

Who'll survive the next decade?

 By [Harry Herber](#)

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Hell, in the blink of an eye, it's 10 years later. I would not have thought a decade would fly by so quickly, but there you are. And if you asked me if a whack had changed in that time, I would've answered "not so much".

I mean, after all, agencies have remained more or less the same, and media, well, media come and go. So 99% has stayed the same, surely? Margins are still tight, great campaigns, few far between, and though there is a new station here, or a print title there, I would have said, same old, same old. That was until I delved into the archives and found one of the first articles I wrote for *The Media*.

I looked at the ad numbers. And I thought it would be worthwhile comparing those numbers to today's numbers. Now I know Ad Dynamix is constantly changing, improving and altering, so really the actuaries among us would say you can't compare ad spend from 10 years ago to today's numbers. Well, too bad, I'm going to. And boy are there a couple of surprises! For those who care, the numbers I'm comparing are 12 months ending August 2002 vs 12 months ending May 2012.

There are some startling revelations, which I'll come to shortly. But as is the wont of communications people, the first impression one gets from the analysis is that everything has exploded. There were 12 media categories in the good old days of a decade ago.

Today, there are 38! What used to be known as outdoor for example, today is 10 sub-categories, including important data relating to 'premise signage'!

What the fragmentation does is muddy the water when it comes to comparing A to B. But I did have a shot at it, and came up with the two charts - one reflects the share of the media type 2002 versus 2012, and the second the share of spend that particular media type attracts today versus a decade ago.

| Growth for Major Media 2012 versus 2002: | |
|--|---|
| Daily Press | 233% |
| Weekly Press | 229% |
| Cinema | The 2 figures are too disparate to compare! It's nonsense |
| Radio | 363% |
| OOH | 363% |
| TV | 330% |
| Consumer Mags | 219% |
| Business and Trade Mags | 153% |
| Community Newspapers | 394% |

| | |
|---------------------|-------|
| Internet | 1575% |
| Total Market | 305% |

So what do the growth rates tell us? Firstly, can you believe spend has tripled? Yes, tripled. One sees radio, out of home media, TV all performing ahead of the market.

Internet has certainly come into its own from a new-born to a precocious teenager. And the laggards are apparent. But if one had to recognise any single effort, its hats off to the community press guys. Not a glitzy, glamorous, easy to sell concept. One that you really have to work on, and one that obviously delivers to its advertisers. Also, their performance should be seen in the context of an environment where the balance of print is really struggling.

Now given these growth rates, how has the share of advertising been affected over 10 years?

| Share of advertising: 2002 vs 2012 | | |
|------------------------------------|-------|-------|
| Daily Press | 15.3% | 11.5% |
| Weekly Press | 7.0% | 5.2% |
| Cinema | 0.6% | 1.7% |
| Radio | 12.4% | 14.6% |
| OOH | 3.9% | 4.5% |
| TV | 43.1% | 46.0% |
| Consumer Mags | 9.2% | 6.6% |
| Business/Trade Mags | 3.0% | 1.5% |
| Community Press | 4.4% | 5.7% |
| Internet | 0.5% | 2.5% |
| Other | 0.5% | 0.2% |

Takeout? The print picture is just so depressing! (With the exception of community papers as mentioned). Certainly a medium in crisis. I know and recognise there are exceptions. But I feel on a macro-scale it is an industry that concentrates on keeping busy rather than productive. It spends inordinate amount of time making cosmetic and editorial tweaks. But as yet, it has not tried to repackage or re-engineer its revenue stream from advertising, nor changed one iota in how it presents itself to the communications industry. In reality, emphasis is on yield, sales targets and budgets. All of these are inward looking initiatives, though pressure is massive on the ad-sales divisions to deliver. Despite them having been furnished with no tangible new thinking or approach. A medium that hasn't cracked the digital evolution of its product yet, and is highly defensive when asked about it's very apparent decline in fortunes on all fronts.

A true recipe for disaster, and if not addressed, in 10 years' time they won't have to worry.

ABOUT HARRY HERBER

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