South African Online Report for June 2013

July 12, Cape Town, South Africa

The South African digital market

South Africa's online market is enjoying a growth spurt thanks to healthy competition in the broadband sector and the wide scale deployment of 3G mobile data services that now rival available ADSL offerings in terms of both speed and price.

According to Effective Measure's digital market data for the month of June, South Africa's digital community is largely using ADSL for its connection (48.73%) followed by mobile connectivity (36%).

The leading digital tribes are located in Gauteng province, which has the highest traffic flow (+46%) spurred by Johannesburg and Pretoria populations followed by the Western Cape (21.97%).

The classic profile of the South African digerati is aged over 40 (56%), university educated (72%) with kids (64%).

Significantly, the South African digital nation is still a very practical one, using online time most dominantly for accessing email (90.26%) and online banking (69.44%). Online spending is also largely devoted to book buying, sports and events ticketing and travel.

Access to real time news is also driving eyeballs online and on to mobile with 6.7 million South Africans going online in June to stay in the informed loop.

As more and more South Africans are seeking breaking news at their fingertips and entertainment, information, and purchase opportunities on the go, they are increasingly being driven to their mobile handset as their access point.

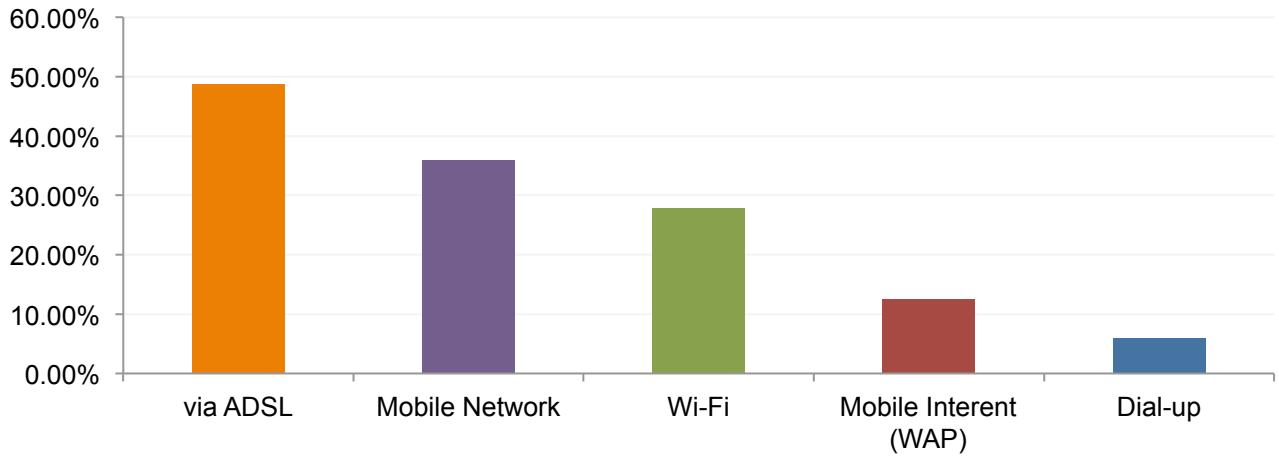
June was punctuated by a 90% year on year shift in mobile access to the Internet. Of those users going mobile, the classic profile emerging is a single, 30-39 year olds getting on their email, doing their baking and seeking always-on news sources.

Summary: All Categories, Comparing June 2012 with June 2013

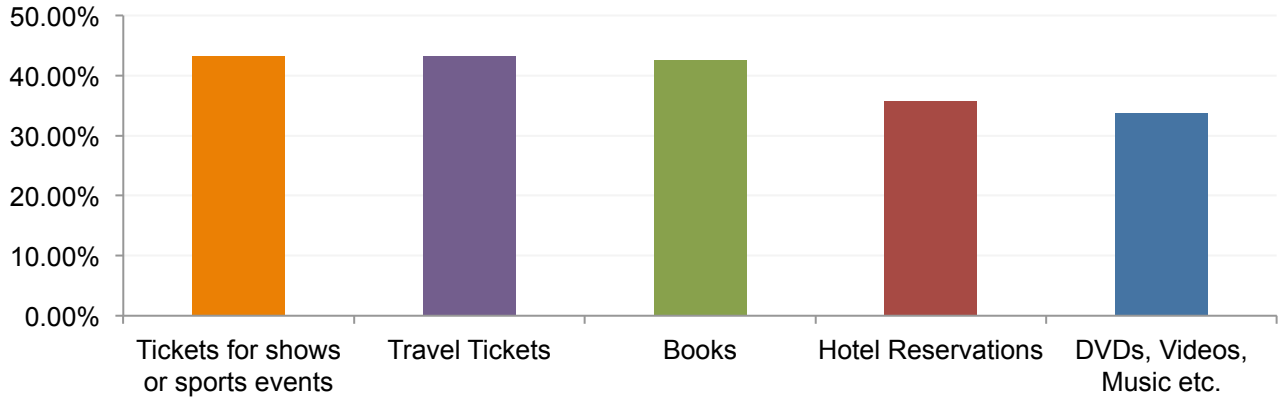
	June 2013	June 2012	Increase/Decrease	% Change
Unique Browsers	19,995,454	14,996,951	**4,998,503**	**33.33%**
Visits	155,687,435	108,411,364	**47,276,071**	**43.61%**
Page Impressions	564,537,597	466,374,764	**98,162,833**	**21.05%**
Average Page Duration (seconds)	90	91	**-1**	**- 1.1%**
Average Visit Duration (minutes)	05:27:00	06:30:00	**01:03:00**	**- 15.3%**
Average Pages per Visit	3.63	4.30	**0.67**	**- 15.5%**
% Mobile	39.89	20.99	**18.9**	**90%**

Surf is up! How South Africa is catching the digital wave

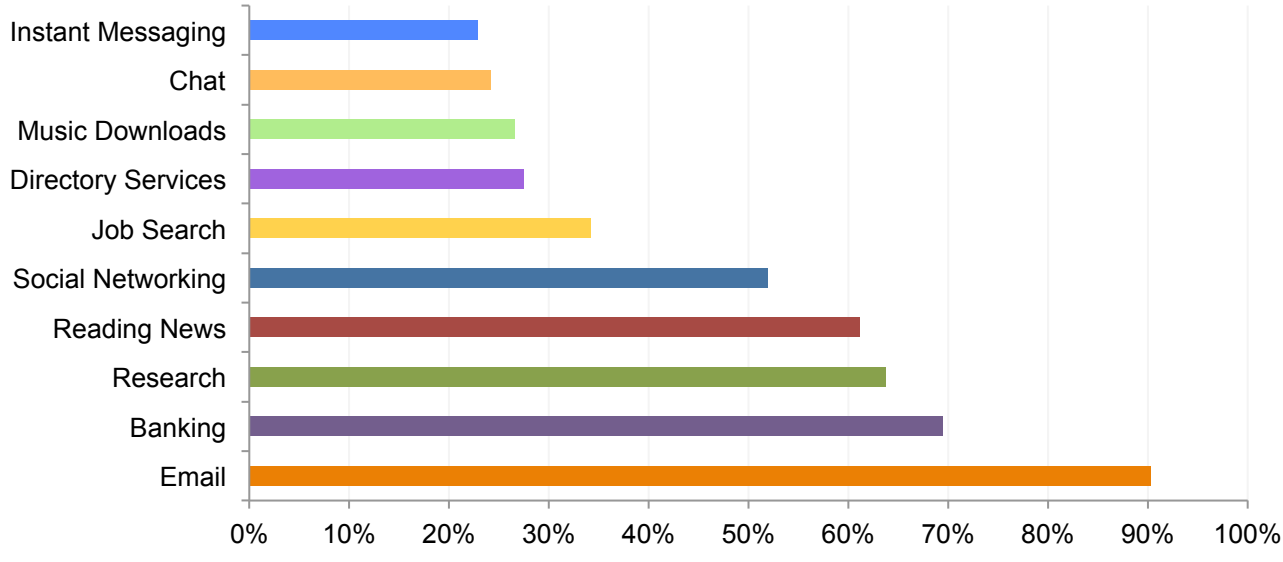
How are South Africans Accessing the Internet?



What are South Africans Buying Online? (Top 5)



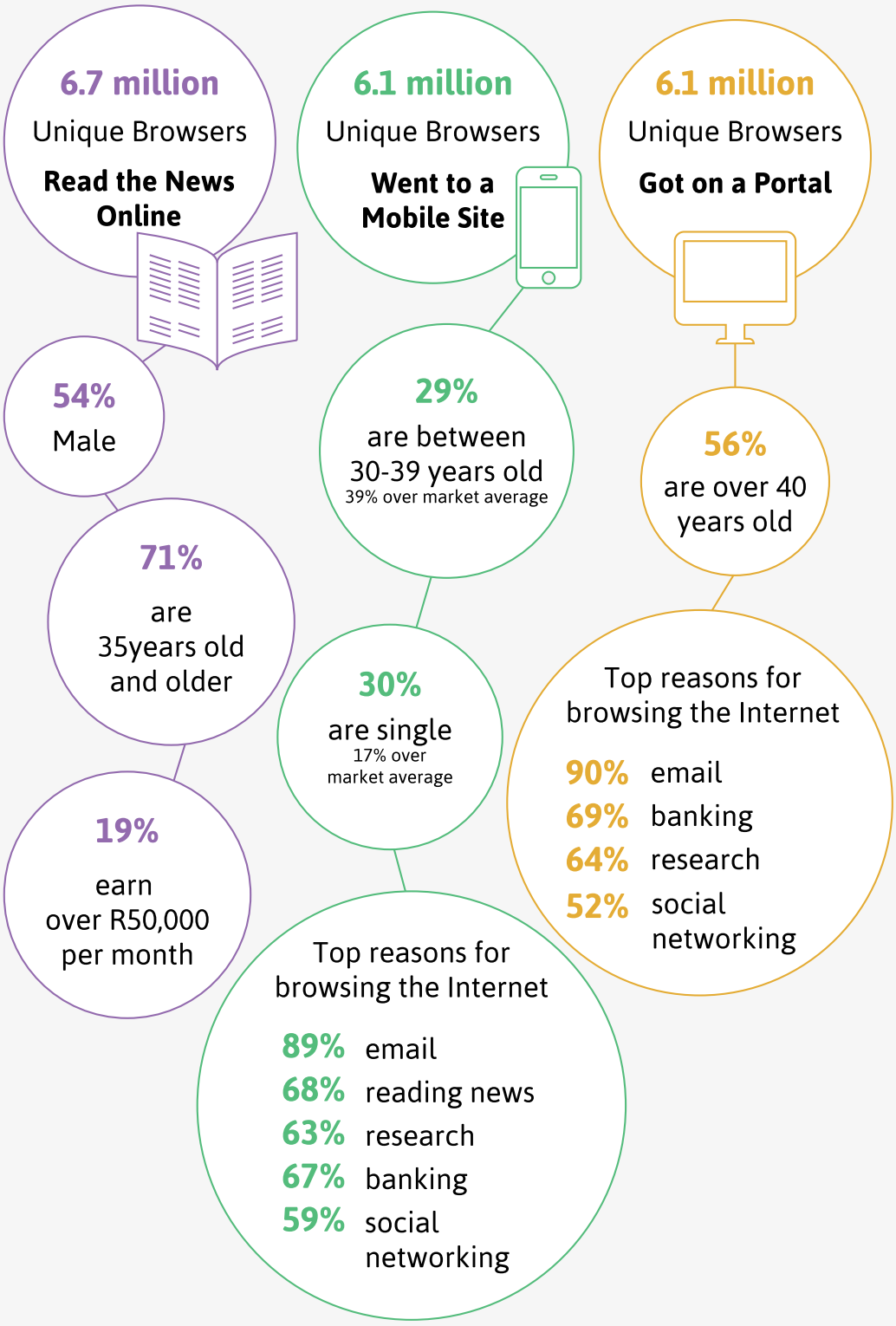
Why are South Africans Going Digital? (Top 10)



effectivemeasure

DMMA
DIGITAL MEDIA & MARKETING ASSOCIATION

June 2013 - South African Content Watch



effectivemeasure www.effectivemeasure.com

For the month ending June 2013, Effective Measure and the DMMA reports the following rankings of websites visited by Internet users inside South Africa:

Top 30 Local Websites accessed by South Africans

Rank	Site	UB	PV	APD	Mobile
1	news24.com	2,410,231	40,109,803	-0.31%	7.70%
2	howzit.msn.com	1,417,525	25,117,451	-13.05%	0.39%
3	iol.co.za	1,345,955	15,526,468	-10.25%	18.14%
4	za.yahoo.com	1,222,400	14,077,547	-17.54%	0.46%
5	m.news24.com	1,183,022	27,378,429	7.46%	98.61%
6	dstv.com	1,052,937	16,654,005	83.55%	49.10%
7	sport24.co.za	811,631	9,564,950	2.77%	51.52%
8	Skype PC App - Home Page	793,305	8,631,446	-9.59%	-
9	pnet.co.za	696,573	20,950,615	-11.19%	25.33%
10	channel24.co.za	685,938	4,593,377	-35.43%	38.95%
11	Careers24.com	670,920	7,608,470	-10.75%	24.49%
12	mybroadband.co.za	636,442	5,225,634	-7.24%	21.83%
13	autotrader.co.za	627,501	23,586,723	-4.22%	38.97%
14	BBC Sites	611,122	5,770,723	-11.16%	19.28%
15	careerjunction.co.za	610,982	8,583,829	-5.77%	21.37%
16	junkmail.co.za	599,221	12,521,643	-6.56%	49.23%
17	timeslive.co.za	590,224	4,378,069	-16.53%	23.75%
18	supersport.com	576,025	9,622,168	-26.00%	13.17%
19	sowetanlive.co.za	562,793	8,804,291	-17.22%	12.41%
20	mg.co.za	561,174	3,924,987	-14.43%	19.25%
21	mobi.supersport.com	529,275	11,572,779	-26.52%	99.76%
22	fin24.com	510,219	3,357,785	-9.86%	9.23%
23	mweb.co.za	479,317	11,318,176	-9.29%	5.25%
24	webmail.co.za	444,702	20,057,809	-15.29%	10.42%
25	brabys.com	400,956	863,128	-6.26%	24.29%
26	yellowpages.co.za	388,562	1,420,002	-17.41%	5.11%
27	Health24.com	362,800	1,297,689	-7.50%	13.85%
28	Kick Off South Africa	349,980	10,819,630	12.70%	65.98%
29	beeld.com	340,281	2,976,730	22.68%	34.00%
30	bdlive.co.za	339,734	1,464,088	-11.84%	31.70%

UB: Unique Browsers, **PV**: Page Views, **APD**: Average Page Duration, **Mobile**: % Viewed on Mobile

Frequently Asked Questions

What is the Methodology used to obtain data?

Effective Measure relies primarily on collection of local website market data through an on-page tag. This universal JavaScript tag provides the best coverage of all browser combinations, as it also includes a backup option for web browsers that do not support JavaScript on some mobile platforms.

A website tags with Effective Measure by including this JavaScript code on the footer of all pages in the site, and then as their visitors browse around the site each Page View triggers a tracking call to EM, where cookies for the user are retrieved and set (when needed), and detailed information about that particular Page View is recorded into our collection servers.

This method provides direct measurement of visitors visitation to a website and is aggregated into "Verified" statistics for UBs, UVs, Sessions, Page Views and Duration in the EM Dashboard.

In addition, we recruit a randomly sampled demographic pool from the users visiting this site by means of an onsite survey. The invitation for this survey slides up from the bottom right of a page by default, and is controlled at an appropriate rate per website. Once a user accepts the invitation to this survey and completes the demographic profile, we can then footprint that user on any site in the

Effective Measure network and present accurate, highly detailed demographic data in the EM Dashboard.

Why is Demographic Data Important?

Demographic data provides those invested in the digital media industry with deep market intelligence that increases the effectiveness of marketing initiatives.

We are acutely aware that online behaviour should directly reflect on real-life habits. In comparison to existing digital audience measurement providers that typically offer data that is based on either tagged sites or panelists, we avoid inaccuracy by minimising estimation.

With our capability to generate in-depth profiling of the online population on specific tagged websites, countries or regions, we offer our client's objective, unbiased intelligence that is of real value.

How does Effective Measure rank websites?

Effective Measure ranks websites on the number of Unique Browsers (UB) aggregated. However, we do not subscribe to the 'one size fits all' approach. The Effective Measure dashboard gives users the freedom to compare our standard measurement (UB) with Unique Visitors (UV).

We measure the absolute visitors to your site in the specified date range, according to the Unique Browser that came to your site. This is the most accurate methodology.

In general, the Effective Measure numbers are slightly different from other analytic tools such as Google Analytics, due to addressing cookie deletion. Because of this, the absolute monthly Unique Visitors may be up to 30% lower.

What is UV?

UV is a less accurate representation of website visitors typically based only on a Third Party Cookie, that is used by other common providers for users to compare against.

It is a form of measurement that is a less strict measure of site visits and includes people without reliable cookie support in their browser, who may generate multiple visitor IDs and be over counted.

UV is more in line with other systems, as many do not scrutinize the level of trust in cookies the same way Effective measure does.

Why should we trust UB?

Our UB data, using Digital Helix™ tag methodology, is the most precise representation of Unique Machines / Browsers accessing Publisher websites available. Digital Helix™, an industry first, has both First Party Cookie and Third Party Cookie working harmoniously to produce unrivalled accuracy in tagged numbers.

Why do we rank sites based on South African audience instead of worldwide audience?

We rank sites based on a Local Audience instead of a Worldwide Audience to ensure that our data is the most relevant to advertisers and agencies keen on targeting the local market.

However, we offer Worldwide Audience data over all the categories that we cover in Australia, South East Asia, Middle East and Africa.

Why can Effective Measure data be trusted?

Effective Measure is ABC UK accredited to global industry standards, see here: http://goo.gl/jwpfq and http://goo.gl/CVtvK.

About Effective Measure

Effective Measure is the leading provider of media planning and audience profiling solutions in the emerging markets, bringing best practice online measurement data to premium publishers, ad agencies, ad networks, advertisers and researchers. Our solutions offer media planners invested in Middle East Africa (MEA), Asia (SE Asia and India) and Oceania (Australia & New Zealand), a clear insight into the state of the Internet and the ever-growing consumer population. www.effectivemeasure.com.

For more information on this topic or an interview request with our local spokesperson, contact Effective Measure Media Team, at media@effectivemeasure.com.

Keep up to date with our latest news on this and other exciting updates by following us on our official **Twitter page @e_measure** now!