newspapers can be obtained from CNA, Exclusive Books, supermarkets and convenience stores.

(3) New Media

New media encompasses the emergence of digital, computerized, or networked information and communication technologies and includes Internet and mobile based media.

Interestingly, South Africa's mobile penetration exceeds that of PC and internet penetration and mobile internet penetration is still in its growth phase. More recently media companies are making available their online content by making use of the dotmobi technology.

South Africa has one online publishing organisation: Online Publishing Association (OPA). Members of this organisation include major media owners such as Media24, Independent Online (IOL) and Mail and Guardian Online Publishers.

The most popular news website in the country (as measured by the number of Unique Browsing and Page Impressions) is the news24.com website which is published by Media24 and is 100% owned by the South African based Naspers. This website is also, amongst all of the sectors / categories, as measured by Nielsen//Netrating, the most popular (visited by unique persons) website. This is followed by the 'IOL news' website as published by Independent Online which is owned by the foreign based Independent News and Media Company.

South Africa has Africa's highest mobile website page impressions as measured by AdMob.

Telecommunications companies are entering the content provision space with Telkom and Vodacom each having a web presence apart from the fact that they own and provide the technology infrastructure required to access the Internet.

CONCLUSION

1) Broadcast Media

The study found that HDI are well represented in ownership of broadcast media. This is due to the policy and regulatory framework provided by ICASA where transformation is well monitored

and encouraged by the Authority. The deregulation of television and radio broadcasting and the introduction of community broadcasting have meant that the airways are relatively open.

The broadcasting media especially radio has also seen many changes in terms of introduction of broad based BEE ownership.

2) Print Media

The print media landscape in the post 1994 South Africa has not transformed much in terms of ownership and control and is still majority owned and controlled by the white shareholders. In spite of various interventions by the state through promotion of transformation processes and BEE, the majority of print media in South Africa is still owned / dominated by a few companies and individuals.

The magazine sector is dominated by Media 24 followed by Avusa. The newspaper sector is dominated by Caxton in terms of number of titles it owns when adding up both local newspapers and daily commercial papers (or mainstream newspapers). However, Media 24 is dominant in terms of circulation of newspapers.

There is a great need to broaden the availability of newspapers to the under-serviced district municipalities. However, literacy must also be factored in to the process of increasing availability to the provinces that have fewer print media products.

3) New Media

In the new media space, those who dominate the print media have repurposed their content for online internet publication.

In terms of media diversity and access by disadvantaged communities, there is a long way to go towards making digital content accessible to the rural and township environments. This is

because of the low computer literacy rate in South Africa in general and particularly within the black communities.

Overall the broadcasting media has experienced transformation, but in the unregulated sectors of print and internet media, very little transformation has taken place to date.

1.0 INTRODUCTION

Media plays an important role in society as a source of information, education and entertainment. It turns the world into a single village saturated with information. Media is a powerful tool that influences the understanding, perception, and views of the world, as Edward Bulwer-Lytton wrote in 1839, “The pen is mightier than the sword”[10].

This comprehensive report, details the results and findings of research into media ownership and control in South Africa. The focus is on assessing the availability of the number of media products in provinces and district municipalities. The report also seeks to explore ownership and control of media in South Africa.

Section 2 presents an overview of the South African Media Industry. Both the history and the current status of the industry are presented, and major industry role players are introduced.

Section 3 contains the analysis of results and includes the number of available magazines, newspapers, radio stations and television stations, and a summary of audience figures as they relate to the media products presented

Section 4 presents conclusions of the study.

To get a more comprehensive picture of the media landscape, this report should be read in conjunction with the database provided, which is the source of the statistics quoted in the analysis section. Due to the size of the data, the tables could not be included on this report in the form of tables. We have designed a database so that it can also be accessed from the website should MDDA wish to upload the data.

[10] *"The pen is mightier than the sword" is a metonymic adage coined by the English writer Edward George Earle Bulwer-Lytton in 1839 for his play Richelieu; Or the Conspiracy*

1.1 Background

The Media Development and Diversity Agency was established by an Act of Parliament (Act 14 of 2002) to enable "historically disadvantaged communities and persons not adequately served by the media" to gain access to the media. Its beneficiaries are community media and small commercial media. MDDA was established as a partnership between the South African Government and major print and broadcasting companies.

MDDA's objectives are to:

- Encourage ownership and control of, and access to, media by historically disadvantaged communities, historically diminished indigenous language and cultural groups;
- Encourage the channelling of resources to community and small commercial media;
- Encourage human resource development and capacity building in the media industry, especially amongst historically disadvantaged groups;
- Encourage research regarding media development and diversity.

1.1.1 Primary Objectives of the Research

In keeping with MDDA's first objective: encouraging ownership and control and access to media by historically disadvantaged communities as well as by the historically diminished indigenous language and cultural groups, the Agency commissioned Z-Coms to conduct a research study into trends of the existing ownership and control of media in South Africa. The research was conducted with a particular focus on categorising the trends by province and where possible by district municipality.

The project objectives as stated in the Terms of Reference are to:

- Take stock of the number of print and broadcast media on a national, provincial and district municipality basis;
- Outline the ownership and control of media on a national, provincial and district municipality basis;
- To establish and assess the extent to which previously disadvantaged communities are taking up ownership and control of media;
- To assess the strides made to-date in ensuring diversity in media ownership and control;
- To establish (in respect of journalistic content online) who owns the most popular South African news sites;
- To establish ownership with regard to the space on cell phone content, in order to understand:
    - if there is diversity in this space,
    - If opportunities exist for new players and
    - the role of cell phone companies (if any).
- To establish and assess the extent to which the previously disadvantaged communities are taking up ownership and control of media; and
- To provide a tool that would enable the final report to be posted on the MDDA website where it can be updated from time to time.

1.1.2 The Scope of the Project

The intention of the research study is to provide the Agency with an in-depth view of the current media landscape. This can then be used as a baseline from which to track changing trends of media ownership and control in the pursuit of media development and diversity. This report

explores media ownership with particular emphasis on percentage ownership by Historically Disadvantaged Individuals (HDI).

2.0 OVERVIEW OF THE SOUTH AFRICAN MEDIA INDUSTRY

2.1 Introduction

South Africa has a very large and robust Media Industry that is growing rapidly. It is one of Africa's major media players

The industry can be divided into three distinct sub-sectors:

(1) Electronic / Broadcast Media: consisting of Radio and Television;

(2) Print Media: consisting of Newspapers, Magazines and Knock-and-drop; and

(3) New Media: which consist of Online media (Internet), and mobile media.

Before going into more detail of each of these sub-sectors it is important to provide a context for this report. The following sections briefly explore the apartheid legacy; the impact of the post 1994 Bill of Rights and examines in more detail what is implied by the term 'ownership and control'.

2.1.1 The South African Media Industry during Apartheid

The South African Media Industry was extensively constrained by government censorship during the apartheid era (pre 1994 democratic elections). Newspapers had to apply for registration if they published more than 11 times a year. An arbitrary amount was also required before registration was approved. The government also enforced regulations controlling what newspapers could publish, especially with regard to articles and comment on activities deemed to be against the apartheid system. The apartheid government dealt harshly with the media if it did not "tow the line".

As a result in the post 1994 era, freedom of the media was given a lot of focus and is regarded as one of the supporting pillars of democracy. Transformation of the media was and remains a challenge in South Africa.

2.1.2 Press Freedom and the Bill of Rights

In 1994 censorship ended and a new constitution was enacted with a Bill of Rights guaranteeing every citizen the right of freedom of expression. The Bill of Right includes freedom of the press and media, the freedom to receive or impart information or ideas, the freedom of artistic creativity, academic freedom, and freedom of scientific research.

Laws concerning the media and political control over its content are generally considered to be moderate and there is little evidence of repressive measures against journalists. Consequently, South Africa was ranked joint 31st (with Australia) in Reporters Without Borders'[11] worldwide index of press freedom in 2005, before dropping down to 36th in 2008, along with 5 other nations including United States and Spain.

2.1.3 Media Ownership and Control

In most cases, media focuses on high income groups with higher disposable income, because they attract premium advertising spend (adspend). However market segmentation is still used - certain products are targeted to mass markets. Therefore high LSM alone does not determine where adspend is targeted. Advertisers are able to place adverts on platforms that cover their products' addressable market.]

Control of any media company can be divided into three areas of operation: shareholdings and equity; general management and editorial control. The ICASA Licensing Regulations require

[11] *Reporters Without Borders was founded in Montpellier, France, in 1985 by Robert Ménard, Rony Brauman and the journalist Jean-Claude Guillebaud Reporters Without Borders draws its inspiration from Article 19 of the 1948 Universal Declaration of Human Rights, according to which everyone has "the right to freedom of opinion and expression" and also the right to "seek, receive and impart" information and ideas "regardless of frontiers.".*

applicants to indicate ownership and control at both shareholding and management levels for all broadcasting licensees.

From a content point of view with respect to radio and TV, the final control on what the station broadcasts rests with the station managers. Therefore there is a distinction between who controls shareholding and management and who decides on what goes on air. A parallel can be drawn between the broadcast and the print media environments. Issues of editorial independence are key in the operation of any print media company. Therefore there has to be a separation of roles between shareholders, management and editors.

There is a further distinction between the shareholder and management. In line with the King II and draft King III report of corporate governance, shareholders should not interfere with management and the executive. In terms of editorial content, management appoints an editor and in an ideal world should not interfere with editorial content. There are codes of good practise that govern how media controllers (editor and station managers) interact as laid out by regulatory bodies (detail below). For the purpose of this report we will assume that these governance principles are adhered to by media companies.

2.1.4 The Broadcasting Regulatory Environment

In the 1990s political reforms radically transformed South Africa's Broadcasting Media. The Independent Broadcasting Authority (IBA) was established in January 1994 in terms of the Independent Broadcasting Authority Act (No. 153) of 1993. The introduction of an independent regulator with constitutionally guaranteed independence was a significant step forward for the industry.

The IBA later merged with the South African Telecommunications Regulation Authority (SATRA) in June 2000 to become the Independent Communications Authority of South Africa (ICASA). The merged regulator is governed by the ICASA Act of 2000 as amended.

In 2005 there was an alignment between broadcasting and telecommunications as the Electronics Communication Act 36 of 2005 made provision to promote convergence in the broadcasting, broadcasting signal distribution and telecommunications sectors.

The ICASA Amendment Act promulgated in 2006 served to introduce a holistic compliance structure to reflect convergence between networks. In terms of the Electronic Communications Act 36 of 2005, no-one may broadcast without a licence, and must also fulfil a stringent set of licence terms and conditions.

2.2 History of the South African Media Industry

2.2.1 History of Broadcasting Media

In the 1920's broadcasting in South Africa started in Johannesburg with the creation of a station called JB Calling. There were various other stations in different cities, but over time, funding constraints left them struggling to sustain themselves. This led to the creation, with government approval, of the African Broadcasting Company in 1927 owned by the Schlezinger organisation.

After funding problems persisted the government took over all broadcasting and created the South African Broadcasting Corporation (SABC) to house all stations. The SABC was established in 1936 through an Act of Parliament and replaced the African Broadcasting Corporation which was dissolved in the same year. Until 1979 the SABC also operated broadcasting services in Namibia. The SABC has grown into a multi-channel state broadcaster with numerous radio and television stations broadcasting in all South African languages.

FM broadcasting was introduced in 1961. But the launch of television came much later. South Africa was among the last countries on the continent of Africa to introduce television broadcasting, despite being the most economically advanced country on the continent.

Television was only launched in 1976. The apartheid government were concerned about the moral and political influences that television might have on the population and perceived the new medium as a threat to Afrikaans and the Afrikaner community by giving "undue" prominence to English, and creating unfair competition for the Afrikaans press. Also they regarded television as

a threat to its control of the broadcasting media, in spite of the fact that the SABC was a state-controlled broadcaster and had a monopoly on radio broadcasting.

The SABC had a monopoly on all broadcasting until the early 1980's when some of the 'homelands' under apartheid started their own services. These included BOP TV and Radio; Transkei broadcasting corporation and privately owned stations such as Capital Radio and Radio 702. A further undermining of SABC's monopoly came from the print media groups who started a pay television service M-Net in 1986. This was the beginning of the liberalization of broadcasting in South Africa.

After the democratic changes in 1994, regulation of the broadcasting industry was assigned to a new independent body: the Independent Broadcasting Authority (IBA). IBA was formed in terms of the IBA Act of 1993. Now regulation of the airwaves was taken from the Department of Posts and Telecommunications and became the sole mandate of the IBA.

One of the first tasks that IBA's undertook was to liberalise the industry by privatizing some of the SABC radio services, licensing new radio services and licensing a new television service. By 1997 two new radio groups: Kagiso Media and Primedia had been created. A new television station, e.tv was licensed in 1998 and went on air in 1999.

In 1995 MultiChoice had taken advantage of the analogue-digital evolution to launch one of the first digital television services outside of the USA via satellite. The service was named DStv and introduced multi-channel television to South Africa for the first time.

IBA and the telecommunications regulator South African Telecommunications Regulation Authority (SATRA) merged to create the current regulator: the Independent Communications Authority of South Africa (ICASA). Further liberalization occurred as ICASA issued 8 new licences in 2007: 3 for new regional radio stations and 5 for pay television operators including DStv. DStv had previously been launched at a time when there had not been a regulatory framework for satellite television.

Today the SABC is still a formidable organization with 18 radio stations and 4 television stations, namely 3 terrestrial television stations and one on DStv satellite bouquet. In 2008 DStv subsequently discontinued the satellite channel. The SABC is currently controlled by a board of

directors appointed by parliament in terms of the broadcasting Act of 1999. Revenue comes predominantly from advertising, with 16%[12] coming from licence fees.

Currently MultiChoice brand DStv has more than 2 million subscribers across Africa, 1.5 million in South Africa. It still operates a terrestrial service, M-Net, but this subscriber base is declining rapidly.

Digital terrestrial television trial phase was introduced at the end October 2008 and has signalled the first digital service outside of the DStv service. This service is expected to go commercial in June 2009 when set-top boxes are expected to be available.

2.2.2 History of Print Media

The first newspaper published in sub-Saharan Africa appeared in Cape Town in the 1800s. It was the arrival of British settlers of 1820, however, that seems to have resulted in the publication of the country's first newspaper.

Despite initial opposition from colonial authorities the paper eventually began to enjoy a measure of freedom and autonomy. In 1876 Afrikaners began publishing their own newspaper called Die Patriot. Die Zuid Afrikaans, a Dutch language newspaper, began publishing in Cape Town in 1828. These newspapers were the roots of present day South African print media.

The Afrikaans press was established partly as a reaction to the liberal views expressed in some of the English papers, particularly with respect to issues such as slavery, tensions between the Dutch farmers and the Xhosas and the work of missionaries in the Cape.

The origin of the black press in South Africa is linked to the establishment of mission stations in the Eastern Cape. The first newspaper intended for black readers, Umshumayeli Wendaba (Publisher of the News), was printed at the Wesleyan Mission Society in Grahamstown from 1837 to 1841. Many others followed, the most significant being:

[12] *SABC Annual Report , 2008*

- Imvo Zabantsundu (African Opinion) started by John Tengo Jabavu in King William's Town in 1884;
- Izwi laBantu started in 1897 by AK Soga;
- Ilanga lase Natal (The Natal Sun), started by John Dube in 1903;
- the ANC's Abantu-Batho, formed in 1912; and
- The Indian Opinion, established in 1903 by Mahatma Gandhi, the founder of the Indian National Congress.

2.3 Current Status of the South African Media Industry

2.3.1 South African Media Industry Landscape

As mentioned previously the media landscape in South Africa is large, complex, robust and mature and arguably, ranks among the largest in Africa. It is relatively open with various participants active in newspapers, television, magazines, radio, film, books, advertising, music and public relations. In addition, South African Media Companies have interests in many parts of the world.

The establishment of press freedom as enshrined in the constitution and the Bill of Rights strengthened the industry and made it more dynamic and influential. The transformation of the South African media since the demise of apartheid has taken the form of significant changes in the media's environment. There is now freedom of speech, unprecedented access to state-held information. There is also a public broadcasting service that seeks to serve the needs of all citizens. Overall there has been a diversification of media; the commercialisation and privatisation of broadcasting; and the move from state broadcasting towards public broadcasting. What diversity does bring is competition, an investigative edge and an opportunity to expand the reading, thinking public, and that can only be good news for South Africa's young democracy.

While South Africa's many broadcasters and publications reflect the diversity of the population as a whole, the most commonly used language is English followed by Afrikaans. However, all 11 official languages are represented to some extent, especially by the public broadcaster.

Radio is the most accessible media in South Africa, with 89% of the population having access.

Terrestrial Television has a coverage of about 90% of the population whilst Satellite television albeit only subscription covers 100% of the population. However satellite TV subscription is just over 2 million which may translate to a population of about 10 million if we assume an average of 5 people per household. Therefore only 20% of the South African population enjoys subscription TV. This will change as competition is introduced and subscription fees become more affordable.

On the other hand, newspaper readership stands at 48% of the total audience and 40% for magazine according to AMPS 2008. Low literacy levels might be one of the reasons for low Print Media circulation.

Also, the impact of digital media cannot be ignored as younger audiences appear to prefer to be on MixT on a mobile device and Facebook on the Internet, rather than read newspapers or magazines.

As previously mentioned the industry can be categorised into three distinct sub-sectors:

(1) Electronic / Broadcast Media: consisting of Radio and Television;

(2) Print Media: consisting of Newspapers, Magazines and Knock-and-drop; and

(3) New Media: which consist of online media (Internet), and mobile media.

1. Electronic Broadcast Media

Electronic Broadcast Media in South Africa is governed by the Electronics Communications Act (Act No 36 of 2005). In terms of this Act all broadcasters must adhere to the ICASA regulations and the Advertising Standards Authority (ASA) Code as determined and administered by the ASA.

Radio

Radio is South Africa's biggest broadcast medium and the sector's deregulation in 1996 led to an even bigger proliferation of radio stations. It is a much more liberalised medium than the television sector. Broadcasts range from the country-wide and regional radio stations of the state-owned and funded SABC to fully commercial privately owned stations and 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 also represented particularly by SABC.

The Radio Industry is dominated by the public broadcaster the South African Broadcasting Corporation (SABC) in terms of number of stations it owns. The SABC owns 18 radio stations, of which 15 are public radio stations broadcasting in all 11 official languages and 3 are regarded as public commercial services.

In addition there are 13 private commercial radio stations and 126 community radio stations. In 2006 ICASA licensed 3 commercial sound broadcasters in “Secondary Markets” in the Northwest, Limpopo and Mpumalanga provinces, increasing the number of commercial radio stations to 18.

Radio has always been South Africa's biggest broadcast medium. The “Triple Inquiry Report” of 1995 published by IBA the then broadcasting regulator and ICASA’s predecessor resulting in the sector's deregulation in 1996. This deregulation led to a further proliferation of radio stations. The majority of radio stations broadcast in English, although other official languages of South Africa are also represented.

Television

The SABC has 3 terrestrial television channels (SABC1, 2 and 3) and an additional channel called SABC Africa, which was part of the DStv bouquet before it was withdrawn in July 2008. All other SABC channels are also distributed via the DStv satellite bouquet.

E.tv is the only privately owned free-to-air commercial terrestrial television station and was licensed in 1998, following a competitive bidding process with 7 applicants. E.tv is licensed to broadcast nationally. From 2001 e.tv was mandated to carry 45% South African content. E.tv is governed by the rules laid out in the Position Paper on the Licensing of South Africa's first free-to-air television channel.

MultiChoice had been the only provider of pay TV and satellite broadcasting in the country for 12 years until 2007 when ICASA licensed 4 other satellite broadcasters. The DStv subscriber base is over two million[13] including all of Africa. MultiChoice owns one terrestrial Pay-TV channel M-Net. M-Net also produces other channels for DStv: M-Net, M-Net Movies, M-Net Series, M-Net Stars, M-Net Action, AfricaMagic, kykNET, MK, GO, K All Day, Channel O and Magic World. All these channels are on the DStv platform. Also, MultiChoice owns SuperSport a sports channel. M-Net also owns an additional channel called the community services network (CSN).

In November 2007 four new licences were granted out of a total of eighteen applications for the operation of satellite Pay-TV services. These are: Walking on Water; On Digital Media; e-Sat (the satellite division of e.tv) and Telkom Media. e-Sat became a 24 hour news channel carried by the DStv platform.

2. Print Media

The South African Print Media industry has experienced good growth in terms of revenue and number of titles despite growth in broadcasting and new media which are in direct competition for adspend. The industry is dominated by a few large companies who own and control a large number of newspapers and magazines across the country.

The four large publishing groups are: Avusa Publishing; Naspers; Independent News, Media24 and Caxton / CTP. Most of these companies have their head offices in Gauteng Provinces with the exception of Naspers which has its headquarters in the Western Cape Province.

[13] *MultiChoice: MultiChoice owns M-Net and DStv.*

There are several independently-owned newspapers, but these are small commercial newspapers.

There are also a large number of free (advertising-funded) local and community newspapers in several different languages. Most of the community newspapers are owned by small companies (SMEs) usually located within the province where they are published and / or circulated. For these small companies competition from major newspapers and larger publishers is fierce, and many go bankrupt within a short period of time due to cash flow and working capital challenges. Hence, lists of these newspapers are constantly changing as newcomers begin circulation and others close their doors.

3. New Media

'New media' refers to the emergence of digital, computerized, or networked information and communication technologies in the later part of the 20th century[14]. This includes Internet and mobile based media technologies.

The use of digital computers has transformed 'old' media – examples are digital television and online publications. Even traditional media forms such as the printing press have been transformed through the application of these technologies.

Interactivity has given additional ways to use media. The New Media industry seeks to gain from the advantages of two-way dialogue with consumers primarily through the internet. Another advantage of the New Media industry is its ability to rapidly disseminate information to the market place.

New Media include Online Media (websites) and Mobile based media (mobisites). New Media is growing rapidly, and increasingly gaining a significant portion of adspend.

It proved challenging to establish ownership for Online Media, as the owners and / or the website can be located anywhere in the world.

[14] *http://en.wikipedia.org/wiki/New_media*

However it was ascertained that most of the Print Media are also represented in the Online Media. For example, a mainstream newspaper will almost always have a website/s, and therefore a presence Online.

2.4 Major Players in the South African Media Industry

The following section examines some of the major players in the media industry in terms of ownership and structure and gives an overview of their media offering.

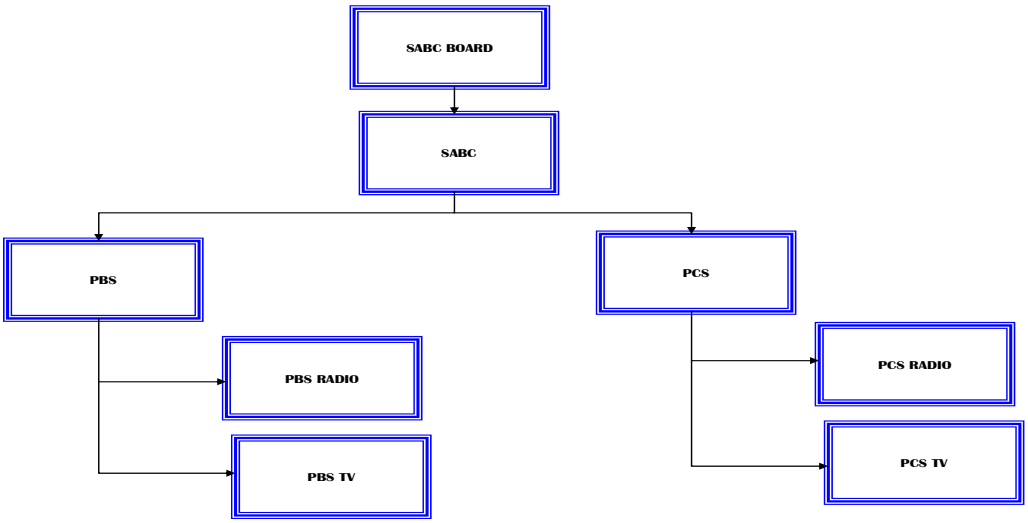
The major players are:

- SABC
- The Independent Newspapers Group
- Avusa
- Naspers
- CTP / Caxton
- Primedia
- Kagiso Media

2.4.1 SABC

The SABC is a public broadcaster in terms of the broadcasting Act of 1999. It was re-licensed in June 2005 in line with section 10 of the Broadcasting Act. The corporation was reorganised into 2 divisions: a public commercial service (PCS) and a public broadcasting service (PBS), shown in Figure 1.

Figure 1: SABC Structure Overview



The public radio division has 11 full spectrum sound services, a regional sound service KFM, a community sound service X-K FM, Lotus FM, Radio 2000, as well as two full spectrums multilingual television channels SABC 1 and SABC 2.

Table 1: SABC Radio and Television Stations

Radio Stations		Television Stations	
PBS Radio Stations	**PCS Radio Stations**	**PBS TV Stations**	**PCS TV Station**
1. CKI 2. Ikwekwezi 3. Lesedi 4. Ligwalagwala 5. Lotus 6. Motsweding 7. Mungana Lonene 8. Phalaphala 9. R2000 10. RSG 11. SAFM 12. Thobela 13. Ukhozi 14. Umhlobo Wenene 15. XKFM	1. 5FM 2. Good Hope FM 3. Metro	1. SABC 1 2. SABC 2	1. SABC 3 2. SABC Africa

The public commercial division comprises 3 sound services 5 FM, Metro FM and Good Hope FM and one television channel SABC 3. By far the largest radio station in South Africa (in terms of audience size) is Ukhozi FM, the SABC's isiZulu cultural service, with 6.38-million listeners. Table 1 on the next page lists SABC's television and radio stations.

SABC is wholly owned by the state. Its funding does depend solely on the taxpayer; income is derived from advertising and licence fees in a ratio of four to one.

Digital Migration, that is the migration of South Africa's broadcasting system from analogue to digital, has a bearing on the technological advancement of the country, particularity on South Africa's ability to host a successful Soccer World Cup in 2010. Digital broadcasting will enable broadcasters to have better capacity to improve and diversify their services and other benefits are better video and sound quality and the transmission of an increased amount of data.

The main challenge of implementing this new technology lies in balancing expansion of services to all South Africans, particularly the poor, with market growth and socio-economic development.

2.4.2 The Independent Newspapers Group

The Independent Newspapers is owned by Independent News & Media Plc (a 'multinational media group") in which Irish businessman; Tony O'Reilly is the major shareholder.. He first acquired a stake in Argus Newspapers in 1994 from Johannesburg Consolidated Investments (Anglo American) and renamed it Independent Newspapers. In the 1990s Argus was South Africa's major newspaper group, selling more than 50% of all daily newspapers in the country. Independent Newspapers is a wholly owned subsidiary of Independent News and Media (South Africa) Limited.

Independent Newspapers publishes 15 daily and weekly newspapers in the country's three major metropolitan areas.

The Star is the group's flagship daily newspaper. Other dailies are the Cape Argus; the premier isiZulu newspaper Isolezwe; Daily News; Cape Times; the Mercury; Pretoria News; the Diamond Fields Advertiser; Business Report and Daily Voice. Sunday newspapers are the Sunday

Tribune, Weekend Argus (which has both a Saturday and Sunday edition) Independent on Sunday and Sunday Independent. The Post is published on Wednesdays. The group's Saturday titles are: the Saturday Star in Gauteng and Independent on Saturday in KwaZulu-Natal.

The group has aggregate weekly sales of 2.8 million copies and reaches about 63% of English readers.

The group receives about 48% of total advertising spend in the paid newspaper market.

Independent's broadsheet dailies carry various supplements and substantial advertising.

The company also publishes 13 free weekly local newspapers in Cape Town, and holds a number of profitable commercial printing and distribution contracts in all areas.

Table 2 below shows the newspaper titles owned by the Independent Newspaper Group.

Table 2: Independent Newspapers Group Titles

MAINSTREAM NEWSPAPERS		
Mainstream Dailies	**Mainstream Saturday**	**Mainstream Sunday**
1. The Star, 2. Isolezwe 3. Daily Voice 4. Cape Argus 5. Cape Times 6. Daily News 7. Mercury, The 8. Pretoria News 9. Diamond Fields Advertiser	1. Saturday Star, 2. The Independent on Saturday 3. Weekend Argus (Sat) 4. Pretoria News Saturday	1. Sunday Tribune 2. Isolezwe ngeSonto 3. Weekend Argus (Sun) 4. Sunday Independent, The

SMALL COMMERCIAL NEWSPAPERS			
Freesheets	**Co-owned: Highway Mail**	**Co-owned: Rising Sun**	**Co-owned: Capital Media**
1. The Post 2. Plainsman 3. Vukani 4. Tabletalk 5. Athlone News 6. Southern Suburbs Tatler 7. Southern Mail 8. Tygertalk Bellville/Durbanville 9. Atlantic Sun 10. Constantiaberg Bulletin 11. Tygertalk (Goodwoow/Parow) 12. False Bay Echo 13. Capetowner 14. Sentinal News	1. Maritzburg Sun (33.33%) 2. Highway Mail (33.33%) 3. Northglen News (33.33%) 4. Berea Mail (33.33%) 5. Queensburgh News (33.33%) 6. Hilltop (2pw) (33.33%)	1. Phoenix Sun (15%) 2. Rekord Moot (25%) 3. Chatsworth Rising Sun (15%) 4. Merebank Rising Sun (15%) 5. Overport Rising Sun (15%) 6. Umzinto Rising Sun (15%)	1. Rekord East/Oos (25%) 2. Rekord Centurion (25%) 3. Rekord North/Noord (25%) 4. Rekord Noweto (25%) 5. Rekord Central/Sentraal (25%) 6. Rekord Mamelodi (25%) 7. Rekord West News/Wes Nuus (25%)
TOTAL WHOLLY OWNED TITLES		**28**	
TOTAL CO-OWNED TITLES		**22**	
TOTAL TITLES OWNED		**50**	

2.4.3 Avusa

Avusa Limited was established on the 1st February 2008. This resulted from an unbundling of Johnnic Communications Limited (Johncom) in 2007 whereby ElementOne Limited retained the Caxton shareholding and the new company, Avusa; purchased Johncom's operating media and entertainment assets. Avusa is listed on the Johannesburg Stock Exchange (JSE) trading under a code "AVU" with effect from the 31st March 2008. The assets currently under Avusa have evolved and grown remarkably over the years, to make the company one of the pre-eminent media and entertainment organisations in South Africa.

Originally Omnimedia Corporation (owned by Anglo American) owned Times Media Limited (TML). Johnnic Communications, a coalition of black business groups and trade unions, and the National Empowerment Consortium bought TML from Omnimedia Corporation in 1996.

The National Empowerment Consortium took over Johnnic and this coincided with the establishment of a joint venture between British group Pearson's and TML, under which the former acquired half of TML's Business Day and Financial Mail. Pearson's and TML subsequently set up the Internet publishing operation I-Net Bridge.

In November 2007, a JSE listed Johnnic Communications changed its name to Avusa. Avusa Limited was formed as a wholly owned subsidiary of ElementOne to acquire and hold all of ElementOne directly-held operating media and entertainment assets. The business units of the Company include media, entertainment, retail, books and maps, music and manufacturing.

The name Avusa is constructed from the words Audiovisual, Vision, Unique and Unity, and South Africa.

The current shareholding structure is shown in Figure 2 further in the text.

The Group's principal activity is operating media and entertainment assets. The Group's operations are carried out through five businesses:

1) Media comprises more than 23 national, regional and community newspapers; over 32 magazines in consumer, business and specialist fields; as well as digital and broadcast enterprises.

2) Entertainment operates cinema multiplexes in South Africa, and shows releases from Hollywood, Bollywood and independent studios. It also distributes primarily Digital Video Disc product into the rental and retail trade and holds prestigious distribution licences for 20th Century Fox, Disney, Warner, the BBC, Universal and various independent studios.

3) Retail operates 46 stores in upmarket shopping centres and at major South African airports.

4) Books and Maps operates five major publishing imprints comprising Struik, Struik Christian Books, Zebra and Oshun.

5) Music and Manufacturing produces, publishes and distributes pre-recorded music.

Table 3 below shows the newspaper titles owned by the Avusa Group.

Table 3: Avusa Newspapers and Magazine Titles

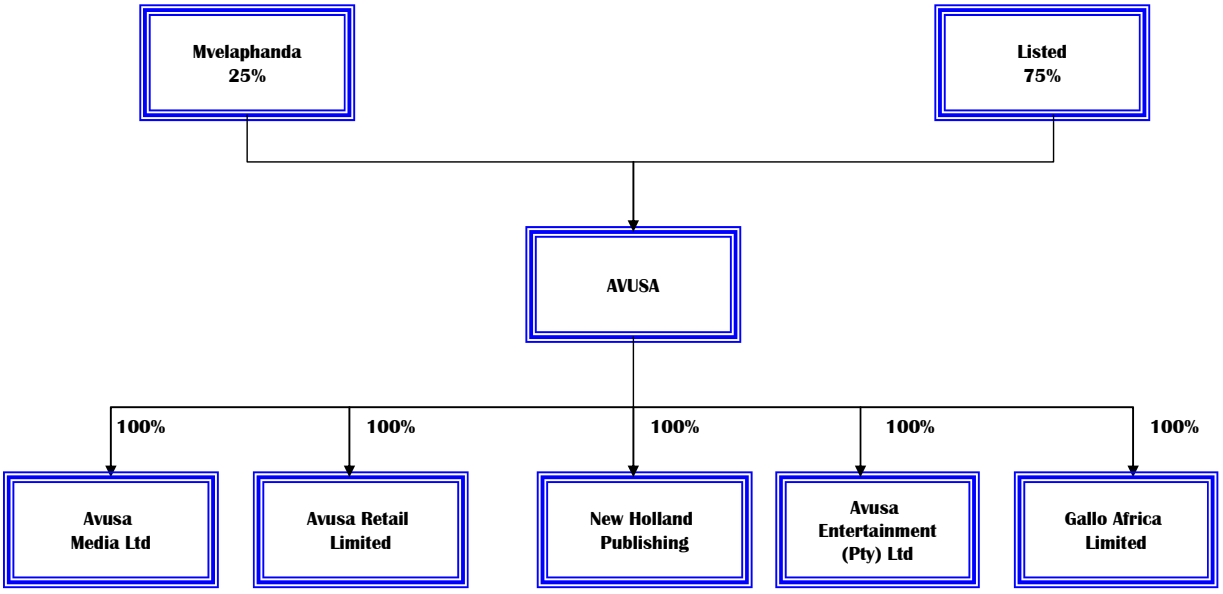
MAINSTREAM NEWSPAPERS		
Mainstream Dailies	**Mainstream Saturday**	**Mainstream Sunday**
1. The Times 2. Sowetan 3. Business Day (50%) 4. Daily Dispatch 5. The Herald	1. Weekend Post 2. Saturday Dispatch 3. Weekender, The (50%)	1. Sunday Times 2. Sunday World
SMALL COMMERCIAL NEWSPAPERS		
Small Commercial	**Free sheets**	
1. Representative 2. Our Times 3. Talk of the Town	1. Algoa Sun 2. Go & Express 3. Ilizwi 4. Eastern Cape Agri (mthly) 5. Western Cape Agri (mthly) 6. KwaZulu Natal Agri (mthly)	7. Mpumalanga Agri (mthly) 8. Free State-Agri (mthly) 9. Northern Cape Agri (mthly) 10. Gauteng Agri (mthly) 11. Limpopo-Agri (mthly) 12. North West-Agri (mthly)
TOTAL OWNED TITLES	**23**	
TOTAL CO-OWNED TITLES	**2**	
TOTAL TITLES OWNED	**25**	
MAGAZINE TITLES		
1. Car Magazine 2. Complete Golfer (Compleat Golfer) 3. Getaway 4. Hospitality 5. Hotel & Restaurant 6. Leisure Wheels 7. Mooiloop 8. Popular Mechanics 9. Wiel	10. Wine 11. Financial Mail 12. Avocado/Avokado 13. Built 14. Computing SA 15. DRIVE 16. Elle 17. Elle Decoration 18. Garden Route Living	19. HOME OWNER 20. Longevity 21. MDR Medical Desk Reference 22. MIMS 23. MIMS Guide to OTC Products 24. PURSUIT 25. SA Home Owner	26. SA Mining 27. Site & Road 28. SoccerLife 442 29. Stuff 30. SUNDAY TIMES MAGAZINE 31. TLC 32. TOP HUIS

Avusa also publishes the Sunday Times, South Africa's biggest Sunday newspaper, as well as the Times, the Sowetan, Business Day, Sunday World, Daily Dispatch, Saturday Dispatch, the Herald, Financial Mail, Weekend Post, and Our Times, South African Home Owner, SA Home Owner National Buyers Guide, Longevity, Elle, The Professions & Projects Register Soccer Life, Top Huis, Avocado, Computing SA, Site & Road, SA Mining, Built Stuff, the Home Show, Summit, I-Net Bridge, Career Junction, Amorphous Corporate, and Picasso Headline. The group also owns music publishing company Gallo Music, movie distributor Nu Metro, the Exclusive Books chain of bookshops, and RandomStruik, New Holland and Map Studio publishers. Avusa Community Newspapers publishes weekly titles comprising Ilizwi, Algoa Sun, The Rep, Go! & Express, Grahamstown this week, Our Times, Talk of the Town and The Mercury.

Avusa is 25.5% owned by Mvelaphanda and the balance is owned by other public shareholders. Avusa's media and entertainment assets are housed within the following companies which are all 100% owned:

- Avusa Media Ltd
- Avusa Retail Ltd
- New Holland Publishing (Pty) Limited
- Avusa Entertainment Ltd
- Gallo Africa Limited

Figure 2: AVUSA Structure Overview



2.4.4 Naspers

Naspers is based in Cape Town and is a multinational media group with its principal operations in print media newspapers, magazines, printing, book publishing and private education and electronic media such as pay television, internet service provision and online news.

Naspers' most significant operations are located in South Africa where it generates approximately 72.7% of its revenues. Other significant operations are located in Sub-Saharan Africa, Greece, Cyprus, the Netherlands, the United States, Thailand, Brazil, Poland, Russia, India and China.

Naspers was founded as Die Nasionale Pers (The National Press) on 12 May 1915 aimed at the Afrikaner population. At first it only published a newspaper, Die Burger which was the official mouthpiece of the National Party in the Cape.

Soon it expanded and in 1916 published its first magazine Die Huisgenoot. In 1918 the company took a further step towards expansion when its book publishing operations were founded as Die Burger Boekhandel.

In 1985, Naspers and a number of other South African media companies formed an electronic pay-television media business, M-Net, which was listed on the JSE Securities Exchange (JSE) in 1990. In 1993, M-Net was divided into two companies: M-Net itself became a pay-television broadcasting station while the company's subscriber management and signal distribution activities were formed into a new company called MultiChoice Limited later renamed MIH Holdings Limited and Orbicom respectively.

Naspers' company structure as shown in Figure 3 further in the text, operates in two core media segments: electronic media and print media.

The electronic media arm falls under MIH Holdings which controls Naspers' pay-television, internet and related technology activities. MIH Holdings either owns or operates pay-television and internet subscriber platforms in Africa, Greece, Cyprus, Thailand and China.

The print media arm of Naspers falls under Media24, which controls Naspers' newspaper and magazine publishing as well as printing activities. Print media comprises two segments: Media24 and book publishing; and private education. Media24 is the largest publisher of magazines and newspapers and is the largest printer and distributor of magazines and related products in Africa. Table 4 shows the Naspers' media offering.

Table 4: Naspers Media Titles

MAINSTREAM NEWSPAPERS			
Mainstream Dailies	**Mainstream Saturday**	**Mainstream Sunday**	**Urban Weeklies**
1. Daily Sun 2. Son (Daily) 3. Beeld, Daily 4. Burger, Die Daily 5. Volksblad - Daily 6. Witness, The (50%)	1. Burger, Die Saturday 2. Beeld, Saturday 3. Weekend Witness (50%) 4. Volksblad – Saturday	1. Rapport 2. Sunday Sun 3. City Press 4. Sondag	1. Soccer Laduma 2. Son (Weekly)

SMALL COMMERCIAL NEWSPAPERS				
Wholly Owned Small Commercial				
1. District Mail 2. Weslander, The 3. Worcester Standard & Advertiser 4. Eikestadnuus 5. Hermanus Times 6. Vrystaat 7. Swartlander 8. Limpopo Informant 9. Breederivier Gazette 10. Caledon Kontreinuus	11. City Vision (Johannesburg) 12. Eastern Express 13. PE Express 14. People s Post Mitchells Plain 15. Mirror, The 16. Express 17. City Vision (Khayelitsha) 18. Bloemnuus 19. Vista 20. Ons Stad 21. People's Post: City Edition	22. Tygerburger Ravensmead/Belhar 23. Tygerburger Elsiesrivier 24. People s Post :False Bay 25. People s Post : Claremont/Rondebosch 26. Tygerburger Bellville 27. City Vision (Langa/Gugulethu) 28. People s Post : Athlone 29. People s Post :Constantia/Wynberg 30. UD News	31. Tygerburger Table View 32. Tygerburger Eersterivier/Blue Downs 33. People s Post Retreat 34. Tygerburger Goodwood 35. Goudveld Forum 36. Express Northern Cape 37. People s Post Grassy Park 38. People s Post Landsdowne	39. Noordkaap 40. Kouga Express Forest Express 41. Tygerburger Durbanville 42. Tygerburger Parow 43. Tygerburger Kraaifontein 44. Tygerburger Kuilsrivier

Co-owned: Mooivaal Media	**Freesheet**	**Co-owned: Capital Media**	**Co-owned: Sky Blue Media**
1. Vaalweekblad (50%) 2. Vaal Weekly (50%) 3. Potchefstroom Herald (50%) 4. Carletonville Herald (50%) 5. Meyerton Ster (50%) 6. Parys Gazette (50%) 7. Sasolburg Ster (50%) 8. Veereniging Ster (50%) 9. Vanderbijlpark Ster (50%) 10. Noordwes Gazette (50%) 11. Vaal Vision (50%)	1. Tygerburger Milnerton 2. Tygerburger Brackenfell 3. Express QwaQwa 4. Kuruman Bulletin 5. Kroonnuus 5. Maluti	1. Rekord Centurion (25%) 2. Rekord North/Noord (25%) 3. Rekord Central/Sentraal (25%) 4. Rekord Mamelodi (25%) 5. Rekord West News/Wes Nuus (25%) 6. Rekord Moot (25%) 7. Rekord Noweto	1. Mthatha Fever (30%) 2. Zululand Fever (30%) 3. South Coast Fever (30%) 4. Uvo Lwethu Fever (30%) 5. Isolomzi Fever (30%) 6. East Griqualand Fever (30%)

		(25%) 8. Rekord East/Oos (25%)	

TOTAL WHOLLY OWNED TITLES	65
TOTAL CO-OWNED TITLES	28
TOTAL TITLES OWNED	93

MAGAZINE TITLES

1. Baba & Kleuter
2. Best Life
3. Bicycling
4. BLUNT
5. Boeke-Insig
6. Bride
7. Cosmopolitan
8. Discovery
9. Dish & Skottel
10. Drive Out
11. Drum
12. Eat In
13. Eat Out - The Restaurant Guide of South Africa
14. Fairlady
15. Fairlady Bride
16. Femina
17. FHM
18. Finweek
19. Fit Pregnancy
20. Front Cover
21. Golf Digest
22. Heat
23. Huisgenoot
24. Ideas/Idees
25. Insig
26. InStyle SA
27. Kia Spirit
28. Kick Off
29. Landbouweekblad
30. Leef
31. Magic & M
32. Maxpower SA
33. Men's Health
34. Men's Health Living
35. Move!
36. MultiChoice Africa eNewsletter
37. National Geographic Kids
38. New Media Publishing
39. RAPPORT TYDSKRYF
40. Reader's Digest
41. Real Simple
42. Runners World
43. Sarie
44. Sarie Bruid
45. Seventeen
46. Shape
47. Sports Illustrated
48. TASTE eNewsletter
49. Time Out, Cape Town Visitor's Guide
50. Top Bike
51. Top Car
52. Top Motor
53. Trade With Britain
54. True Love
55. True Love Babe
56. True Love Bride
57. Tuis Home
58. Tv Plus
59. VISI
60. Weg/Go
61. Wisden Cricketer, The
62. WOMAN'S VALUE IDEAS
63. You
64. Your Baby
65. Your Child
66. Your Pregnancy
67. House & Leisure View
68. Marie Claire View
69. BRIDES & HOMES

Media24's newspaper division publishes 5 national dailies: Daily Sun; Die Burger; Beeld; Volksblad and the Natal Witness. Daily Sun is the largest daily newspaper in South Africa. Rapport; City Press and Sunday Sun are printed on Sundays in 4 cities and distributed nationally. It has 2 weekly publications: Soccer-Laduma and Son; and English and Afrikaans community newspapers in the Western Cape, Eastern Cape, Free State, Northern Cape, Vaal Triangle and North West.

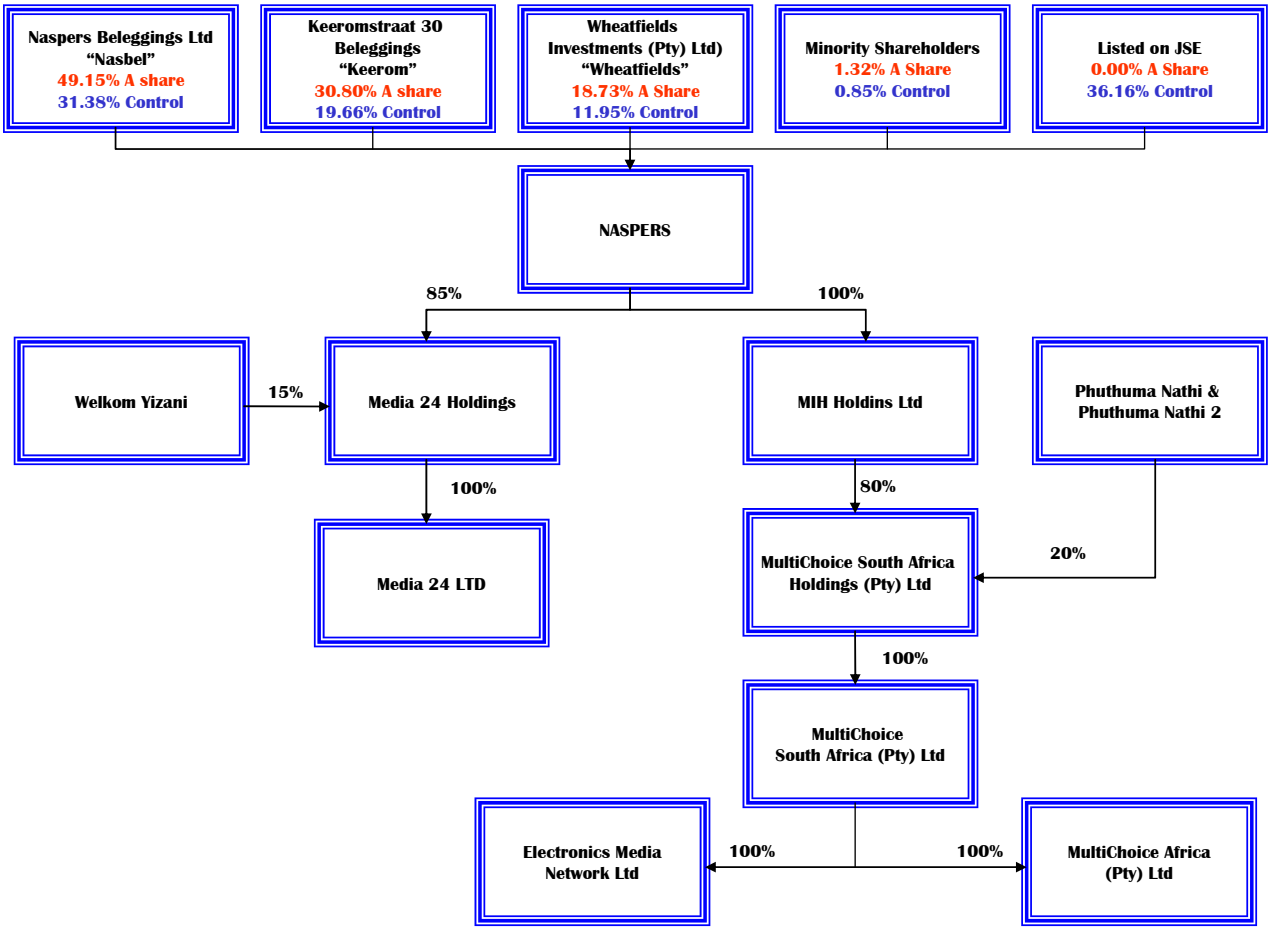
Media24 is the dominant player in the mass consumer magazine sector and sells about two thirds (66.7%) of all the magazines read in South Africa, including imported magazines. The company publishes large national titles such as Fair Lady; Sarie; Insig; SA Sports Illustrated; Kickoff; Huisgenoot; You and Drum.

Media24 owns a number of large media companies such as Touchline, The Witness and Mooival Media.

Until 2000, listed financial services company Sanlam was the major shareholder in Naspers holding about 16.5% of the shares. The company is now effectively controlled by the directors:

- Standard Bank Nominees Ltd - 18%;
- Nedcor Bank Nominees Ltd - 15.2% and
- CMB Nominees Ltd - 16.4%.

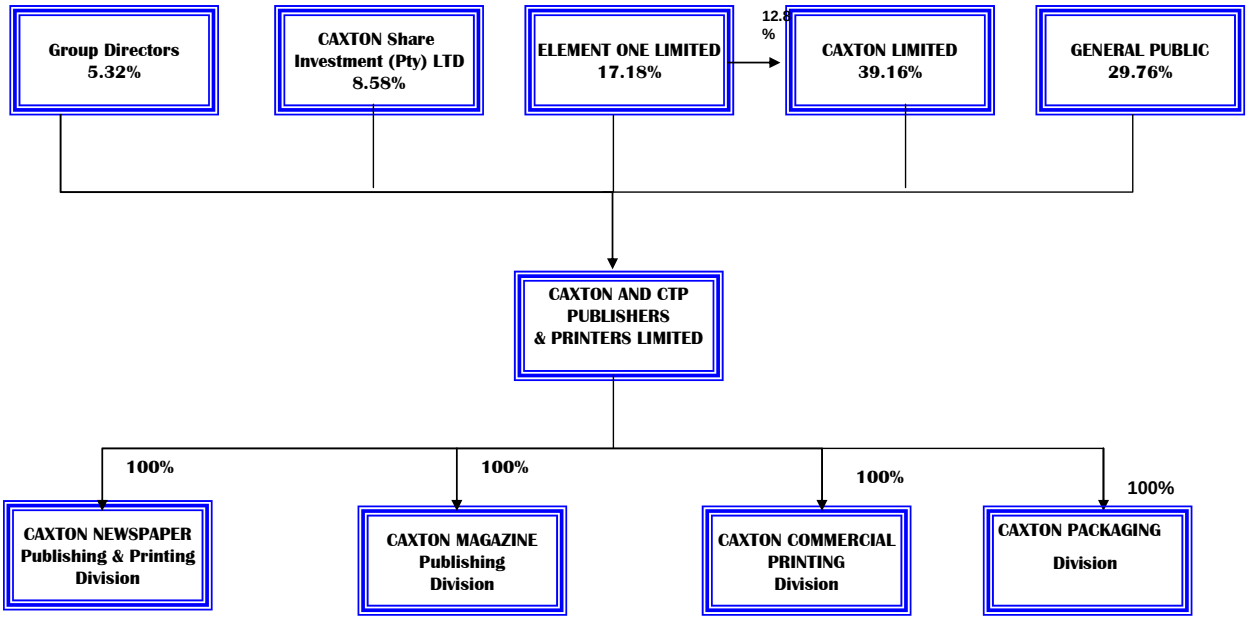
Figure 3: Naspers Structure Overview



2.4.5 Caxton / CTP

Caxton was founded in 1902 by two Pretoria businessmen, William Gindra and Edward Green, who established a small stationery and general printing factory in Pretoria. The company is an investment holding company whose subsidiaries are primarily involved in the printing and publishing of books, magazines and newspapers. Caxton / CTP shown in Figure 4 is recognised as one of the largest publishers and printers of books, magazines, newspapers and commercial print in South Africa.

Figure 4: Caxton Structure Overview



Source: Caxton and CTP Publishers & Printers Ltd.

Caxton and its associates publish 130 newspapers: 89 are wholly owned; 41 are co-owned. The regional and local newspaper division stables 57 free and 32 sold Caxton fully owned titles (89) and co-owns a further 34 free and 7 sold titles (41). The group publishes the Citizen daily, which has a circulation of 68,000[15] and readership of about 540,000[16].

[15] *ABC 2008*
[16] *Source of data : AMPS 2008*

The magazine division publishes 15 titles, including Farmer's Weekly, the oldest magazine in South Africa. The titles cover the interest fields of family, woman, home, lifestyle and decor, lifestyle and entertainment, religion and farming. It also publishes 24 regional editions of free lifestyle magazine called “Get It”.

Caxton manufactures a range of stationery products and produces packaging for a wide range of users.

Table 5: Caxton Newspaper and Magazine Titles

MAINSTREAM NEWSPAPERS				
Mainstream Dailies			**Mainstream Saturday**	
1. Citizen, The (Daily)			1. Citizen, The (Saturday)	
SMALL COMMERCIAL NEWSPAPERS				
Wholly owned Newspaper	**Co-owned: Mooivaal Media**	**Co-owned: Zululand Observer**	**Freesheet**	
1. Rustenburg Herald 2. Witbank News, Fri 3. South Coast Herald 4. Middelburg Observer, Fri 5. Lowvelder, The / Laevelder, Die (Friday) 6. Klerksdorp Rekord 7. Lowvelder, The / Laevelder, Die (Tuesday) 8. African Reporter 9. Mpumalanga News 10. Gemsbok 11. Newcastle and District Advertiser 12. The Mail 13. Capricorn Voice	1. Vaalweekblad (50%) 2. Vaal Weekly (50%) 3. Potchefstroom Herald (50%) 4. Carletonville Herald (50%) 5. Vaal Vision (50%) 6. Noordwes Gazette (50%) 7. Veereniging Ster (50%) 8. Vanderbijlpark Ster (50%) 9. Sasolburg Ster (50%) 10. Meyerton Ster (50%) 11. Parys Gazette (50%)	1. Zululand Observer Friday (60%) 2. Zululand Observer Monday (60%) 3. Umlozi (60%) 4. Zululand North Watch (mthly) (60%) 5. Eshowe Watch (mthly) (60%) 6. Baywatch (60%)	1. Sandton Chronicle 2. Polokwane Express 3. Roodepoort Record 4. Kempton Express 5. Zola Urban News 6. Bedfordview & Edenvale News 7. Boksburg Advertiser 8. Southern Courier 9. Randburg Sun (South) 10. Benoni City Times 11. Alberton Record 12. Fourways Review 13. Dobsonville Urban News	27. Randburg Sun (North) 28. Springs Advertiser 29. North Western Bonus 30. Pimville Urban News 31. Protea Urban News 32. North Eastern Tribune 33. Comaro Chronicle 34. Consumer, The 35. Brakpan Herald 36. Midweek Rekord 37. Southlands Sun 38. Johannesburg Eastern Express 39. South Coast Sun 40. Highvelder, The 41. Steelburger

14. Randfontein Herald 15. Brits Pos 16. Middelburg Observer, Tues 17. Northern Review Weekend 18. Northern Review Midweek 19. Ladysmith Gazette 20. Standerton Advertiser 21. Die Noordwester 22. Vryheid Herald 23. Northern Natal Courier 24. Streeknuus 25. Letaba Herald 26. Bosvelder 27. Times of Newcastle 28. Mid South Coast Mail 29. Stellalander 30. Estcourt and Midlands News 31. Daller, Die 32. Palaborwa Herald			14. Northcliff & Melville Times 15. Jabavu Urban News 16. Orlando Urban News 17. Chiawelo Urban News 18. Diepkloof Urban News 19. Eldorado Urban News 20. Meadowlands Urban News 21. Alex News 22. Germiston City News 23. Northside Chronicle 24. Midrand Reporter 25. Krugersdorp News 26. Rosebank Killarney Gazette	42. Times of Ladysmith 43. Newcastle Sun 44. Lentswe 45. Nelspruit Post 46. Vhembe Herald 47. Northern Natal Farmer 48. Barberton Times 49. Corridor Gazette 50. White River Post 51. Hazyview Herald 52. Barateiro (mthly)
Co-Owned: Ridge Times	**Co-owned: Capital Media**	**Co-owned: Highway Mail**	**Other**	**Co-owned: Rising Sun**
1. Echo, The (70%) 2. Ridge Times (70%) 3. North Coast Courier (50%)	1. Rekord Central/Sentraal (50%) 2. Rekord Mamelodi (50%) 3. Rekord West News/Wes Nuus (50%) 4. Rekord East/Oos (50%) 5. Rekord Centurion (50%) 6. Rekord North/Noord (50%) 7. Rekord Moot (50%) 8. Rekord Noweto (50%)	1. Maritzburg Sun (66.67%) 2. Highway Mail (66.67%) 3. Hilltop (2pw) (66.67%) 4. Northglen News (66.67%) 5. Berea Mail (66.67%) 6. Queensburgh News (66.67%)	1. West Side Urban News 2. Heidelberg Nigel Herald (50%) 3. Tembisan 4. Cosmos Gazette 5. Mopani News	1. Lenasia Rising Sun (50%) 2. Phoenix Sun (30%) 3. Chatsworth Rising Sun (30%) 4. Overport Rising Sun (30%) 5. Merebank Rising Sun (30%) 6. Umzinto Rising Sun (30%)

TOTAL WHOLLY OWNED TITLES	**89**
TOTAL CO-OWNED TITLES	**41**
TOTAL TITLES OWNED	**130**

MAGAZINE TITLES

1. Bona
2. CLEO
3. Essentials
4. Farmer's Weekly
5. Food and Home Entertaining
6. Get It (total 24 of)
7. Living and Loving
8. People
9. Rooi Rose
10. SA Country Life
11. SA Garden and Home
12. Vroue Keur
13. Woman and Home
14. Your Family
15. Stylene Lyne/ Tight lines
16. Threads and Crafts

2.4.6 Primedia

Primedia was established in 1994 and was listed on the JSE Securities Exchange in April 1995. Primedia remained listed on the JSE until 1 October 2007 when its listing was terminated following a private equity transaction. Primedia is now privately owned by a group of investors comprising Mineworkers Investment Company (MIC), the Kirsh Consortium, Brait SA and its own management.

According to the MIC website, MIC (Pty) Ltd is a 100% BEE Investment Company established by the Mineworkers Investment Trust (MIT) “to create a sustainable asset base for the benefit of mine, energy and construction workers and their dependents”.

The group has an established portfolio of businesses that principally cover advertising and content sectors of the media industry. Primedia's advertising businesses are located principally in South Africa. This broad base of assets; which includes radio broadcasting, outdoor advertising, commuter and other out of home media; spans both the traditional and non-traditional media sectors. The content businesses comprise filmed entertainment consisting of cinema exhibition, film distribution, home entertainment and electronic games.

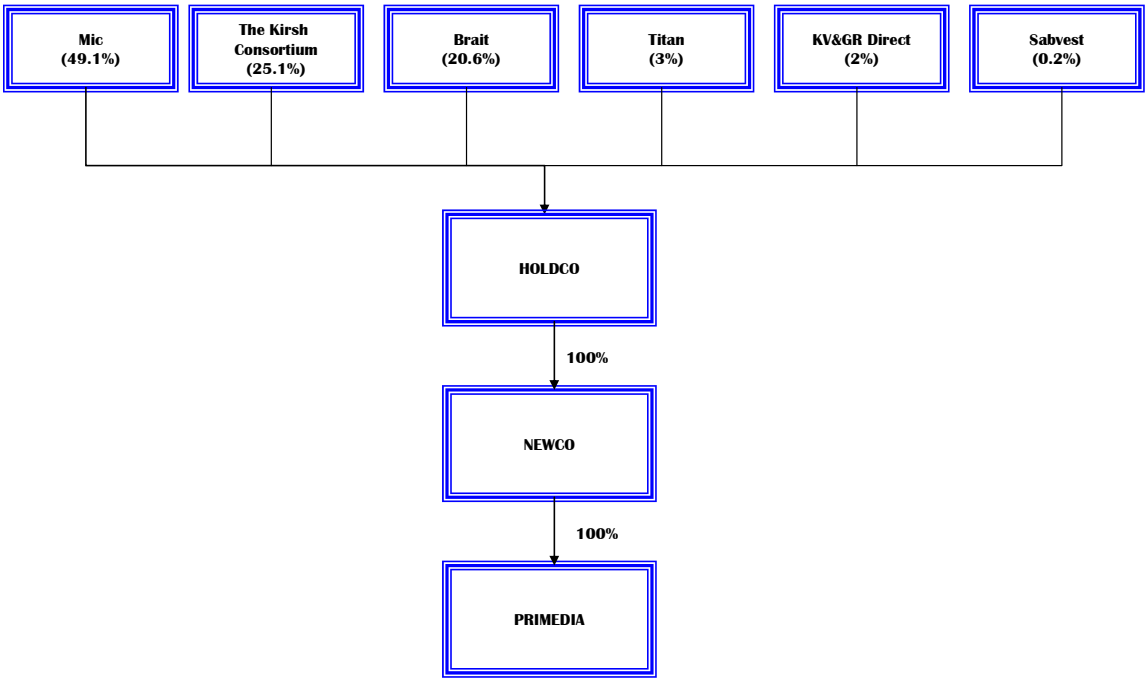
Primedia Group owns the following organisations: 365 Digital; 567 CapeTalk; 702 Talk Radio; 94.5 KFM; 94.7 Highveld Stereo; CineMARK; Comutanet; eXactmobile; iafrica.com; 40% of Kaizer Chiefs; Knowledge Factory; Megapro Marketing; Prezence; Primedia Face 2 Face; Primedia @ Home; Primedia Activation; Primedia Instore; Primedia Lifestyle; Primedia Outdoor; Primedia Publishing,; Primedia Unlimited; Spectrum; Ster-Kinekor; Ster-Kinekor Games; Warwick Hospitality and Events; Wide Open Platform and XProcure.

Table 6: Primedia Magazine Titles and Radio Stations

Magazine Titles	Radio Stations
1. ADVANTAGE 2. Analytical Reporter 3. ARCHITECT & BUILDER 4. DIY Trade News 5. Films Finesse 6. Frontshop 7. GARDENING, SA 8. Grand Preve 9. Hire SA 10. In Via Mental 11. Leading Architect & Design 12. Money Marketing 13. SA Gardening 14. SA Tuin Paleis 15. Specialised Micro technique	1. Highveld Stereo 2. K FM 3. Radio 702 4. 567 Cape Talk

Figure 5 shows Primedia's structure taken after delisting from the JSE. Subsequent to the delisting memorandum MIC increased its shares from 40% to about 49.1%, acquiring the controlling majority stake.

Figure 5: Primedia Structure



2.4.7 Kagiso Media

Kagiso Trust was established in 1986 as a non-profit agency which aimed to work with people to create a society which would offer liberty, justice and freedom from poverty. The organisation was established as a mechanism to channel funds which would support the 'struggle' (popular term for the resistance against the apartheid government) as well as uplift and empower communities deprived by the apartheid system. Kagiso Trust Investments (KTI) was established in 1993 as the investment arm of Kagiso Trust, and is widely regarded as one of South Africa's pre-eminent black economic empowerment (BEE) companies. KTI, which owns 47.78% of Kagiso Media, is dedicated to implementing a programme of social and economic change throughout the Group, through a focused and integrated BEE scorecard.

Kagiso Media is a leading black-owned and black-managed broadcasting, publishing and exhibitions company that is listed on the national securities exchange. It is a leading player in the South African media marketplace with its national suite of highly desirable radio assets, a radio advertising sales house, a leading publishing and information offering with reach into Africa,

exhibitions and events company and more recently, an out-of-home advertising and promotions business.

Kagiso Media's interests in regional radio stations include a controlling share in East Coast Radio and Jacaranda 94.2, and strategic stakes in OFM (Bloemfontein), Kaya FM (Johannesburg), Heart 104.9 (Cape Town) and iGagasi 99.5 (KwaZulu-Natal). Kagiso Media recently increased its stake in its highly cash-generative broadcasting asset, Jacaranda 94.2, effectively bringing Kagiso Media's Group stake to 80%. Table 7 below shows the Kagiso Media Radio Stations.

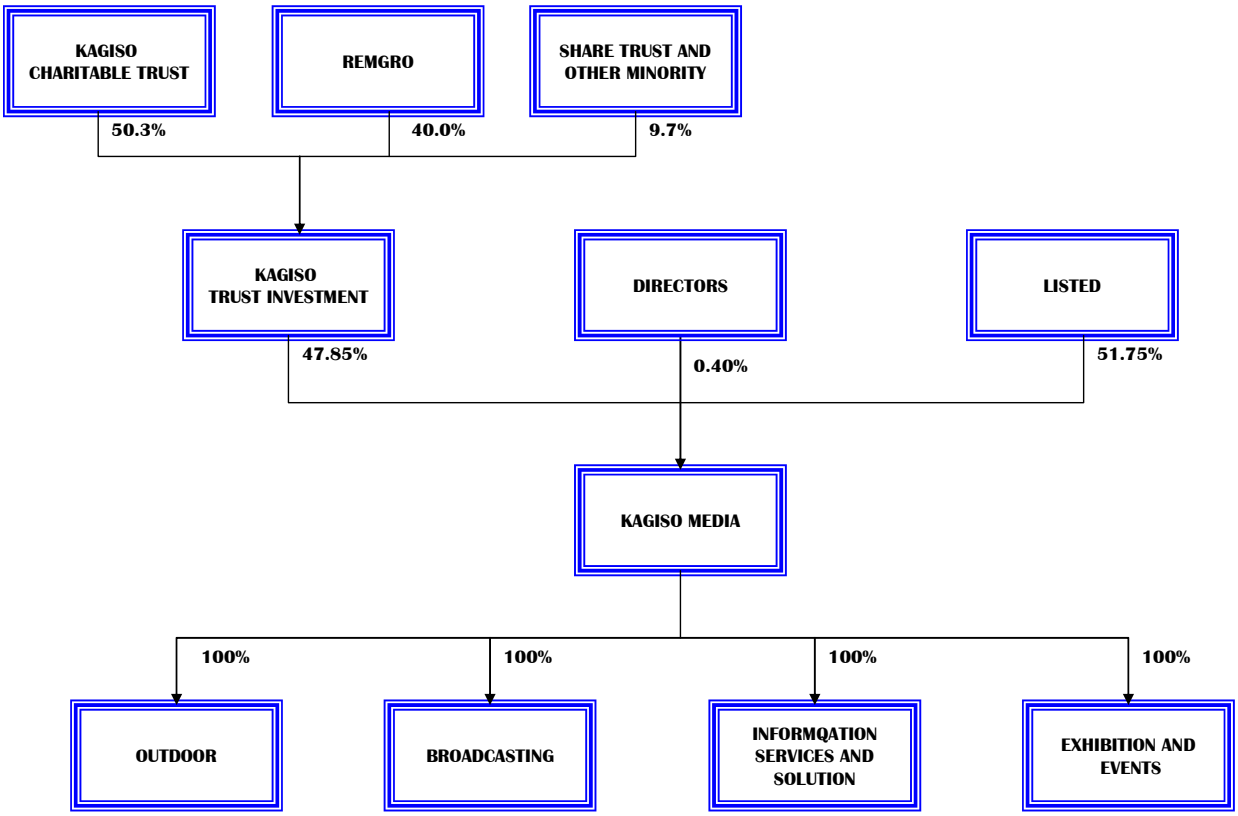
Table 7: Kagiso Media Radio Stations

Radio Stations
1. East Coast Radio
2. Jacaranda FM
3. OFM
4. Kaya FM
5. Heart 104.9
6. iGagasi

LexisNexis Butterworths, a specialist academic, professional and business publishing and information service, was one of the first acquisitions of Kagiso Media. LexisNexis Butterworths provide online services, intranet, CD and printed, legal, tax, regulatory, risk-management and business information. LexisNexis has a strong and growing presence in Africa, particularly in Nigeria, Kenya, Ghana and Mauritius.

Figure 7 on the next page shows the structure of Kagiso Media.

Figure 6: Kagiso Media Structure Overview



3.0 ANALYSIS OF RESULTS

3.1 Introduction

This section presents the results of the analysis of the research. The analysis is broken down into sub-sectors:

(1) Broadcasting Media which covers the radio and television industry,

(2) Print Media which covers newspapers and magazines, and

(3) New Media which covers online news (Internet) and mobile media.

3.2 Analysis of Broadcasting Media

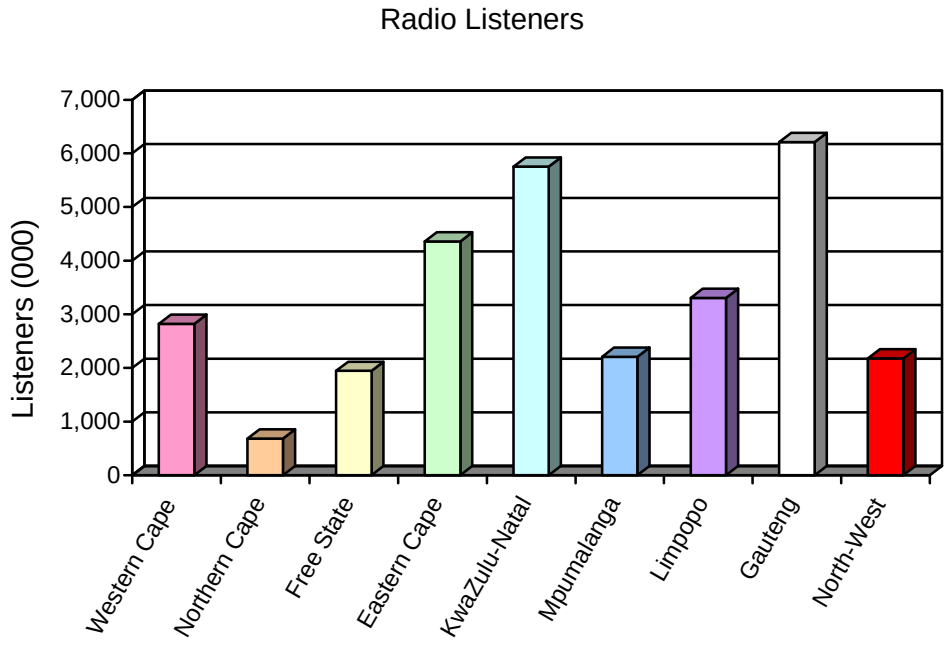
A separate analysis of radio and television is given. Both are analysed in terms of audience size (control) and ownership with particular focus on the %HDI shareholding.

3.2.1 Radio

3.2.1.1 Radio Audience Size

Radio is the medium which has the largest audience of about 29.5 million listeners nationally. Gauteng province has the highest radio audience with more than 6.2 million listeners, followed closely by KwaZulu-Natal Province with just below 5.8 million. Northern Cape Province has the lowest radio audience with just 682 thousand people. Figure 8 below gives of a graphical representation of the data.

Figure 7: Radio Listeners



By far South Africa's largest radio station in terms of audience size is Ukhozi FM, broadcasting in isiZulu, with about 5.9 million[17] listeners. Ukhozi FM broadcast in the provinces of KwaZulu-Natal, Gauteng, Mpumalanga, north-eastern Eastern Cape, eastern Free State, eastern North West and southern Limpopo.

The second largest radio station in terms of audience numbers is Umhlobo Wenene FM with 4.5 million listeners. Umhlobo Wenene FM broadcast in the following areas: Eastern Cape, Western Cape, Northern Cape, Free State, Gauteng, eastern North West, and parts of KwaZulu-Natal Province.

[17] *Source of data : AMPS 2008*

3.2.1.2 Ownership and Control Analysis

This section covers 3 types of radio stations:

- Public radio stations;
- Private commercial and secondary market radio stations and
- Community radio.

Public Radio Stations

SABC has a total of 18 radio stations, of which 15 are Public Broadcasting Services (PBS) radio stations. They broadcast in all 11 official languages and include: a cultural service for the Indian community broadcasting in English; a regional community station broadcasting in isiXhosa and English and a Community station broadcasting in the !Xhu and Kwe languages of the Khoisan people of the Northern Cape. The other 3 radio stations are Public Commercial Services (PCS) and these are: 5fm; MetroFM and Good Hope FM. Table 8 below shows a list of SABC radio stations and the predominant languages they broadcast on.

SABC is controlled by Board of Directors appointed by Parliament. The Board of Directors has the power to appoint and remove management. The establishment of the Board is regarded as a necessary step in transforming SABC from being a ruling party's mouth piece (previously the National Party), to a public broadcaster. However, the issue of to what extent the government can influence content is a matter of debate, which is beyond the scope of this project.

Table 8: SABC Radio Stations

Radio Station	Type	Predominant Language/s
1. 5FM - (National)	PCS	English
2. CKI	PBS	English and isiXhosa
3. Good Hope FM	PCS	English and Afrikaans
4. Ikwekwezi	PBS	isiNdebele
5. Lesedi	PBS	seSotho
6. Ligwalagwala	PBS	isiSwati
7. Lotus	PBS	English
8. MetroFM - (National)	PCS	English
9. Motsweding	PBS	Setswana
10. Mungana Lonene	PBS	IxiTsonga
11. Phalaphala	PBS	Tshivenda
12. R2000- (National)	PBS	Predominantly English
13. RSG- (National)	PBS	Afrikaans
14. SAFM- (National)	PBS	English
15. Thobela	PBS	Sepedi
16. Ukhozi	PBS	isiZulu
17. Umhlobo Wenene	PBS	isiXhosa
18. XKFM	PBS	!Xu and Khwe

Private Commercial and Secondary Market Radio Stations

The majority of Private Commercial Radio stations broadcast in English. However, the Secondary Market Radio Stations broadcast in multi languages, including the local African language/s, and English.

There are 13 private commercial and 3 secondary market radio stations in South Africa.

Table 9 below shows the ownership breakdown for Private Commercial and Secondary Market Radio Stations

Table 9: Private Commercial and Secondary Market Radio Stations

Radio Station	Shareholders	HDI	Foreign	Listed	White
1. East Coast Radio	Kagiso Media (100%)	24.5%	0.0%	51.7%	23.8%
2. Highveld Stereo	Primedia (100%)	50.0%	0.0%	0.0%	50.0%
3. K FM	NAIL (66.5%), Broadcape Investments (28.5%)& Employee Share Trust (5%)	63.0%	0.0%	0.0%	37.0%
4. Radio Algoa	African Media Entertainment Limited (AME) (95%), Umoya Staff trust (5%)	6.5%	0.0%	0.0%	93.5%
5. Radio 702	Primedia (100%)	50.0%	0.0%	0.0%	50.0%
6. Jacaranda Fm	Kagiso Media (80%), Legarde Active Radio International (20%)	41.7%	20.0%	0.0%	38.3%
7. Radio Oranje (OFM)	African Media Entertainment (AME) (70.1%), Kagiso Media (24.93%), Shares not Allocated (4.97%)	15.80%	0.0%	0.0%	84.2%
8. Classic FM	Class FM PLC(20%), Liberty Life Foundation(15.09%), Ingoma Trust(15.09%), Mmino Holdings (7.55%), Disability Employment Concerns(7.55%), Ubhubu Investments (7.55%), Money Web Holdings(19.6%), Class FM Staff(7.55%)	37.74%	0.0%	0.0%	62.3%
9. Kaya FM	Shanike Investments(24.9%), Thebe Convergent Technologies(45.2%), NAIL(24.9%), Makgosi Holdings(5%)	88.49%	0.0%	0.0%	11.5%
10. YFM	Sabido Investments (100%)	100.0%[18]	0.0%	0.0%	0.0%
11. 567 Cape Talk	Primedia(100%)	50.0%	0.0%	0.0%	50.0%

[18] *Source: ICASA*

Radio Station	Shareholders	HDI	Foreign	Listed	White
12. Heart Fm (P4 Cape Town)	Makana Radio Communication(100%)	88.1%	0.0%	0.0%	11.9%
13. IGagasi Fm	Makana Radio Communication(100%)	88.1%	0.0%	0.0%	11.9%
14. Radio North West	Direng Investments(26%), SADTU Investment Holdings(24%), Altivex 269 (20%), 21st Venture Capital (20%), Khethani Trust(10%)	76.1%	0.0%	0.0%	23.9%
15. M- Power Radio	African Media Entertainment (24.9%), Direng Investment Holdings (27.1%), Mbombela Consortium (48%)	52.2%	0.0%	0.0%	47.8%
16. Capricorn FM	MSG Africa Holdings(37.5%), Safika Holdings(27.5%), Limpopo Women Investors(15%), Ashifa Media(5%), Parrywood Investments(5%), Capricorn Fm Staff(5%), University of Limpopo(5%)	100.0%	0.0%	0.0%	0.0%
Average Ownership		**58.3%**	**1.3%**	**3.2%**	**37.3%**

Ownership of radio stations is strictly regulated and controlled by ICASA.

Kagiso Media and Primedia have the majority of ownership of Radio Broadcasting media. Kagiso directly and indirectly owns 6 radio stations while Primedia (also directly and indirectly), owns 4 radio stations.

ICASA regulations and the Broadcasting Act determine the minimum HDI shareholding, and maximum foreign ownership. Hence, ownership by HDI is very high compared with unregulated media. An average of 58.3% of all private commercial and secondary market is owned by HDI. Radio Algoa is the only radio station with very low HDI ownership (6.5%). There are 2 radio stations with 100% HDI ownership, and these are: YFM and Capricorn FM.

Community Radio

From 1994 the IBA processed hundreds of community radio licence applications from diverse groups and sectors of South African society. The rules governing community radio are laid out in the Position Paper on Community Sound Broadcasting Services as reviewed in 2005 and Community Television published in 2004. These incorporate the licensing, regulatory and broad operating principles for community broadcasting services.

There are 126 licensed community radio stations in South Africa, licensed by ICASA in all 9 Provinces. 87 Community Radio Stations are on air. Table 10 to Table 18 below shows community radio stations licensed in all the Provinces including coverage areas, broadcast frequencies and operation status.

Table 10: Mpumalanga Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Barberton Radio	104.1 FM	Barberton	Barberton	ON AIR
2. Kangala Radio	92.8 FM	Kangala	Kangala	ON AIR
3. Moutse Radio	92.8 FM	Moutse	Moutse	ON AIR
4. Radio Alpha	97.8 FM	Warburton	Warburton	ON AIR
5. Radio Bushbuckridge	88.4 FM	Bushbuckridge	Bushbuckridge	ON AIR
6. The Greater Middelburg FM	89.7 FM	Greater Middelburg	Greater Middelburg	ON AIR
7. Radio Laeveld	100.5 FM	Laeveld	Laeveld	ON AIR
8. Radio Platorand	99.3 FM	Platorand	Platorand	ON AIR
9. Radio Ermelo	104.0 FM	Ermelo	Ermelo	ON AIR
10. Radio Kragbron	93.1 FM	Kragbron	Kragbron	ON AIR
11. Radio Kriel		Kriel	Nkangala District	

Table 11: Northern Cape Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Radio Kaboesna	98 FM	Kaboesna, Calvinia	Kaboesna, Calvinia	ON AIR
2. Radio Teemaneng	98.2 FM	Kimberley	Kimberley	ON AIR
3. Radio Riverside FM	98.1 FM	Upington	Upington	ON AIR
4. Ulwazi FM	88.9 FM	Nonkwe	Nonkwe	
5. Radio Karoo	95.5 FM	Orania	Orania Municipality	

Table 12: Free State Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Mosupatsela Radio	107.4 FM	Botshabelo	Botshabelo	ON AIR
2. Lentswe Stereo	93 FM	Parys	Parys	ON AIR
3. Naledi Radio	103.9 FM	Senekal	Senekal	ON AIR
4. Overvaal Stereo	96 FM	Koppies	Koppies	ON AIR
5. Qwaqwa Radio	100.3 FM	Qwaqwa	Qwaqwa	ON AIR
6. Radio Rosestad	100.6 FM	Bloemfontein	Bloemfontein	ON AIR
7. Radio Shimla	97 FM	Bloemfontein	Bloemfontein	ON AIR
8. Radio Volkstem	107.6 FM	Henneman	Henneman	ON AIR
9. Setsoto Stereo	101.4 FM	Ficksburg	Ficksburg	ON AIR
10. Motheo FM	88.5 FM	Bloemfontein	Bloemfontein	
11. Karabo FM	103.7 FM	Sasolburg, Zamdela	Sasolburg, Zamdela	

Table 13: Limpopo Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Botlokwa Radio	89.3 FM	Botlokwa	Botlokwa	ON AIR
2. Mohodi Radio	98.8 FM	Polokwane, Makhado, Tzaneen, Mokopane, Ngoako Ramalepe, Sekakeng, Fatima, Madikana, Maponto, Broekman, Brussels, Lisa, Mogwadi and Makgalong	Mohodi	ON AIR
3. Moletjie Progressive Radio	98.6 FM	Ga- Moletjie	Ga- Moletjie	ON AIR
4. Radio Turf	103.8 FM	University of the North Campus	University of the North Campus	ON AIR
5. Univen Radio	99.8 FM	Thohoyandou	Thohoyandou	ON AIR
6. Soetfontein or Sekgosese Radio	107.3 FM	Soetfontein	Soetfontein	ON AIR
7. Mokopane Radio	100 FM	Mokapane	Mokapane	ON AIR
8. Sekhukhune Radio	93.4 MHz	Sekhukhune	Sekhukhune	
9. Tubatse Radio	93.4 FM	Sekhukhune	Sekhukhune	
10. Radio Bushveld	104.9 FM	Thabazimbi	Thabazimbi	
11. Phalaborwa Radio	101.5 FM	Greater Phalaborwa	Greater Phalaborwa	
12. Makhado FM	107.3 FM	Makhado	Makhado	
13. Greater Lebowakgomo Radio		Lebowakgomo	Capricorn District	

Table 14: Eastern Cape Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Khanya Radio Station	106.1 FM	Butterworth	Butterworth	ON AIR
2. Nkqubela Radio	97.0 FM	Port Elizabeth	Port Elizabeth	ON AIR
3. Radio Graaff Reinet	90.2 FM	Graaff-Reinet	Graaff-Reinet	ON AIR
4. Radio Grahamstown	102.1 FM	Grahamstown	Grahamstown	
5. Radio Unique	90 FM	Paarl	Paarl	ON AIR
6. Rhodes Music Radio	89.7 FM	Grahamstown	Grahamstown	ON AIR
7. Takalani Radio	107.2 FM	Aliwal North	Aliwal North	ON AIR
8. Unitra Radio	97 FM	Umtata	Umtata	ON AIR
9. Vukani Radio Station	100.3 FM	Cala	Cala	ON AIR
10. Radio Kingfisher	103.8 FM	Port Elizabeth	Port Elizabeth	ON AIR
11. Ilitha Radio	93.5 F	Maclear & Ugie	Maclear & Ugie	
12. Forte Radio	100.6 MHz	Amatole	Amatole	
13. Alfred Nzo Radio	98.3 MHz	Alfred Nzo	Alfred Nzo	
14. Ekhephini Radio	107.9 MHz	Ukhahlamba	Ukhahlamba	
15. Inkojane Fm	91.9 MHz	O R Tambo District Municipality	O R Tambo District Municipality	
16. Emmanuel Haven FM	91.9 MHz	Butterworth	Port Elizabeth	

Table 15: North West Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Letlhabile Radio	99.5 MHZ	Letlhabile	Letlhabile	ON AIR
2. Moretele Radio	106.6 MHZ	Moretele	Moretele	ON AIR
3. Radio Mafisa	93.4 MHZ	Rustenburg	Rustenburg	ON AIR
4. Vaaltar MHZ	93.6 MHZ	Taung	Taung	ON AIR
5. Radio Lichtenburg	95.6 MHZ	Litchtenberg	Lichtenberg	ON AIR
6. Star FM	102.9 MHz	Klerksdorp	Klerksdorp	
7. Aganang Radio	103.9 MHz	Potchefstroom	Potchefstroom	
8. Radio Puk		Potchefstroom	Southern District	

Table 16: KwaZulu-Natal Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Indosakusa (Icora FM)	107.7 MHZ	Durban	Ethekwini Metropolitan	ON AIR
2. Radio Khwezi	90.5 MHZ	Eshowe	Uthungulu District	ON AIR
3. Highway Radio	101.5 MHZ	Durban	Ethekwini Metropolitan	ON AIR
4. Durban Youth Radio	105.1 MHZ	Durban	Ethekwini Metropolitan	ON AIR
5. Imbokodo Radio	96.8 MHz	Umbumbulu	Ugu District	ON AIR
6. Newcastle Radio	103.7 MHZ	Newcastle	Amajuba District	ON AIR
7. Radio Sunnysouth	97.0 MHZ	Durban	Ethekwini Metropolitan	ON AIR
8. Hindvani Radio	91.5 MHZ	Durban	Ethekwini Metropolitan	ON AIR
9. Maputaland Radio	107.6 MHZ	Ubombo	Umkhanyakude District	ON AIR

Radio Station	Frequency	Location Area	Coverage Area	Status
10. Izwi Lomzansi Radio	98.0 MHz	Durban	Ethekwini Metropolitan	
11. Vibe Fm	88.4 MHZ	Kwa- Mashu	Ethekwini Metropolitan	
12. Inanda Radio	97.0 MHz	Kwa- Mashu	Ethekwini Metropolitan	
13. Ubuhlebeshowe Radio		Eshowe	Uthungulu District	
14. Umgungundlovu Radio	107.6 MHz	Umngungundlovu District	Umngungundlovu District	
15. Good News Radio	88.4MHz, 98MHZ, 94.7MHZ, 103MHZ	KZN	Ethekwini Metropolitan	ON AIR

Table 17: Western Cape Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1. Radio 786	100.4 MHZ	Cape Town, Goodwood, Stellenbosch, Somerset West, Simons Town and Durbanville	Cape Town	ON AIR
2. Voice of the Cape FM	100.4MHZ, 90.7MHz, 90.9MHz	Cape Town, Goodwood, Stellenbosch, Somerset West, Simons Town and Durbanville	Cape Peninsula and Boland	ON AIR
3. Radio Tygerberg	96.7 MHZ	Cape Town, Goodwood, Stellenbosch, Somerset West, Simons Town and Durbanville	Cape Town	ON AIR
4. Cape Community FM	107.5 MHZ	Cape Town	Cape Town	ON AIR
5. Bush Radio	89.5 MHZ	Metropolitan Cape Town	Metropolitan Cape Town	ON AIR

Radio Station	Frequency	Location Area	Coverage Area	Status
6. Fine Music Radio	101.3 MHZ	Cape Town, Goodwood, Stellenbosch, Somerset West, Simons Town and Durbanville	Cape Town	ON AIR
7. Zibonele Radio	92.2 MHZ	Khayelitsha	Khayelitsha	ON AIR
8. Radio KC	107.7 MHz	Paarl, Drakenstein, Worcester, Wellington and Cape Town.	Paarl Valley	ON AIR
9. UCT Radio	104.5 MHZ	Cape Town	Cape Town	ON AIR
10. Matie FM	92.6 MHZ	Matieland	Matieland	ON AIR
11. Radio Helderberg	95.9 MHZ	Helderberg	Helderberg	ON AIR
12. Radio Atlantis	107.9 MHZ	Mowbray	Mowbray	ON AIR
13. Radio Namakwaland	93.4 MHZ	Vanrhynsdorp	Vanrhynsdorp	ON AIR
14. Valley FM	90.2 MHz	Worcester	Worcester	ON AIR
15. Radio Gamka Land	87.6 MHZ	Beaufort West	Beaufort West	
16. Radio West Coast	92.3 MHZ	West Coast	West Coast	ON AIR
17. Reenboog FM	104.1 MHZ	Oudtshoorn	Oudtshoorn	
18. Eden FM	103.6MHz, 90.1MHz, 87.7MHz	Oudtshoorn, George, Riverside	Oudtshoorn, George, Riverside	

Table 18: Gauteng Province Community Radio Station

Radio Station	Frequency	Location Area	Coverage Area	Status
1.Radio TNG	96.2 MHz	Soshanguve	Soshanguve	ON AIR
2. Radio Tuks	107.2 MHz	Pretoria	Pretoria	ON AIR
3. Chinese Radio	835.5 MW	Johannesburg	Johannesburg	
4. New Panhellenic Voice	828 MW	Johannesburg	Johannesburg	ON AIR
5. East Wave Radio	92.2 MHz	Lenasia	Lenasia	ON AIR
6. Soshanguve Community	90.7 MHz	Soshanguve	Soshanguve	ON AIR
7. Technikon Pretoria (Top Stereo)	96.8 MHz	Pretoria	Pretoria	ON AIR
8. Kathorus Radio	102.2 MHz	Katlehong	Katlehong	
9. Radio Mams	103.0 MHz	Mamelodi	Mamelodi	
10. Rau Radio	95.4 MHz	Johannesburg	Johannesburg	ON AIR
11. Thetha FM	100.6 MHz	Orange Farm	Orange Farm	ON AIR
12. Radio East Rand	93.9 MHz	East Rand	East Rand	ON AIR
13. Voice of Tembisa	87.6 MHz	Tembisa	Tembisa	ON AIR
14. Radio Tritech	96.9 MHz	Vanderbijlpark	Vanderbijlpark	ON AIR
15. Radio 1584	1584 MHz	Pretoria	Pretoria	ON AIR
16. Rainbow Radio	1305 MHz	Roodepoort	Roodepoort	ON AIR
17. Radio Islam	1548 MHz	Lenasia	Lenasia	ON AIR
18. Jozi FM	105.8 MHz	Soweto	Soweto	ON AIR
19. Radio Today	1485 MHz	Johannesburg, Roodepoort, Randburg, Sandton, Edenvale, Alberton, Germiston, Boksburg and Benoni	Johannesburg	ON AIR
20. Alex FM	89.1 MHz	Johannesburg	Johannesburg	ON AIR

Radio Station	Frequency	Location Area	Coverage Area	Status
21. Heidelberg Radio	97.1 MHz	Lesedi Municipality, Heidelberg	East Rand	ON AIR
22. Mid Cities Radio	97.8 MHz	Midrand	Lesedi Municipality, Heidelberg	
23. Chai FM	107.4 MHz	Northern JHB	Midrand	
24. Midrand Radio	109.9 MHZ	Midrand	Northern JHB	
25. Impact Radio	102.3 MHZ	Pretoria	Midrand	
26. Voice of WITS		Johannesburg	City Of Johannesburg Metropolitan	

3.2.2 Television

3.2.2.1 Audience Size for Television

Television is the second most dominant medium in terms of audience size, with a total of 26.2 million viewers. Gauteng Province has 6.1 million TV viewers, which the highest number of viewers in the country, followed by KwaZulu-Natal Province with 4.7 million. Northern Cape Province has 705 thousand viewers which is the lowest in the country. Figure 9 below presents the data graphically.

Figure 8: Television Audience by Province

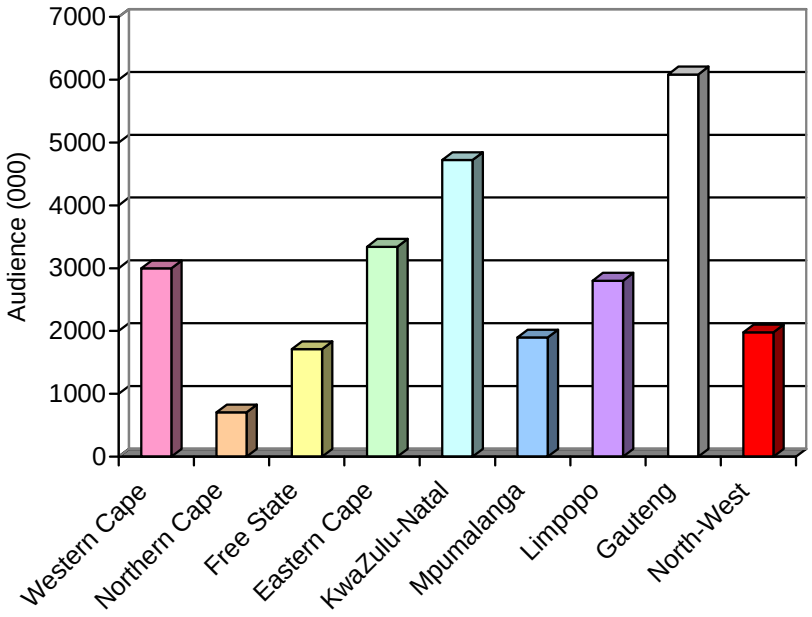
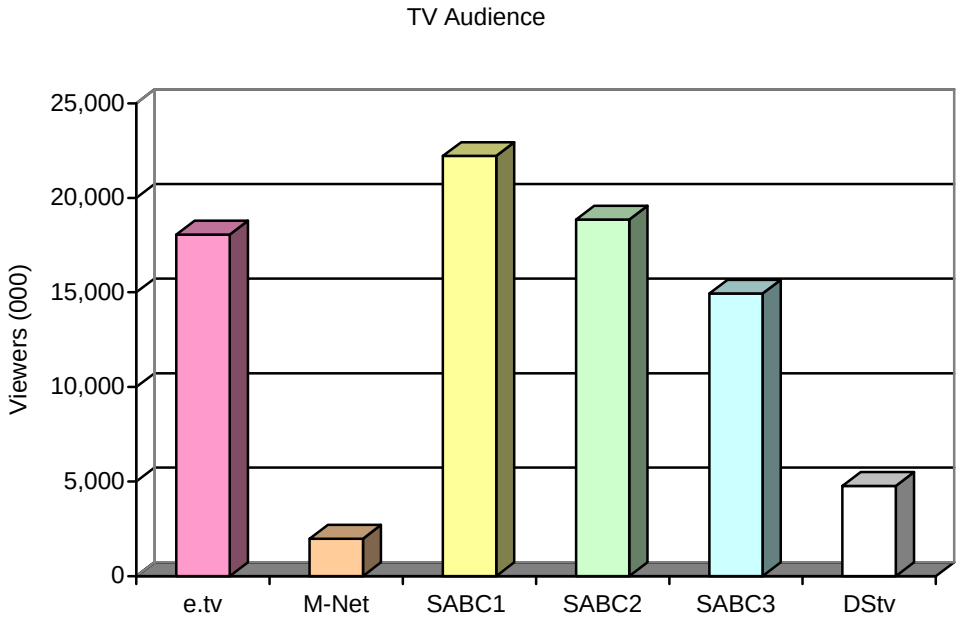


Figure 9: Television[19] Audience by Station



[19] *Source of data : AMPS 2008*

SABC1 has the largest number of viewers with 22.2 million viewers followed by SABC 2 with 18.9 million. Hence, in terms of number of viewers, SABC dominates the market. E.tv has 18.1 million viewers, SABC3 has 14.9 million, DStv has 4.8 million, and M-Net has 2 million.

3.2.2.2 Ownership and Control

Television is the most tightly regulated media sector in South Africa. Broadcast rights, especially for television, are issued under strict terms and conditions. Only 2 independent television broadcasters had been permitted to operate up until 2007.

Broadcast licenses for radio and television require minimum HDI ownership of the broadcasting station of 30%.

Local, community and educational content requirement are included as conditions of the licenses. In terms of section 65 and 66 of the ECA, there is limitation to control of both broadcasting and print media.

On cross media ownership, the ECA says that no person who controls a newspaper may be in a position to control a commercial broadcasting service licence either in TV or sound broadcasting in the area where the newspaper has an average circulation of 20% of the total readership in the area.

The next sections cover the 3 types of television stations:

- Public Television Broadcast;
- Private Commercial Television Broadcast and
- Community Television Broadcast.

Public Television Broadcast

The South African Broadcasting Corporation (SABC) is responsible for public-service broadcasting in South Africa, for both radio and television. SABC has 3 free-to-air terrestrial television channels: SABC 1, 2 and 3. SABC is required by act to broadcast in all 11 official languages. African languages are broadcasted predominantly on SABC 1 & 2, which are Public Broadcasting Services (PBS) channels. SABC 2 also broadcast in Afrikaans. SABC 3, which is a Public Commercial Services (PCS) television channel, broadcast primarily in English, and to a certain extent, in Afrikaans. English is used in all 3 channels. Table 19 shows SABC's 3 channels and the predominant languages used in each channel.

Table 19: SABC Television Broadcasting Channels

TV Station	Type	Predominant Languages
SABC 1	PBS	English, IsiZulu, IsiXhosa, IsiNdebele, IsiSwati
SABC 2	PBS	English, Afrikaans, Sesotho, Sepedi, Setswana, Tshivenda, IxiTsonga,
SABC 3	PCS	English, Afrikaans

Private Commercial Television Broadcast

E.tv is the only privately owned free-to-air (FTA) television station.

MultiChoice was the only 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.

In November 2008 4 new licences were granted, for the operation of Pay-TV services, and these are:

- Walk on Water (WOW) - a dedicated Christian service;
- On Digital Media - a broad-spectrum entertainment offering;
- e-Sat - a satellite service from e.tv and

- Telkom Media - a company which is 66% owned by telecommunications operator Telkom.

MultiChoice which had been broadcasting under permission was also licensed at the same time, making a total of 5 Pay-TV operators licensed to operate in South Africa.

Table 20 below shows the ownership breakdown for Private Commercial Television Stations

Table 20: Private Commercial Television Stations

TV Station	Type	Shareholders	HDI	Foreign	Listed	White
1 MultiChoice (DStv)	Pay-TV	MultiChoice South Africa Holding (Naspers) (100%)	20.0%	11.6%	28.9%	39.5%
2 MultiChoice (M-Net)	Pay-TV	MultiChoice South Africa Holding (Naspers) (100%)	20.0%	11.6%	28.9%	39.5%
3 e-tv	FTA	Sabido Investment (100%)[20]	100%	0.0%	0.0%	0.0%
4 e-sat	Pay-TV	Sabido Investment (100%)	100%	0.0%	0.0%	0.0%
5 WOW (Walking on Water Tv)	Pay-TV	WindsObey (40%), Cornastone Technology Holding (40%), Lifa Investment (5%), Vhomakadzi Enterprise (5%), Employee Share Scheme (10%)	93.40%	0.0%	0.0%	6.6%
6 On Digital Media	Pay-TV	FNMIH (28.21%), IDC (11.13%), Kopano Ke Matla (10%), Lereko Media (30%), A Moodley (0.66%), SES Astra (20%).	68.87%	0.0%	0.0%	31.1%
7 Telkom Media	Pay-TV	Telkom SA (66%), Video Vision Home Entertainment (15%), WDB Investment Holdings (5%), MSG Afrika Media (5%), Staff Incentives Trust (4%), BBBEE Shareholders (5%)	48.20%	20.0%	0.0%	31.8%
Average Ownership			**64.4%**	**6.2%**	**8.3%**	**21.2%**

[20] *Sabido owns 100% of e-tv, and is 100% HDI owned: Source: ICASA*

HDI are well represented in the ownership of private commercial television. The study found that HDI own an average of 64.4% per television station. The exceptions are e.tv and e-sat which are fully owned and controlled by HDI (Sabido Investment).

Foreign ownership is on average 6.2% per television station. This is due to the 40% limitation on foreign ownership in terms of the IBA Act and Broadcasting Act.

The average listing on the JSE is 8.3%.

Community Television

Community television is owned and run by a community. In terms of South Africa's broadcasting policy, a community is a group of people who have something in common, either from a geographical perspective or by way of sharing interests. Hence, community television serves as an access point for diverse members of the community as a means to share political, cultural, artistic, spiritual, and individual expression.

Community television stations are non-profit organisations operating as section 21 companies under the Companies Act No 61 of 1973, and their beneficiaries are the communities they serve. They primarily depend on volunteers, donations, and sponsorship for their survival. However, advertisement is also a source of income.

Community broadcast is aimed at empowering citizens not only through providing useful information, but also by enabling them to access and build their communities.

The past 10 years have seen a slow evolution of community television in South Africa, and now it is poised to become a really important media player. Table 21 below lists the 4 community television stations licensed in South Africa and shows their coverage area.

Table 21: Community Television Stations

Station Name	Coverage Area
1. Soweto Comm. TV	Soweto & DStv Channel 360
2. Bay Television Station	KwaZulu-Natal
3. Cape Town Community TV	Western Cape
4. Trinity Broadcasting Network	Eastern Cape & DStv channel 341

More about the Community Television Stations:

- **Soweto Community TV** was the first South African geographical community television, launched in 2006. It currently utilises a terrestrial platform, as well as a digital signal, via channel 360 on the DStv bouquet, giving it both local community and country-wide coverage through terrestrial and satellite transmission respectively.

- **Bay Television Station** was formed by the different communities found in the northern part of KwaZulu-Natal and the stakeholders around the coverage area. The station does not serve a specific viewership and is intended to provide services that will uplift the community and become an integral component in transforming the livelihoods of the people in this region.

- **Cape Town Community TV (CTCTV)** aimed at the greater Cape Town metropolitan area, the television station was founded by over 200 non-profit community organizations in 2006. It is committed to using the medium of television as a tool to promote human rights, social justice and community cultural development.

- **The Trinity Broadcasting Network (TBN)** is the Bhisho-based Christian television station. TBN South Africa is licensed as Trinity Broadcasting Ciskei (registered name) broadcasting terrestrially in Eastern Cape and through DStv. TBN is part of the international Christian television network headquartered in Costa Mesa, California. However, TBN claims that the South Africa station does not receive funding from its mother organisation in the United States

and is only funded by local donations. TBN South Africa is controlled by a board of 4 directors based in the community it serves in the East London, Umthatha and surrounding areas.

3.2.3 Conclusions for Broadcasting Media

The study found that HDI is well represented in the ownership of broadcasting media.

The major reason for this is that the Broadcasting Media is regulated by ICASA and transformation is well monitored and encouraged by the Authority.

Terms and conditions of licenses, concerning a minimum level of HDI ownership are being adhered to by radio and television stations. In addition, change of ownership of broadcasting media requires ICASA approval.

3.3 Analysis of Print Media

Print media is by far the largest section of media in South Africa (in terms of the number of titles and ownership) and yet it is the most unregulated. Print is physical and tangible unlike broadcasting and new media which are signal and gadget based (TV, radio, computer and cell phone). Consequently factors such as print layout and quality together with distribution area and frequency of publication are of great importance.

Print media consists of newspapers, magazines and newsletters. Newsletters will not form part of this report as they are only used within certain offices and organisations such as schools, churches, and clubs.

The predominant language of South African print media is English, followed by Afrikaans and IsiZulu.

Related aspects of the print media value chain namely publishing, printing and distribution will also be analysed in the following sub-sections.

The print media in South Africa consists of two broad categories: the major media players and the independent publishers (Members of the Association of Independent Publishers).

There are 5 major media players: Naspers through its subsidiary Media24; Caxton; Avusa; the foreign owned Independent Newspapers and the fifth largest company is Primedia. Primedia also has a broadcasting interest and is a key player in the ownership and control of Magazines.

Table 22 below shows the ownership details for the 5 major media players.

Table 22: Major Print Media Owners

Owner	HDI	Foreign	Listed	White	No. of Wholly Owned Newspaper Titles ()	No. of Magazine Titles
Media24	15.0%	0.0%	0.0%	85%	65	89
Caxton	0%	0.0%	49.03%	50.97%	89	39
Avusa	25.5%	0.0%	58.2%	16.48%	23	32
Independent Newspaper	0.0%	100.0%	0.0%	0.0%	28	0
Primedia	50.0%	0.0%	0.0%	50.0%	0	15

Independent Media players consist of community news and small commercial newspapers. Major media players' influence can also be seen in this space through acquisition of shares (large or small) in these independent publishing concerns.

3.3.1 Newspapers

Newspapers in South Africa's are the most contested medium in the print media sector. South Africa newspapers are aimed at a broad spectrum of readers of the country. They are printed in English, Afrikaans and the vernaculars. 5.7 million newspapers are sold in South Africa[21]. Dailies account for 2 million of this figure and 3.7 million are for weekly newspapers.

[21] *http://www.southafrica.info/about/media/news.htm*

In terms of circulation and readership, 4 large media companies dominate the newspaper industry. Media24 leads the pack with an annual circulation of 367.5 million[22] accounting for 39.1% of total circulation. Independent Newspapers follows with a 21.7% market share. These newspaper titles include both commercial and local free newspapers. The local newspaper titles which are mainly knock and drop carry a fair amount of advertisement and some local community news.

Table 23 shows newspaper owners who have 3 or more titles, and Figure 10 depicts this graphically.

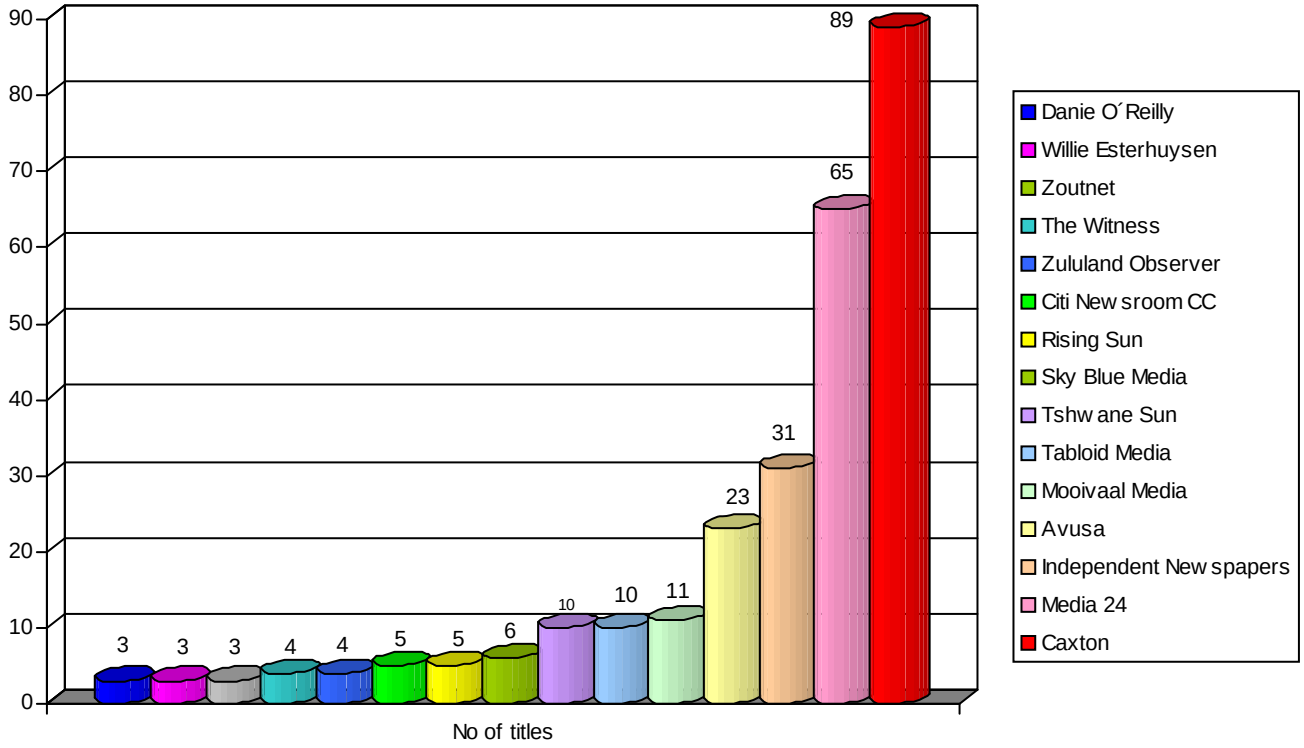
Table 23: Newspapers Owners with Three Titles or More

COMPANY	TOTAL NO. OF	BREAK DOWN OF TOTAL TITLES				SHAREHOLDERS			
	TITLES	Main stream	Small Comm	Local	Comm	HDI %	Foreign	Listed	White
1. Caxton	89	1	32	56	0	0%	0.0%	49.03%	50.97%
2. Media24	65	14	10	41	0	15.0%	0.0%	0.0%	85.0%
3. Independent Newspapers	31	18	0	13	0	0.0%	100.0%	0.0%	0.0%
4. Avusa	23	8	3	12	0	25.5%	0.0%	58.0%	16.5%
5. Mooivaal Media	11	0	11	0	0	11.8%	0.0%		88.2%
6. Tshwane Sun	10	0	10	0	0	100.0%	0.0%	0.0%	0.0%
7. Tabloid Media	10	0	10	0	0	100.0%	0.0%	0.0%	0.0%
8. Sky Blue Media	6	0	6	0	0	30.0%	0.0%	0.0%	70.0%
9. Citi Newsroom CC	5	0	5	0	0	0.0%	0.0%	0.0%	100.0%
10. Rising Sun	6	0	0	6	0	55%	0.0%		45%
11. The Witness	5	2	3	0	0	7.5%	0.0%	0.0%	92.5%
12. Zululand Observer	5	0	2	3	0	0%	0.0%	0%	100%
13. Danie O´Reilly	3	0	3	0	0	0.0%	0.0%	0.0%	100.0%
14. Willie Esterhuysen	3	0	3	0	0	0.0%	0.0%	0.0%	100.0%
15. Zoutnet	3	0	3	0	0	0.0%	0.0%	0.0%	100.0%
16. Andre Coertzen	2	0	2	0	0	0.0%	0.0%	0.0%	100.0%

[22] *Audit Bureau of Circulation (ABC)*

COMPANY	TOTAL NO. OF	BREAK DOWN OF TOTAL TITLES				SHAREHOLDERS			
	TITLES	Main stream	Small Comm	Local	Comm	HDI %	Foreign	Listed	White
17. Dr Hilda Grobler	2	0	2	0	0	0.0%	0.0%	0.0%	100.0%
18. Fezile Monki	2	0	2	0	0	100.0%	0.0%	0.0%	0.0%
19. Gansbaai Media	2	0	2	0	0	0.0%	0.0%	0.0%	100.0%
20. Joseph Bushby	2	0	2	0	0	0.0%	0.0%	0.0%	100.0%
21. Mr & Mrs Roberts	2	0	2	0	0	0.0%	0.0%	0.0%	100.0%
22. Capital Media	7	0	0	7	0	0	0	0	100%

Figure 10: Newspaper Owners with at Least 3 Titles.



The bar graph above shows how skewed the distribution is: the top 15 organisations own 300 newspaper titles or 65.4% of newspaper circulating in South Africa. The top 3 organisations own a total of 216 titles or 47.1% of the titles in circulation. Caxton owns 130 titles (89 wholly owned, and 41 co-owned) representing 28.3% of the total newspaper titles in the country.

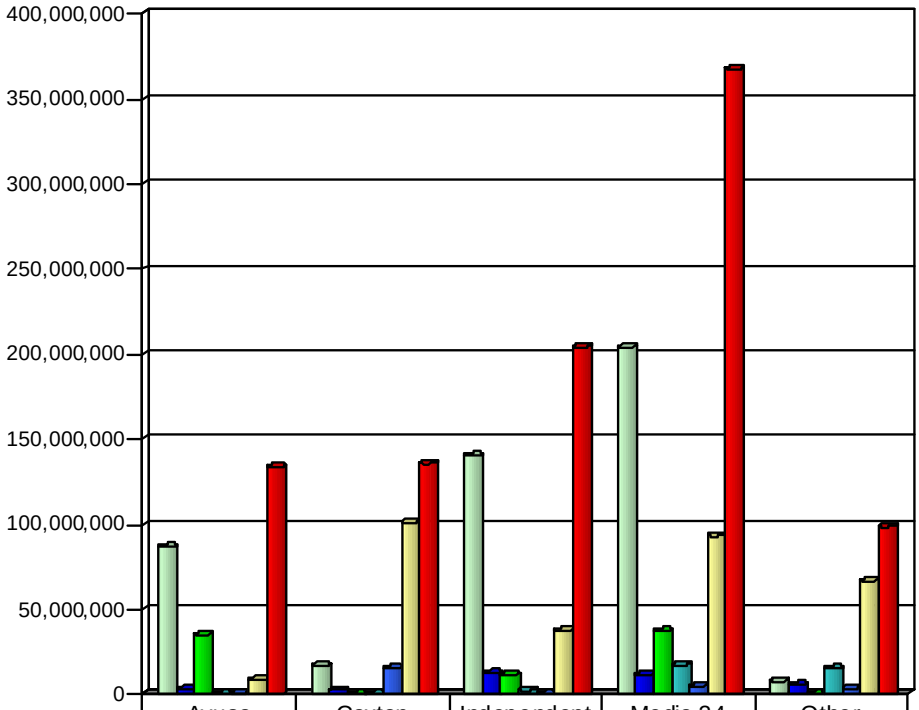
Newspaper Circulation

Figure 11 shows newspaper circulation per annum from the four major media houses, and other publishers combined.

In terms of circulation, Media24 has the highest number of newspaper circulation in the country at 368 million[23] newspapers per annum. The second highest newspaper circulation with 204 million newspapers is with Independent, followed by Caxton with 136 million newspapers per annum. Avusa has about 134 million newspapers per annum. Other newspaper publishers combined contribute about 99 million newspapers per annum.

Figure 11: Newspaper Circulation by Owner

[23] *Source: ABC*

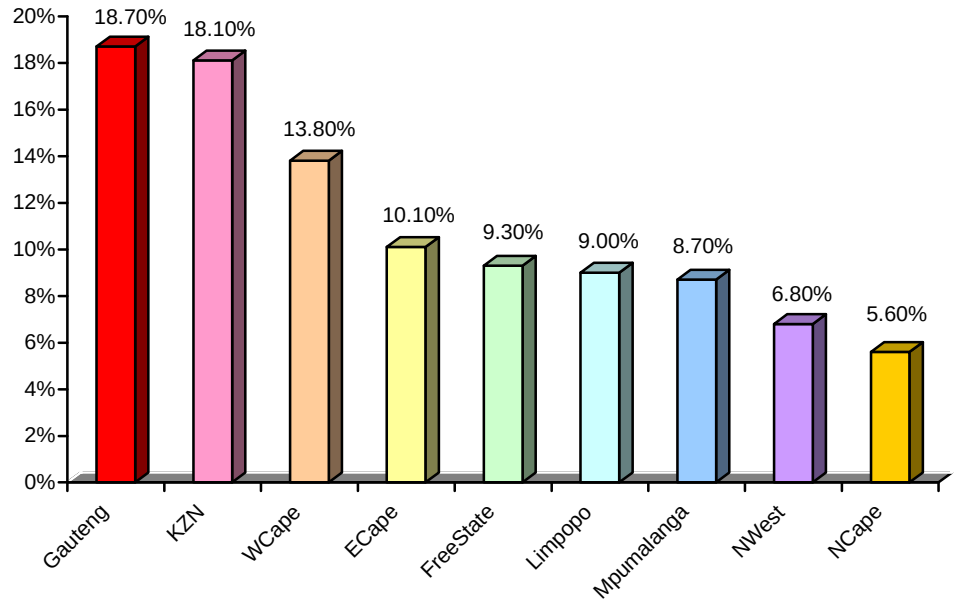


	Avusa	Caxton	Independent	Media 24	Other
Urban Dailies	86,684,875	16,890,000	140,313,500	203,934,625	7,741,000
Weekend Saturdays	2,896,035	2,660,160	12,522,999	11,381,390	5,654,957
Weekend Sundays	35,017,467	0	11,454,651	37,216,077	0
Other Urban Weeklies	0	0	2,415,156	17,080,563	15,109,005
Community	610,419	15,233,986	0	4,680,194	3,549,136
Freesheets	8,493,564	101,129,612	37,445,655	93,210,568	66,631,154
TOTAL	133,702,360	135,913,757	204,151,961	367,503,416	98,685,251

3.3.1.1 Newspapers by Province and Municipality

Newspaper circulation also differs from province to province. Economically strong provinces such as Gauteng, Western Cape and KwaZulu-Natal account for 50.6% of the newspaper titles circulating in South Africa. Gauteng Province accounts for 18.7%, KwaZulu-Natal for 18.1% and Western Cape for 13.8% of newspaper titles circulating in South Africa. Northern Cape and North West receives the lowest number of newspaper circulation, receiving 5.6% and 6.8% respectively. Figure 12 shows the newspaper circulation by province.

Figure 12: Newspaper Circulation by Province



As a result of this uneven distribution, people living in rural areas do not have access to newspaper media, and therefore less likely to be informed about news and other important events in the country.

The reason for this low circulation of newspaper is partly economic. People living in major cities have higher disposable income on average, and therefore are more attractive to advertisers.

There may be little profit incentive to increase circulation in small towns and rural areas but there is a developmental perspective to increase media coverage to these areas.

3.3.1.2 Newspaper Titles with HDI Ownership

The analysis in this section encompasses all the various types of newspapers (community, local, dailies, and weeklies) identified to date. Table 24 below shows the number of newspaper(s) owned by entities with either total or partial HDI shareholding. There are at least 206 out of the estimated 469 newspaper titles published and printed in the country with HDI shareholding, representing around 44%.

Table 24: No of Newspaper Titles with HDI Shareholding

No.	Name(s) Of Newspaper Title(s) Owner	No. of Titles Owned	HDI %	No	Name(s) Of Newspaper Title(s) Owner	No. of Titles Owned	HDI %
1	Media 24	65	15	39	Mr Madan Ramjathan & Clinton	1	100
2	Avusa	23	25.5	40	Mr Olivier	1	100
3	Mooivaal Media	11	7.5	41	Mr Paul Moola	1	100
4	Mr Nazeer Noormohamed	10	100	42	Mr Pitso Takane	1	100
5	Tabloid Media/Rishaad Mahomed	10	100	43	Mr Sharief Hassan-Palekar	1	100
6	Sky Blue Media (+Izimpondo)	6	30	44	Mr Sicelo Somali	1	100
7	Rising Sun - V Maharaj (+ Indep & Caxton)	6	55	45	Mr Sy Makaringe	1	100
8	Natal Witness (+Media24)	5	7.5	46	Mr Vusumuzi Mdletshe	1	100
9	Tempo Newspapers	2	100	47	Mr Zaheed Khan	1	100
10	Rising Sun - V Maharaj (+ Caxton only)	1	50	48	Ms Irene Singh	1	100
11	Austin Moyo & Sibusiso Dludla	1	100	49	Ms Thembisa Mjiba-Mkasi	1	100
12	Balaodi Publishers	1	100	50	Moslem Community	1	100
13	Bank & Themba Mathebula	1	100	51	Nkosiyabo Mxabo	1	100
14	Boniswa Kahla	1	100	52	Oupa Mabhena	1	100
15	Celani Motaung	1	100	53	Puleng Medupe	1	100
16	Charles Makgolo, Lesley Kanti & Larry Tebejane	1	100	54	Quarty Media	1	100
17	Dunisani Ntsanwisi	1	100	55	Queen Mkhondwane	1	100
18	East Griqualand Printers	1	100	56	Sabelo Sikakane	1	100
19	Esther Matlala	1	100	57	Sanele Mdlatshe	1	100
20	Fezile Monki	1	100	58	Shaheed Mohamed	1	100
21	Goodwill Dlamini	1	100	59	Shakiera & Mohammed Tayob	1	100
22	Izimpondo Communications	1	100	60	Sheila Mhlongo	1	100
23	Lehlaka Publication	1	100	61	Shirley Govender	1	100
24	Limpopo Media Corporation	1	100	62	Sindi Mkhize	1	100
25	M&G Media	1	87.5	63	Sindiswa Jam-Jam	1	100
26	Mandla-Matla	1	100	64	Tebogo Mahlaba	1	100
27	Maropeng Modiba and Partners	1	100	65	Thabo Madihlaba	1	100
28	Mbali Dlomo	1	100	66	Thabo Mosoahle	1	100
29	Mbali Mabizela	1	100	67	Themba Ntshingila	1	100
30	Michelle Mashiane	1	100	68	Uxhumano Communications	1	100
31	Mondi Mthembu	1	100	69	V.M Dlamini & Others	1	100
32	Mongy Mahlaola	1	100	70	Violent Mokoti	1	100
33	Mr & Mrs Makubalo	1	100	71	Vuyani Mrwetyana	1	100
34	Mr & Mrs S & RD Ramdas	1	100	72	Wandile Fana	1	100
35	Mr Adam Kola	1	100	73	Welcome Khumalo	1	100
36	Mr Bheki Mashile	1	100	74	Zaidi Sipho E. Khumalo	1	100
37	Mr James Maphanka	1	100	75	Zakheni Training And Development Centre	1	100

38	Mr Linda Shabalala	1	100	76	Eric Mseleni	1	60
	Total No of Titles	**206**					

Most of the major print media players i.e. Media24 and Avusa have some degree of HDI ownership. Avusa has at least 25.5% HDI shareholding which is as a result of Mvelaphanda Holdings acquiring part of Allan Gray's stake in the company.

Of the 3 major newspaper owners, Avusa has the largest HDI shareholding proportion of 25.5% compared to Media24's HDI shareholding of 15%. Almost all of the Caxton newspaper publications are 'free community and regional' newspapers while Media24 and Avusa have daily and weekly newspapers in their stables in addition to a number of community and regional newspapers. Between them, Avusa and Media24 own 60% (88) of the newspaper titles with HDI ownership.

The next 3 newspaper companies (numbers. 4, 5 and 6 in Table 24) with HDI ownership have 100% HDI shareholding, with each company owning between 6 and 10 community newspaper titles. The next 3 owners (numbers. 7, 8 and 9) each own 2 newspaper titles. There are 23 other 100% HDI owned newspaper titles.

The Mail and Guardian has 87.5% black ownership. However, the black owner of this newspaper is a naturalised South African citizen. For that reason the black ownership is not classified as HDI. This is the only independent owned weekly newspaper that is nationally distributed.

Based on the above analysis it is worth noting that the number of newspaper titles owned by HDI is boosted by HDI shareholding in the 3 major print media companies as they account for the high percentage of ownership (shareholding) of newspaper titles by HDI.

The foreign owned Independent Newspapers Group does not have any HDI shareholding. It should also be noted that in the case of Zululand Observer, the HDI ownership applies to one out of their 5 newspaper titles, namely, Umlozi Wezindaba in partnership with Eric Mseleni.

3.3.1.3 Analysis of Newspaper Titles Available in District Municipalities

Table 25 below lists the number of newspaper titles available by district municipality. The municipalities are ranked according to number of newspapers that are circulating in that municipality.

It should be noted that certain newspapers may be distributed in more than one district municipality. These would include regional newspapers such as The Sowetan, The Star, and The Citizen. National newspapers are also included in the list. For this reason the total number of newspapers in the table does not necessarily represent the actual number of newspapers being distributed in the country, as this would result in double counting.

Table 25: Newspaper Circulation by District Municipalities

District Municipality	Number of titles					
	Community	Local	Main stream	Small Comm.	Total	% Number of titles
1. City Of Johannesburg Metropolitan	5	30	22	9	66	14.4%
2. Ethekwini Metropolitan	4	12	23	25	64	13.9%
3. City Of Cape Town Metropolitan	3	21	23	8	55	12.0%
4. City Of Tshwane Metropolitan	5	10	21	15	51	11.1%
5. Umgungundlovu District	3	8	22	16	49	10.7%
6. Ekurhuleni Metropolitan	4	17	20	6	47	10.2%
7. Ugu District	3	11	22	11	47	10.2%
8. Cacadu District	7	8	22	8	45	9.8%
9. Eden District	3	6	28	6	43	9.4%
10. Uthukela District	3	10	20	9	42	9.2%
11. Cape Winelands District	4	9	23	6	42	9.2%
12. Sisonke District	3	6	21	11	41	8.9%
13. Uthungulu District	3	7	23	7	40	8.7%
14. Motheo District	3	7	21	9	40	8.7%
15. Zululand District	3	8	20	8	39	8.5%
16. Overberg District	3	5	22	9	39	8.5%
17. Waterberg District	4	5	19	10	38	8.3%
18. Gert Sibande District	4	7	19	8	38	8.3%
19. Ehlanzeni District	4	8	19	7	38	8.3%
20. Amajuba District	3	12	20	3	38	8.3%
21. Ilembe District	3	6	22	6	37	8.1%
22. Mopani District	3	7	19	7	36	7.8%
23. Capricorn District	5	4	19	8	36	7.8%

District Municipality	Number of titles					
	Community	Local	Main stream	Small Comm.	Total	% Number of titles
24. Nkangala District	4	6	19	7	36	7.8%
25. Amathole District	3	4	21	8	36	7.8%
26. Thabo Mafutsanyane District	3	7	18	7	35	7.6%
27. Fezile Dabi District	3	5	19	8	35	7.6%
28. Umzinyathi District	3	7	20	4	34	7.4%
29. West Coast District	3	4	22	5	34	7.4%
30. Bojanala Platinum District	3	8	18	5	34	7.4%
31. West Rand District	4	6	20	3	33	7.2%
32. Umkhanyakude District	3	7	20	3	33	7.2%
33. Sedibeng District	4	3	20	5	32	7.0%
34. Greater Sekhukhune District	5	4	19	4	32	7.0%
35. Lejweleputswa District	3	6	18	5	32	7.0%
36. Chris Hani District	3	3	20	6	32	7.0%
37. Alfred Nzo District	3	2	20	7	32	7.0%
38. Central Karoo District	3	2	22	4	31	6.8%
39. Southern District	4	4	18	5	31	6.8%
40. Frances Baard District	3	5	20	3	31	6.8%
41. Nelson Mandela Metropolitan	3	4	21	3	31	6.8%
42. O R Tambo District	3	2	20	6	31	6.8%
43. Kgalagadi District	3	4	18	5	30	6.5%
44. Ukhahlamba District	3	2	20	5	30	6.5%
45. Metsweding District	4	3	20	1	28	6.1%
46. Siyanda District	3	4	18	3	28	6.1%
47. Xhariep District	3	2	19	4	28	6.1%
48. Vhembe District	3	4	19	1	27	5.9%
49. Central District	3	3	18	3	27	5.9%
50. Pixley Ka Seme	3	5	18	1	27	5.9%
51. Namakwa District	3	4	18	1	26	5.7%
52. Bophirima District	3	3	18	1	25	5.4%

The City of Johannesburg Municipal region has the most number of newspaper titles distributed in that municipality with 66 Newspaper titles. This is equivalent to 14.3% of the 455 newspaper titles circulating in the country.

Ethekwini, the City of Cape Town and the City of Tshwane Metropolitan Municipalities each have 64, 54 and 51 titles respectively, each with more that 11% of titles in circulation.

Umkhanyakude, Siyanda, Pixley ka Seme, Metsweding and Bophirima Districts have the least newspaper circulation.

There is a correlation between the number of newspapers distributed in a district municipality and the economic activity taking place within that municipality. The greater the economic activity the more likely it is to find locally based newspapers, as is the case with Metropolitan municipalities. Also the population density within a municipal region plays a key role in the number of newspapers distributed. Most of the districts with fewer or no locally based newspapers distributed are sparsely populated, as is the case with the Northern Cape based district municipalities.

Urban areas tend to have a dense population with high disposable income as compared with rural areas that have lower income and are more sparsely populated. Ability to attract good ad spend is determined by the size and income level targeted. Hence, in an effort to pursue return on investment for shareholders, newspaper owners focus on urban areas, leaving rural areas with lower newspaper circulations.

3.3.2 Magazines

Table 26 below shows the number of magazine titles as published by various entities. Most of these are owned by the publishers, only a few are contract magazines published for a third party.

At the time of writing this report at least 502 magazine titles with ownership information were identified. Media24 owns 55 magazine titles and has a 50% shareholding in New Media Publishing, the company with the second largest number of titles at 34. Therefore Media24, as the largest single shareholder in New Media Publishing, has control over at least 89 magazine titles.

Avusa has the third largest number of magazine titles with about 32. Caxton Limited has at least 31 titles and the company has a 30% shareholding in Ramsay, Son and Parker, which controls 9 magazine titles. Highbury Safika Media follows closely with 25 titles. Primedia Publishing has 15 titles under its control.

Table 26: Table Showing the Number of Magazine Titles Owned by Companies

Number	Name of Magazine owner	Number of titles	Percentage
1	Media24 (Magazines)	55	11.0%
2	Caxton Ltd	31	7.8%
3	New Media Publishing (Media24 has 50% stake)	34	6.8%
4	Avusa Media	32	6.4%
5	Highbury Safika Media (Pty) Ltd	25	5.0%
6	Primedia Publishing (Pty) Ltd	15	3.0%
7	Cape Media Corporation	12	2.4%
8	Medpharm Publications (Pty) Ltd	9	1.8%
9	Ramsay Son & Parker (Pty) Ltd (Caxton 30%)	9	1.8%
10	Now Media (Pty) Ltd	8	1.6%
11	Publishing Partnership, The	8	1.6%
12	Technews Publishing (Pty) Ltd	8	1.6%
13	Panorama Publications (Pty) Ltd	7	1.4%
14	Picasso Headline (Pty) Ltd	7	1.4%
15	Future Publishing (Pty) Ltd	6	1.2%
16	Mafube Publishing (Pty) Ltd	6	1.2%
17	EE Publishers (Pty) Ltd	5	1.0%
18	Conde Naste Independent Magazines (Pty) Ltd	4	0.8%
19	AA Travel Guides	3	0.6%
20	Associated Magazines (Pty) Ltd	3	0.6%

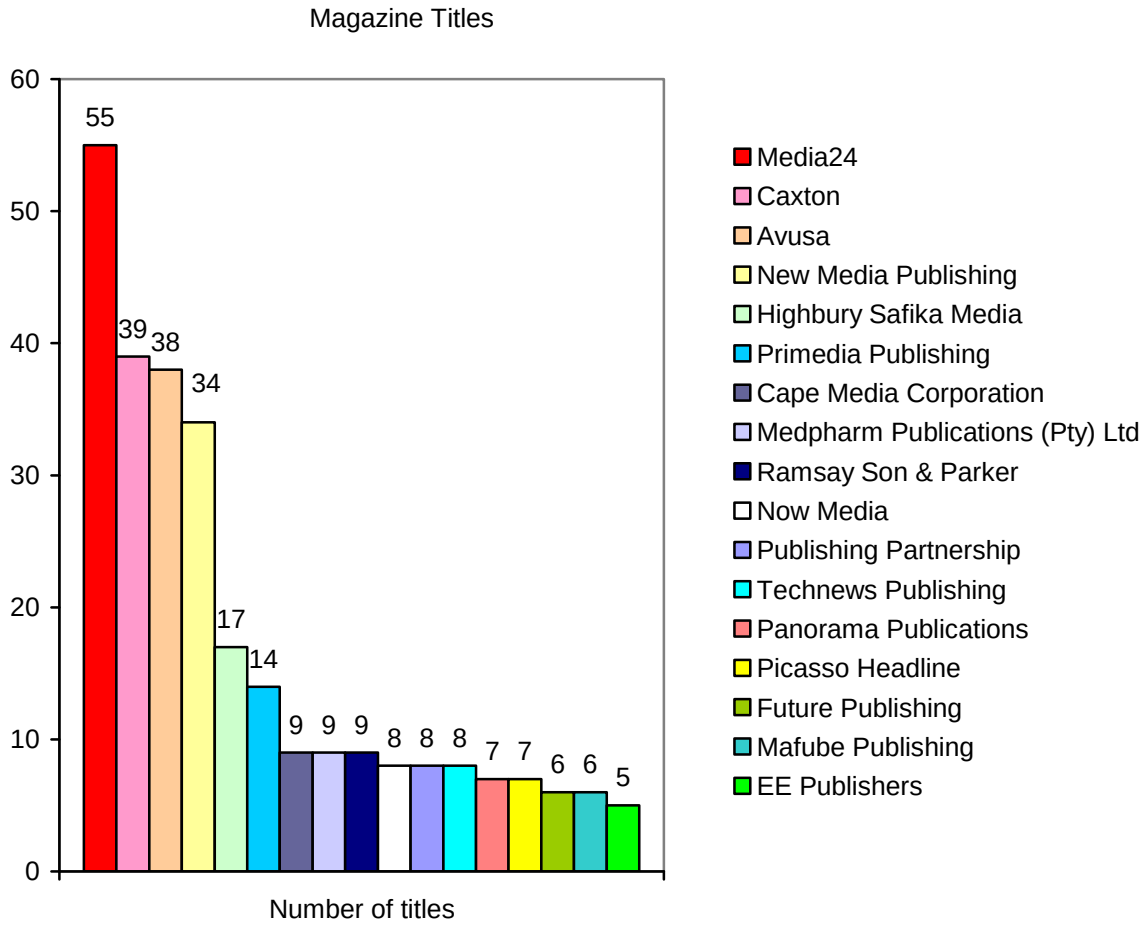
Number	Name of Magazine owner	Number of titles	Percentage
21	Brooke Pattric	3	0.6%
22	Contact Publications (Pty) Ltd	3	0.6%
23	Intelligence Publishing (Pty) Ltd	3	0.6%
24	iTWeb Ltd	3	0.6%
25	Lloyds Publishing	3	0.6%
26	Osgard Media	3	0.6%
27	Trade Focus Publishing	3	0.6%
28	Wag The Dog Publishers (Pty) Ltd	3	0.6%
29	Other Owners (with less than 3 titles)	191	38.0%
	Grand Total	**502**	**100.0%**

In addition to the abovementioned, there are at least 9 other magazine title owners who own or control between 5 and 10 titles each; about 25 others with 2 to 4 titles under their control and at least 70 others who each own or control one magazine title.

The top 5 title owners (Ramsay treated as part of Caxton) control at least 31% of the magazine titles that are distributed in the country. Of all the magazine owners, Media24 (including New Media Publishing) controls the largest number of magazines (about 18%) of the total number of titles.

Figure 13 graphically depicts magazine owners that have at least 5 titles.

Figure 13: Magazine Owners with at Least 5 Titles



The bar chart shows that the magazine category is also dominated by the big companies. Media24 is the biggest owner of publishing houses. This magazine dominance remains untouched despite recently discontinuing publication of some titles.

There are very few privately owned Magazines with quality news content. Most privately owned are property ads magazines and product or business specific magazines. Most of these and other privately owned magazines have zero HDI ownership percentage.

Local magazines are not as widespread as local newspapers. Media24 has just re-launched its micro-local title MyWeek with a new look and focus. Caxton also plays in this space with its micro-local glossies Get It. From December 2008, a bumper Joburg Northern Suburbs edition will

hit the stands. It will be made up of the trio of Sandton Rosebank, Fourways Bryanston and Northcliff Randburg editions. In Pretoria and Cape Town, there will be a single city edition for these local areas.

As before, these city titles will sit alongside the existing local editions that include Joburg West, Joburg South, Joburg East, Durban Highway and Berea Northglen, Umhlanga Ballito, Bloemfontein, Lowveld and more. Gateway is another prominent local magazine, especially in the Northwest and Free State.

3.3.2.1 Magazine Publishers

The large publishing houses are owned by the major media companies, with Naspers leading with several newspaper and magazine publishing houses. Naspers owns 85% of Media24 Magazines and 85% share in Touchline Publishing which has 11 magazine titles and an additional 4 through its wholly owned subsidiary, Atoll Media (Pty) Ltd. Naspers / Media24 also has 50% shares in New Media Publishing, Upper Case Media, Alchemy publishing and 8 Ink Media.

Media24 publishes more than 80 titles, several of them in conjunction with other publishers. More than 5.9 million magazines with a readership of 8.7 million get published in this stable monthly according to the Media24 magazines web page.

Media24 is the owner or shareholder of several newspaper publishing houses. The following are some examples of these: Boland Koerante (14 titles); Mooivaal Media (12 titles); The Natal Witness Printing and Publishing Company (5 tittles).

Caxton / CTP owns 18 magazines and several others in partnership with other individuals and entities. Caxton has a 50% stake in Cape Media Corporation, and owns 30% of Ramsay Media and Carpe Diem Media. These 3 together add a further 25 titles to Caxton's 18 to make 41. The 18 titles include Get It, a local community magazine.

Avusa Media has 25 titles and a further 4 are owned by subsidiary Picasso Headline. The publishing partnership publishes 20 contract magazines and Primedia publishes 15. The health and medical publishing group publishes 13 journals, followed by 3S Media with 12.

Table 27 shows the total number of titles owned by publisher and their % HDI shareholding.

Table 27: Publishers who Owns more than 3 Publications Titles

Name of Publisher	Number of titles owned	HDI % Shareholding
Media24	55	15%
Avusa Media	25	25.50%
Caxton Ltd	18	0.0%
Primedia Publishing (Pty) Ltd	14	40.00%
New Media Publishing (Media24 has 50% stake)	12	7.50%
Cape Media Corporation (Caxton 50%)	12	4.29%
3S Media	12	0.00%
Touchline Media (Media24, 85%)	11	15.00%
Now Media (Pty) Ltd	10	0.00%
Quantum Publishing	10	0.00%
Technews Publishing (Pty) Ltd	10	0.00%
Ramsay, Son & Parker (Pty) Ltd (Caxton 30%)	9	78.00%
Medpharm Publications (Pty) Ltd	9	0.00%
Publishing Partnership, The	8	0.00%
Top Companies Publishing (Pty) Ltd	8	0.00%
Panorama Publications (Pty) Ltd	7	0.00%
Mafube Publishing (Pty) Ltd[24]	6	50.00%

[24] *Note that Mafube has since ceased operations*

Name of Publisher	Number of titles owned	HDI % Shareholding
Future Publishing (Pty) Ltd	6	0.00%
Associated Magazines (Pty) Ltd	5	0.00%
EE Publishers (Pty) Ltd	5	0.00%
Intelligence Publishing (Pty) Ltd	5	0.00%
Picasso Headline (Pty) Ltd	4	25.50%
Media In Africa	4	0.00%
iTWeb Ltd	3	25.00%
Atoll Media (Touchline Subsidiary)	3	15.00%
AA Travel Guides	3	0.00%
Brooke Pattric	3	0.00%
Deslink Publishers	3	0.00%
Lloyds Publishing	3	0.00%
Osgard Media	3	0.00%
Trade Focus Publishing	3	0.00%
Wag The Dog Publishers (Pty) Ltd	3	0.00%
Total and Average HDI percentage	**292**	**9.67%**
Total Other Publishers owning less than 3 Magazine titles	47	17.11%
Grand Total of Titles	**339**	

Of the big publishing houses, Primedia has the highest HDI ownership of 49.1%, followed by Avusa's with 25.5%. The other large title holder, Highbury Safika could have a higher HDI ownership but did not make the information available.

Table 28 shows the % HDI shareholding of magazine publishers in descending order.

Table 28: Magazine Publishers with HDIs

Number	Name of Publisher	HDI % Shareholding
1	Ramsay, Son & Parker (Pty) Ltd (Caxton 30%)	78.0%
2	Mafube Publishing (Pty) Ltd[25]	50.0%
3	Primedia Publishing (Pty) Ltd	60.0%
4	Avusa Media	25.5%
5	Picasso Headline (Pty) Ltd	25.5%
6	iTWeb Ltd	25.0%
7	Media24	15.0%
8	Touchline Media (Media24, 85%)	15.0%
9	Atoll Media (Touchline Subsidiary)	15.0%
10	New Media Publishing (Media24 has 50% stake)	7.5%

The average HDI ownership of publishers with more than 2 titles is 9.67% and for the other publishers it is 17.11%. Only 10 of the 34 publishers listed have HDI ownership, and some of these have indirect HDI ownership through the shareholding of Media24 and Avusa.

[25] *Note that Mafube has since ceased operations.*

3.3.2.2 Printers

Table 29 lists printing companies by province and town. 12 of these printing companies are in Gauteng, 7 in the Western Cape, 4 in KwaZulu Natal, one in the Free State and one is in the Northwest.

Printing companies are located in cities such as Johannesburg, Durban and Cape Town, so many newspaper and magazine owners have to go to these large cities for their printing.

Most printing companies are owned by the big media companies. Media24 and Caxton provide much of their own printing needs and those of others media entities in both newspapers and magazines. In 2006, Caxton / CTP became the largest publisher and printer of books, magazines, newspapers and commercial print in South Africa.

Table 29: Ownership of printers listed by province and town

Printing Company	Provincial Location	Owner 1	Percent1	Owner 2	Percent2	HDI
Africa Web Printers and Distributors	Gauteng (JHB)	Media24	100%			15%
Caxton Printing Works	Gauteng (JHB)	Caxton CTP	100%			0%
CTP Gravure	KwaZulu-Natal	Caxton CTP	100%			0%
CTP Newspapers-Cape	Western Cape	Caxton CTP	100%			0%
CTP Web	Gauteng (JHB)	Caxton CTP	100%			0%
Goldfields Press	Gauteng (JHB)	Mr A Bath	100%			0%
Highway Printers	KwaZulu-Natal (Pinetown)	Caxton CTP	100%			0%
Inca Holdings	Gauteng (JHB), KZN (Durban) & Western Cape (Cape Town)	Caxton & Siyavuka Media	41.1%	Artkins Family	58.9%	26.47%
Kagiso BM Web	Gauteng (JHB)	Caxton CTP	100%			0%
Media24 Printers	Gauteng (JHB)	Media24, Yizani	100%			15%

Printing Company	Provincial Location	Owner 1	Percent1	Owner 2	Percent2	HDI
		Shares Scheme				
Northwest Web Printers	Northwest (Rustenburg)	Caxton CTP, PJT Bellatan	100%			0%
Oranja Drukkerei	Free State (Senekal)	W.C,Hauptsleisch, D Potgieter, H & B Barnes	100%			0%
Paarl Coldset	Western Cape (Paarl)	Media24,Khurisani & Yizani	100%			38.75%
Paarl Gravure Printers	Western Cape (Montagu Gardens)	Media24,Khurisani & Yizani	100%			38.75%
Paarl Media Holding	Western Cape (Paarl)	Media24, Yizani Shares Scheme	100%			12.75%
Paarl Web Printers	Western Cape (Paarl)	Media24,Khurisani & Yizani	100%			38.75%
Pro Print	KwaZulu-Natal (Durban)	Barry Roberts	100%			0%
RNA	Gauteng (JHB)	Caxton CTP	100%			0%
Seculo Printers	Gauteng (JHB)	Seculo Production	100%			0%
Seriti Printers	Gauteng (Pretoria)	A Goeman & A Dikswart	100%			0%
Shumani Print Services	Western Cape (Tygerberg)	Caxton CTP	100%			0%
Tandem Print	Gauteng (JHB)	L Di Vitto	100%			0%
The National Printing Company (TNPC)	Gauteng (JHB)	Independent Newspapers	50%	Avusa	50%	12.75%
AVERAGE HDI						**11%**

Caxton owns several printing entities (at least 11 as shown in Table 29). Caxton web printing operations are situated in two factories in Johannesburg (Web offset litho), Durban (Gravure), and Cape Town (Web offset Litho).

Naspers accounts for 6 printing entities and the partnership of Avusa and the foreign owned Independent News and Media, owning the large printing company (TNPC) jointly. The average HDI ownership is 11%. Clearly, the big media players are responsible for this HDI ownership. None of the big independent printing companies are black owned. The number of printing entities of the dominant media players is obviously larger than what the table above indicates, taking into accounts the different local and regional offices.

The Paarl Media Group, a Media24 subsidiary, is one of the most extensive commercial printing operations in South Africa. This national, multi-faceted Group has 6 specialised printing plants that provide a comprehensive range of printing facilities. These are Paarl Print (Paarl); Paarl Web (Gauteng); Paarl Web (Paarl); Paarl Gravure (Cape Town); Paarl Coldset (Paarl) and Paarl Labels (Paarl). The broad spectrum of products offered range from high volume magazine and commercial printing; heat set and cold set offset web book; bible and label printing to high quality sheet fed products.

The printing plants of Paarl Media Holdings which is 85% owned by Media24, a division of Naspers, and the remaining 15% is allocated to the Yizani share scheme giving it an HDI of 15%. The printing subsidiaries Paarl Web, Paarl Print and Paarl Labels have HDI ownership of 38.75%, taking into account it's partnership with a BEE company Kurisani Investments. Kurisani is part of Love Life.

The printing of newspapers in the independent community and for small commercial newspapers is mainly done by the major media owners, as printing plant ownership is out of reach for the small media owners in terms of capital cost requirements. This often leads to countless frustrations:

- Obviously, the printing priorities of the owners of the equipment take precedence.
- The high cost of printing makes it unaffordable for some. Hence they may skip some scheduled issues or even close down operations.

- There are even growing perceptions that some big media owners use printing as a weapon to keep independents out of the print industry or to force the independents to sell their newspapers to them.

3.3.2.3 Distribution

Newspaper and Magazine distribution is done mainly by the big media players. Caxton's RNA and Media24's NND24 and NLD24 are used by them and many other media companies. Many small to medium sized companies outsource this service to RNA and NND. These are the organisations that are most often quoted by various newspapers and magazines when asked how they distribute. Others quote the Post Office or CNA. Most magazines and newspapers can be obtained from CNA, Exclusive Books, supermarkets and convenience stores.

Most newspaper companies distribute for themselves or outsource it to some other small companies like 'Mr Pamphlet', Promail or Colour Press. Some of these distributors like Colour Press and Intraprint also double up as printers. Those media companies that distribute for themselves either send out their free newspapers door-to-door or drop them off at petrol stations and supermarkets / convenient stores.

The ownership and control of newspaper and magazine distributors, as in other sections of media, is dominated by the big media owners. The independents are mostly white. In our research, we have not found one distributor wholly owned by an HDI.

3.3.2.4 Newspapers and Magazine Provincial Readership Figures

According to SAARF data published by AMPS 2008, total national readership of both magazines and newspapers is 31.3 million people. Table 30 below shows that the concentration of readership of magazines is in the Gauteng province accounting for 21%, followed by KZN at 20% and the Eastern Cape at 15%. The readership figures correspond to the availability of the magazines in provinces, where there is low magazine circulation; this is reflected in the readership figures.

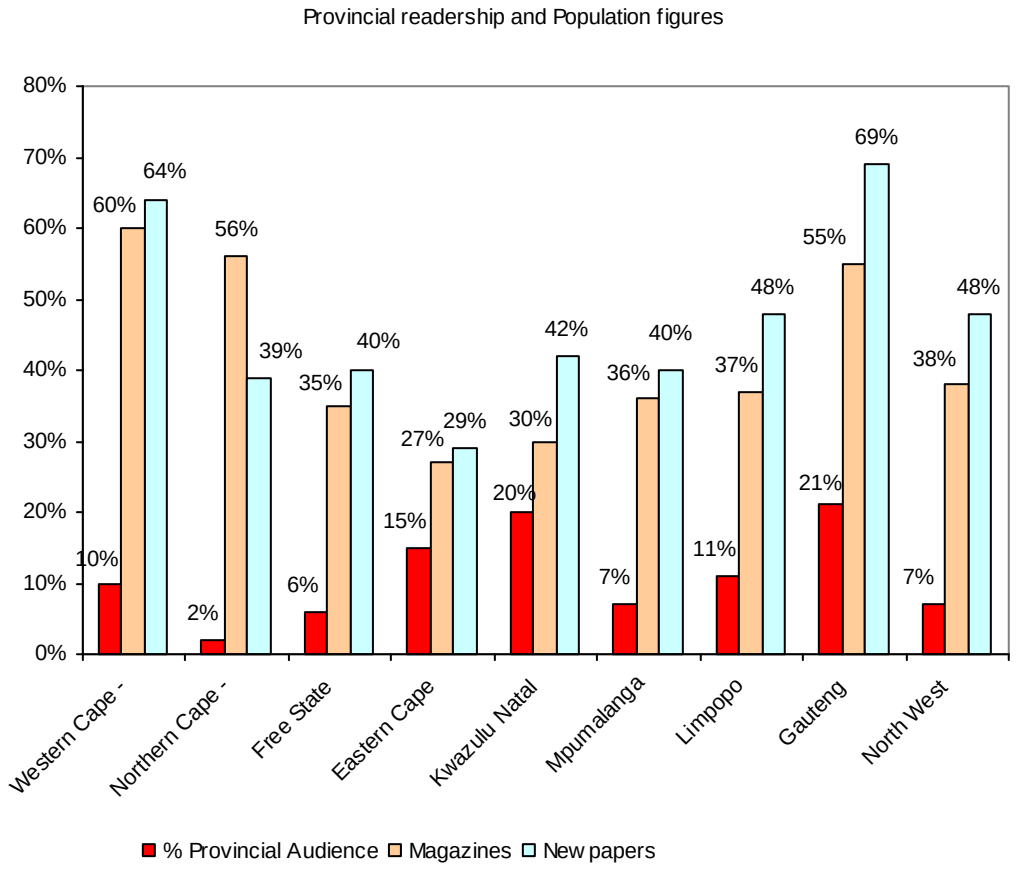
Table 30: Magazine readership by province

Figures in thousands

Total Readership	W Cape	N Cape	Free State	E Cape	KZN	Mpumalanga	Limpopo	Gauteng	NW
31,303	3,099	775	2,005	4,658	6,395	2,329	3,375	6,442	2,236
% per Province	10%	2%	6%	15%	20%	7%	11%	21%	7%

Figure 14 graphically depicts the AMPS data that illustrates that magazines are by and large available in all provinces and are read in varying degrees. If readership can be used as one of the yardsticks to measure media control then any company that owns a high percentage of titles that enjoy high readership, are likely to exert control on information consumed by a proportionate percentage of the population.

Figure 14: Provincial Readership and Population Figures



3.3.3 Conclusions for Print Media

One of the challenges facing the South African Media Industry is that ownership and control of the print media houses is skewed towards the big corporations. In spite of various state interventions: promotion of transformation processes and BEE, the majority of print media in South Africa remains in the hands of a few companies and individuals.

Print media is an expensive medium to disseminate information. Therefore sustainability of print media companies in previously disadvantage areas is a challenge.

3.4 Analysis of New Media

'New media' refers to the emergence of digital, computerized, or networked information and communication technologies in the later part of the 20th century[26]. This includes Internet and mobile based media technologies.

The use of digital computers has transformed 'old' media – examples are digital television and online publications. Even traditional media forms such as the printing press have been transformed through the application of these technologies.

Interactivity has given additional ways to use media. The New Media industry seeks to gain from the advantages of two-way dialogue with consumers primarily through the internet. Another advantage of the New Media industry is its ability to rapidly disseminate information to the market place.

In this section we review and analyse ownership and control in the South African New Media Sector including the structure of New Media (online content).

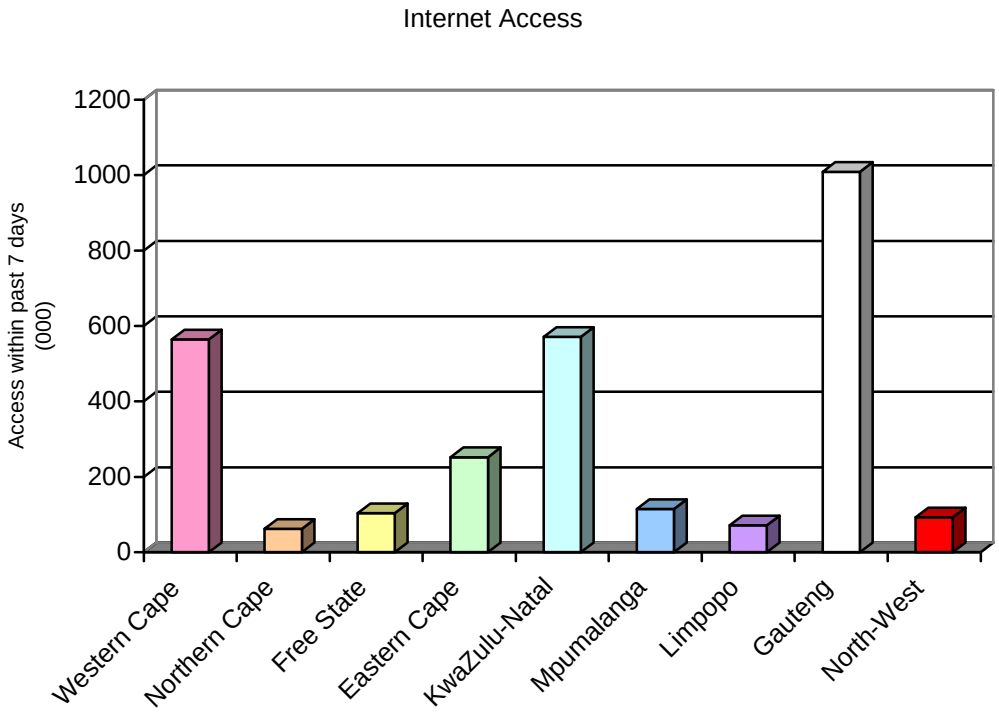
3.4.1 The Internet

3.4.1.1 Internet Access[27]

The Internet industry has experienced a high growth rate over the past ten years and is increasingly becoming an important business tool. Hence the number of people with internet access is higher in provinces with large cities. Gauteng, KwaZulu-Natal and Western Cape Province have the highest number of people with internet access, while the Northern Cape, Limpopo and North West Province have the lowest number of people. Figure 15 shows internet access over the past 7 days by province.

[26] *http://en.wikipedia.org/wiki/New_media*
[27] *Source of data : AMPS 2008*

Figure 15: Internet Access (past 7 days)



Putting online media in perspective, there are more cellular phone owners in South Africa than there are people who have internet access. Based on AMPS data[28] there are 2.4million people with internet compared with 21 million mobile subscribers. And the figure does not include prepaid mobile users. Therefore, right now, mobile content would reach more people than internet content.

Further analysis was conducted in 3 areas:

- online newspaper ownership;
- online magazine ownership and;
- other online media / services ownership.

[28] *AMPS 2008*

3.4.1.2 Online Newspaper Ownership

Table 31 below shows a summary of the number of newspapers with an online presence, grouped by owner or publisher. For example, Media24, the Naspers subsidiary, has various newspapers in its stable including Die Burger and there is also Die Burger online newspaper, which can be accessed from the website http://www.dieburger.com/.

The operations structure[29] of Naspers shows that the company owns 100% of its South African Internet business interest (under 24.com brand) separately from its print business which owns 85% of the Media24, the balance being owned by the HDIs. The following tables will therefore show Naspers and not necessarily Media24 as the direct owner of online newspapers. It is acknowledged that Media24 newspapers are a major source of news for the News24.com website[30], a 24.com news portal. The HDI ownership of Naspers as a listed company is not clear and is therefore shown as 0% in the tables that follow.

Table 31: The number of newspaper websites by Owner/Publisher

[29] *The Naspers Operations' structure is available in the website* *http://www.naspers.com/Operations.cfm?content=2642&currentpage=2642&CFID=17188497&CFTOKEN=67233726&jsessionid=f0309248820cd4a701513d133ac29521d482*

[30] *See website for details of relations between News24.com and Media24, two of Naspers businesses* *http://www.media24.com/generic.aspx?i_BusinessUnitID=4&lang=Eng&i_CategoryID=171&nodeid=node171*

No	Owner/publisher	No of website	Shareholding	
		Newspapers	HDI	Foreign
1	Naspers	27	0.0%	0.0%
2	Independent News & Media	17	0.0%	100.0%
3	Avusa	14	25.5%	0.0%
4	Tabloid Media	10	100.0%	0.0%
5	Caxton	4	0.0%	0.0%
6	Sky Blue Media	6	34.5%	0.0%
7	Other HDI owned	5	100.0%	0.0%
8	Community 'Owned'	4	N/A	N/A
9	Others	20	N/A	N/A
	Total	**107**	**N/A**	**N/A**

Naspers has at least 27 online newspapers, the most number of online websites owned by a single entity, followed by Independent News and Media (INC) with 17 online newspapers. It should be pointed out that the presence of INC's 17 titles does not imply that all of the online newspapers' content is accessible to all browsers. Subscribers will have access to all articles but the general public will have access only to those articles as determined by the publisher, usually after a certain period has expired.

Third on the list is Avusa with 14 websites. These include 'The Times / Sunday Times' online; 'Sowetan Online' and the 'The Weekender' online of which the company has a 50% shareholding. Avusa has Mvelaphanda, a BEE company, as one of its major shareholders.

Tabloid Media, a 100% HDI owned company has its 10 small commercial newspapers' news accessible online, even though the depth of its news is limited to the locations where Tabloid Media distributes its print newspapers. So, in terms of the depth of news coverage, the content of Tabloid Media is simply not comparable to that of, for example, the 'Mail and Guardian Online'

newspaper, with just one print newspaper title and is therefore included under 'Others' in the table.

Only 4 online newspapers owned by Caxton were identified even though this company owns the most number of newspaper titles in the country. This could be due to nature of the titles owned by Caxton, i.e. 'local newspapers' with locally based content.

Sky Blue Media has 6 print titles which are similarly branded and are represented as such in the company's 'Fever Online' website. As is the case with Tabloid Media, the focus of their content is on local news, whereas Sky Blue's newspapers are distributed. Sky blue has a 30% direct HDI ownership which includes ZICO (Zungu Investment Company (Pty) Ltd) and Cyril Madlala as shareholders and an indirect 4.5% as a result of the 30% owned by Media24.

3.4.1.3 Online Magazine Ownership

Table 32 below shows the number of magazines with an online presence grouped by their ownership, and ranked in terms of number of online magazines owned.

Table 32: The number of Magazine websites by Owner/Publisher

No	Owner/publisher	No of website	Shareholding	
		Magazines	HDI	Foreign
1	Naspers	48	0.0%	0.0%
2	Caxton	14	0.0%	0.0%
3	Ramsay Son & Parker	8	2.6%	0.0%
4	Avusa	6	25.5%	0.0%
5	Media in Africa	6	0.0%	0.0%
6	Chris Yelland & Irene Blythe	5	0.0%	0.0%
7	Creamer Media	2	0.0%	0.0%
8	HDI owned	1	100.0%	0.0%
9	Others	62	N/A	N/A
	Total	**152**		

In this section, Meda24's magazines with an online presence are assumed to be warehoused under the Naspers Internet business as is the case with Media24's online newspapers.

The table reflects general media ownership with Naspers having the most number of online magazine titles with, at least 48 (31%) titles out of 152 identified sites. Included in these titles are those in which Naspers through Media24 has a 50% or less shareholding, such as those owned jointly with New Media Publishing and Jane Raphaely. However Khanyi Dhlomo's Destiny Magazine which is co-owned by Media24 (50%) is not included in this figure.

Caxton's magazines are the next most represented online with 14 (or 9% of the total identified) of its titles having some form of Internet presence, including Bona Magazine[31]. Caxton's online magazine count excludes those which this company co-owns with Ramsay, Son and Parker. Ramsay, Son and Parker own at least 8 online published magazine websites.

[31] *Bona's December 2008 home page address was listed as* *http://www.bona.co.za/index.php?p[IGcms_nodes][IGcms_nodesUID]=0cb4a97c14909231ddda572542234aa4*

This is followed by Avusa and Media in Africa with 6 online 'titles' each. Included in Avusa's count of online magazines is the Financial Mail in which the company has a 50% shareholding and the balance is held by Pearsons plc, a UK based company.

Chris Yelland and Creamer Media with 5 and 2 online magazines respectively are amongst the other online magazine owners. These family owned companies publish technical content that is directly acquired from their print versions. As will be shown in the next subsection Creamer Media have expanded their online offering beyond their print equivalent.

Amongst other media owners with online magazine presence there are Raphaely family (House & Leisure[32], Marie Claire); Peter Borchert (Africa Geographic, Africa Birds and Birding); Primedia Publishing (Gardening SA) and Woolworths with their online 'Taste' magazine.

In summary it can be stated that the pattern of online magazine ownership is a mirror image of the print magazine ownership. Media24 dominates in the number of its magazines represented online.

3.4.1.4 Other Online Media Ownership

Other than websites which are an extension of an existing newspaper or magazine brand, there are a number of other website brands that have been identified. Table 33 overleaf shows the number of such websites identified to date where the ownership has been verified.

Table 33: The Number of Other Types/Brands of websites by Owner/Publisher

No	Owner/publisher	No of website	Shareholding	
		Other Web presence	HDI	Foreign
1	Naspers	6	0.0%	0.0%
2	Interface Media	6	0.0%	0.0%
3	AC Braby	3	0.0%	0.0%
4	SABC	3	N/A	N/A

[32] *House and leisure website address is http://www.houseandleisure.co.za/ and that of Marie Claire is http://www.marieclaire.com/*

No	Owner/publisher	No of website	Shareholding	
5	Primedia	3	50.0%	0.0%
6	Creamer Media	2	0.0%	0.0%
7	Avusa	2	25.5%	0.0%
8	Independent News & Media	1	0.0%	100.0%
9	Others	11	N/A	N/A
	Total	**37**		

The Naspers group has a number of well known website brands associated with some of the company's other businesses including, 24.com (portal), Mweb (portal), M-Net, SuperSport, Carte Blanche, MultiChoice and Kalahari.net (an e-commerce website). It should be pointed out that some of these websites provide access to numerous services / information, including job hunting, classifieds, directory services, multimedia content (audio and visual), personals and dating services, messaging and chat-rooms.

Interface media has a number of web brands including an online directory (easyinfo.co.za), careers portal (jobs4u.co.za), email messaging and chat services (webmail.co.za).

AC Braby owns some of the well known web brands i.e. Ananzi web portal and directory, Funnel and Brabys online directories. Both AC Braby and Interface Media do not have any HDI shareholding.

The SABC as a broadcaster has extensive content which the organisation seeks to disseminate using various platforms. The Internet is one such platform, each of the broadcaster's radio stations has a website, but only 5FM's website's traffic statistics are measured and published by Nielsen//NetRatings. The SABC being a public broadcaster has the government as its sole shareholder.

Primedia has the established iafrica.com brand which acts as a portal to the various categories of news and service offerings on their website. The company also owns the 365 website dedicated

to sports news and information. This company has an estimated 50% HDI ownership through MIC who is 100% HDI owned and controlled.

Creamer Media has a website dedicated to policy issues of the country and has specific mining research focused websites as part of its online offering. Creamer Media, a family owned entity, does not have any HDI ownership.

One of the more popular employment websites[33] 'careerjunction.co.za' is owned by Avusa. In addition to this website, Avusa jointly owns the I-net bridge, a financial news website with Pearsons plc.

Independent News and Media has the IOL online portal which serves as a gateway to this company's New Media offering and includes articles from the company's print newspapers. Avusa has a 25.5% BEE ownership which excludes any BEE ownership from the listed share of the company.

Aardvark, the Telkom owned search engine/directory features amongst the websites as measured by Nielsen//NetRatings implying that Telkom Ltd is also involved in the content business. On becoming a listed entity, Telkom's shareholding was diversified: it included foreign entities; a small percentage of HDI and the government as a major shareholder. The Elephant consortium, a black economic empowerment group holds a 5.8% shareholding in Telkom and it is the only significant and direct shareholding by HDI.

The Vodacom4me website brand owned by Vodacom is the most popular website[34] owned by a mobile operator, based on the Nielsen//NetRatings measurement for quarter 2 of 2008. As a member of the Online Publishers Association, this suggests that Vodacom is active in the business of creating and distributing content through their mobile platform. The Vodacom4me website makes available various services including news, chat and messaging services. Vodacom is 65% owned by Vodafone, a foreign owned company and is 35% owned by Telkom.

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[33] *According to the Quarter 2 (April, May and June 2008) 2008 Nielsen//NetRatings data by Unique Browser (UB) ratings, this website was overall ranked number 21 out of more than 120 websites as monitored by Nielsen.*

[34] *According to the Nielsen // NetRatings measurements by overall Unique Browser (UB) measure for Quarter 2 2008, the Vodacom4me website ranked number 9 out of the 124 websites measured. The data was obtained from the OPA website http://www.opa.co.za/*

The direct HDI shareholding in Vodacom occurred when the company implemented its BEE deal[35] in 2008 which resulted in broad based Black Economic Empowerment shareholders owning 6.25% of the company's issued ordinary share capital. In addition the percentage of shares owned by HDI in Vodacom will be in direct proportion to the HDI shareholding in Telkom Ltd, namely 50% of Elephant Consortium's shareholding amounting to 2.9%. Vodacom therefore has an estimated 9.15% shareholding by HDI.

Therefore the major media players who generate and own their content have sought to take advantage of alternative platforms of distribution including new media platforms such as the internet and mobile telephony.

Two additional players operate in this space: the mobile telephony company Vodacom and the fixed line telephony operator Telkom are to some extent involved in the Internet content business through their respective brands, Vodacom4me portal and Aardvark search engine/web directory, respectively.

3.4.1.5 Online Publishing

In an effort to establish "the most popular South African news site" it is necessary to identify key stakeholders in the online industry and to understand how they have organised themselves in an emerging industry.

South Africa has one online publishing organisation, namely the Online Publishing Association[36] (OPA). Members of this organisation include major media owners such as Media24, Independent Online (IOL) and Mail and Guardian Online Publishers.

The OPA's members and associates are encouraged to affiliate to Nielsen//NetRatings[37] in order to have credible and independently measured online website traffic statistics.

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[35] *See article in the Mail and Guardian titled 'Vodacom implements BEE deal worth R7,5bn' dated July 29 2008 http://www.mg.co.za/article/2008-07-29-vodacom-implements-bee-deal-worth-r75bn*

[36] *OPA define themselves as "a grouping of South Africa's most prominent online publishers", whose aim "is to promote the growth and profitability of the online publishing industry, by setting the highest standards and meeting the needs of marketing and advertising professionals". From Presentation obtained from OPA website http://www.opa.co.za/download_files/targeting_the_online_consumer.ppt on 17 November 2008.*

In this section data Nielsen//NetRatings' website traffic statistics for the specified period is analysed to assess the most visited website by South African domestic surfers.

3.4.1.6 Most Popular News Website in South Africa

Nielsen//NetRatings measured the 'domestic and total traffic' to OPA members' websites and for the purposes of this analysis 2 measures will be used: the number of Unique Browsers (UB) and the number of Page Impressions (PI). The number of each of was counted for South Africa's most popular news websites for the periods April, May and June of 2008.

It should be noted that only those websites that belong to OPA members or associate members and who have entered into an agreement with Nielsen//NetRatings are included. Therefore certain websites such as Caxton / CTP's Citizen Newspaper website http://www.citizen.co.za/ does not feature in this analysis, because at the time of writing the report Caxton / CTP was not yet a member of OPA.

Table 34: List of Most Popular Websites in South Africa for the Period April, May and June of 2008[38]

No	Website	Publisher	Shareholders	HDI	Foreign
1	news24.com	Media24	Naspers	0.0%	0.0%
2	IOL News	Independent Online	Independent News & Media	0.0%	100.0%
3	News24 South Africa	Media24	Naspers	0.0%	0.0%
4	The Times	Avusa	Avusa	25.5%	0.0%
5	mg.co.za	Mail & Guardian Online	New Trust Company	87.5%	10.0%
6	News24_Beeld	Media24	Naspers	0.0%	0.0%

[37] *Nielsen//NetRatings is an organization that provides "independent online measurement services" to Online Publishing companies interested in profiting from their websites*

[38] *Source: Nielsen//NetRating and Z-Coms research/analysis Ranking of the web sites is based on Unique Browsing and Page Impression. According to the Nielsen //NetRating Online Ranking Report. Data was obtained from the OPA website http://www.opa.co.za/readership/*

No	Website	Publisher	Shareholders	HDI	Foreign
7	M&G Online	Mail & Guardian Online	New Trust Company	0.0%	10.0%
8	Mail & Guardian Online	Mail & Guardian Online	New Trust Company	0.0%	10.0%
9	world	Media24	Naspers	0.0%	0.0%
10	24.com News	Media24	Naspers	0.0%	0.0%
11	www.sowetan.co.za	Avusa	Avusa	25.5%	0.0%
12	Homepage	Mail & Guardian Online	New Trust Company	87.5%	10.0%
13	SABCnews.com	SABC	SABC	N/A	N/A
14	M&G Homepage	Mail & Guardian Online	New Trust Company	87.5%	10.0%
15	Die Burger	Media24	Naspers	0.0%	0.0%
16	Dieburger.com	Media24	Naspers	0.0%	0.0%
17	M&G Homepages	Mail & Guardian Online	New Trust Company	87.5%	10.0%
18	The Star	Independent Online	Independent News & Media	0.0%	100.0%
19	News24	Media24	Naspers	0.0%	0.0%
20	News24_Rapport	Media24	Naspers	0.0%	0.0%
21	www.dispatch.co.za	Avusa	Avusa	25.5%	0.0%
22	SA GoodNews	South Africa The Good News	Community	0.0%	0.0%
23	City Press	Media24	Naspers	0.0%	0.0%
24	News24_CityPress	Media24	Naspers	0.0%	0.0%
25	Cape Argus	Independent Online	Independent News & Media	0.0%	100.0%
26	Cape Times	Independent Online	Independent News & Media	0.0%	100.0%
27	www.sundayworld.co.za	Avusa	Avusa	25.5%	0.0%
28	Sake24	Media24	Naspers	0.0%	0.0%

The most popular news website in the country according to Nielsen//NetRatings (online) for the period April, May and June 2008 is the news24.com website[39]). This website is published by Media24 and is 100% owned by the South African based Naspers. This website is also, amongst all of the sectors / categories as measured by Nielsen//NetRatings, the most popular (visited by unique persons) website.

'IOL news' website follows, and is published by Independent Online which is owned by the foreign based Independent News and Media Company.

The third most popular news website, "news24.com/South Africa" is published by Media24 owned by Naspers.

This is followed by The Times website published and owned by Avusa.

The fifth most popular news website is the mg.co.za published by Mail and Guardian (M & G) online and majority owned New Trust Company (Mr Trevor Ncube's company). This is the only online news website with a significant black ownership.

Amongst the top 5 rated news websites, 2 are owned by the Naspers group, one each by Independent group, Avusa and New Trust Media (M & G majority owner). All of these companies are involved in the publishing and ownership of print media and particularly newspaper publications. Their online news content includes news published in their print editions. Mail and Guardian claims to be the first South African[40] and African newspapers to be published online. In the early days of Internet news publishing, the company distributed a newsletter to subscribers who would then read details of the news articles on M & G website.

Although Naspers owns 85% of Media24 Holdings, which has an HDI ownership of 15%, in the case of its Internet business including the 24.com brand, Naspers owns 100%. This implies that there may not be any shareholding by HDI of this Naspers Internet brand which make use of Media24's newspapers generated content. With respect to its internet businesses, Naspers has no obligation to satisfy any regulated ownership requirements.

[39] *This may refer to the homepage which serve as a portal to 24.com's other offerings*
[40] *http://www.mg.co.za/page/about-us*

Based on the above analysis, Naspers is the dominant player amongst the news websites accessed by South Africans.

3.4.1.7 Web Portals

The top 5 'popular websites' homepages as listed in the previous table also serve as web portals for their publishers. For example, Media24.com serves as a gateway to Beeld website (6th on the table), world news (9th), 24.com News (10th), Die Burger (15th, and 16th), News24.com Rapport (20th), City Press (23rd & 24th) and Sake24.

Likewise, the IOL website serves as a portal for other Independent Online offerings such as the Star (18th), the Cape Argus and Cape Times (25th and 26th respectively).

Avusa has the Times website which serves both the daily Times and the weekly Sunday Times newspaper including its supplements. Sowetan online (11th) and Sunday World (27th) and these appear to be grouped together as website brands.

3.4.1.8 Print Online

3.4.1.8.1 Online Newspapers

Amongst the news websites as listed in the previous table Table 34, there are those associated with established print newspapers. For instance, news published in the IOL website is primarily extracts from the Independent News Media's (INC) newspaper publications, i.e. The Star, Cape Times, Pretoria News, Sunday Independent, etc. INC also publishes separate websites for its individual newspapers such as The Star, Cape Argus and Cape Times.

Likewise some of Media24 newspaper articles appear in the Media24.com website which acts as a portal for the company's online publications. Die Beeld, Die Burger and City Press are amongst the publisher's most accessed websites and each of these papers has its own separate website albeit they are an extension of Media24.com website brand.

Mail and Guardian newspaper articles are also published in its website with the print version's inserts also published online.

Avusa, being one of the major commercial newspaper publishers in the country (in terms of number of titles it owns) also has a web presence through 'TheTimes' website. This website acts as a gateway to articles published in the Times and the Sunday Times newspapers. Other newspapers in the Avusa stable, which include The Sowetan, The Daily Dispatch and the Sunday World, have their own individual websites and are amongst those listed in Table 34.

Caxton Group, the other major newspaper owner has a website for its publication the Citizen. As mentioned above Caxton is not yet a member of the Online Publishers Association (OPA) and is also not affiliated to Nielsen Online for monitoring of visits to its websites and therefore was excluded from this analysis.

In conclusion, online news in South Africa is dominated by established media owners Avusa, Independent Online, Naspers's Media24 and New Trust's Mail and Guardian.

3.4.1.8.2 Online Magazines

A number of print magazine publishers have expanded their channels of content distribution beyond the traditional print version into new technologies including the Internet. These publishers either publish versions of their magazine online as "ezines" or they make the articles from the print version of the magazine available online, with different content available to subscribers versus the general public.

With respect to the web presence of published magazines, Media24 has the most number of magazines 'titles'. It's the availability of this magazine content, amongst other things, that probably contributes towards Media24's dominance of the Internet content in the country

Table 35 shows magazine publications with an online presence

Table 35: Magazine publications with an online presence

Magazine Titles	Publisher(s)	Owner(s)
Soccer Life, Longevity, Elle	Avusa	Avusa
Financial Mail	BDFM	Avusa, Pearsons
Bona, Cleo, Essentials, Farmers Weekly, Living & loving, Rooi Rose etc.	Caxton	Caxton
Engineer IT,	EE Publications	EE Publications
Electricity & Control	Crown Publications	Crown Publications
PC Format, Intelligence	Intelligence	Intelligence
FHM, Heat, National Geographic, Baba & Kleuter, Golf Digest, Kick off, Topbike, True Love, You, Psychologies,	Uppercase Media, 8 Ink Media, Alchemy publishing, Touchline Media, Attoll Media, Jane Raphaely, New Media publishing	Media24
Leisure Wheel, Car, Getaway Magazine	Ramsay, Son and Parker	Ramsay, Son and Parker, Caxton

3.4.1.9 Social Media

The lightning fast spread of the video story of Mr Nhlanhla Nene's collapsing chair experience during an SABC studio recording on the 22nd October 2008 illustrates the role that social media plays in the dissemination of information or news.

One of the many definitions of social media is

> "Online technologies and practices that people use to share opinions, insights, experiences, and perspectives with each other[41]".

Examples of such social media include Facebook and Mixit. Social media entails some form of interaction or exchange of ideas between the users of various technologies. The technologies include cellular phones as well as computers.

[41] *Definition obtained from the website www.tvb.org/multiplatform/Multiplatform_Glossary.asp*

According to an e-book[42] titled "What is Social Media?" there are 6 kinds of social media currently in use:

- Blogs;
- Wikis;
- Podcasts;
- Forums;
- Content communities and
- Microblogging.

In this report only blogs will be explored. Locally based equivalents of the measurements used by the Nielsen//NetRatings will be used in the analysis.

3.4.1.9.1 Blogs

Blogs, according to the e-book referred to above, are "online journals" where most recent entries appear first. Alternatively it can be defined as a website that displays postings in chronological order by one or more individuals and usually has links to comments on specific postings.

The websites such as that of the Mail and Guardian online, host Blogs that are found in a variety of formats e.g. video, text and photo blogging.

The Nielsen/NetRatings list of monitored websites includes a number of blogs sites as listed in Table 36 below.

[42] *The "What is social media?" e-book obtained from the website* http://www.icrossing.co.uk/fileadmin/uploads/eBooks/What_is_Social_Media_iCrossing_ebook.pdf

Table 36: List of some of the blogs as monitored by Nielsen//NetRatings[43]

No	Websites	Publisher	Type	Ownership	HDI	Foreign
1	24.com Blogs	Media24	Blogs	Naspers	0.0%	0.0%
2	MSN Spaces	MSN	Blogs	Microsoft	0.0%	100.0%
3	www.mydigitallife.co.za	ITWeb Limited	Blogging/ Technology	ITWeb Ltd, Umango Investment	25.1%	0.0%
4	Thought Leader	Mail & Guardian Online	Blogs, Opinion	New Trust Company	87.5%	10.0%
5	The Times Planet Blog	Avusa	Blogs	Avusa	0.0%	0.0%

Three of the major media owners (Nasper, New Trusts Company (M & G owners) and Avusa) have a 'blogging' presence that is monitored and is ranked by the Nielsen//NetRatings company. Such blogs, as is the case with other website categories (careers/employment, property, financial news etc.) are accessible through the portals / websites of these media owners' established online brands. Naspers dominance of the online business is confirmed by the 'popularity' of the company's blogging sites as compared with its competitors.

The blogs as listed in the table above represent only a few of the blogging sites utilised by South Africans.

[43] *Source: Nielsen//NetRating and Z-Coms research/analysis*

3.4.2 Mobile Media

3.4.2.1 Introduction

Mobile devices have evolved from being a pure voice communication tool to a multimedia communication device in a technologically converging environment. For a mobile device, this convergence of technologies has meant that its capabilities have been extended to include the ability to surf the internet. First it was Short Message Service (SMS) as a communication method and then WAP (Wireless Application Protocol) allowed websites to be accessed through cell phones. Now the dot mobi website 'revolution' has began, where websites are being specifically designed to be accessed by mobile media.

According to an article[44] published in Bizcommunity.com's websites, South Africa has Africa's highest mobile website Page Impressions (PIs) as measured by AdMob. The article also states that South Africa's mobile penetration exceeds that of PC and Internet penetration and that this mobile Internet penetration is still in its growth phase.

Apart from being a tool for communication, the use of a mobile device to access information and services is becoming increasingly common. For those without computer based access to the Internet, the mobile device provides a channel through which they can access information and various services including online banking services.

Table 37 below gives examples of mobile websites offering various services.

[44] http://www.bizcommunity.com/Article/196/78/29860.html *titled AdMob on realising the value in mobisites*

Table 37: Some Titles with mobile websites (Mobi websites/WAP sites)

Title	Sector	Mobisites/WAP site	Owner(s)	Shareholding	
				HDI	Foreign
Mail & Guardian	Subscription Services, Mail and Guardian mobile news site	m.mg.co.za	New Trust Company, Guardian	87.5%	10.0%
Highveld Stereo	Radio station website	http://www.highveld.mobi/	New Primedia	50.0%	0.0%
The Times	News, sports, business etc.	http://www.m.thetimes.co.za/	AVUSA	25.5%	0.0%
Sowetan Mobile	News	http://mobi.sowetan.co.za/	AVUSA	25.5%	0.0%
eXactmobile	Sports, music downloads, games, ring tones	www.exactmobile.mobi	Primedia	25.0%	49.95%
Mweb	Internet Services	www.mweb.mobi	Naspers, BEE entities	22.0%	0.0%
Soccer Laduma	Football News	http://soccerladuma.mobi/	Naspers	0.0%	0.0%
Die Burger	News, sports, business etc.	www.dieburger.mobi	Naspers	0.0%	0.0%
IOL Online	Ring tones, games , wallpaper	http://m.iol.co.za/	Independent News & Media	0.0%	100.0%
Nimbuzz	Instant messaging platform, Call, Chat	http://get.nimbuzz.com/	Naspers, Nederlands Co	0.0%	75.0%
24.com	Mobile email, Music download, Ring tones, Games, Graphics, Animations, News	http://m.24.com/	Naspers	0.0%	0.0%
SABC Mobile	SMS/WAP, USSD portal	http://wap.mzuzu60.co.za	Government	0.0%	0.0%
Onegospel Channel	Subscription television	mobi.onegospel.co.za	Naspers	0.0%	0.0%

3.4.2.2 Newspaper on a Mobile

More recently media companies are making their online content available by using the dotmobi (.mobi) type of websites. These websites, according to a wiki[45] are designed so that they are "optimized when viewed on a mobile phone". So those who access the dotmobi Internet websites using mobile devices should be able to navigate such websites with ease.

One of the more recent additions to the dotmobi revolution is 'The Times' web portal which is now available in mobile friendly format http://m.thetimes.co.za (see Table 37 above).

Media24 has its own version of the dotmobi address, namely, http://m.24.com/ address.

In addition to its main mobisite http://m.mg.co.za/ The Mail and Guardian newspaper has made available it's 'thought leader' series of articles available through specific mobisites e.g. the thought leader (blogs, opinions and analysis) can be accessed using m.thoughtleader.co.za mobisite and sports leader using m.sportsleader.co.za.

In conclusion established print media companies are exploiting the new technologies that have become available in the mobile media space.

3.4.2.3 Magazine on a Mobile

Established media owners have not only made some of their published magazines available online, but they have also made it possible for such publications to be conveniently accessible via mobile devices. These media owners include Media24 magazine publishers Touchline Media (Golf Digest) and Uppercase Media (FHM men's magazine) as shown in Table 38 below.

[45] *http://en.wikipedia.org/wiki/.mobi*

Table 38: Magazine on Mobile

Magazine Title	Website	Publisher	Owners
CAR today	http://mobile.cartoday.com	Ramsay, Son & Parker (Pty) Ltd	Ramsay Son & Parker (Pty) Ltd
FHM	m.fhm.co.za	Uppercase Media	Media24
GETAWAY MAGAZINE	http://mobile.getaway.co.za	Ramsay, Son & Parker (Pty) Ltd	Ramsay Son & Parker (Pty) Ltd
Golf Digest	http://mobile.GolfDigest.co.za	Touchline Media (Pty) Ltd	Media24
HIP2B2	mobi.hip2b2.com	BSquare Communications	BSquare Communications & Shuttleworth Foundation
PC FORMAT	http://mippin.com/pcformat	Intelligence Publishing (Pty) Ltd	Urs Honneger
YOU	http://www.you.co.za/	Family Magazines	Media24

It should be noted that the dominant magazine publishers/owners are amongst the market participants who have taken advantage of mobile technologies to further promote and enable accessibility of their publications content.

3.4.3 Conclusions for New Media

New media is dominated by the major media companies such as Naspers/Media24 with their 24.com website/mobisite brand and Avusa with its various news (e.g. the times website/mobisite) and service (career junction website/mobisite) offerings. These companies have not shied away from exploiting new technologies as part of their strategy of promoting their content.

Small and specialised publications like the Mail and Guardian have created new business models by adopting the new technologies which have enabled them to extend their reach beyond the print version of their newspaper.

Telecommunications companies are entering the content provision space with Telkom and Vodacom each having a web presence apart from the fact that they own and provide the technology infrastructure required to access the Internet.

Specialist magazine publishers such as Creamer Media who have identified niche opportunities for themselves are using new technologies to exploit these identified niche markets (e.g. polity website which focuses on government policy and regulatory issues in the country).

Coal City, the small commercial newspaper (a 100% BEE and woman owned) which received MDDA funding has established a web presence that complements the company's newspaper print version.

In terms of media diversity and access by disadvantaged communities, there is a long way to go towards making digital content accessible to the rural and township environments. This is because of the low computer literacy rate in South Africa in general and particularly within the black communities.

4.0 CONCLUSION

In the 1990s political reforms radically transformed South Africa's Broadcasting Media. As a result, in the post 1994 era, freedom of the media was given a lot of focus and is regarded as one of the supporting pillars of democracy. The introduction of an independent regulator with constitutionally guaranteed independence was a significant step forward for the industry. However transformation in the print media sector remains a challenge in South Africa.

4.1 Broadcast Media

The deregulation of television and radio broadcasting and the introduction of community broadcasting have meant that the airways are relatively open. Overall there has been: a diversification of media; the commercialisation and privatisation of broadcasting and the move from state broadcasting towards public broadcasting.

What diversity does is to: bring competition; an investigative edge and an opportunity to expand the reading and thinking public. This can only be good news for South Africa's young democracy.

The study found that HDI are well represented in the ownership of broadcast media. This is due to the policy and regulatory framework provided by ICASA where transformation is well monitored and encouraged by the Authority. HDI owns an average of 64.4% of Private Commercial television stations and 58.3% of all Private Commercial and Secondary Market radio stations.

Community broadcasting serves as an access point for diverse members of the community to share political, cultural, artistic, spiritual and individual expression. Community broadcasts are aimed at empowering citizens by providing useful information and also enabling them to access and build their communities.

The broadcasting media, especially radio, has also seen many changes in terms of the introduction of broad based BEE ownership.

4.2 Print Media

Print media is by far the largest media sub-sector in South Africa (in terms of the number of titles and ownership) and yet it is the most unregulated. About 5.7 million newspapers are sold per annum in South Africa. In terms of circulation and readership, 4 large media companies (Media 24, Avusa, Caxton and The Independent) dominate the print media industry. These 4 companies also own the majority of printers and distribution companies.

In post 1994 South Africa the print media landscape has not transformed much in terms of ownership and control and is still majority owned and controlled by white shareholders. In spite of various interventions by the state through promotion of transformation processes and BEE, the majority of print media in South Africa is still owned / dominated by a few companies and individuals.

The magazine sector is dominated by Media 24, followed by Avusa. The newspaper sector is dominated by Caxton; in terms of the number of titles it owns (adding both local and daily commercial papers). However Media 24 is dominant in terms of the circulation of newspapers.

There is a great need to broaden the availability of newspapers to the under-serviced district municipalities. However literacy must also be factored into the process of increasing availability to provinces with fewer print media products.

A challenge faced by the new print media companies is the lack of capital and therefore inability to continue operations. Some of the big print media companies assist small print publishers by providing print services, however they demand payment terms which the small companies cannot afford.

4.3 New Media

In the new media space, those who dominate the print media have repurposed their content for online Internet publication. We therefore found that Naspers, the 85% Media24 owner is a dominant player in the online space with their 24.com website / mobisite brand; and the other dominant player is Avusa with its various news offerings (e.g. the times website / mobisite) and service offerings (career junction website / mobisite). These companies have not shied away from exploiting these new technologies as part of their strategy to promote their content.

In terms of media diversity and access by disadvantaged communities, there is a long way to go towards making digital content accessible to the rural and township environments. This is because of the low computer literacy rate in South Africa in general, and particularly within the black communities.

Overall the broadcasting media has experienced transformation, but in the unregulated sectors of print and internet media, very little transformation has taken place to date.

5.0 APPENDIX A

Table 39: Total Traffic by Site according to Nielsen//NetRatings Online Ranking Report[46]

	Nielsen Online Ranking Report										
	Website	**Owner/Publisher**	**Type/Sector**	**UB June**	**UB May**	**UB April**	**Q2 UB AVE**	**PI June**	**PI May**	**PI April**	**Q2 PI AVE**
	Market Aggregate			**8,641,698**	**9,228,501**	**8,890,670**	**8,920,290**	**328,692,321**	**334,789,712**	**342,080,195**	**335187409**
1	news24.com	Media24	News	1,796,559	1,943,533	1,760,071	**1,833,388**	31,731,424	31,651,880	32,520,186	**31,967,830**
2	IOL News	Independent Online	News	971,046	1,095,226	1,077,128	**1,047,800**	11,277,219	11,941,080	13,037,597	**12,085,299**
3	MSN	MSN	Portal of Microsoft	892,697	955,234	966,847	**938,259**	11,794,976	10,743,996	11,205,264	**11,248,079**
4	Hotmail	MSN	webmail services	830,140	904,408	1,028,132	**920,893**	42,630,729	43,478,390	51,538,634	**45,882,584**
5	Webmail	Interface	Email, Messaging & Chat	702,820	758,381	721,392	**727,531**	38,007,438	39,327,646	38,705,208	**38,680,097**
6	www.mweb.co.za	MWEB	Portal, Email, Messaging & Chat	676,040	708,499	703,781	**696,107**	25,647,460	26,401,764	26,247,866	**26,099,030**
7	24.com	Media24	Web Portal	652,865	718,458	699,255	**690,193**	8,731,003	9,688,407	10,241,863	**9,553,758**
8	Vodacom4Me	Vodacom	Mobile	641,167	643,034	455,751	**579,984**	15,715,960	15,665,576	11,914,241	**14,431,926**
9	News24 South Africa	Media24	News	634,369	703,812	646,525	**661,569**	4,346,838	5,124,667	4,519,539	**4,663,681**
10	health24.co.za	Media24	Healthcare	451,161	559,666	550,623	**520,483**	3,224,676	3,854,967	3,602,021	**3,560,555**
11	www.mweb.co.za/home	MWEB	Portal	432,262	448,959	453,684	**444,968**	5,441,821	5,660,670	5,985,382	**5,695,958**
12	The Times	Avusa	News	427,430	458,217	432,249	**439,299**	3,879,353	4,077,222	3,988,162	**3,981,579**
13	mg.co.za	Mail & Guardian Online	News	416,181	482,256	502,719	**467,052**	3,763,217	4,523,287	4,601,638	**4,296,047**
14	world	Media24	News	412,617	522,068	326,942	**420,542**	1,218,995	1,440,536	1,111,455	**1,256,995**
15	fin24.co.za	Media24	Financial News	407,814	409,230	361,174	**392,739**	2,345,884	2,419,732	2,167,512	**2,311,043**
16	supersport.co.za	SuperSport Zone	Sports	401,589	427,309	460,325	**429,741**	7,031,790	7,907,859	9,115,409	**8,018,353**
17	M&G Online	Mail & Guardian Online	News	370,048	463,058	488,878	**440,661**	3,258,425	4,129,037	4,457,179	**3,948,214**
18	www.mg.co.za	Mail & Guardian Online	News	369,578	462,423	488,198	**440,066**	3,257,412	4,127,308	4,455,370	**3,946,697**

[46] *The Nielsen Online Ranking Report was obtained from the Online Publishers Association Website http://www.opa.co.za/download_files/readership/Q2_2008_Publishers_by_Total_UB.xls in November 2008. Z-Coms merely sought to classify the type of website/webpage*

	Website	Owner/Publisher	Type/Sector	UB June	UB May	UB April	Q2 UB AVE	PI June	PI May	PI April	Q2 PI AVE
19	Mail & Guardian Online	Mail & Guardian Online	News	367,378	459,569	485,280	**437,409**	3,214,805	4,070,669	4,392,078	**3,892,517**
20	careerjunction.co.za	Career Junction	Employment	330,787	345,971	341,917	**339,558**	16,260,651	15,595,055	15,154,212	**15,669,973**
21	News24 sport	Media24	Sports	324,636	300,016	308,599	**311,084**	1,921,219	1,680,203	1,751,645	**1,784,356**
22	yellowpages.co.za	Yellow Pages South Africa	Directory Services	323,396	339,261	321,418	**328,025**	3,889,534	3,756,667	3,592,706	**3,746,302**
23	News24_Beeld	Media24	News	266,242	283,540	263,259	**271,014**	7,829,181	7,360,632	7,004,819	**7,398,211**
24	women24.com	Media24	Women's Interest	263,743	269,919	255,327	**262,996**	1,443,941	1,506,630	1,497,085	**1,482,552**
25	Autotrader.co.za	Auto Trader	Motoring classified	258,797	265,821	262,314	**262,311**	12,791,806	13,040,881	12,834,886	**12,889,191**
26	News24 entertainment	Media24	entertainment	257,831	271,616	261,478	**263,642**	1,147,552	1,169,726	1,150,221	**1,155,833**
27	Bizcommunity.com	Bizcommunity.com	Marketing	250,853	251,167	237,163	**246,394**	2,692,200	2,721,305	2,620,277	**2,677,927**
28	MWEB webmail	MWEB	Email, Messaging	238,552	244,233	242,846	**241,877**	14,505,099	14,701,825	14,315,096	**14,507,340**
29	wheels24.co.za	Media24	Automotive	232,099	273,221	251,774	**252,365**	1,477,395	1,610,256	1,468,931	**1,518,861**
30	messagecentre.mweb.co.za	MWEB	Email, messaging, Chat	228,103	233,483	232,073	**231,220**	13,752,295	13,948,848	13,577,316	**13,759,486**
31	ananzi.co.za	Ananzi (Pty) Ltd	Directory Services	221,436	263,138	261,949	**248,841**	1,583,085	1,785,494	1,846,747	**1,738,442**
32	IOL Motoring	Independent Online	Automotive	200,585	200,029	204,289	**201,634**	933,739	963,843	1,000,546	**966,043**
33	Homepage	Mail & Guardian Online	News	192,268	197,953	202,607	**197,609**	1,270,763	1,374,658	1,490,353	**1,378,591**
34	Business Report	Independent Online	Bsiness News	177,383	176,854	186,163	**180,133**	604,542	621,920	651,298	**625,920**
35	IOL Tonight	Independent Online	Entertainment	176,798	177,725	189,302	**181,275**	843,454	876,574	818,002	**846,010**
36	Property24.com	Media24	Property	175,176	192,489	199,570	**189,078**	2,523,683	2,595,041	2,933,263	**2,683,996**
37	IOL Sport	Independent Online	Sports	171,535	181,110	175,007	**175,884**	780,646	775,489	782,593	**779,576**
38	www.privateproperty.co.za	Private Property	Property	166,884	162,926	170,955	**166,922**	4,297,853	4,361,750	4,714,778	**4,458,127**
39	M&G Homepage	Mail & Guardian Online	News	166,649	190,487	195,231	**184,122**	1,104,687	1,316,249	1,429,070	**1,283,335**
40	24.com News	Media24	News	164,316	172,061	184,653	**173,677**	2,431,972	2,516,045	2,949,449	**2,632,489**
41	M&G Homepages	Mail & Guardian Online	News	162,372	195,537	200,369	**186,093**	1,074,188	1,353,533	1,470,363	**1,299,361**
42	SABC NEWS	SABC	News	161,389	167,788	161,879	**163,685**	1,726,181	1,585,724	1,177,864	**1,496,590**
43	Brabys.com	Ananzi (Pty) Ltd	Directory Services	150,685	140,190	170,107	**153,661**	752,200	734,114	834,872	**773,729**
44	Easyinfo	Interface	Directory Services	147,790	152,464	153,201	**151,152**	1,216,817	1,250,948	1,289,805	**1,252,523**

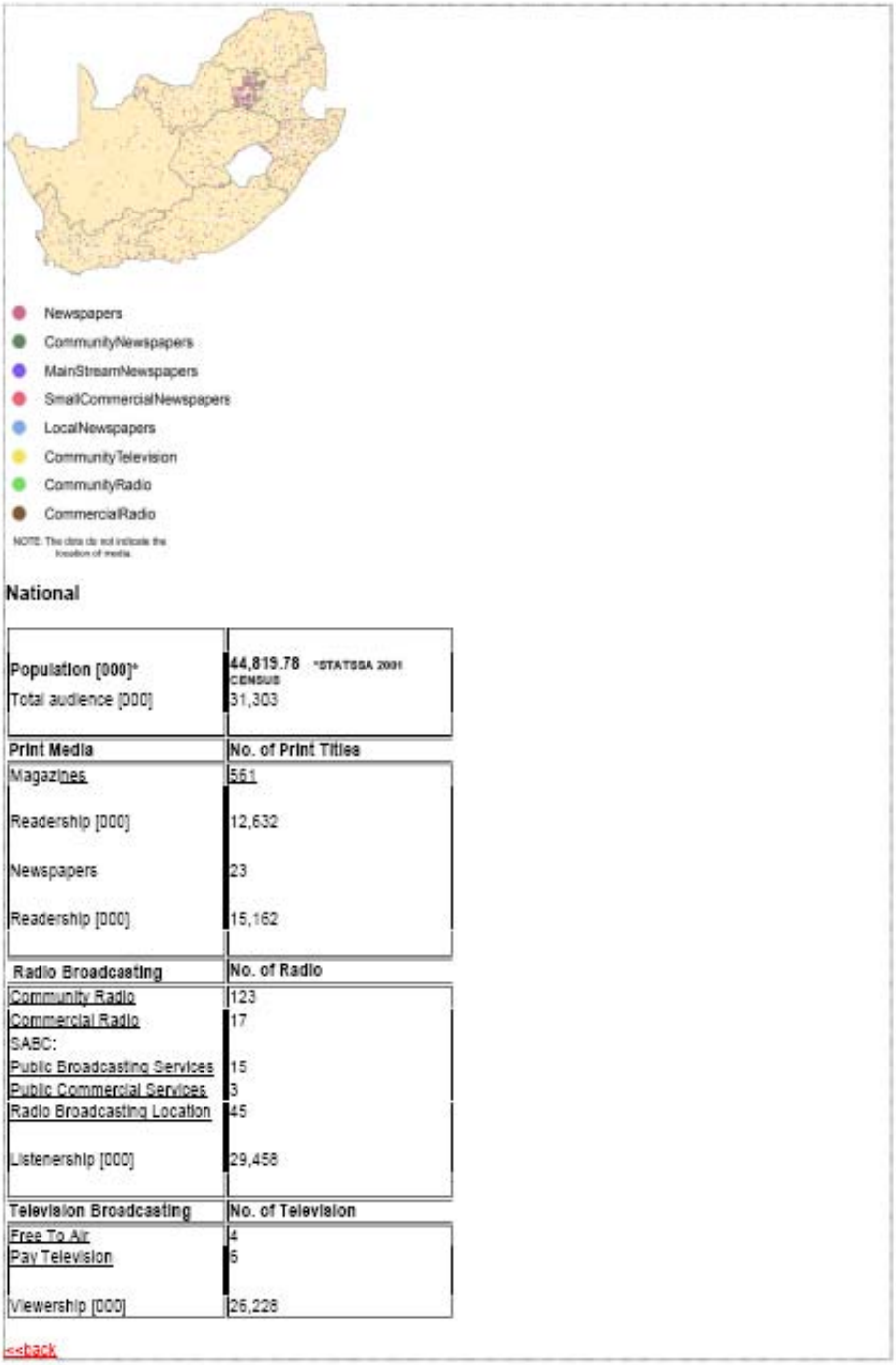
	Website	Owner/Publisher	Type/Sector	UB June	UB May	UB April	Q2 UB AVE	PI June	PI May	PI April	Q2 PI AVE
45	The Star	Independent Online	News	141,710	157,705	165,496	**154,970**	1,098,290	1,235,037	1,282,789	**1,205,372**
46	www.sowetan.co.za	Avusa	News	140,438	155,458	144,704	**146,867**	3,234,168	3,395,334	3,401,132	**3,343,545**
47	DStv.com	MultiChoice	Television	139,914	139,522	124,872	**134,769**	1,499,058	1,406,139	1,196,453	**1,367,217**
48	moneyweb.co.za	Moneyweb Holdings	Financial News	136,780	132,091	135,887	**134,919**	1,363,526	1,377,548	1,344,523	**1,361,866**
49	mineweb.net	Moneyweb Holdings	Mining News	130,209	134,829	119,456	**128,165**	398,134	406,070	374,941	**393,048**
50	businessday.co.za	Avusa	Business News	130,018	129,848	141,486	**133,784**	1,272,883	1,272,701	1,344,591	**1,296,725**
51	Die Burger	Media24	News	124,376	147,051	130,932	**134,120**	1,835,851	2,117,163	2,127,769	**2,026,928**
52	Dieburger.com	Media24	News	123,933	146,437	130,428	**133,599**	1,791,688	2,052,272	2,069,905	**1,971,288**
53	Sport24	Media24	Sports	120,461	149,863	159,773	**143,366**	905,540	1,428,860	2,041,032	**1,458,477**
54	Kick Off South Africa	Media24	Sports Magazine	117,809	90,042	81,303	**96,385**	2,231,935	1,567,065	1,372,215	**1,723,738**
55	www.engineeringnews.co.za	Creamer Media (Pty) Ltd	News Magazine	115,470	132,878	123,466	**123,938**	347,268	394,764	376,334	**372,789**
56	ioljobs.co.za	Independent Online	Employment	115,309	121,079	122,183	**119,524**	2,115,529	2,041,028	2,356,954	**2,171,170**
57	News24 scitech	Media24	Technology	113,613	130,412	123,677	**122,567**	325,854	365,242	345,539	**345,545**
58	food24.co.za	Media24	Food	113,028	117,884	109,698	**113,537**	701,938	696,479	708,760	**702,392**
59	5fm	SABC	Radio	109,257	130,421	119,014	**119,564**	1,644,124	1,826,998	2,051,673	**1,840,932**
60	itweb.co.za	ITWeb Limited	Technology	107,158	107,078	113,071	**109,102**	428,122	425,727	440,166	**431,338**
61	Careers24	Media24	Employment	105,883	111,128	99,849	**105,620**	1,640,532	1,609,442	1,549,589	**1,599,854**
62	www.dispatch.co.za	Avusa	News	98,223	104,498	82,188	**94,970**	1,008,791	1,002,677	903,090	**971,519**
63	Who's Who	Media24		94,949	99,535	96,837	**97,107**	530,191	552,663	554,175	**545,676**
64	Ananzi Site Directory	Ananzi (Pty) Ltd	Directory Services	94,195	112,057	120,225	**108,826**	163,898	192,501	213,157	**189,852**
65	24.com Blogs	Media24	Blogs	93,994	94,705	69,377	**86,025**	1,336,715	1,324,233	863,081	**1,174,676**
66	aardvark.co.za	Telkom SA	Search Engine	88,774	116,199	108,174	**104,382**	640,839	827,594	800,669	**756,367**
67	24.com Entertainment	Media24	Entertainment	84,723	102,706	95,982	**94,470**	341,522	395,829	379,583	**372,311**
68	News24_Rapport	Media24	News	84,597	86,545	78,049	**83,064**	965,854	875,957	799,556	**880,456**
69	Ananzi Mail	Ananzi (Pty) Ltd	Email, Messaging	83,295	85,053	83,390	**83,913**	8,160,972	8,384,537	8,192,507	**8,246,005**
70	News24	Media24	News	79,553	80,987	79,197	**79,912**	460,899	458,889	444,604	**454,797**
71	Kick Off Nigeria	Media24	Sports	78,712	68,612	60,742	**69,355**	764,597	647,208	521,534	**644,446**
72	www.miningweekly.co.za	Creamer Media (Pty) Ltd	Mining News	77,004	80,651	97,715	**85,123**	217,937	228,589	286,305	**244,277**

	Website	Owner/Publisher	Type/Sector	UB June	UB May	UB April	Q2 UB AVE	PI June	PI May	PI April	Q2 PI AVE
73	Kaizer Chiefs	SuperSport Zone	Sports	73,370	68,323	60,217	**67,303**	1,061,978	933,153	781,639	**925,590**
74	Sharenet	Sharenet	Financial Services	72,454	75,798	71,011	**73,088**	3,528,989	3,606,664	3,575,890	**3,570,514**
75	gallery	Media24	Social	71,848	52,089	54,012	**59,316**	195,719	165,218	157,022	**172,653**
76	MSN Spaces	MSN	Blog	70,695	73,146	70,556	**71,466**	689,015	722,314	679,514	**696,948**
77	Brabys Maps	Ananzi (Pty) Ltd	Maps	66,244	65,607	68,435	**66,762**	817,548	720,880	863,715	**800,714**
78	Rapport	Media24	News	65,658	63,059		**64,359**	295,148	276,799		**285,974**
79	GoTravel24	Media24	virtual travel agency	64,405			**64,405**	150,766			**150,766**
80	yellow pages maps	Yellow Pages South Africa	Maps	63,004	59,797	53,664	**58,822**	498,868	479,988	434,815	**471,224**
81	Phone Book Online	Yellow Pages South Africa	Online Directory	61,957	62,844	63,250	**62,684**	574,859	562,881	550,087	**562,609**
82	Ananzi Search	Ananzi (Pty) Ltd	Search Engine	61,413	82,689	76,679	**73,594**	334,593	409,021	428,883	**390,832**
83	White Pages	Yellow Pages South Africa	Online Directory	59,466	60,105	61,012	**60,194**	531,010	516,275	507,257	**518,181**
84	www.mydigitallife.co.za	ITWeb Limited	Technology/Blogging	58,514	62,780	58,203	**59,832**	140,776	135,465	133,925	**136,722**
85	Cape Argus	Independent Online	News	57,318	66,368	62,847	**62,178**	440,371	486,577	455,865	**460,938**
86	Thunda.com	Thunda.com	Entertainment News	56,602	60,059	65,850	**60,837**	4,567,108	4,822,089	5,591,583	**4,993,593**
87	cartoday.com	Ramsay, Son & Parker	Automotive	55,444	59,136	58,188	**57,589**	894,815	984,944	918,692	**932,817**
88	Thought Leader	Mail & Guardian Online	Gblogs, Opinion	55,186	70,007		**62,597**	214,514	275,130		**244,822**
89	The Times Multimedia	Avusa	Multimedia Content Portal	54,722	76,070	25,184	**51,992**	189,358	280,393	76,651	**182,134**
90	Netads 24	Media24	General Classified	54,502	57,192	51,180	**54,291**	427,935	444,204	407,417	**426,519**
91	IOL Technology	Independent Online	Technology	54,020	58,677	51,065	**54,587**	121,096	132,262	118,903	**124,087**
92	SA Good News	South Africa The Good News	News	53,933	54,947	46,527	**51,802**	144,958	138,294	129,884	**137,712**
93	Love2meet.co.za	Media24	Personals and Dating	53,235	54,463	55,529	**54,409**	2,334,502	2,366,408	2,372,296	**2,357,735**
94	Love2meet	Media24	Personals and Dating	53,184	54,400	55,394	**54,326**	2,317,221	2,346,964	2,343,537	**2,335,907**
95	search.24.com	Media24	Search engine	51,485	58,222	54,143	**54,617**	219,536	254,619	232,009	**235,388**
96	Cape Times	Independent Online	News	51,455	62,948	60,505	**58,303**	376,164	446,510	428,003	**416,892**
97	RSG	SABC	Radio	45,832	40,414	38,306	**41,517**	639,103	501,693	397,522	**512,773**

	Website	Owner/Publisher	Type/Sector	UB June	UB May	UB April	Q2 UB AVE	PI June	PI May	PI April	Q2 PI AVE
98	City Press	Media24	News	45,236	30,375		**37,806**	269,914	137,805		**203,860**
99	News24_CityPress	Media24	News	45,236	46,767	42,523	**44,842**	269,914	251,941	234,917	**252,257**
100	iolclassifieds.co.za	Independent Online	General Classified	44,804	47,738	54,876	**49,139**	615,436	632,913	817,113	**688,487**
101	jobs4u.co.za	Interface	Employment	44,499	44,508	43,933	**44,313**	383,303	385,376	412,909	**393,863**
102	IOL Classifieds	Independent Online	General Classified	43,626	46,434	53,561	**47,874**	590,528	605,762	790,448	**662,246**
103	News24_DieVolksblad	Media24	News	43,456	44,946	41,656	**43,353**	444,438	479,752	438,349	**454,180**
104	SABC portal	SABC	Television	42,299			**42,299**	176,907			**176,907**
105	Menshealth	Media24	Men magazine	41,495	29,849	29,575	**33,640**	192,919	151,473	144,519	**162,970**
106	tiscali.co.za	MWEB		40,969	45,760	44,143	**43,624**	237,367	275,029	264,911	**259,102**
107	The Times Planet Blog	Avusa	Blog	40,279	34,148	47,802	**40,743**	88,940	79,341	125,694	**97,992**
108	IOL Travel	Independent Online	M-Net Profiles	38,921	43,363	42,049	**41,444**	67,407	71,499	71,956	**70,287**
109	M-Net Profiles	Electronic Media Network	Television	38,781	43,131	37,680	**39,864**	747,060	789,620	850,912	**795,864**
110	The Witness	Media24	News	38,248	39,144	51,094	**42,829**	470,042	495,797	467,058	**477,632**
111	Pretoria News	Independent Online	News	37,232	41,516	42,309	**40,352**	264,257	288,751	296,523	**283,177**
112	IOL Dating	Independent Online	Personals and Dating	37,197	49,840	51,071	**46,036**	975,089	1,144,474	1,230,939	**1,116,834**
113	www.sundayworld.co.za	Avusa	News	35,929	36,881	29,027	**33,946**	619,664	536,929	487,426	**548,006**
114	www.qq.co.za	MWEB	Instant Messaging	35,778	36,786	37,454	**36,673**	152,884	162,022	165,935	**160,280**
115	Communities QQ	MWEB	online community	35,771	36,785	37,448	**36,668**	152,830	162,010	165,868	**160,236**
116	Daily News	Independent Online	News	34,823	38,192	34,637	**35,884**	215,146	227,986	220,604	**221,245**
117	financialmail.co.za	Avusa	Financial News	34,541	35,220	35,235	**34,999**	159,374	173,565	154,760	**162,566**
118	Sundowns	SuperSport Zone	Sports	34,055	33,096	34,077	**33,743**	347,227	325,109	387,813	**353,383**
119	Litnet	Media24	Web Journal	33,912	44,396	37,501	**38,603**	389,611	487,484	515,593	**464,229**
120	Volksblad	Media24	News	33,539	34,946		**34,243**	194,144	209,144		**201,644**
121	www.polity.org.za	Creamer Media (Pty) Ltd	Policy News	33,295	43,702	41,433	**39,477**	101,774	133,232	128,257	**121,088**
122	The Herald	Avusa	News	33,028	50,726	39,171	**40,975**	617,511	669,209	650,717	**645,812**
123	M&G Zapiro	Mail & Guardian Online	Cartoon	32,577	36,036	46,894	**38,502**	328,869	415,214	499,658	**414,580**

6.0 APPENDIX B: DATABASE INTERFACE –MAP SNAP SHOTS

6.1 National



National

Population [000]*	**44,819.78** *STATSSA 2001 CENSUS
Total audience [000]	31,303
Print Media	**No. of Print Titles**
Magazines	561
Readership [000]	12,632
Newspapers	23
Readership [000]	15,162
Radio Broadcasting	**No. of Radio**
Community Radio	123
Commercial Radio	17
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	29,458
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	26,226

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6.2 Eastern Cape



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media.

Eastern Cape Province

Population [000]*	**6,436.76** *STATSSA 2001 CENSUS
Total audience [000]	4,658
Print Media	**No. of Print Titles**
Newspapers	55
Small Commercial Newspapers	21
Local Newspapers	14
Mainstream Newspapers	23
Community Newspapers	7
Readership [000]	1,363
Radio Broadcasting	**No. of Radio**
Community Radio	16
Commercial Radio	3
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	4,356
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	3,341

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6.3 Free State



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media

Free Sate Province

Population [000]*	2,706.78 *STATSSA 2001 CENSUS
Total audience [000]	2,005
Print Media	**No. of Print Titles**
Newspapers	50
Small Commercial Newspapers	23
Local Newspapers	14
Mainstream Newspapers	20
Community Newspapers	0
Readership [000]	603
Radio Broadcasting	**No. of Radio**
Community Radio	11
Commercial Radio	1
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	1,947
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	5
Viewership [000]	1,709

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6.4 Gauteng



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media.

Gauteng Province

Population [000]*	**8,837.18** *STATSSA 2001 CENSUS
Total audience [000]	6,442
Print Media	**No. of Print Titles**
Newspapers	121
Small Commercial Newspapers	36
Local Newspapers	55
Mainstream Newspapers	24
Community Newspapers	0
Readership [000]	4,419
Radio Broadcasting	**No. of Radio**
Community Radio	26
Commercial Radio	22
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	6,210
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	6,084

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6.5 KwaZulu-Natal



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media.

Kwazulu Natal Province

Population [000]*	**9,426.02** *STATSSA 2001 CENSUS
Total audience [000]	6,385
Print Media	**No. of Print Titles**
Newspapers	117
Small Commercial Newspapers	53
Local Newspapers	32
Mainstream Newspapers	27
Community Newspapers	0
Readership [000]	2,656
Radio Broadcasting	**No. of Radio**
Community Radio	15
Commercial Radio	4
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	5,753
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	4,721

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6.6 Limpopo



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media.

Limpopo Province

Population [000]*	5, 273.64 *STATSSA 2001 CENSUS
Total audience [000]	3,375
Print Media	**No. of Print Titles**
Newspapers	58
Small Commercial Newspapers	21
Local Newspapers	12
Mainstream Newspapers	19
Community Newspapers	0
Readership [000]	1,634
Radio Broadcasting	**No. of Radio**
Community Radio	13
Commercial Radio	4
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	3,306
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	2,799

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6.7 Mpumalanga



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media.

Mpumalanga Province

Population [000]*	**3,122.99** *STATSSA 2001 CENSUS
Total audience [000]	2,329
Print Media	**No. of Print Titles**
Newspapers	56
Small Commercial Newspapers	17
Local Newspapers	16
Mainstream Newspapers	19
Community Newspapers	0
Readership [000]	931
Radio Broadcasting	**No. of Radio**
Community Radio	11
Commercial Radio	2
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	2,205
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	5
Viewership [000]	1,896

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6.8 North West



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media.

North West Province

Population [000]*	3,669.35 *STATSSA 2001 CENSUS
Total audience [000]	2,236
Print Media	**No. of Print Titles**
Newspapers	44
Small Commercial Newspapers	9
Local Newspapers	13
Mainstream Newspapers	18
Community Newspapers	0
Readership in [000]	1,066
Radio Broadcasting	**No. of Radio**
Community Radio	8
Commercial Radio	2
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership in [000]	2,176
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership in [000]	1,977

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6.9 Northern Cape



Newspapers
CommunityNewspapers
MainStreamNewspapers
SmallCommercialNewspapers
LocalNewspapers
CommunityTelevision
CommunityRadio
CommercialRadio

NOTE: The dots do not indicate the location of media.

Northern Cape Province

Population [000]*	8,22.73 *STATSSA 2001 CENSUS
Total audience [000]	775
Print Media	**No. of Print Titles**
Newspapers	36
Small Commercial Newspapers	8
Local Newspapers	5
Mainstream Newspapers	20
Community Newspapers	0
Readership [000]	300
Radio Broadcasting	**No. of Radio**
Community Radio	5
Commercial Radio	0
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	682
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	705

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6.10 Western Cape



- Newspapers
- CommunityNewspapers
- MainStreamNewspapers
- SmallCommercialNewspapers
- LocalNewspapers
- CommunityTelevision
- CommunityRadio
- CommercialRadio

NOTE: The dots do not indicate the location of media

Western Cape Province

Population [000]*	4,524.34 *STATSSA 2001 CENSUS
Total audience [000]	3,099
Print Media	**No. of Print Titles**
Newspapers	89
Small Commercial Newspapers	23
Local Newspapers	34
Mainstream Newspapers	28
Community Newspapers	0
Readership [000]	1,989
Radio Broadcasting	**No. of Radio**
Community Radio	18
Commercial Radio	6
SABC:	
Public Broadcasting Services	15
Public Commercial Services	3
Radio Broadcasting Location	45
Listenership [000]	2,822
Television Broadcasting	**No. of Television**
Free To Air	4
Pay Television	6
Viewership [000]	2,996

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7.0 APPENDIX D: MEDIA PROJECTS SUPPORTED BY MDDA

Organization	Media Type
1. Aganang community Radio	Radio
2. Agenda	Journal
3. Agenda Feminist Journal	Journal
4. Agenda Magazine	Magazine
5. AIPSA Advertising	Publishers
6. Alexandra Community Broadcasting Trust	Radio
7. Alfred Nzo Community Radio	Radio
8. Amajuba News Publishers	Printing & Newspaper
9. Amandla Publishers	Magazine
10. Amazwi Writers	
11. Ambani Communication	Newspaper
12. Asenze Youth Development Initiative	Newspaper
13. Association of Independent Publishers of Southern Africa	Publishers Association
14. Balaodi Publishers	Newspaper
15. Baobab Review (Gavaza)	
16. Barberton Community Radio	Radio
17. Bay Community Television	Television
18. Beeuchamp printing and Publishing	Printing and publishing
19. Big News	Newspaper
20. Bonteheuwel Community News	Newspaper
21. Botlokwa Community Radio	Radio
22. Bush Radio	Radio
23. Bushbuckridge Community Radio	Radio
24. Cape Town Community Television Collective	Television
25. Chalkline	Newspaper
26. Challenge Magzine	Magazine
27. Children and Broadcasting Foundation for Africa	Broadcasting
28. Coal City News	Newspaper
29. Literacy Development Project	Magazine
30. Dobsonviller	Newspaper
31. Dumile Mateza & Associates	Editorial & Research
32. Eastern Cape Hub	Media Development
33. Ekhephini Community Radio	Radio
34. Excellor Publications	Newspaper
35. Forte Community Radio	Radio
36. Franschhoek FM Radio Foundation	Radio
37. Funda Publications	Newspaper
38. Gender Advocacy Programme	
39. Genuine Magazine	Magazine

40. George Comm Media Team	
41. Grassroots Media House	Newspaper
42. Greater Lebowakgomo Community Radio	Radio
43. Greater Middleburg FM	Radio
44. Harambe Concept	
45. HIV/AIDS in the Media Project	Newsletter
46. Homeless Talk	Newspaper
47. Hope Community Newspaper	Newspaper
48. Human Science Research Council – Community TV	TV
49. IAJ	Journalism
50. IAJ Wits Course	Journalism
51. Ideals Media Company	
52. Ihlokohloko News	Newspaper
53. Iliso Community News	Newspaper
54. Litha Community Radio	Radio
55. Litha Research and Publication	
56. Inanda Community Radio	Radio
57. Indonsakusa Community Radio	Radio
58. dcdxc	Radio
59. Institute for the Advancement of Journalism	Journalism
60. Iqhawe Communications	Newspaper
61. Isibani Somphakathi News	Newspaper
62. Kalakuta Trust	Magazine
63. Karabo Youth Development	
64. Kasi 2 Kasi/2004 Calender	
65. Kathorus Community Radio	Radio
66. Khululeka Community Media	
67. Kratmedia Publications	Newspaper
68. Kwaito Bluprynts Korporation	Magazine
69. Labour Bulletin	
70. Lema Printing and Media House t/a People's Agenda	
71. Life Comnews	Newspaper
72. Luonde Media Research Centre/Makhado FM	Radio
73. Mahala Empowerment Media	
74. Maputaland Community Radio	Radio
75. Maputaland Mirror	Newspaper
76. Masilonyana News	Newspaper
77. Media & Training Centre for Health	Training
78. Media Institute for Southern Africa	Institute
79. Media Monitoring Project	
80. Mier News	Newspaper
81. Mohodi Community Radio	Radio

82. Mokopane Community Radio	Radio
83. Moletsi Community Radio	Radio
84. Mosupatsela Community Radio	Radio
85. Motheo Multi Media Institute	Radio
86. Moutse Community Radio	Radio
87. Mqomboyi Trading Co-operative Limited	
88. Nababeep Advice and Development Centre	Newsletter
89. National Community Radio Forum	Radio
90. National Community Radio Forum Investment Agency	Radio
91. NCRF Signal Distribution	Signal Distribution
92. Ndlovukazi	Magazine
93. Ndzalamana Community News	Newspaper
94. Nemato Voice	Newspaper
95. Newcastle Community Radio	Radio
96. Newtown Express	Newspaper
97. Ngulu News	Newspaper
98. Nhluvuko Media Communication	Newspaper
99. Nkangala Informer	Newspaper
100. North West on Sunday	Newspaper
101. Orange Farm Community Radio	Radio
102. Phumelelo Express	Newspaper
103. Ponelopele Newspaper	Newspaper
104. Radio Atlantis 107.9 FM	Radio
105. Radio Graaff Reinet	Radio
106. Radio Riverside 98.2	Radio
107. Radio Sunny South	Radio
108. Rainbow News	Newspaper
109. Rhodes Newspaper Course – Sol Plaatjie Leadership Institute	Institution
110. SANGONet Community Newspaper	Newspaper
111. Satyagraha	Newspaper
112. School Talk	Newspaper
113. Skhukhune Community Radio	Radio
114. Sesa Media	Newspaper
115. Shine Community Radio (Shine FM)	Radio
116. Shine the Way	Newspaper
117. Siyaya Media	Newspaper
118. Sol Plaatjie Institute for Media Leadership	Institute
119. Sosh Times	Newspaper
120. Southern Africa Media and Gender Institute	Institute
121. Star FM Community Radio	Radio
122. Street Is Waar	Newspaper
123. Takalani Community Radio	Radio

124.	Taxi Talk	Newspaper
125.	The Big Issue	Magazine
126.	The Gay and Lesbian Archives	
127.	The Voice of Tembisa	Newspaper
128.	The Voice of the Nkomazi	Newspaper
129.	Thembisa Mail	Newspaper
130.	Timbila Poetry Project	Poetry
131.	Tubatse Progressive Community Radio Station	Radio
132.	Two Mission Newspaper	Newspaper
133.	Ubuhleboshowe / Zululand Community Radio	Radio
134.	Umbele Wolwazi Education Trust	Newsletter
135.	Umgidi Magazine	Magazine
136.	Unakho Eastern Cape Community Development Project	Development
137.	Unitra	
138.	Vaaltar FM	Radio
139.	Vibe FM	Radio
140.	We are Capable	
141.	Winelands Echo	Newspaper
142.	Wits Radio Academy	Institute
143.	Woman on Farms	Training
144.	Women's net	Online
145.	Workers' World Media Production	Radio
146.	Zenzele Community Development Newspaper	Newspaper
147.	Zisize Educational Trust	Radio
148.	Ziwaphi (xhumano Communications)	Newspaper