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*Presentation for the Parliamentary Portfolio Committee on Communications, 19 August 2014*

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# **SOUTH AFRICAN MEDIA: SECTOR ANALYSIS**

# Introduction

*The Media Policy and Democracy Project (MPDP)* is a joint collaborative research project between the Department of Communication Science at the University of South Africa (UNISA), and the Department of Journalism, Film and Television at the University of Johannesburg (UJ). It was launched in 2012, and aims to promote participatory media and communications policymaking in the public interest in South Africa.

MPDP's three areas of work:

- Media diversity and transformation
- Media accountability
- ICT's and public interest communications policy

# Purpose of presentation

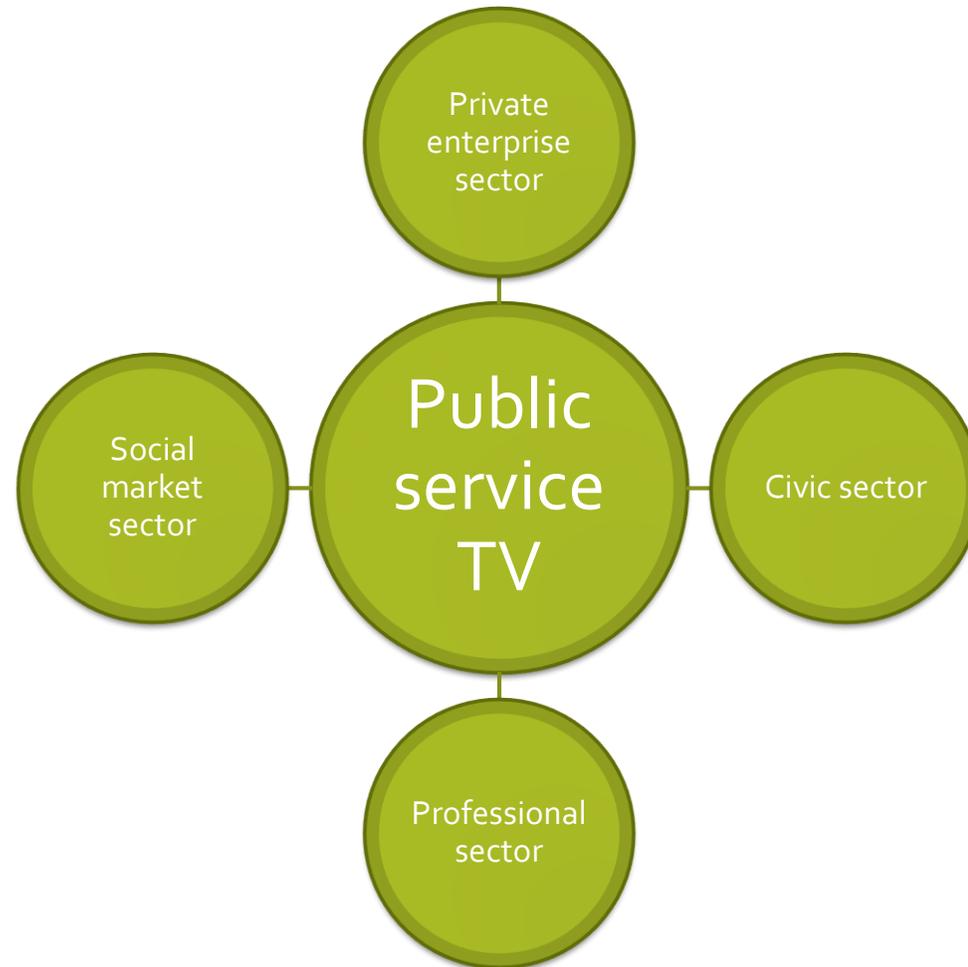
- Suggest a framework for the committee's oversight and legislative work, including evaluation of portfolio organisations
- Propose a normative framework for the South African media system
- Analysis of strengths and weaknesses in South African media system based on normative framework
- Analysis of particular sectors and legislative issues
- Flagging of specific areas that require attention

# AN IDEAL MEDIA SYSTEM?

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Some normative concepts

# James Curran's democratic media model



Source: Curran 1991: 82-117

# Defining media transformation

“Successful transformation will be achieved when the media reflects in its ownership, staffing and product, the society within which it operates, not only in terms of race, but also socio-economic status, gender, religion, sexual orientation, region, language, etc. This is only possible if access is opened again in ownership, staffing and product not only to the emerging black elite, but also to grassroots communities of all colours” – Ron Krabill and Mashilo Boloka

Source: Krabill and Boloka 2000: 9.

# THE REALITY

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South Africa's media system 20 years into democracy

# Media concentration and diversity in SA

- Different methods of measuring levels of economic media concentration
- HHI – measurement of market power, but threshold set for other markets may not be appropriate for the media
- Noam Index - measures market power (HHI) and the pluralism of a market (number of voices)
- Noam index applied to SA – moderate concentration when considering individual titles, but high concentration when considering holding companies
- Media access less pluralistic in small localities, and for LSM 1 – 4
- Greatest pluralism in radio and in the LSM 8-10 bracket
- Social diversity/ diversity of content?

Sources: Potgieter and Angelopulo 2013; Potgieter and Angelopulo 2014 .

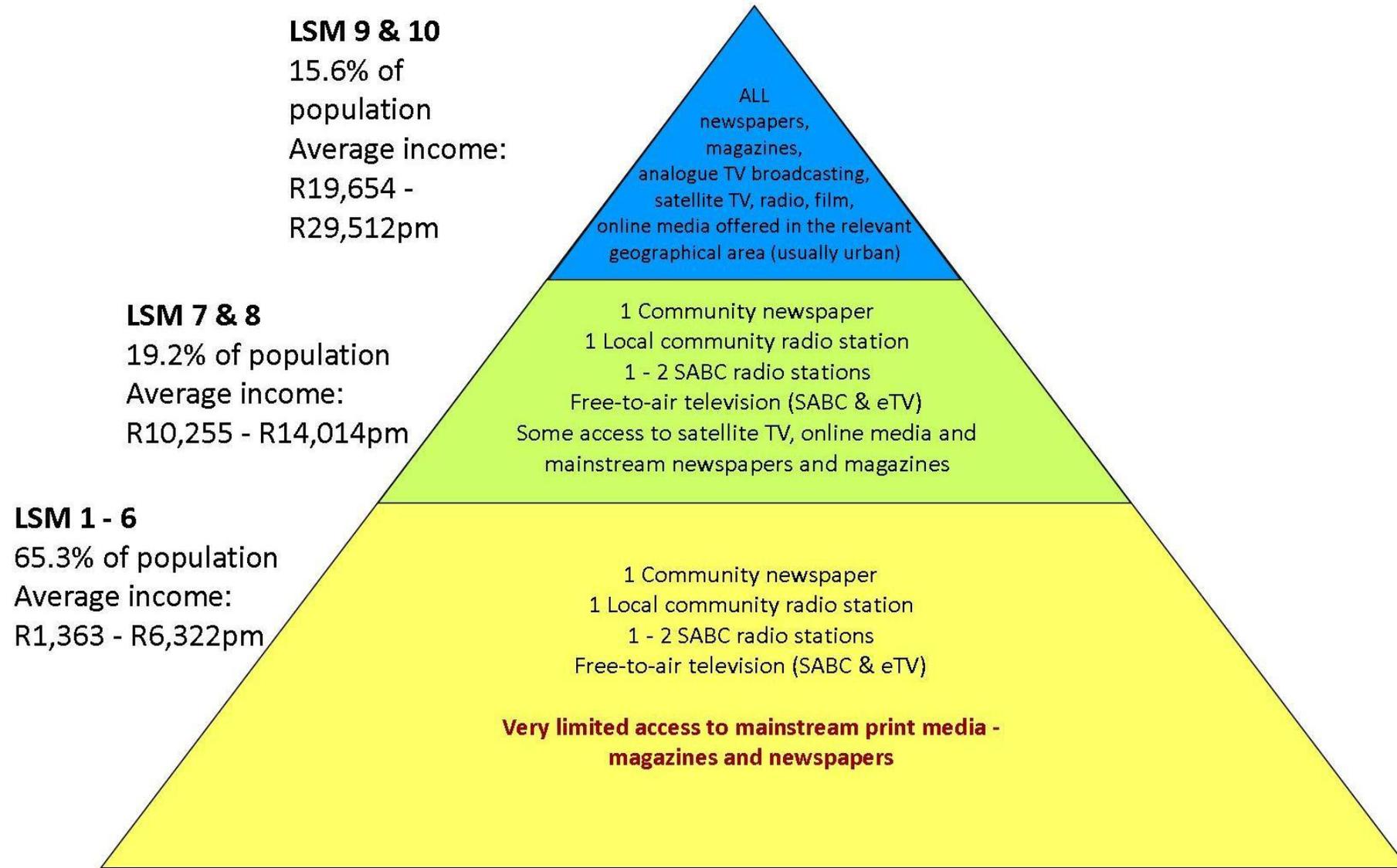


Figure 1: Media bundles in South Africa, Dr. Julie Reid, Department of Communication Science, Unisa and Media Policy and Democracy Project, 2012

# IMPACT ON MEDIA CONTENT

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Some examples

# Area of strength – investigative reporting

## Findings of 'NKANDLAGATE' - a critical textual analysis of the press coverage

Findings of a research report, conducted for the Media Policy & Democracy Project: a critical discourse analysis of the *City Press* and *Mail & Guardian* coverage of Nkandlagate between Sept 2012 & Sept 2013. ('media' here below refers to *City Press* and *M&G* only)

1 WERE THE MEDIA HOSTILE TO THE ANC?

**NO.** There is **no evidence** of undue hostility from the media. There is evidence of detailed and constant analysis, & calls for access to **information**.

3 Did the media operate to the detriment of the public interest?

**NO.** It would have been wrong of the media **NOT** to report on the story. The media's persistent calls for access to information that citizens are constitutionally entitled to serve the public interest.

5 Did the ANC act to the detriment of the public interest?

**YES.** The ANC and security cluster officials displayed consistent reluctance to release information about the public funds spent on Nkandla - information to which citizens are constitutionally entitled.

4 Did the media treat the protection and promotion of media freedom as more important than responsible and ethical reporting?

**NO.** The Nkandla saga has been a test of the media's willingness to protect their freedom of speech and they have done so with determination. There is no evidence that responsible or ethical reporting were neglected in the pursuit of media freedom.

6 Was the ANC hostile toward the media?

**YES.** Officials consistently responded in tones of reluctance, impatience, righteousness and arrogance. The President attempted to present himself as the victim instead of accepting the responsibilities associated with his office.

7 Whose voices did the media include and how were these voices positioned?

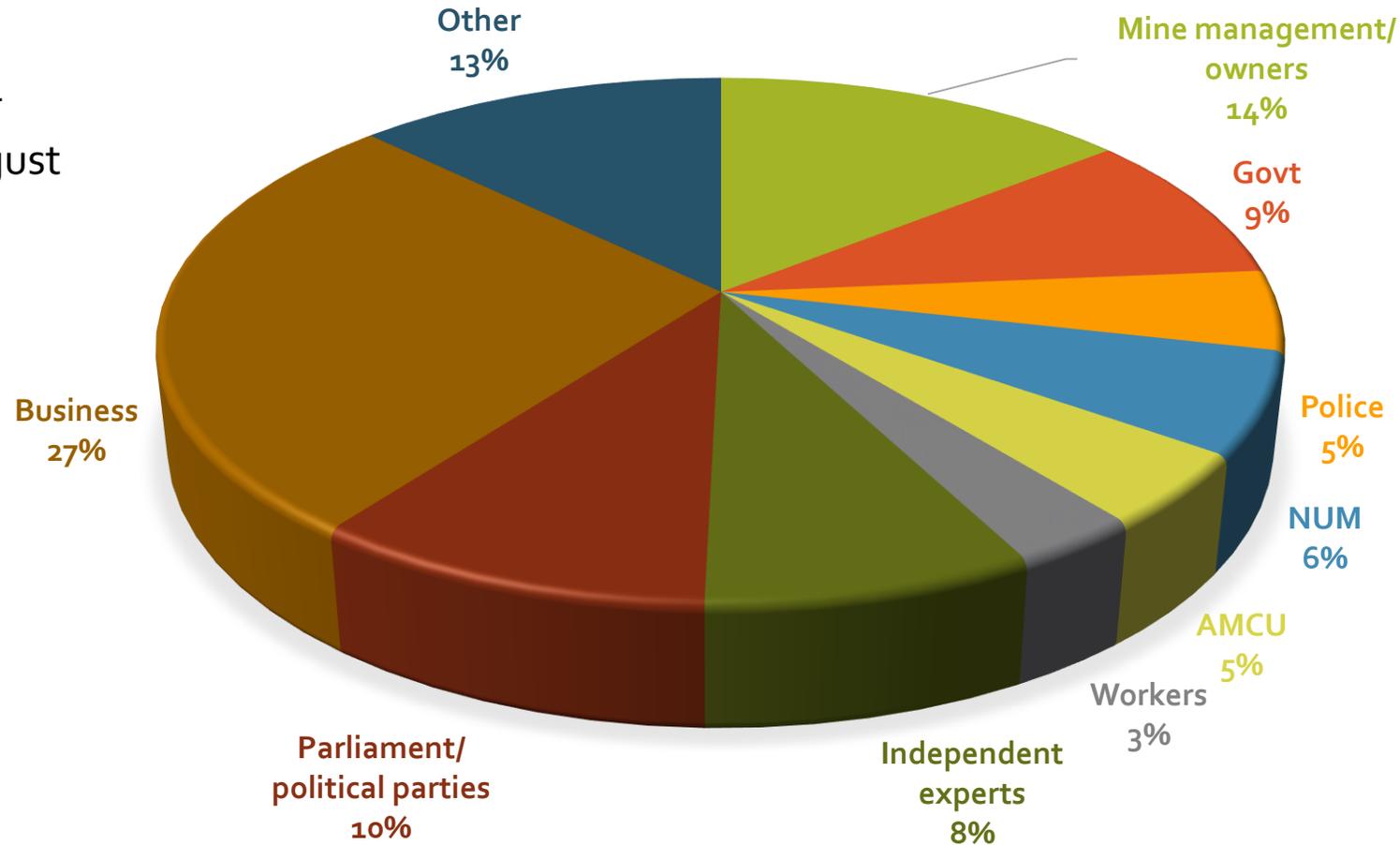
Coverage was confined to the voices of the social elite, politicians, lawyers, civil society leaders & public intellectuals. Voices of ordinary South Africans were not frequently represented.

2 DID THE MEDIA ATTACK THE DIGNITY OF ANC POLITICIANS?

**NO.** The media took care to argue points logically and not engage in *ad hominem* attacks. Deriding authoritarian behaviour is not an attack on someone's dignity.

# Area of weakness – class and media

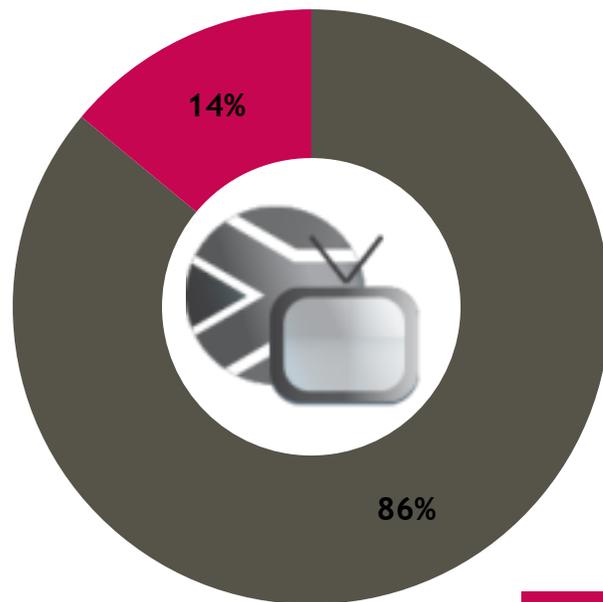
Marikana/ Lonmin stories - newspaper sources (13 - 22 August 2012)



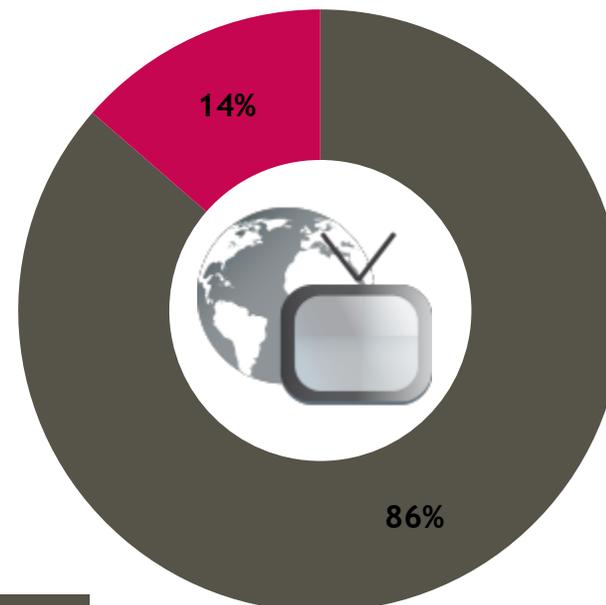
Newsclips provided by The News Monitor. Newspapers sampled: Business Day, The Star (including Business Report), The New Age, Citizen, Mail and Guardian, City Press, The Sunday Times and Times, Sowetan, Beeld, Die Burger, Sunday Independent, Financial Mail. Total number of newspaper articles: 153. Source: Duncan 2013.

# Women not on news agenda

Distribution of coverage between the genders:  
SA TV



Distribution of coverage between the genders:  
International TV



Female

Male

Women are remarkably underrepresented in both South African and global television news media with only 14% of the protagonists reported on being female. Breaking the glass ceiling is not just a struggle for women in their professional development, but also transcends to their global relevance.

Basis: 6 306 reports in 6 SA TV news programmes and 90 853 reports in 37 international TV news programmes

# ELECTION REPORTING TRENDS

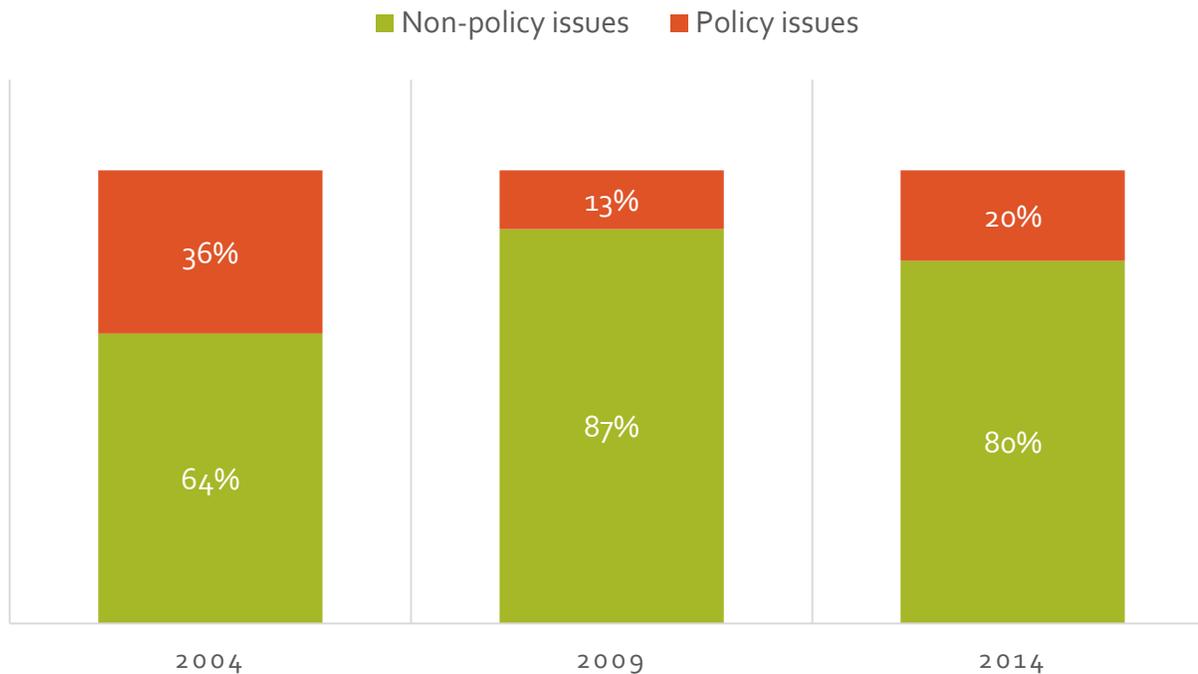
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Some observations

# Trends in election reporting

- Reportage overwhelmingly fair and neutral. Little evidence of overt bias
- But, coverage tends to lack depth
- Under-reportage on policy issues

POLICY VERSUS NON-POLICY ISSUES – 2004 - 2014

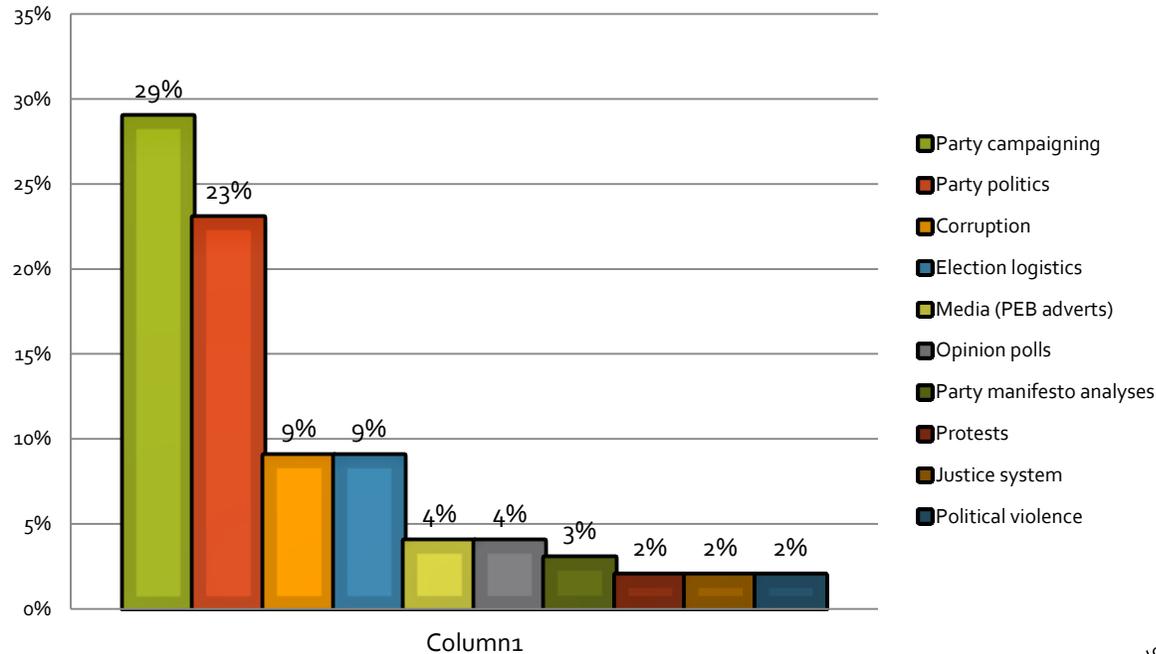


Source: Duncan 2014, based on Media Tenor statistics

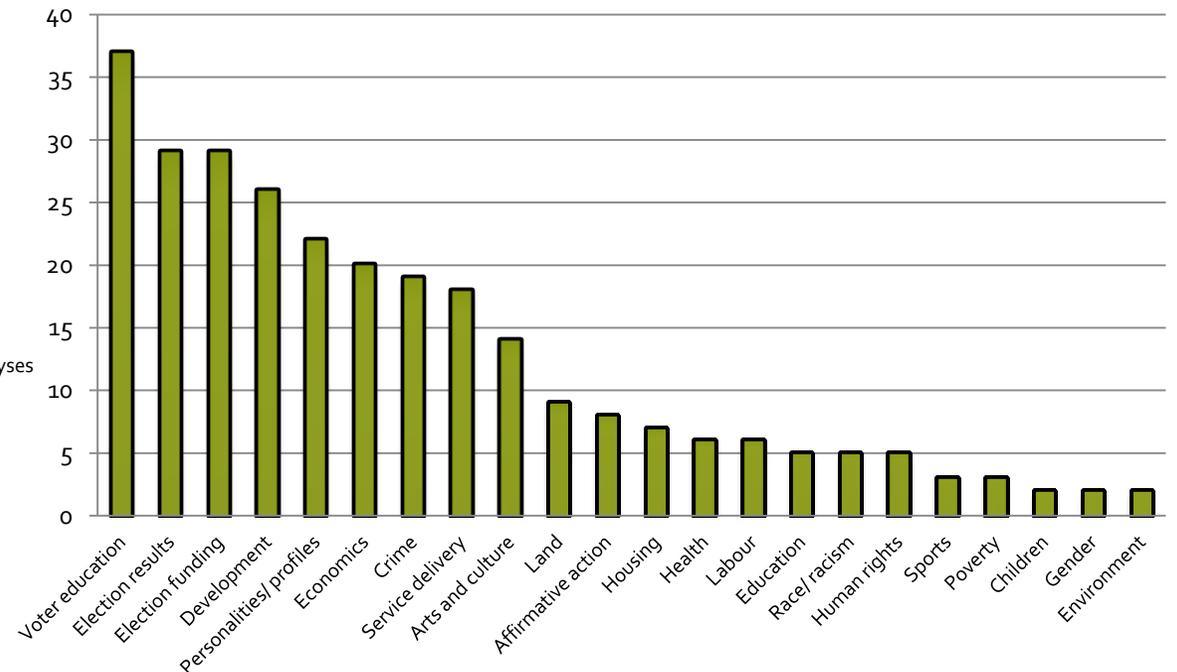
# Trends in 2014 election reporting

Afrobarometer: jobs and unemployment remained top of mind for South Africans (70%), followed by crime (30%), housing (29%), corruption (26%), poverty (21%), infrastructure/ roads, education and water supply (14%), health and electricity (12%) (Afrobarometer 2012). But this was not what was covered.

**Top 10 topics covered**  
(89% of total)



**Marginalised issues**  
(Topics <2%. 8% of total)



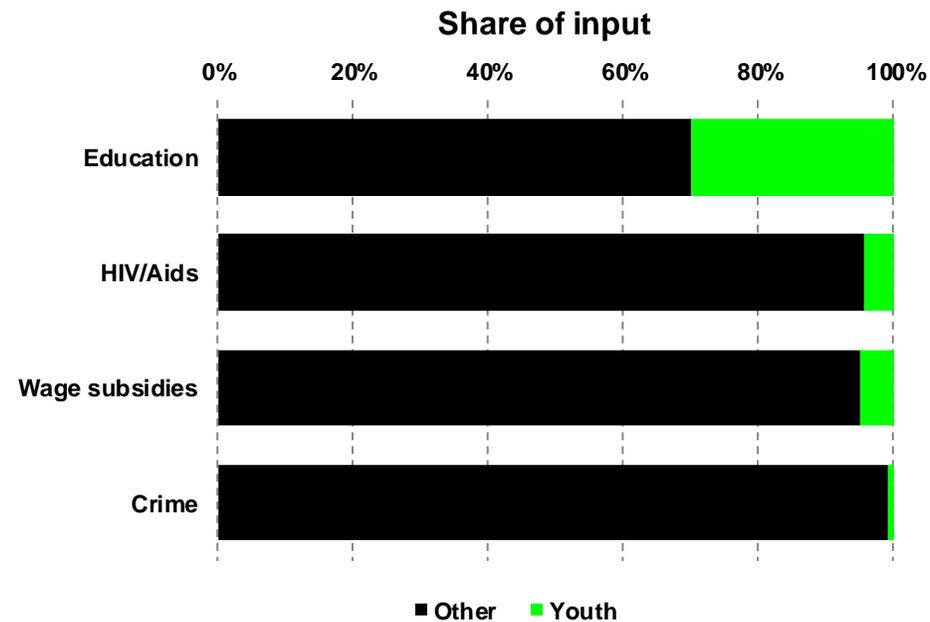
Source: Media Monitoring Africa graphics in Duncan 2014

# YOUTH AND MEDIA PERFORMANCE

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Summary of a baseline study of youth, the media and the public sphere in  
South Africa

## The youth's input on issues of importance generally minimal



With the exception of education, youths had little input on issues closely linked to them. The youth's voice was particularly lacking in regards to crime.

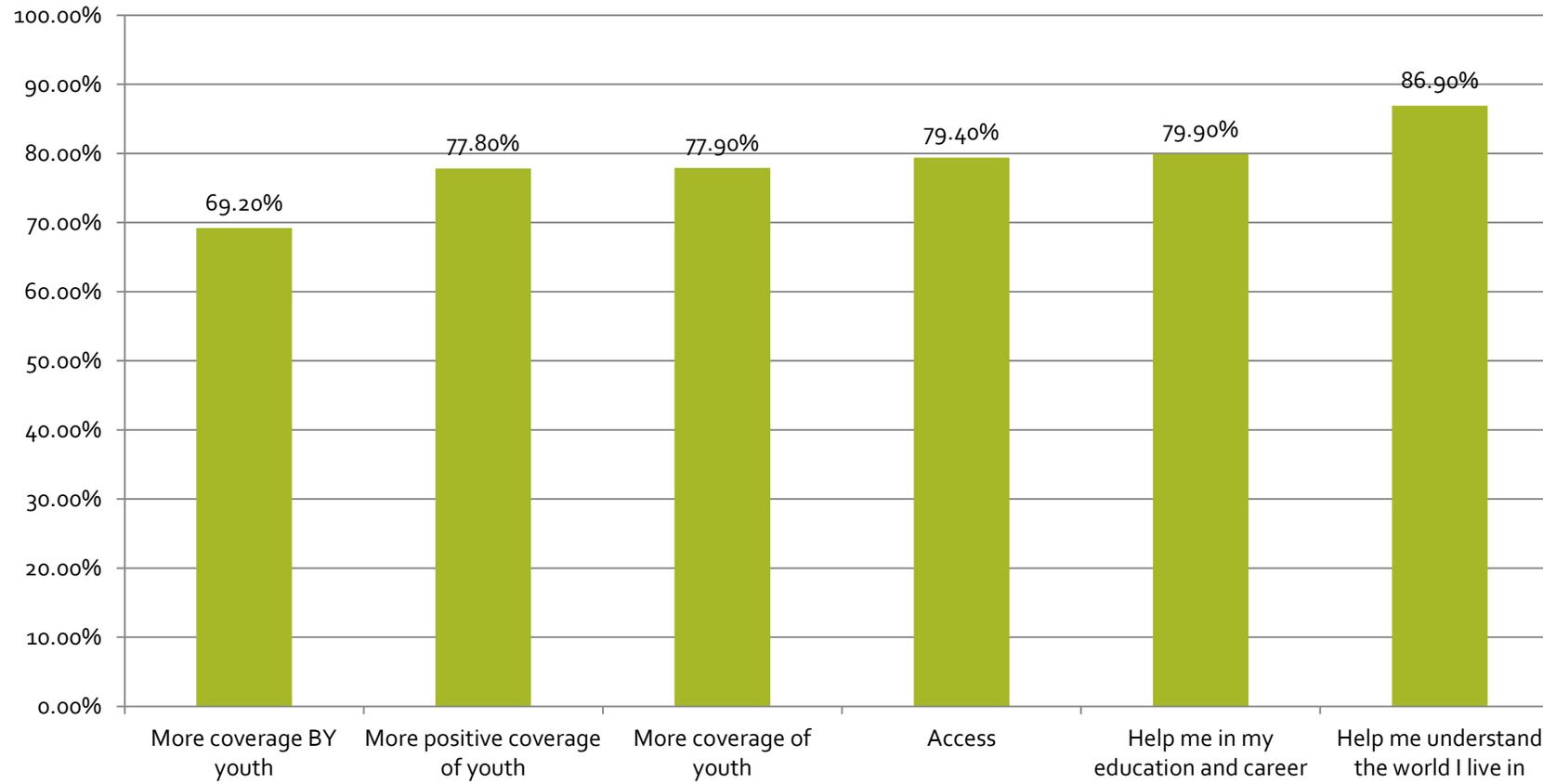
Basis: 17706 statements in SA media over time

# Youth views on media performance

Specific issues	Performance
Credibility of media	Low across the board. SA TV news (58%), radio news (55%), mainstream newspapers (52%), magazines (34%), tabloids (19%)
Provision of in depth coverage	Lower scores than credibility. SA TV news (45%), radio news (37%), mainstream newspapers (52%), magazines (34%), tabloids (19%)
Covering a range of issues	Low across the board. SA TV news (50%), radio news (50%), mainstream newspapers (52%), magazines (40%), tabloids (36%)
Provision of relevant information	Again, low scores. No media scored above 50%. Mainstream newspapers (39%).
Media enjoyment	No media scored about 50%. Mainstream newspapers (47%)

Source: Malila et al 2013

# What would make media more relevant for the youth?



Source: Malila et al 2013

# Media transformation strengths and weaknesses

- Major transformation gains, freedom and independence key strengths
- But, social inequalities = media inequalities
- Media complaints bodies do not deal with the 'real sins of the news media...[these being] sins of omission and long term distortions' (Claude-Jean Bertrand in APC 1996).
- Income main determinant of pluralism, too little diversity across the board
- Common viewing and listening spaces (public sphere)?
- Digitisation and fragmentation
- Too much state steering or too little?
- Three tiers of broadcasting or one tier with two subsidiary elements?
- The danger of two television systems – DTT as 'poor man's television'

# SECTOR ANALYSES

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Observations on performance of sectors and portfolio organisations

# SABC and public service broadcasting

- Broadcasting Act of 1999, as amended
- Global challenges to PBS in the light of the digital multimedia environment
- Why is public broadcasting still needed in the era of media abundance?
- From public service broadcaster to public service communicator
- Major transformation gains since 1994 – clear legislative mandate, editorial policies, universal service targets, from state to public broadcaster
- Commercialisation, little public funding. Is it constituting a public sphere?
- Independence – Articles of Association most likely unlawful
- SABC losing credibility, audiences

# Community broadcasting

- Community radio listenership doubled since 2004
- Financial fragility of sector – reliant on government support, programming, advertising income unstable
- Class licencing. Problems of first come, first serve approach. Amendment needed so that Icasa considers the objectives of the sector
- DoC funding of community radio – underspending, lack of systems, susceptible to political manipulation
- No qualitative research on programming and its contribution to quality of debate
- Community television – largely commercial stations in disguise?

Sources: Pygma Consulting, 2011 and Duncan and Glenn, 2010

# Community print

- Sector recovering after years of weakness
- Increased diversity
- Print and Digital Media Transformation Task Team (PMDTT)
- BUT, faces major competitive pressures, ongoing complaints of unfair practices
- Competition Commission/ Tribunal and problem of creeping acquisitions
- Corporate advertising, the advertising agency and the advertising procurement industries are skewed to the detriment of community print media
- 30% of government adspend to community media – voluntary or mandatory?
- Legislative cap on press concentration – how big is too big?

# Media Development and Diversity Agency

- Media Development and Diversity Act (MDDA Act)
- GCIS estimated that R500 million would be needed to make a substantial difference to the media landscape.
- Funding proposal was revised downwards to R256 million over five years. This means that the body that was eventually established was a shadow of what was initially envisaged.
- Within available constraints, clearly made a significant contribution to community media diversity
- BUT, need for independent review of MDDA – how effective has it been?
- How to measure levels of media diversity? Need for media diversity measurement tool.
- Voices of women, youth, workers?

(Sources: Pillay, 2003: 415; Skinner, 2005).

# Government Communications

- Comtask argued that government move away from the role of direct communicator.
- Comtask - government should adopt a two-way, participatory, dialogic approach to communications, while providing citizens with the informational tools for self-empowerment.
- Government communications should be about talking *and* listening.
- Split head of GCIS from cabinet spokesperson (Anton Harber's suggestion)?
- Communication of government departments with media highly uneven – pockets of excellence, but some poor communicators
- Unevenness across local government, need for a comprehensive communications plan

(Sources: Comtask, 1996; Harber 2010; Kutu Consulting 2009)

# Press Council of South Africa reforms

- Shift from self-regulation to public/ press co-regulation
- Removal of waiver, more general acceptance of qualified third party complaints
- More resources for Press Council, establishment of public advocate's office

## PROMINENCE OF THE SANCTION

**2009-2012:**

**Complaints sanctioned**

Prominence stipulated: 25%

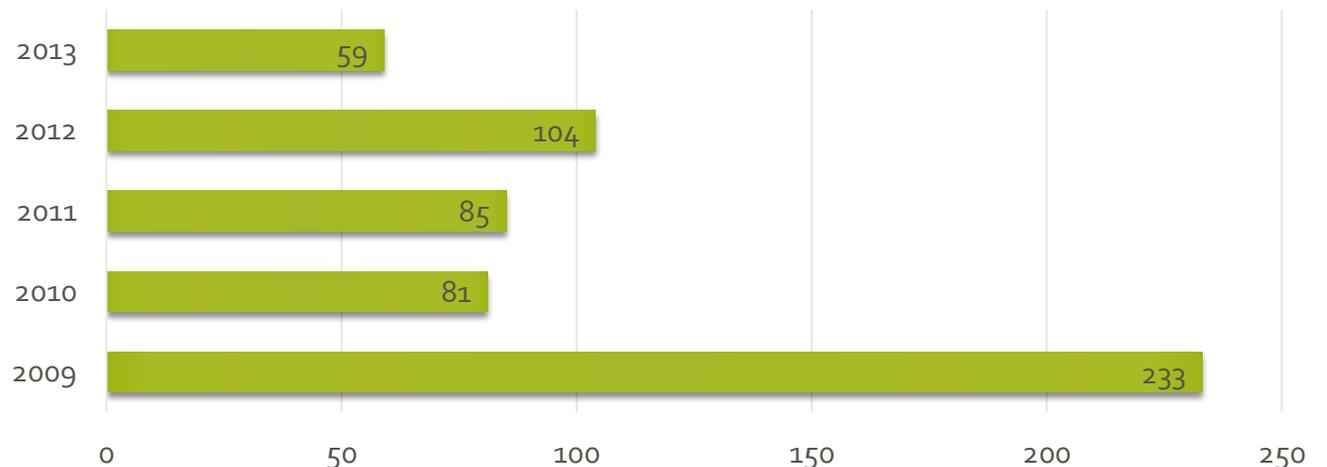
**2013:**

**Complaints sanctioned**

Prominence stipulated: 93.84%

Adherence by publications at 100%

## Number of days taken to resolve complaint (with ruling)



# Independent Communications Authority of South Africa

- Legislation (Icasa Act) generally meets best practice guidelines (clear roles, most licencing controlled by Icasa, etc)
- Effectiveness of Icasa, especially in relation to SABC.
- Lack of competition in commercial free to air and subscription markets. Market studies?
- Danger of sidelining broadcasting and content issues. Need for content-orientated councilors
- Underfunded, BUT also underspending on key performance targets
- Amendments on community broadcasting class licences
- Appointment process of councillors – is it working?
- Nine full time councillors – too many? Conflict with CEO role?

(Source: Open Society Foundation research on effectiveness of Icasa, forthcoming)

# Regulation of films and publications

- Film and Publications Act of 1996, as amended
- Need for a credible regulator that regulates, not censors
- De Reuck judgment, artistic/ aesthetic expression and context
- 'XXY', 'The Spear' and 'Of Good Report' – need for well-founded decisions
- Repealing pre-control of publications (s16(2))
- No aspect of broadcasting should be regulated by FPB
- Definitions of sexual conduct in XX category overbroad, need to be amended

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