BIZCOMMUNITY

IAB report surveys the local digital landscape

By Jessica Tennant

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The IAB SA held its Digital Landscape webinar on Thursday, 23 April at 2pm via Zoom, in which it revealed key findings from the latest Internet Advertising Revenue Report, conducted by PwC and sponsored by the IAB SA, as well as the IAB SA Digital Landscape Survey. Both of these reports are confidential, and the content exclusive to IAB members, however, the IAB SA has allowed us to share some topline learnings and insights.

We covered the internet advertising trends in part one of this series, and here, we feature the high-level findings from the IAB SA Digital Landscape Report for 2020, as presented by Ryan Smit, MD at BMIT and head of the Measurement Council for the IAB.

PwC, IAB release latest Internet Advertising Revenue Report

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The objectives of the IAB SA Digital Landscape Report are to provide an overview of the size of the Digital Audience in South Africa, to provide a demographic overview of the SA Digital Audience, and to provide insights into the behaviours of digital consumers, and the trends across audience segments.

The study was based on three months' worth of aggregated survey data, looking at the size of the local digital audience, their demographics and their online behaviours. The size of this audience is 26.3m adults, who have accessed the internet in the past month, and the variables used to weight this data were gender, age, population group, SEM and province. The audience was grouped into five supergroups, profiling the different types of users who are accessing the internet on a socio-economic scale, one being those with the lowest socio-economic status and five being those with the highest. This is important, said Smit, because they wanted to make the study representative of the entire digital population and inclusive of those that are less active on the internet.

Ryan Smit, MD at BMIT and head of the Measurement Council for the IAB.

In terms of demographics, when respondents were asked when the last time they accessed the internet was, the majority (85%) said they accessed it the previous day. There is no clear trend in gender and age groups when it comes to the last time that respondents used the internet, but almost all (95%) supergroup 5 consumers said the last time they accessed the internet was the previous day, while 77% of supergroup 1 consumers indicated the same.

While 82% of respondents said they own a personal mobile phone, only 9% of respondents claim to own a smart TV. 36% of consumers said they have a personal desktop or laptop at home, while 34% said they have a work desktop or laptop at home.

When comparing home internet access by SEM supergroup consumers, it is correlated and higher supergroup consumers are more likely to have internet access at home. But when compared by gender, there was no significant difference, except that older respondents are more likely to have internet access at home, compared to younger respondents, other than their mobile phones.

In terms of the type of internet access connection at home, older respondents are more likely to have ADSL or fibre connections, compared to younger respondents who are more likely to use wireless and SIM internet connections. Fibre internet access increases with SEM supergroups. While a third of supergroup 5 respondents have fibre at home, only 1% of supergroup 1 consumers indicated that they have a fibre internet connection.

Then looking at the types of things people are doing while they're on the internet, with regard to instant messaging, the majority of respondents (85%) said they use instant messaging, such as WhatsApp or Facebook Messenger at home. 87% of female respondents said they use instant messaging, while 84% of male respondents indicated that they do.

They also looked at things like voice calling. 40% of the audience said they use voice calling at home. Higher supergroup consumers are more likely to use voice calling applications as compared to lower supergroup consumers.

Looking at social media, 64% of respondents use social media applications at home. While more than two-thirds of supergroup 4 and 5 consumers use social media, only about half of supergroup 1 (53%) and supergroup 2 (55%) consumers indicated that they do.

Around a quarter (24%) of the audience said they use taxi services, such as Uber and Bolt. SEM supergroup 1 and 2 consumers and respondents aged 50 years and older are the least likely to make use of taxi services.

Watching videos, 50% said they watch videos at home via the internet. It may be that others do not watch videos at home, but at different access points, such as work, schools and/or their friend's houses due to the high bandwidth and associated cost implications.

Watching streaming TV services, 26% of the audience said they watch streaming TV services at home. About half (51%) of supergroup 5 consumers said they use streaming TV services, while only 11% of supergroup 1 consumers indicated that they watch streaming TV services.

About half (51%) of respondents said that they use online/mobile banking. While 73% of SEM supergroup 5 consumers said they use online banking, only 34% of SEM supergroup 1 consumers said they do so.

18% of the audience listen to podcasts. Younger consumers and males appear to be slightly more likely to do so, while 25% of those in SEM supergroup 5 indicated that they listen to podcasts.

24% indicated that they stream music when they're home. Consumers aged 50 years and older as well as SEM supergroup 1 and 2 consumers are least likely to stream music, while 38% of those in SEM indicate that they do so.

11% indicated that they use mobile payment applications, such as Zapper and SnapScan. The usage of these types of services increases significantly from 5% of those in SEM supergroup 1 to 23% of those in SEM supergroup 5.

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These are just some of the results that came out of the study, and it will be interesting to see what trends emerge across these audience segments, when the next report is released. "We're going to be doing this again at the end of the year and that will give us the ability to compare year-on-year data. We only launched the survey in July last year so we couldn't go further back than a few months, but once we have a full year's worth of data, we'll be able to start trending some of these activities, and it will be very interesting to see what's happened with these activities in this very different world we're coming to," concluded Smit.

The IAB SA Digital Landscape Survey report is available for IAB SA members on the IAB SA member portal. To access the portal, email Debbie@iabsa.net.

To access more smart, actionable and motivating insights to help you make better digital decisions, join the IAB SA Insights Online webinar this Thursday, 30 April at 11am. You can register here.

ABOUT JESSICA TENNANT

Jess is Senior Editor: Marketing & Media at Bizcommunity.com. She is also a contributing writer. marketingnews@bizcommunity.com

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