

Kaya FM: the challenge of an afropolitan positioning

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Introduction

The lifelong mission of Kaya FM's managing director, Greg Maloka, had been to tell the African story refreshingly so that lives would be transformed and minds shaped for good. In his 10 years at the helm of Kaya FM, he had sought to achieve this by reinforcing the station's positioning as the "home of the afropolitan" and providing content that enabled listeners to live out their Afropolitan identity. However, now, in the first quarter of 2018, the station was facing stiffer competition than ever and its future was looking less secure than he would have liked. Sales revenues were down and listener numbers had not grown as projected. He had to find a way to preserve Kaya FM's future while staying true to its Afropolitan positioning.

South African radio shaped by apartheid

Kaya FM's mission and positioning were deeply rooted in the history of radio in South Africa. Radio was a vital tool in the lives of South Africa's people. Many depended on it for information and education, and the medium had played a dominant role in shaping South African society (Ngubane, 2006). A report by consulting firm, PricewaterhouseCoopers, showed that radio was the predominant medium for providing information to the South African public, reaching more than 88% of rural and urban dwellers in a typical week in South Africa (Stuart and Chotia, 2016). For the rural poor, radio was the best channel to get news and practical information, and to hear the views of their neighbours. The South African Advertising Research Foundation estimated that South Africans listened to the radio for more than 3 h a day (Music in Africa, 2015).

The state-owned South African Broadcasting Corporation (SABC) dominated the South African airwaves and the apartheid government had used the power of radio to promote its agenda (Music in Africa, 2015). The apartheid-era radio stations categorised people based on race and language, so black people received radio broadcasts in their local language, but, noted Maloka, only as a political mechanism to promote apartheid propaganda. These stations primarily targeted listeners in rural areas. According to Maloka: "the SABC served the black audience with a very inferior, low-quality broadcast service. For example, Radio Zulu and Radio Xhosa were done in your local language, and the type of advertising that used to go there was this low-quality, mass-branding kind of thing" [8].

Thus, during the apartheid era, black communities had limited access to urban radio (Ngubane, 2006). Maloka noted, "South Africa was ruled by apartheid, and apartheid was a law of segregation and that fabric of racism filtered through every industry because it was a way of life. That is how people lived. Black people were put in townships, and that is where we lived, and all we were was labour". In the radio industry, this mindset began to change in

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Disclaimer. This case is written solely for educational purposes and is not intended to represent successful or unsuccessful managerial decision-making. The authors may have disguised names; financial and other recognisable information to protect confidentiality.

the early 1980s through the efforts of independent radio stations broadcasting from the “independent” homelands of Bophuthatswana, Ciskei, Transkei and Venda [1]. The emergence of these independent stations provided a huge impetus for the opening of the airwaves in years to come. Maloka explained: “this is how Radio Bop [Radio Bophuthatswana] came about. This is how 702 [Talk Radio] came about. Because they used to broadcast from ‘outside’ South Africa in Ga-Rankuwa, which was then in Bophuthatswana” [9].

Radio Bop broadcasted to listeners in areas such as Alexandra, Pretoria, Soweto and Tembisa (all in present-day Gauteng). From the outset, Radio Bop had talented people and the resources of a modern broadcasting station. Listening to the station proved to be revolutionary for Maloka, Thabo Mokwele (known as T Boss, host of The Best T in the City) and their friends. “Radio Bop was the first station that gave us a real taste of what urban radio should sound like”, said Maloka. “For the first time, black audiences were served with bespoke urban radio services. This was now like getting urban radio for the first time, in the way it should be, in your own backyard, on your own frequency, on FM, in stereo. It was a great sound. Listening to Radio Bop was refreshing. Politically, it was also emancipating because through music and through that kind of station, you start to realise that your lives were not in fact what the apartheid state was trying to decide for us” [10].

Mokwele explained that for him Radio Bop played a big part in beginning the emancipation journey. “People were made to believe they could become something worthwhile. It was during the time of Radio Bop that many young black South Africans became very much alive to their role in the black struggle, and thus, contributed in various ways to propel the Afropolitan revolution”, he said [11].

Maloka saw the SABC’s establishment of Radio Metro in 1986 (it later changed its name to Metro FM) as an attempt to contain the increasing influence of Radio Bop. The station was able to assemble some of the best radio presenters and programme managers, and ushered in a new dawn of radio programming. “Obviously, Radio Metro became big very quickly”, said Maloka. Nevertheless, he felt that, while Metro was serving the needs of black audiences, the station was still under the control of state machinery and so was not exploiting its full potential. “Radio Metro was limited, in that the only power it wielded was the fact that it had millions of listeners, but it was always at the mercy of advertisers, and survived because they were inside the SABC”, he said [12].

A new era

A new era for radio became possible after the democratic government came into power in 1994. It was at this point that the government opened up participation in radio broadcasting to private individuals.

The SABC began to sell off some of its stations, thus creating a range of commercial stations that were outside state control ([South Africa’s radio stations, 2006](#)). In 1996, six important SABC radio stations were sold to private entities. In 1997, eight new commercial radio stations were licensed to operate in Johannesburg, Cape Town and Durban, amongst them YFM and Kaya FM in Johannesburg ([South Africa’s radio stations, 2006](#)). For Maloka, “the consequence of the deregulation was that black audiences could now be targeted with new and enriched radio formats”. Neil Johnson, head of programming at Kaya FM explained, “Kaya gets its license in 1997, so we start with this euphoria of independence: freedom-coming, post-elections, black ownership, people running their own stations and doing their own thing” [13].

The home of the afropolitan

Based in Gauteng, South Africa’s most populous province, and targeting a mainly-black, urban audience between the ages of 25 and 49, Kaya FM’s name was derived from the

isiZulu word for “home”. The station used this name to position itself as “the Home of the Afropolitan” (described by Kaya FM as a mature, sophisticated, socially conscious individual rooted in an African heritage) (Kaya FM, 2021). The association with “home” was intended to resonate with the station’s listeners as a place to find comfort, encouragement and information that was relevant to their lives. Given South Africa’s apartheid history, Kaya FM’s purpose was to create a platform for social change. Thus, the country’s history influenced every element of the station’s programming and positioning (Kaya FM, 2021).

The term “Afropolitan” was first used in 2005, in the work of a Nigerian/Ghanaian author, Taiye Selasi, who described Afropolitans as “not citizens but Africans of the world” (Tutton, 2012). Her initial writing focussed on the complexities of the multicultural identities of Africans living in the diaspora. The term later became popular not only amongst the African diaspora but also amongst young, urbanised Africans who were politically active and culturally aware of their roots, while at the same time being globally-minded, desiring a positive change in the continent (British Council, 2021).

Maloka described an Afropolitan as “a person born in Africa, who lives in Africa and sees Africa as their space. Africa is where they invest their time, money and ideas. They do not have dual citizenship. This is their home. Everything is rooted and centered around all that is Afrocentric. Being an Afropolitan is both a physical and emotional experience; it is not about colour, it is about what your heart dictates” (Tshabalala, 2017) (Exhibit 1 for Kaya FM’s audience persona).

The station combined talk and music in its programming, with a ratio of 60% music to 40% talk. Musically, Kaya FM offered listeners a blend of soulful, adult-contemporary music and other smoother sounds such as R&B, kwaito [2] and jazz. All of its music had strong African roots. In addition, the station provided news, sport and phone-in discussions on thought-provoking issues that affected people in the township, urban and peri-urban communities of Johannesburg. Kaya FM’s discussions focussed on issues such as politics, education, entertainment, family, health, security and technology. Programming was influenced heavily by views that listeners shared with the station on a daily basis [14].

Kaya FM presenters

Kaya FM’s presenters were a mix of personalities, chosen to appeal to the station’s Afropolitan audience (Exhibit 2 for some of Kaya FM’s on-air personalities and programmes). The presenters used English as the predominant language because this was the *lingua franca* of Johannesburg, but they would occasionally also use other local languages: the reason being that listeners were “Afropolitans” whose “mother tongues” were a range of different African languages, and who mixed languages in their everyday discourse [15].

Attracting and retaining highly-skilled, on-air presenters had been a major challenge. It was a big blow to Kaya FM when, after years of developing a huge audience following the station’s breakfast show, presenter Bob Mabena moved to rival station Power FM, along with many listeners – a consequence of listeners becoming firmly attached to specific personalities and not the radio station itself. Maloka wanted that to change, so that listeners focussed instead on the mission and positioning of the station, and not on the personality of the presenters [16].

A misunderstood audience

Kaya FM’s founding premise consisted of breaking the mould of existing radio stations by focussing on black audiences in particular and offering unique radio formats and programmes designed specifically for this audience. However, this approach was not without challenges. One of the effects of apartheid was that the media industry was

controlled and dominated by white people. “We were dealing with an industry with a strong bias. Media agencies and so forth were all exclusively white, and every brand owner and marketer was also white”, explained Maloka. “In fact, it was like that up until some 10 years ago, and to a large degree it still is”. Stan Katz, one of the founders of 702 Talk Radio, reflected this view in 1996. Having just won the bid for Radio Highveld (one of the SABC’s commercial stations that was for sale), he said that the station would continue to target white audiences because commercial radio was “about delivering audiences to advertisers, which means giving them what they want” (Staff Reporter, 1996).

Maloka observed that during the apartheid era, many advertisers did not consider the opportunities presented by the black market. In addition, because the laws were designed to confine black people to specific places, the mostly white-controlled media agencies did not commit to understanding this market. He noted that very little research had been done to understand this market or to reveal deep insights about the characteristics of the black middle class. Where research was conducted, he said, advertisers were more interested in understanding their products than the black audience who used them. This lack of research led to years of neglect and ignorance within the advertising industry about the market, which Kaya FM was targeting [17].

Maloka stressed that, despite the precarious living conditions and life experiences of black people during apartheid, they still managed to create wealth for themselves, build strong businesses and cater for their families. He observed: “ironically, the assumption was that if you are black, then you are poor. You stay in the township and that was it. Because they thought that dispossession took care of it. They were wrong. Because all dispossession can do is to strip you of your physical possessions, but it can never take away your mind; it can never take away your education; it can never take away your resolve as a person; it can never take away your resourcefulness to start anew” [18] (Exhibit 3 for details on the growth in the black middle class and Kaya FM’s definition of a typical black middle-class person.).

Maloka believed that if advertisers and media agencies had a deeper insight into the culture, behaviour and lifestyle of black consumers, they would have better understood and categorised the market. Bundling black people together into one, the undifferentiated group generated little value and prevented the in-depth consumer insights necessary for an effective marketing strategy. “Nobody understood the life and culture of the black middle-class”, said Maloka [19].

Thus, while audience numbers for Kaya FM grew dramatically in the early years, advertising revenues did not. Things stabilised at Kaya FM when five shareholders put money into the station in 2001 [19]. There were also some operational and structural issues that had to be dealt with to set Kaya FM up for future success. “There was no control over music, no control over news, no control over sales. People were doing their own stuff; there was no one to pull them together”, explained Johnson [20].

To overcome these challenges, the station had to improve its systems, rebrand and realign the mix between music and talk to achieve a better balance. Thus, between 2005–2008, audience confidence began to improve, and listenership grew from 400,000 to 800,000 listeners. It later reached 1.2 million listeners in 2015, following the station’s organisational restructuring efforts [20].

Understanding listeners at kaya FM

Still, the challenge Kaya FM faced was that of ensuring that the Afropolitan, black, middle-class audience became a dominant target segment and convincing media planners and advertisers that this was an attractive and viable target market. Thus, the station made continued efforts to educate the mainstream industry and the general public about Afropolitan and the value of this market.

Research for customer insights

To achieve this, Kaya FM had a strong focus on market research. The station used both qualitative and quantitative methods in its research. Advertisers liked quantitative data, said Reitumetse Mpholle, a research and development specialist at Kaya FM, noting that most firms were interested in numbers and listenership trends when determining where to invest their money. Thus, it was important for the research team to keep abreast of the numbers continuously ([Exhibit 4](#) for listenership trends). However, to gain deeper insights into the station's listeners, Kaya FM's research team used qualitative methods such as interviews and focus group discussions [21].

Another critical role of research was to understand social trends so as to stay ahead of the competition. Mpholle explained, "part of how we do research is focussing on the 16% of our listeners who are influencers: people who are aware of trends that are coming and are able to pick up those trends before the majority does. From those conversations, we identify the big trends and try to push content in those directions. This is how we try to stay ahead of our competition" [21]. Key questions the team asked included: what problems does the black middle-class face? What are their values? What are their struggles and concerns, and how can Kaya FM provide current and future solutions for them [21]?

Segmenting the market

Kaya FM's marketing team believed that listeners in different market segments had different aspirations, preferences, needs, wants, struggles and daily realities. The station segmented its market based on a range of demographic, psychographic and geographic factors, along with the benefits that they sought from listening to Kaya FM. Important variables Kaya FM used included age, gender, race, income, lifestyle, location, self-concept and socio-cultural factors such as beliefs about Ubuntu ([Exhibits 5–9](#) for some appropriate segmentation factors). The listeners' lifestyle regarding how and where they listen to radio equally forms important bases for segmenting the audiences ([Exhibits 10 and 11](#)). Johnson explained: "the nuances of our market are really intricate and even for the urban, peri-urban and rural areas the differences are huge" [22]. Mpholle observed: "we are one of the few companies to base our brand on people, so we spend a lot of time understanding the listeners, their needs, their psychographics and how we can provide solutions to their problems" [23].

Kaya FM chose to use the socio-economic measure (SEM) tool to segment its market, instead of the more widely-used living standards measure (LSM) [3] tool. The station found that the SEM tool offered a better understanding of the unique, lived experiences of its target audiences ([Exhibit 12](#) for the SEM categories). The LSM measured what a person had, whereas the SEM measured how a person lived. Mpholle explained: "although possessions serve as a measure of wealth, fundamental questions to ask are: 'who pays for those things?', 'where do people live?' [and] 'what is their work status?'" . Illustrating what Kaya FM perceived to be a weakness in the LSM tool, Mpholle pointed out that because LSM measured what people had, people living in the most rural and poorest parts of South Africa, who possessed many durable items, were placed in a higher LSM, even though they were actually very poor [23].

Customer changes

A fundamental challenge for Kaya FM was accounting for changes in listeners' needs, and preferences over time. Maloka explained that listeners changed because they went through various life stages or because society and culture changed over time. Technology, for example, had brought about enormous changes regarding how people listened to the radio ([Exhibit 10](#)) [24].

While digital was currently playing an essential complementary role in radio broadcasting, Maloka was concerned about the impact of digital innovations on traditional radio. Some scholars and technology enthusiasts shared that digital technology could modify or replace many traditional business models, and that radio was no exception (Haanaes & Fjeldstad, 2016). Kaya FM considered digital technology to be both something that would transform the industry and a vital enabler of the station's work. Digital programming complemented both online and offline on-air programming. For example, listeners accessed content at their convenience through Kaya FM podcasts, especially when they missed specific programmes. The majority of listeners could access Kaya FM via online streaming and cable TV. Despite the recognition that digital disruptions will impact how listeners consume radio, the stations' leadership were unsure how digital technology would transform the radio industry.

Notably, many black South Africans began to see real change in their economic status after the end of apartheid. Johnson noted: "from the period between 2000 and 2010, black South Africans were moving into other LSMs so fast because people were getting jobs and better opportunities. They were consuming more. If you looked at yourself in 1997, compared to 10 years later – there was a massive change. In this new dispensation, the dynamics of the country have changed, politically, socially, economically – and we need to represent that" [18].

One major change was that the target audience now felt more able to speak about things that they would previously not have discussed in public. Johnson demonstrated the enormous changes that had occurred in listener behaviour over time by asking Mokwele, "if you took the subject matter that you talk about on a daily basis, 10 years or 12 years ago, would you have got the same call-ins and same response?" [18]. "Obviously not", answered Mokwele. Johnson continued, "people are now talking about transgender issues, they are talking about sexuality, they are talking about money issues, politics, family issues; people are free to talk about anything. In addition, I must say it is most of the people. People are willing to pick up the phone to phone in. That shows you the change that has occurred over time. It just shows [...] if we do not move with society, society will leave us behind. So, we need to be ahead of society" [18].

Audience perceptions

Kaya FM regularly engaged listeners to understand their perceptions of the station (Exhibit 13 for some audience perceptions). The research showed that for loyal listeners, Kaya FM was indeed home. For example, when asked, which station was her favourite, one listener exclaimed without hesitation: "Kaya! I love their shows, especially the midday shows. It is personal, engaging and touches on the very issues that affect us every day; relationships, security, politics, finance etc." Another said, "Kaya is the place I go to when I need entertainment, sports and news. I enjoy their soul music and jazz very much. Also, the way they go about sports analysis is very educational and enjoyable. However, I also tend to spend time with other stations, such as 702 and Metro because I love their talk shows. I like to call myself a variety seeker" [18]. Another listener shared her views, saying, "Kaya has a perfect balance as a source of entertainment and relevant educational content for many black people in Joburg" [18].

Generally, listeners held the view that the events and topics Kaya FM focussed on were personal, socially relevant and professionally enriching, while highlighting the experiences of Afropolitans. Regular listeners associated Kaya FM with the words, namely, fun, home, global citizens, Joburg vibe, soulful music, talk and upbeat [25] (Exhibit 14 for the brand associations of Kaya FM.).

Competitors react

Staying relevant in a dynamic marketplace was a daunting challenge. Not only did Kaya FM have to adapt to changing listener needs, but the station also had to deal with the challenge

of competitor reactions to its success (Exhibits 15 and 16 for major competitors' listenership figures in Gauteng only, as well as in South Africa). As Kaya FM found success with the Afropolitan middle-class audience, so other radio stations became eager to copy the station's style and content. "Look at what 702 did", asserted Mokwele. "They felt they could not poach all of Kaya FM's talent, but what they could do is that they can also go black because they also want the Afropolitan. Now, many of the presenters on their airwaves are black" [26]. Mpholle saw the same trend with other stations, "the presenter line-up across most stations used to be very white, but they are now going black. Right now, 94.7 [previously Radio Highveld] has almost a million listeners. Of those million listeners, about 800,000 listen to one black female host" [27].

Kaya FM responded to competition by mixing things up a bit and becoming "very dynamic with our presenter line-up", said Mpholle and hiring David O'Sullivan, a white presenter, to host its morning drive show when Mabena left. The station's Afropolitan positioning was all about transformation and black consciousness, so to bring a white presenter onto one of its most important shows was a major decision. Some criticised Kaya FM's decision as hypocritical, saying that on the one hand the station was positioned as Afropolitan, but on the other hand, it was using a white person to advance the Afropolitan cause. Johnson described the reaction: "with David [O'Sullivan] people were like, 'what is this guy about?' However, he has maintained the audience ever since Bob [Mabena] left" [28].

Stations in other provinces had also started copying Kaya FM. Mokwele asserted: "the Afropolitan formula is now spreading to other provinces; who knows what Cape Town is doing with Afropolitan positioning? Durban is copying what we are doing right now. They think that they are in another province, so they can redo what we do. I have become a victim of that [...] they have copied two of my programmes; cut and paste on their shows" [29].

Limited financial resources

As its competitors reacted, Kaya FM continued to try to be innovative with its programming and with its marketing campaigns. From the very beginning, the station had had to do this with limited resources. When the station started in 1997, it had faced enormous financial constraints. It struggled for a long time against its well-resourced, more established competitors and had to think creatively about how to use the resources at its disposal to build awareness and a favourable image. Johnson elaborated: "we did not have money to splash on outdoor billboards and advertising. We had to be creative to gain awareness and build confidence in our target audience and advertisers, respectively" [30].

Thus, the majority of marketing decisions required Kaya FM to make trade-offs between different objectives. Johnson explained some of the trade-offs Kaya FM had to make: "as Kaya does not have the capacity to do national sales, we have had to outsource that function to MediaMark [4]. Instead, we have an in-house sales team, which sells to the government, local businesses, concerts, etc" [30].

The station also had to adopt innovative approaches that would give it maximum impact at a relatively low cost. Kaya FM's "two strangers at a wedding" campaign was an example of this strategy [30]. The experiment involved marrying people who had engaged in many conversations on radio, but saw each other's faces for the first time on their wedding day, which took place in the forecourt of Kaya FM. "This was unconventional and went against the norms of society, but it got so many people talking and paying attention to what we did at Kaya FM", said Johnson. "We had to be tactical to get awareness and to get people to feel connected and pay attention to us" [30].

Kaya FM also focussed on building a community of loyal listeners as a defence against the actions of its competitors. Johnson explained: "part of the innovation was to introduce mid-morning programming, in-office listening to get people to listen to us while in the office" [30].

Keywords:
Market orientation/
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Market segmentation/
target markets

Conclusion: Looking to the future

Maloka had mixed feelings about what the future held for Kaya FM. He felt that radio listeners and the radio industry had changed. Listeners were more empowered than before and had more choices than before. Things were happening faster in the marketplace, requiring a different kind of leadership and marketing strategy. While Maloka was happy about how far the station had come, he was still not at all satisfied about one thing: for advertisers, Afropolitans were still not a mainstream market and did not command a significant enough portion of advertisers' marketing budgets. Revenue targets had been missed for 2018. "Is there something wrong with our Afropolitan positioning?" he asked himself. Until Afropolitans became mainstream, he could not rest.

Notes

1. The 10 homelands or "Bantustans" referred to an administrative mechanism by which the South African Government under the apartheid regime sought to divide South Africa into separate states. The primary aim was to move the majority of the black population out of the urban areas and provide them with the responsibility of running their own semi-independent homelands. The black population were allocated to homelands based on ethnic origin, for example, a Zulu person was assigned to KwaZulu-Natal, a Xhosa person to Ciskei or Transkei and a Sotho person to QwaQwa. The homelands ceased to exist on 27 April 1994 and were re-incorporated into the nine new provinces of a democratic South Africa [Source: South African History Online (2019), "the Homelands", available at: www.sahistory.org.za/article/homelands (accessed 28 January 2019)].
2. Kwaito emerged as a genre of music in the 1990s. It started by remixing international house music tracks, slowing down the tempo, adding percussion and African melodies. The word, "Kwaito", was derived from the Afrikaans word for angry – *kwaai*, but as was common with township slang, the word had taken on a more positive status. One of the most iconic Kwaito songs was *Nkalakatha* by Mandoza. [Source: South African History Online, (2011), "a history of Kwaito music", available at: www.sahistory.org.za/article/history-kwaito-music (accessed 4 February 2019); Andersen N. (2018), "what is Kwaito music and where did it start?" *The South African*, 27 May, available at: www.thesouthafrican.com/what-is-kwaito-music-where-start/ (accessed 4 February 2019).
3. The LSM estimated what people had based on their living standards instead of income and how they lived. The SEM focussed on the lifestyles of South Africans by basing its categorisations on where people lived and how they lived. Thus, an individual could live in a poor community but could be categorised under a higher SEM level. Targeting consumers on the basis of how they lived was proving popular amongst practitioners, including advertisers and broadcasters [Source: Strategic Marketing, (2017), "new SEM socio-economic segmentation tool explained", available at: <https://prc.olio.co.za/wp-content/uploads/2017/08/New-SEM-socio-economic-segmentation-tool-explained.pdf> (accessed 8 February 2018).
4. Mediamark referred to a multichannel specialist media sales and solutions firm with vast experience in radio, digital, events and television. [Source: Mediamark, (n.d.), "About us", available at: <https://mediamark.co.za/about-us/> (accessed 10 November 2018).
5. Shepherd L. (2011). "The 3 Cs of a great B2B marketing strategy", available at: www.canadianbusiness.com/innovation/the-3-cs-of-a-great-b2b-marketing-strategy/ (accessed 15 March, 2020).
6. Source: Strategic Marketing, (2017), "new SEM socio-economic segmentation tool explained", available at: www.prc.za.com/wp-content/uploads/2017/08/New-SEM-socio-economic-segmentation-tool-explained.pdf (accessed 8 February 2018).
7. The perceptual map in Figure 2 derives from class discussion whereby one cohort of Postgraduate Diploma in Business Administration students at Wits Business Schools shared their views on the perceived location competing radio stations on the map by age of listeners and programme type. This reflects the majority views of the class of about 50 students.
8. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
9. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
10. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
11. Personal interview with Thabo Mokwele, Johannesburg, 6 September 2018.
12. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.

13. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
14. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
15. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
16. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
17. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
18. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
19. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
20. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
21. Personal interview with Reitumetse Mpholle, Johannesburg, 6 September 2018.
22. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
23. Personal interview with Reitumetse Mpholle, Johannesburg, 6 September 2018.
24. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
25. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
26. Personal interview with Gregory Maloka, Johannesburg, 31 August 2018.
27. Personal interview with Reitumetse Mpholle, Johannesburg, 6 September 2018.
28. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.
29. Personal interview with Thabo Mokwele, Johannesburg, 6 September 2018.
30. Personal interview with Neil Johnson, Johannesburg, 13 September 2018.

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Exhibit 1. Kaya FM's audience persona

Figure E1

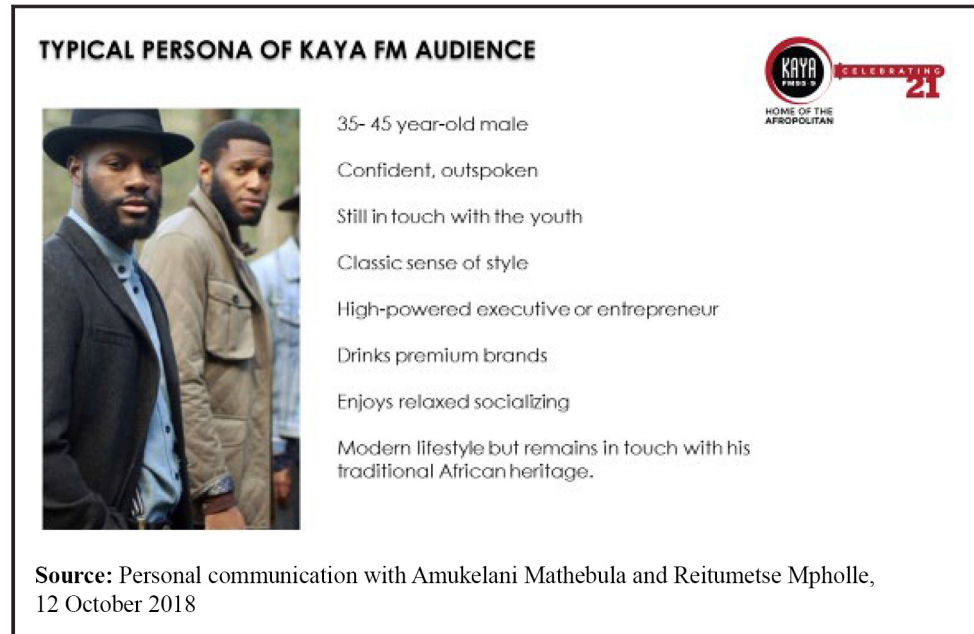



Exhibit 2. Some of Kaya FM's on-air personalities and programmes

Figure E2

Show/Time Slot	Presenter	Kaya FM's description of presenter and show
Breakfast with David Mon-Thur: 06h00-09h00	David O' Sullivan 	Seasoned journalist, David O' Sullivan, who began his career at Capital Radio, hosts a show that offers "bite-sized commentary by well-informed analysts who provide insights for the discerning Afropolitan listener."
The Best T in the City Mon-Thur: 09h00-12h00	Thabo Mokwele 	Mokwele (T Boss) is the host of The Best T in the City and Touch of Soul. His show is interactive, informative, inspiring educational and empowering. He aims to empower people to take charge of their lives by raising some topical social issues and seeking adequate responses.
The B Side Mon-Thur: 12h00-15h00	Bridget Masinga 	Actress, fashion model, media personality and philanthropist, Bridget Masinga hosts a show that is "about the unexpected in everything, from lifestyle, to the arts, to the personal" and explores "unchartered territory when it comes to the Afropolitan's relationship with themselves and those around them, while touching on book clubs, cooking, films and more."
Kaya Biz Mon-Thur: 17h00-18h00	Gugulethu 	At the helm of Kaya's business radio show, Kaya Biz, Gugulethu presents local and international business news, entrepreneurship, corporate and investment banking.
Today with John Perlman Mon-Thur: 18h00-19h00	John Perlman 	Seasoned journalist, John Perlman aims to provide the ultimate platform for debate, raising current issues affecting the Gauteng province, but of national relevance. Topics are based on current affairs and politics with an aim to inform as well as to make a difference.
Home with Mapaseka Mon-Thur: 19h00-20h00	Mapaseka Mokwele 	This show talks to the listener who cares about issues affecting the home and the family. Here the listener's opinion is more prominent and valued. The guests on the show offer expert advice and also offer personal accounts of how they have dealt with and were once affected by the topic at hand.
Life with Kojo Thursdays: 20h00-21h00	Kojo Baffoe 	Life with Kojo aims to navigate "the nooks and crannies of every aspect of life, from the frivolous to the serious. It is a manifestation of the random things that go through Kojo Baffoe's mind and the people and stories behind those thoughts. It is about being naturally curious, engaged and interested."

Source: Kaya FM (2021)

Exhibit 3. Growth of the middle class in South Africa (2004-2012)

Figure E3

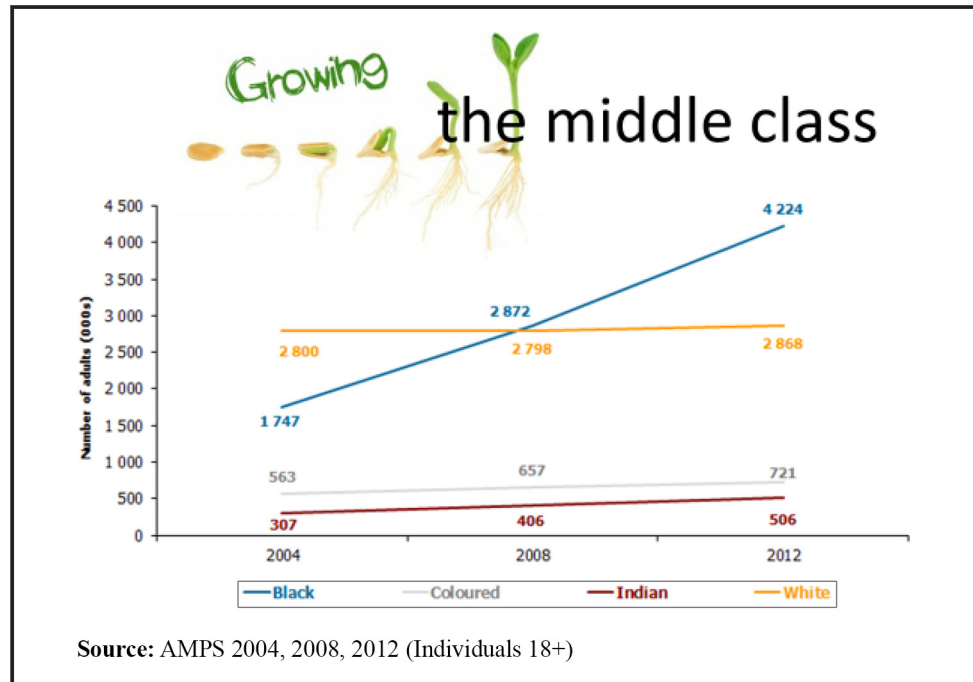


Exhibit 4. Kaya FM's description of a typical black middle-class person

Figure E4

The middle class can

- drive a car
- pay off debt
- afford some wants
- own a 'good' home
- live in suburbs
- shop at malls
- send children to good schools
- access internet
- have financial stability
- enjoy DSTV

Source: Personal communication with Amukelani Mathebula, 24 May 2019

Exhibit 5. Listenership trends

Figure E5

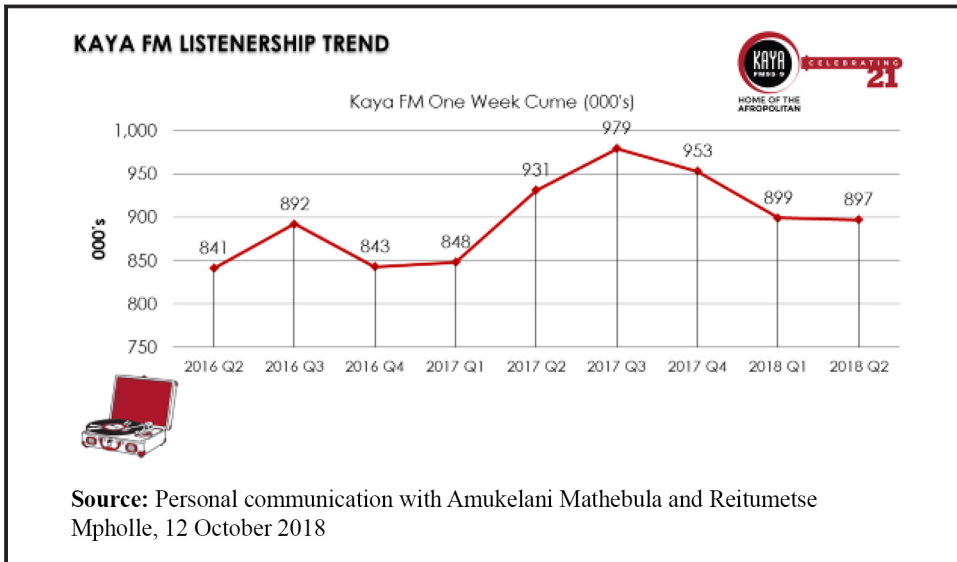


Exhibit 6. Kaya FM's target audience: age

Figure E6

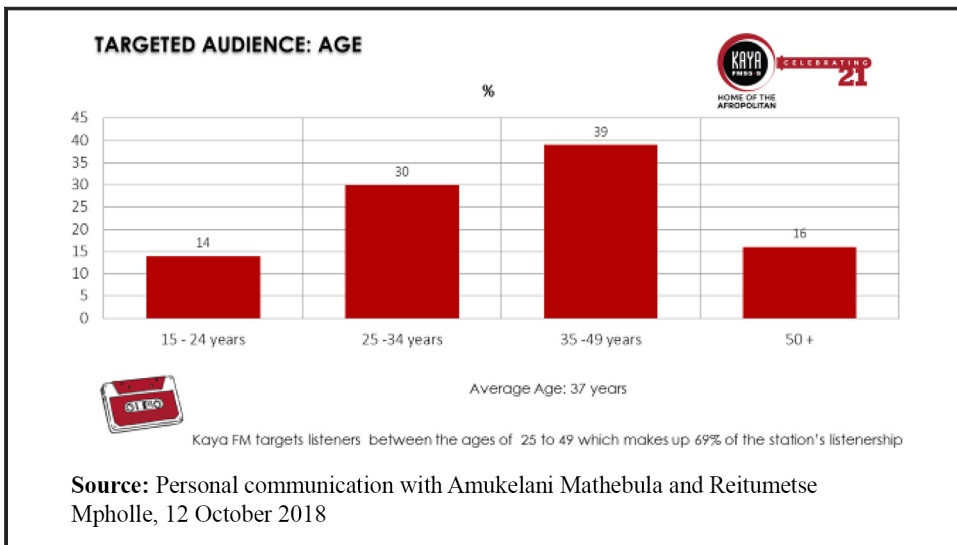


Exhibit 7. Kaya FM's target audience: gender

Figure E7

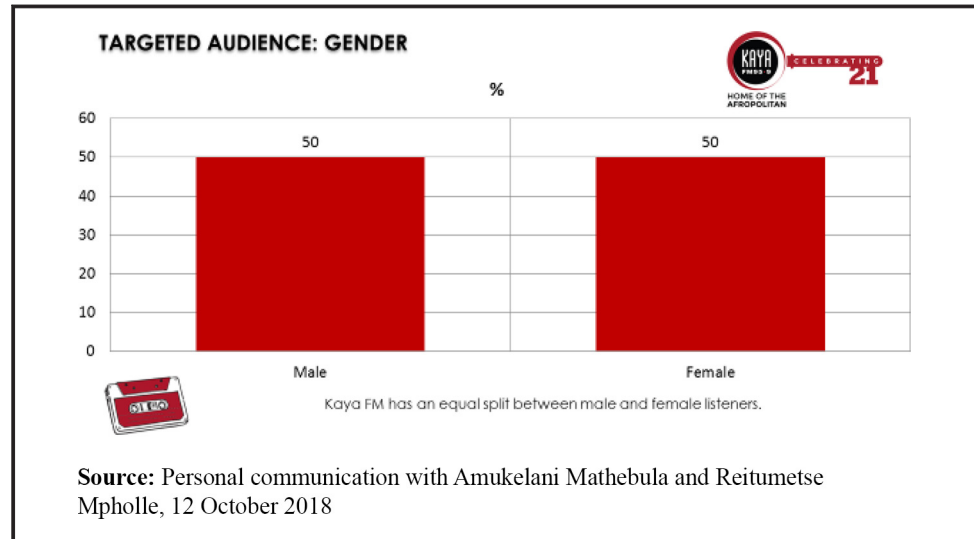


Exhibit 8. Kaya FM's target audience: race

Figure E8

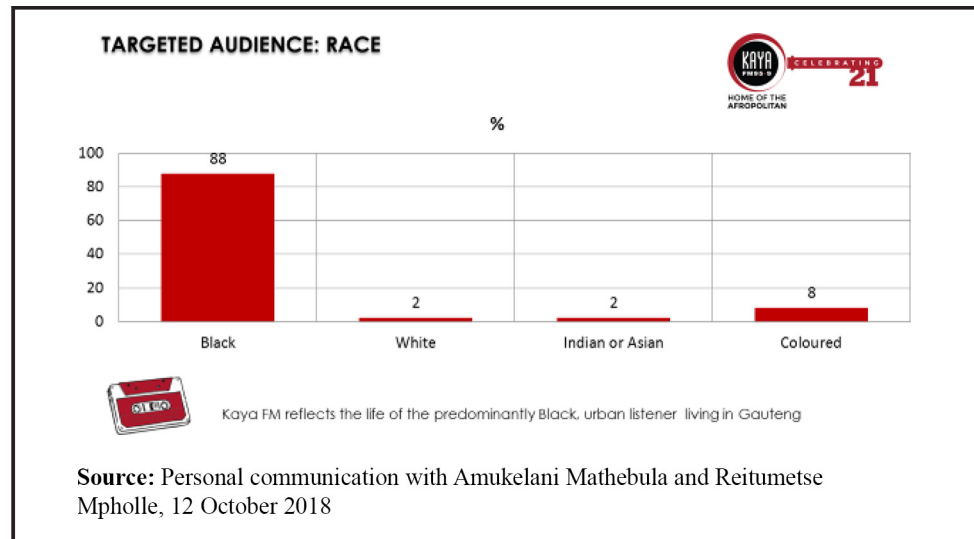


Exhibit 9. Kaya FM's target audience: average household income

Figure E9

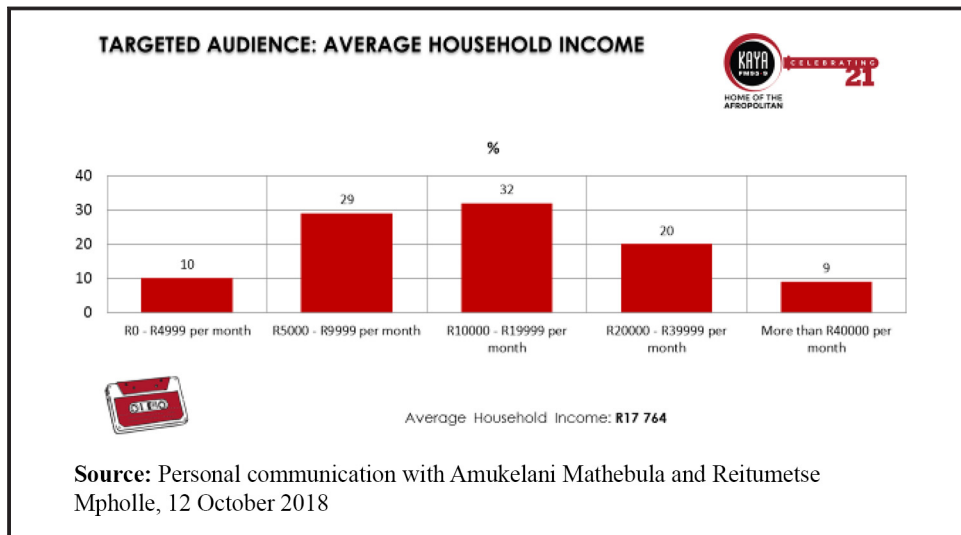


Exhibit 10. Kaya FM's target audience: area (location of listeners)

Figure E10

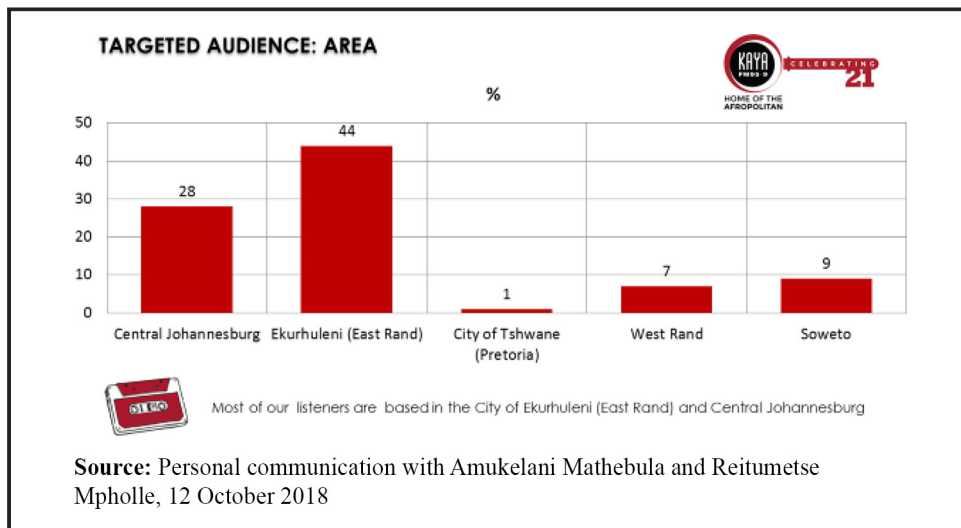


Exhibit 11. Kaya FM's target audience: device listening

Figure E11

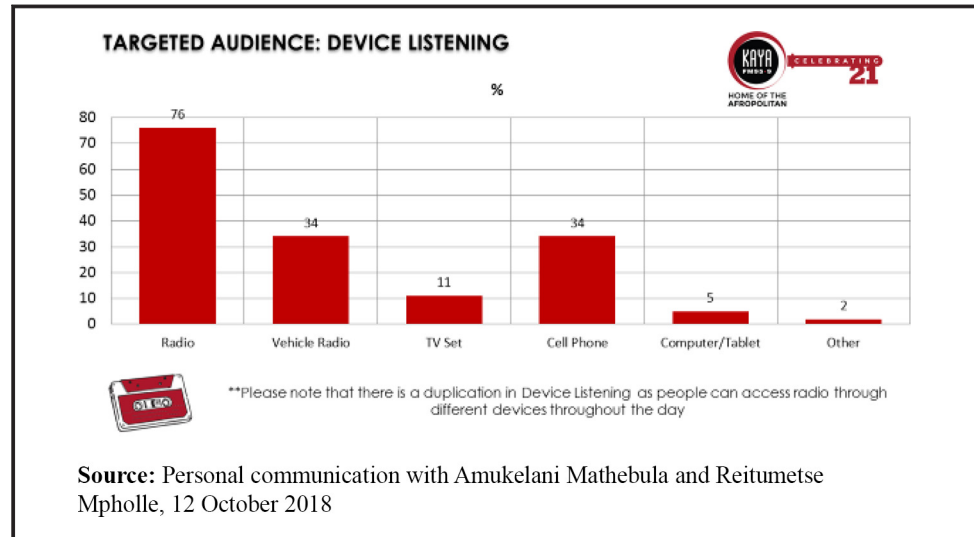


Exhibit 12. Kaya FM's target audience: location listening

Figure E12

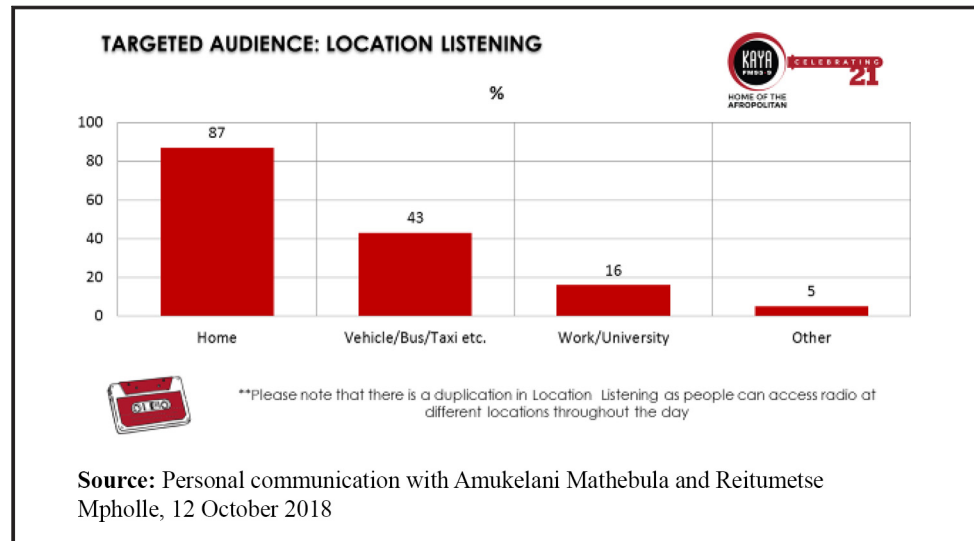


Exhibit 13. Kaya FM's target audience: socio-economic measures (SEMs)

Figure E13

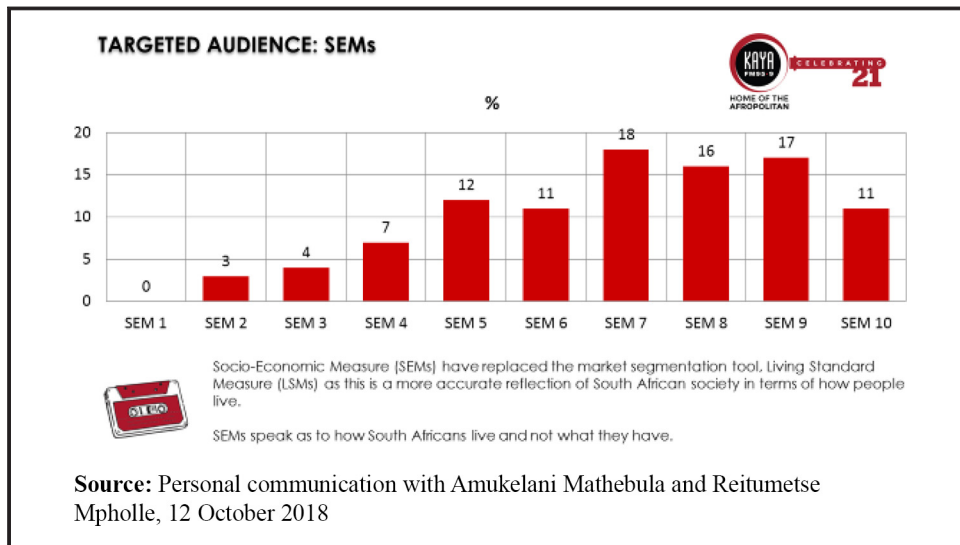


Exhibit 14. Audience perceptions

Figure E14

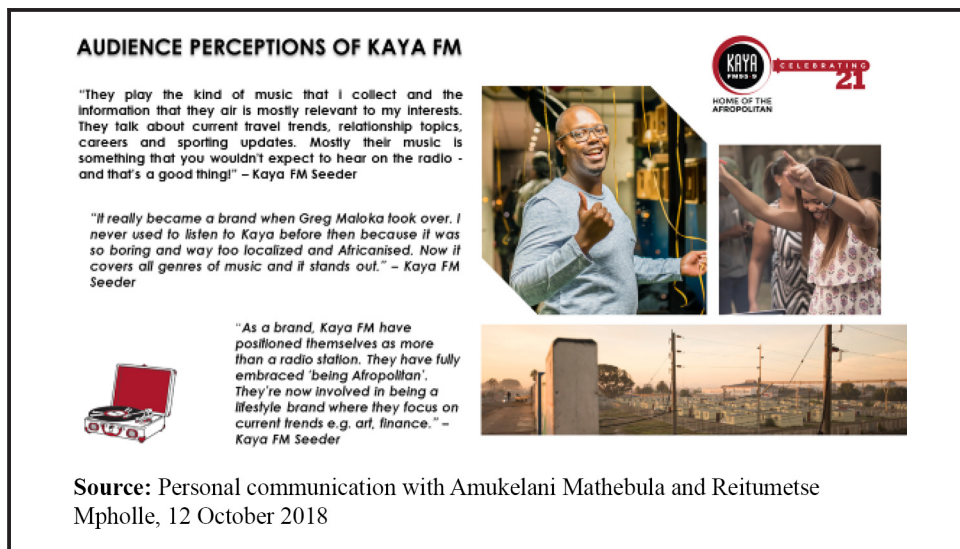


Exhibit 15. Brand associations of Kaya FM

Figure E15

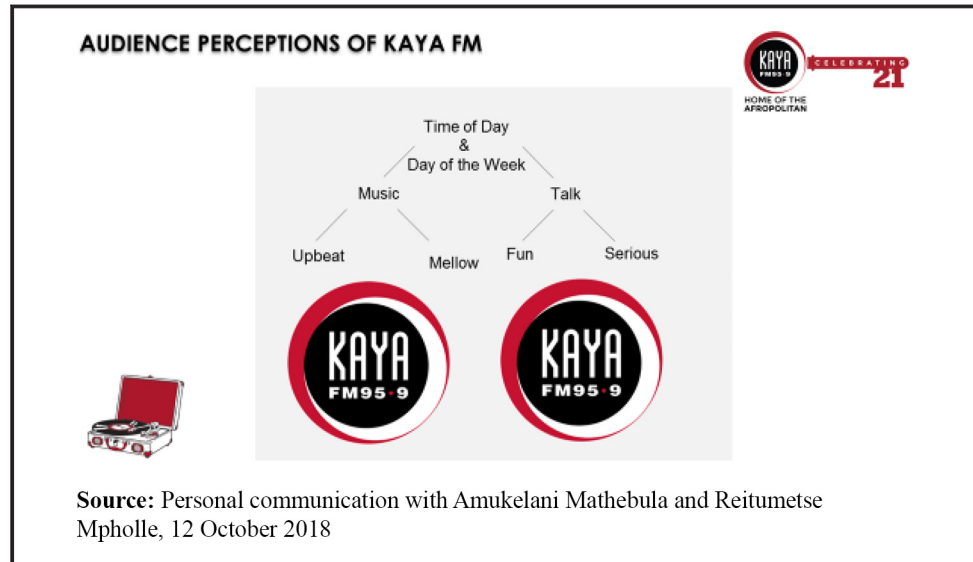


Exhibit 16. Competitors' listenership figures (South Africa)

Figure E16

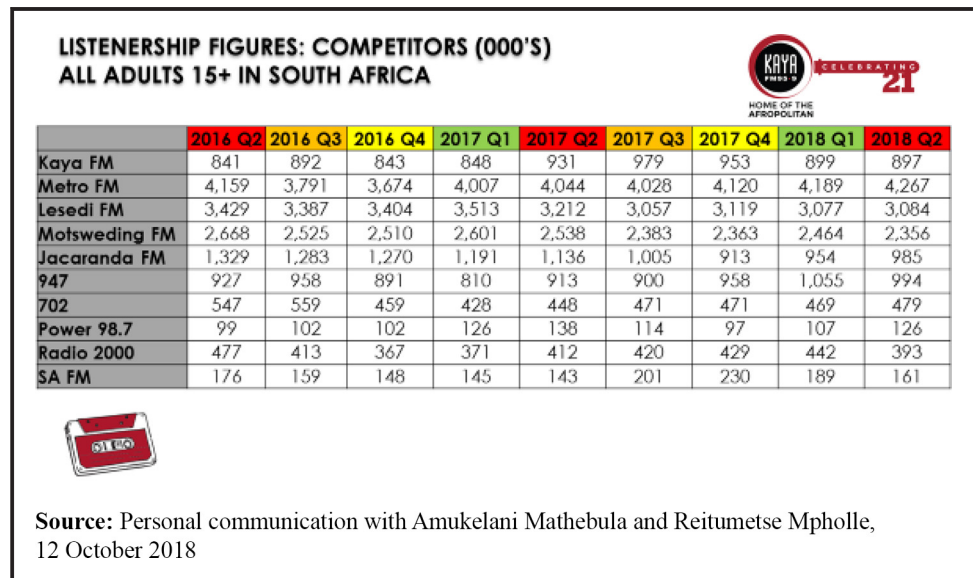
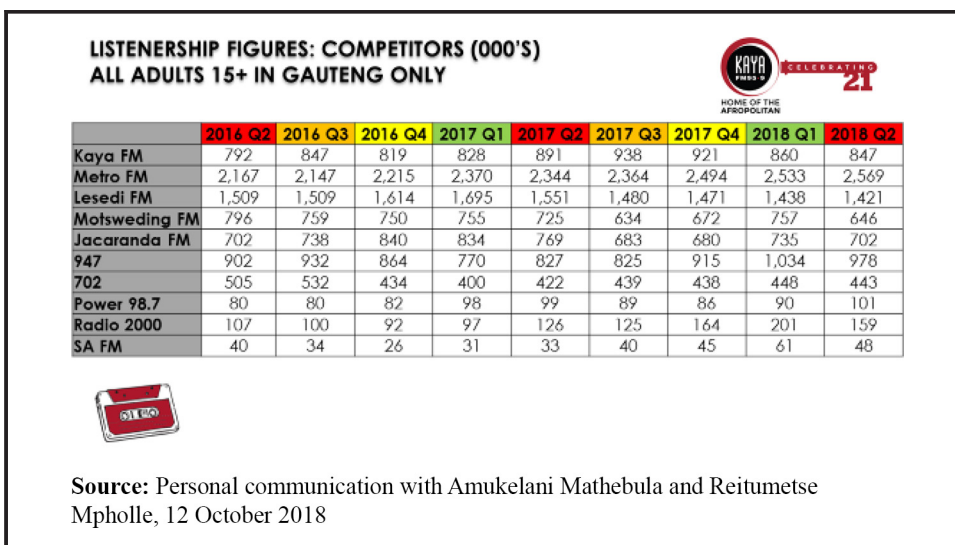


Exhibit 17. Competitors' listenership figures (Gauteng only)

Figure E17



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