

SOUTH AFRICA'S DIGITAL NATION

METHODOLOGY

WHO

Columinate surveyed 2 263 internet users

WHEN

Data collection for the survey took place from 21 September to 5 October 2012

WHAT

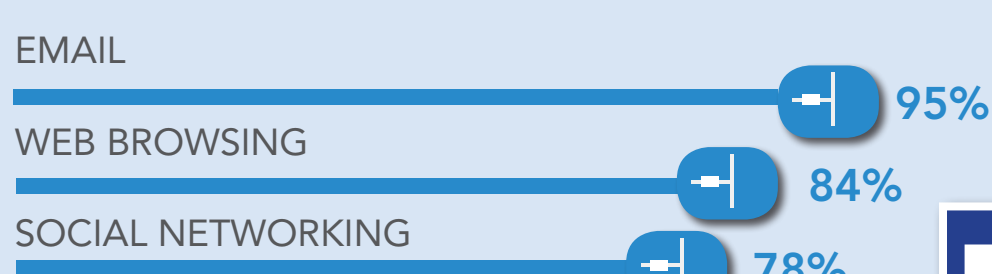
An online survey aimed at answering the following:

- How do they use the internet?
- How are devices used in their daily lives?
- How do they use social networks?
- What do they think of online shopping?
- How do they use internet data?
- How safe do they feel online?
- What do they think of online advertising?



WEBOGRAPHICS

WHAT DO THEY DO ONLINE?

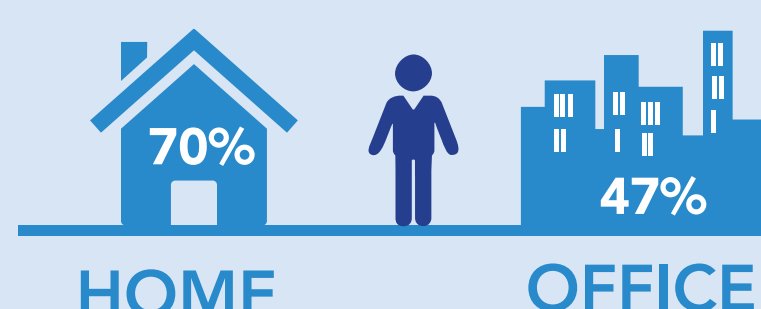


WHAT ABOUT MOBILE PHONES?

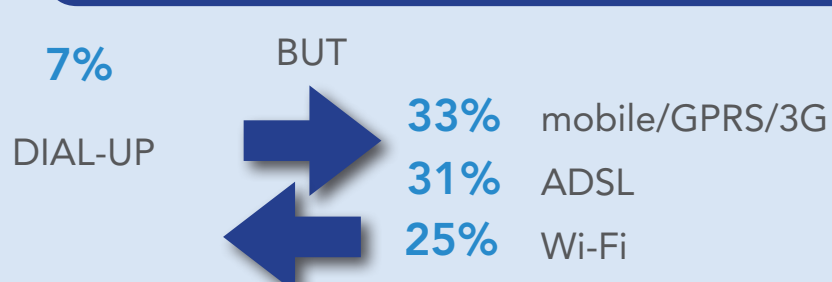


3 in 4 internet users who access the internet from their mobile phones do so every day

WHERE DO THEY ACCESS THE INTERNET?



WHAT TYPE OF CONNECTION DO THEY HAVE AT HOME?



WHICH INTERNET BROWSER DO THEY USE AND PREFER?



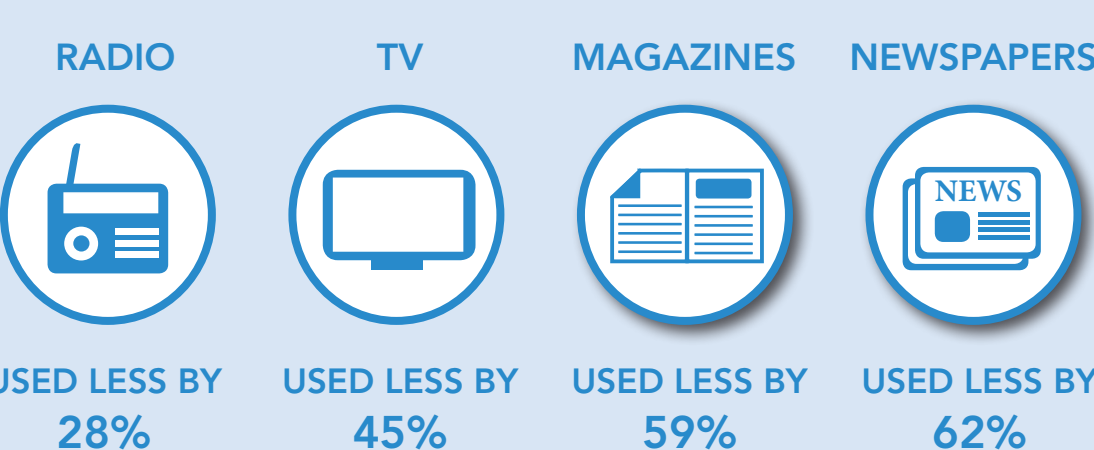
While the majority (63%) of internet users use Internet Explorer, 40% of those who use more than one browser prefer Google Chrome



63%

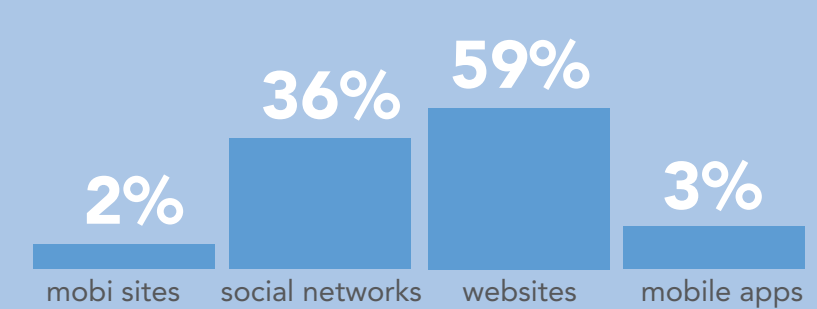
40%

DOES THE INTERNET DISPLACE OTHER MEDIA? YES



ONLINE ADVERTISING

WHAT TYPE OF ONLINE ADVERTISING IS MOST RELEVANT?

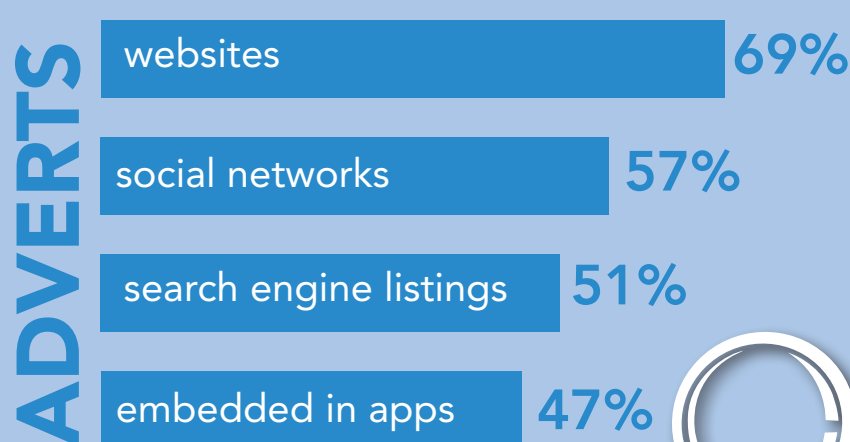


WHICH ADVERTISING FORMATS HAVE THEY NOTICED?



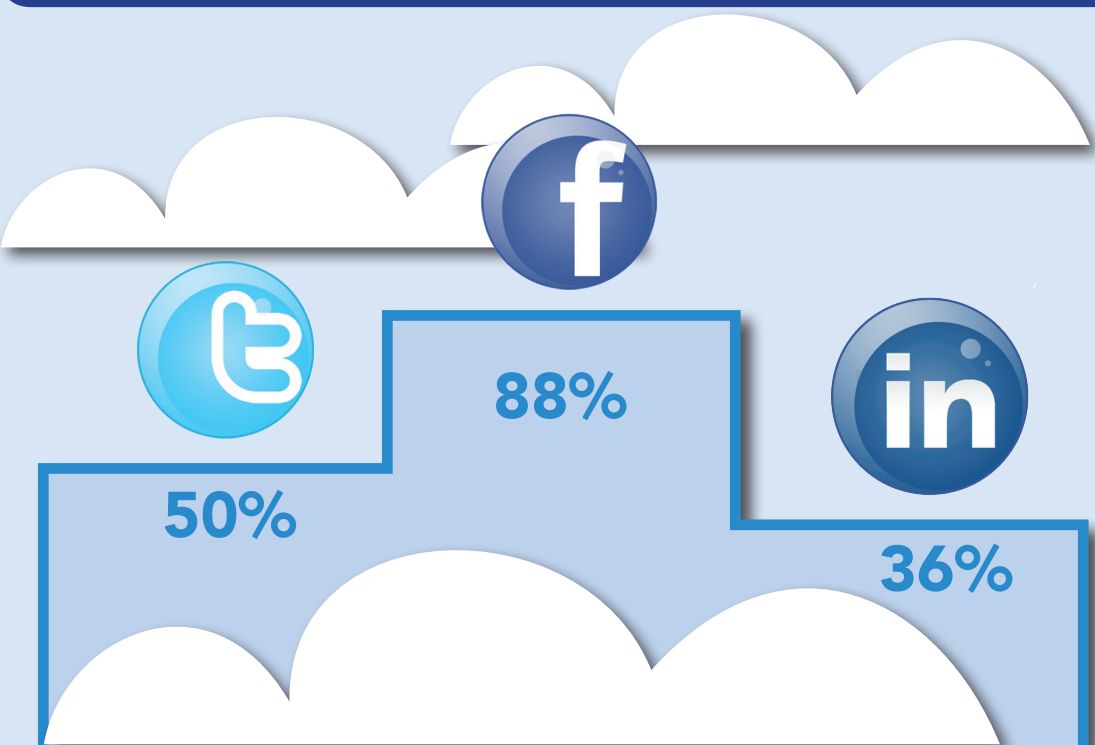
ADVERTISING IMPACT

Looked for more information after seeing this type of advert:



SOCIAL NETWORK MEMBERSHIP

WHICH SOCIAL NETWORKS ARE THEY A MEMBER OF?



HAVE THEY EVER FOLLOWED BRANDS ON SOCIAL NETWORKS?



WHAT KIND OF CONTENT DO THEY CREATE?

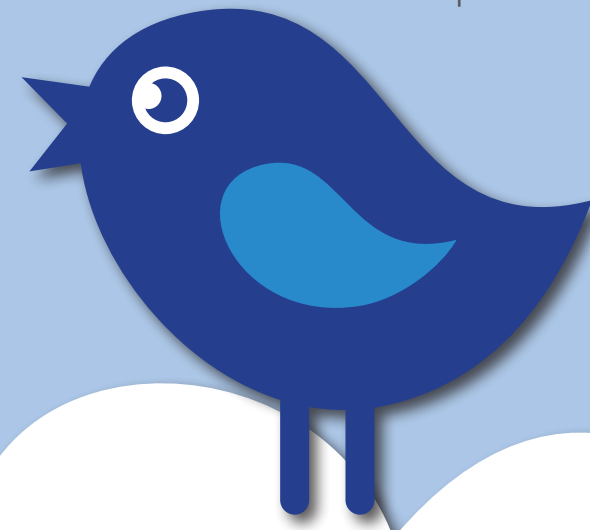


HOW OFTEN DO THEY VISIT EACH SOCIAL NETWORK?



Facebook, Twitter and G+ have the most stickiness as users are more likely to use these several times a day. YouTube, LinkedIn and Pinterest have less stickiness as these users only visit these sites a couple of times a week.

Almost 1 in 5 users are likely to spend more than 5 hours each day on Facebook...



Positive comments have more impact on social networkers' perceptions of brands than negative comments...



WHO SHOPS ONLINE?

HAVE THEY DONE ANY ONLINE SHOPPING?

After 5 years of using the internet, the likelihood of online shopping increases by

50%

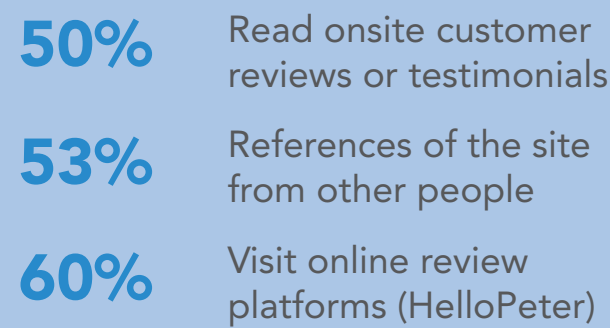
WHY DO THEY NOT SHOP ONLINE?

The majority of those who do not shop online are concerned about security...

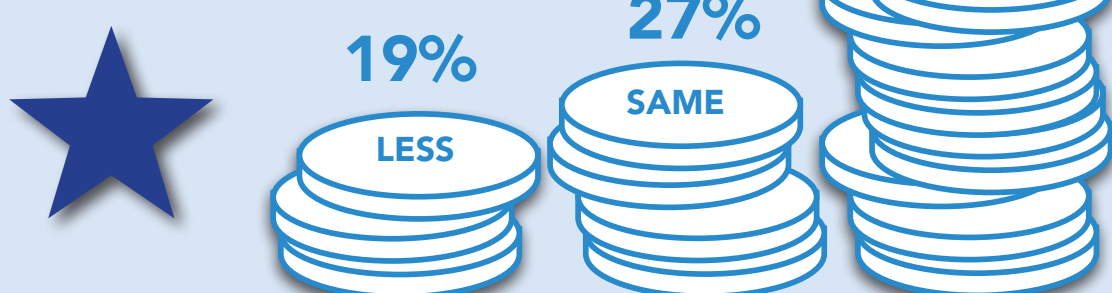
52%

HOW DO THEY JUDGE THE CREDIBILITY OF AN ONLINE STORE?

Recommendations from others is the major driver of such credibility:



HOW HAS THEIR SPENDING ON ONLINE SHOPPING CHANGED SINCE LAST YEAR?



DO THEY PREFER LOCAL OR INTERNATIONAL ONLINE SHOPPING?

8% prefer international

66% prefer local

26% do not have a preference

