Middle East and Africa

South Africa

Key digital behaviors and trends over time and across demographics

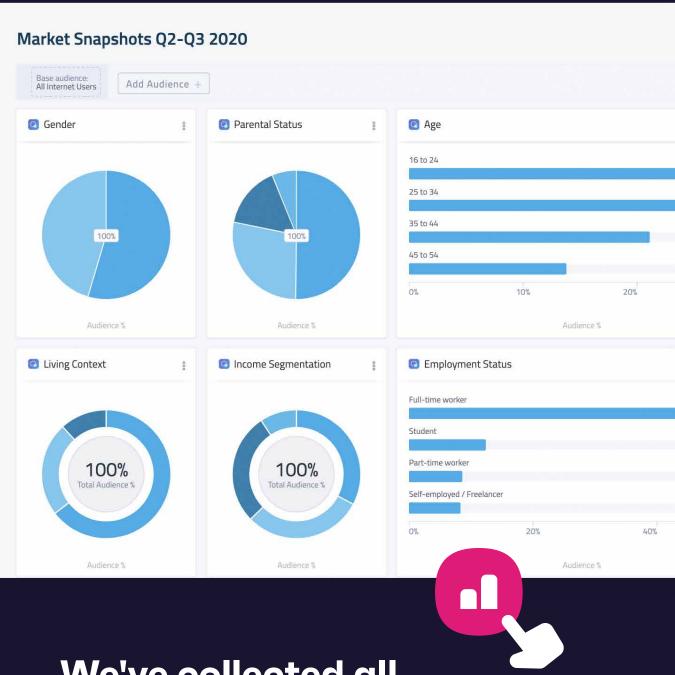


Sample Q2-Q3 2020 3,086

Internet Penetration*



*GWI's forecasts for 2020 based on 2018 ITU data

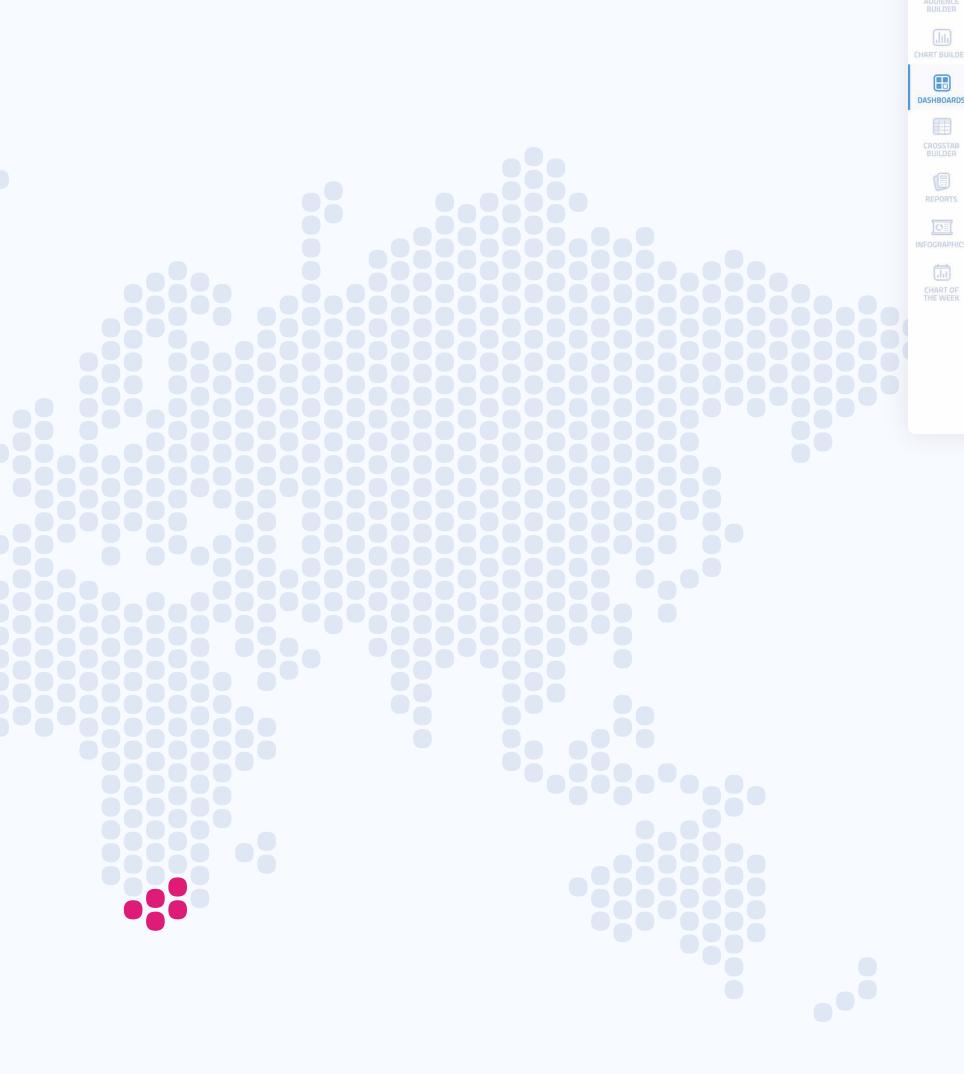


We've collected all charts in this report in an interactive dashboard on our Platform, where you can investigate the data by demographics, over time, and among custom audiences.

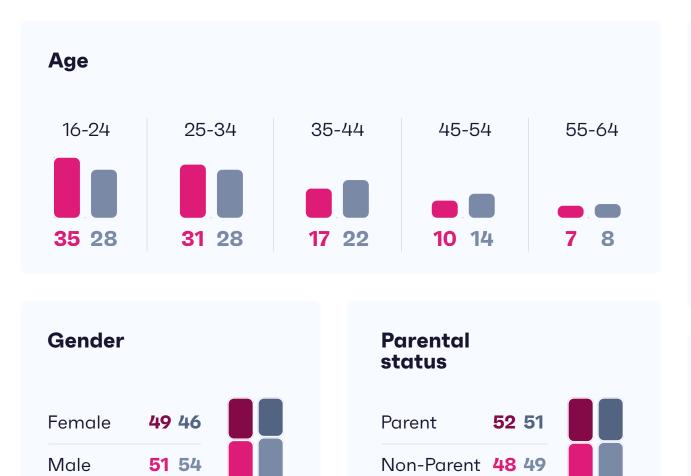


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Who are they?

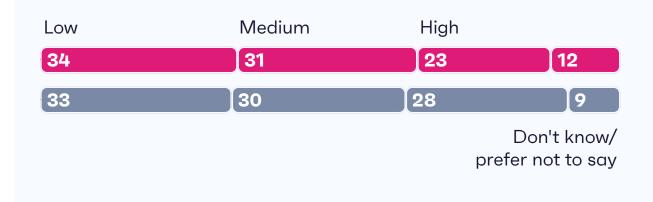


Living context

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39	52		9
64		23	13
Urban		Suburban	Rural

Income segmentation



Self-perceptions

I believe all people should have equal rights
I like to know what is going on in the world
I am interested in other cultures/countries
l like to explore the world
l take care of my appearance

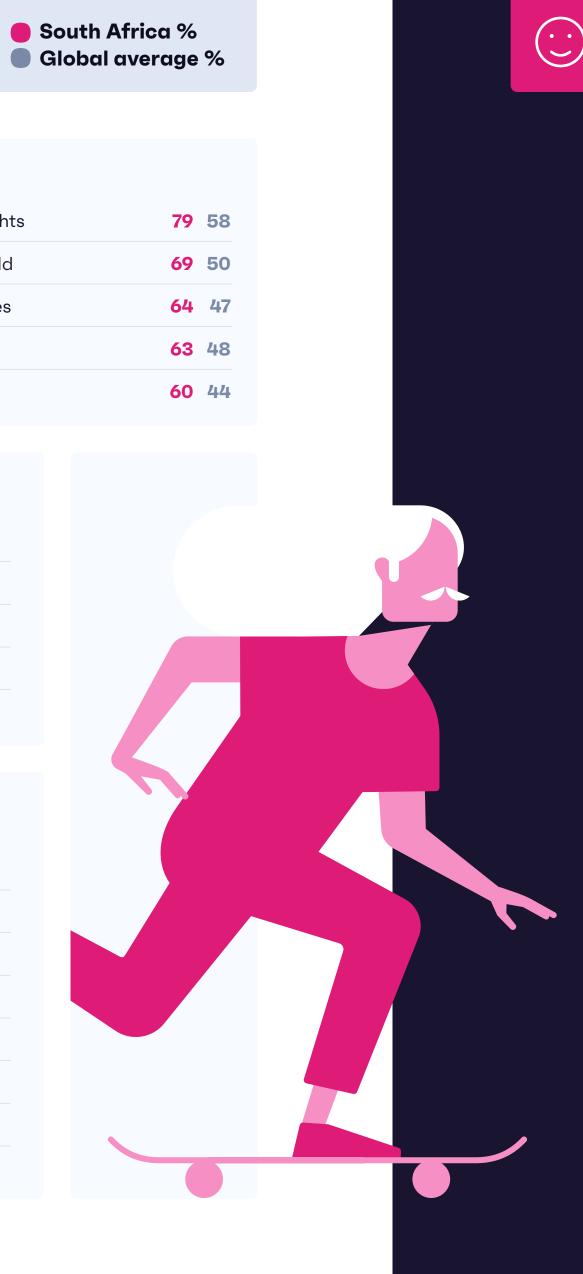
Character

Open-minded	<mark>81</mark> 55
Confident	<mark>64</mark> 48
Ambitious	63 32
Creative	<mark>62</mark> 46
Adventurous	55 35

Employment status

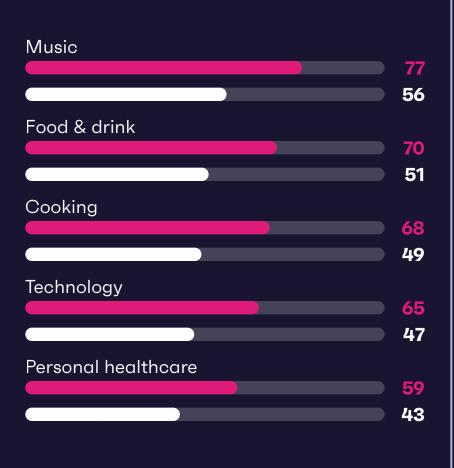
Full-time worker	40	52
Part-time worker	11	8
Self-employed/freelancer	16	10
Full-time/stay-at-home parent	2	3
Student	18	15
Student Unemployed	18 11	15 7





What's their lifestyle?

Top 5 interests



Exercise

% who do the following at least once a week

Go running	41	54
Go to the gym	32	40

Top 5 sports played

Soccer	31	23
Swimming	26	28
Exercise classes	21	15
Cycling	13	21
Athletics	13	10

L ifestyle % who do the following at least once a week			Future outlook % who think the following will get better in the next 6 months
Drink alcohol	29	30	The environment 40 50
Eat out at a restaurant	12	28	Your personal finances 57 50
Eat fast food	27	30	The economy of the 28 46
Visit the cinema	4	15	country where you live

Travel behaviors

% who do the following at least once every 6 months

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Domestic vacation
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Top 5 travel influences

% who say the following have most impact on where they travel for a vacation

Value for money

Relaxing experience

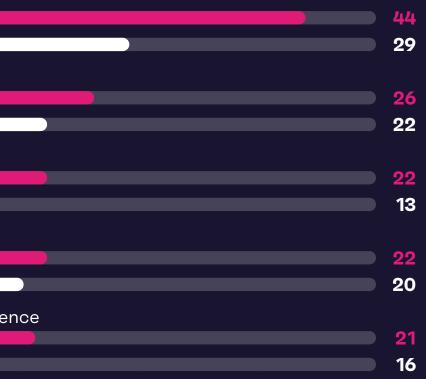
Special offers/deals

Weather/time of year

Once in a lifetime experience



5% 47%	Vacation abroad	<mark>14%</mark> 29%





Time spent online

Average h:mm per day typically spent online on the following devices



Attitudes to technology

% who feel the following describe them

I am confident using new technology

I follow the latest technology trends and news

I worry about how companies use my personal data onli

I am comfortable with my apps tracking my activity

I worry I spend too much time on my smartphone



Plan to buy a new phone or upgrade in the next 12 months

Top 5 handset brands for next purchase

% who say they would buy the following brands when they next upgrade or buy a new phone. Global figures in this chart exclude China

1.	Samsung	SAMSUNG
2.	iPhone	É
З.	Huawei	HUAWEI
4.	Sony	SONY
5.	Nokia	NOKIA

	<mark>60 43</mark>
	44 38
line	44 33
	35 25
	33 31

59% 57%

63	52
45	41
44	13
9	6
7	5

5G enabled (capable of faster speeds via the 5G network)	
	37 44
Enhanced camera capabilities e.g. dual-camera, better resolution	
	36 26
	20
Biometric security features e.g. fingerprint scanners	
	11
	12
Augmented reality functionalities	
	7
	8

Top 5 mobile actions

Desired mobile features

% of mobile upgraders who say they're looking for

the following features when purchasing their next phone

% who say they have done the following mobile actions in the last month

1.	Made a video call or used FaceTime	67	47
2.	Used/scanned a QR code	40 (39
З.	Tracked your spending	39 (33
4.	Used an image recognition tool (e.g. Google Lens)	35 (33
5.	Watched content on a TV by mirroring/casting	33 (30

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Smart home product ownership

% of smart home product owners who say they own the following

	South Africo	ı Global
Irt speaker .pple HomePod)	53%	65%
Irt utility product emotely controlled thermostat)	33%	44%
Irt security product emotely controlled doorbell)	39%	40%

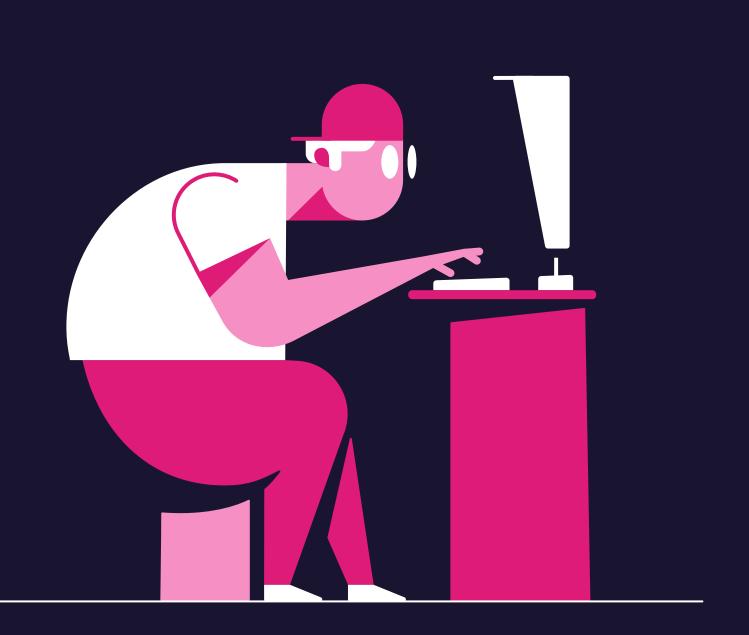
Top 5 electronics

Purchased in the last 3-6 months

Planning to purchase

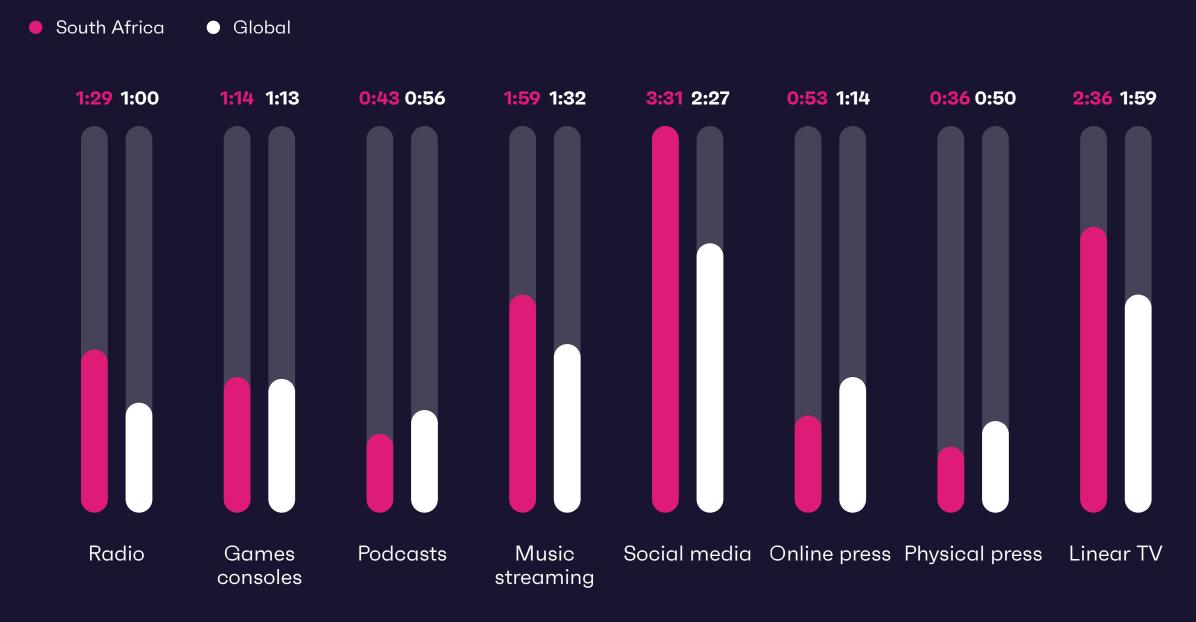
		%
	Headphones/earphones	<mark>39</mark> 18
) - •	Laptop	30 25
).	Flat-screen TV	<mark>21</mark> 21
	Computer/video games	18 13
	Tablet	13 9





Daily media time

Average time spent per day on the following types of media in h:mm





What media do they consume?

TV behaviors % who do the following at least once a week

Watch any type of TV	97 93
Watch live television on a TV channel	<mark>76</mark> 80
Watch subscription services such as Netflix	<u>68</u> 62
Watch a TV channel's on-demand service	59 54
Watch shows that you have recorded from TV	54 48

Top 5 streaming services % who have used the following in the last month NETFLIX 69 42 showmax 42 1 rica only) Google Play 35 24 **Premium 35** 20 VouTube Kids 16 11

1.	Netflix
2.	ShowMax (Poland/South Afri
З.	Google Play
4.	YouTube Premium
5.	YouTube Kids

1:35 1:27

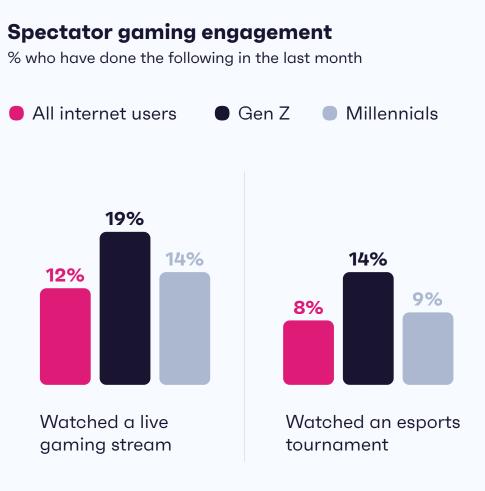


Gaming devices % who use the following devices to play games Smartphone
 Personal PC/Laptop Games console 65 64 71 74 67 63 66 54 49 49 66 51 35 34 29 29 35 36 2015 2016 2017 2018 2019 2020

All internet users





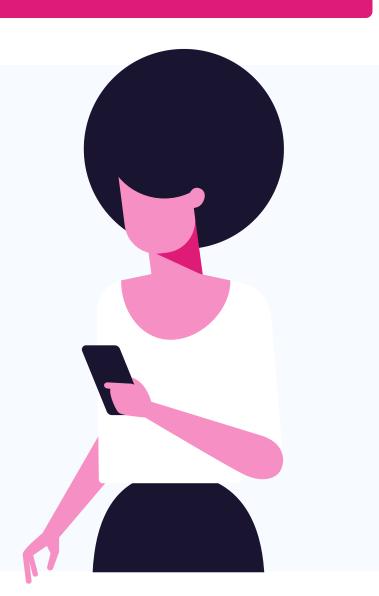


How do they use social media?

Attitudes toward social

% who say the following describe them

I think social media is good for society	
	40
	37
l worry l spend too much time on social media	
	31
	27
I am using social media less than I used to	
	28
	20
l feel using social media causes me anxiety	
	14
	15



Top 5 reasons for being on social

% who say the following are main reasons for using social media

1.	To stay up-to-date with news	53 37
2.	To find funny or entertaining content	51 35
З.	To stay in touch with what my friends are doing	50 33
4.	General networking with other people	45 27
5.	To research/find products to buy	41 27

Brand interactions on social

% who have done the following in the past month

1.	Liked/followed a brand on social	30 23
2.	Visited a brand's social network page	27 22
З.	Used a social networking "share" button	24 17
4.	Clicked on a sponsored post on social	20 16
5.	Shared a brand's post on a social network	17 12

South Africa % Global average %

Accounts followed

Brands you like

47% 31%

Brands you are thinking of buying something from

33% 21%

Top 10 social platforms in South Africa

Visitors/users

Global average



Members

WhatsApp

Facebook



YouTube





Snapchat

Members People who say they have an account on the platform in question. People who say that, within the last month, they have visited or used a social network's website or app via any device. Visitors/users







Facebook Messenger



Instagram





Skype

Note that global figures in this chart exclude China.

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How do they make purchases?

Purchase journey

0	Brand/product discovery	Ads seen on TV	<mark>52</mark> 33
	% who discover brands/products	Ads seen on social media	<mark>46</mark> 28
	via the following	Search engines	43 34

Online brand/ product research

% who use the following for more information about a brand/product

Search engines	70 53
Social networks	58 44
Consumer reviews	<mark>45</mark> 39

-	Online purchase drivers	Free delivery	74 53
	% who are most likely to buy a product online due to the following	Loyalty points	53 27
		Easy returns policy	50 33

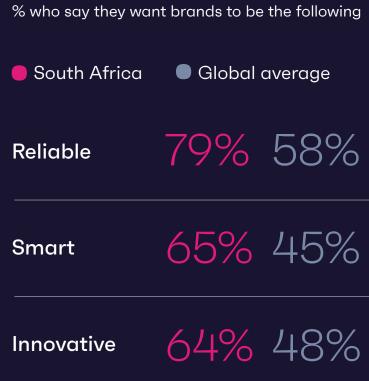
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Brand advocacy

% who are motivated to advocate a brand online by the following

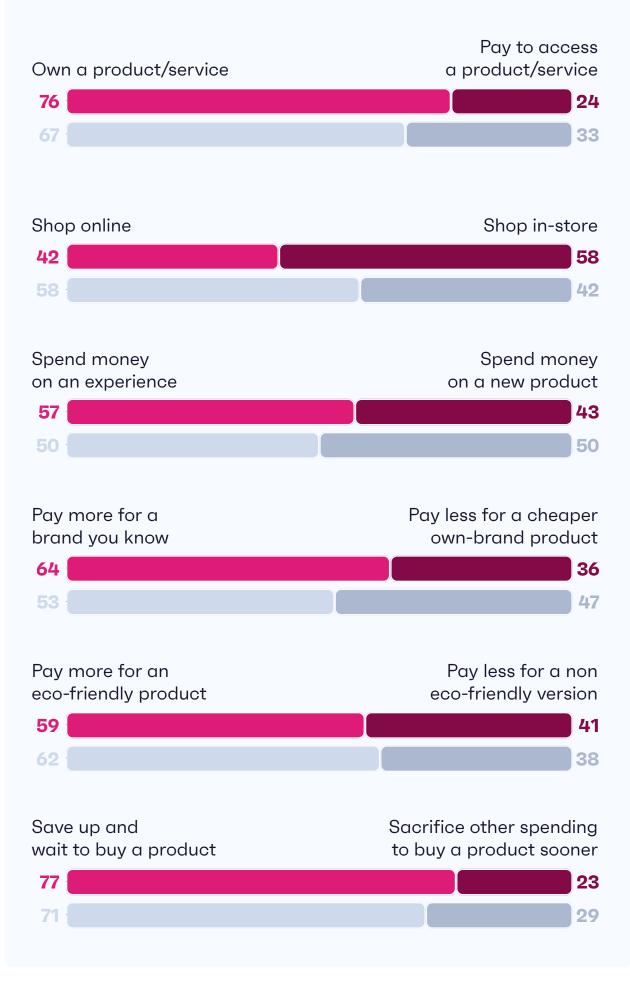
High-quality products	<mark>66</mark> 49
Rewards	<mark>62</mark> 41
Great customer service	<mark>54</mark> 35



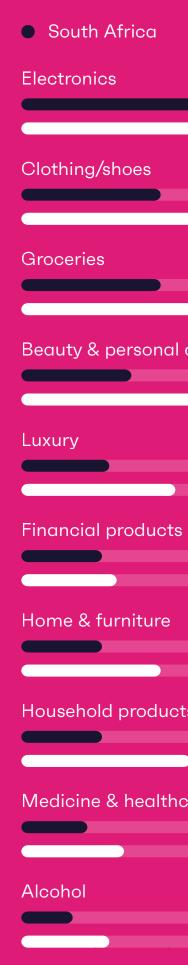


Purchase preferences

% who say they'd rather do the following



Online purchases





% who have purchased the following products online

 Global average 	%	% change since Q1 2020
	26 32	+14%
	19 28	-2%
	19 36	+37%
care	15 31	+17%
	12 21	-17%
	11 13	-4%
	11 19	+11%
ts	11 23	+32%
care	9 14	+35%
	7 12	+11%

Methodology

Unless otherwise stated, all figures in this report are drawn from GWI's online research among internet users aged 16-64. Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

For an in-depth explanation of GWI's research and methodology, including information on our country coverage, internet penetration rates, our sample structures, and much more, please **click here.**

Purchase category definitions:

Alcohol

Beer, Champagne/sparkling wine, Cider, Pre-mixed/readyto-drink cocktails, Spirits, Wine (any), Wine (red), Wine (white)

Beauty & personal care

Conditioner, Deodorant, Exfoliating products, Grooming & shaving products, Hair coloring products, Hair styling products, Hair styling tools, Make-up/cosmetics, Moisturizer, Shampoo, Skincare products

Clothing/shoes

Clothing, Shoes, Sports clothing/equipment

Electronics

2-in-1 laptop/tablet, Broadband/fiber optic, Computer/video games, Desktop PC, Digital camera, Flat-screen TV, Games console, Headphones/earphones, Laptop, Smart home assistant, Smart wearable device, Tablet

Financial products

Car/automotive insurance, Foreign currency, Health insurance, Home contents insurance, Home-owners/ building insurance, Life insurance, Mortgage, Pet insurance, Travel insurance

Groceries

Bottled water, Breakfast cereal, Candy, CBD-infused products

(U.S.A. and Canada only), Cheese, Chewing gum, Chocolate, Coffee, Cookies, Fresh ready meals, Frozen food/ready meals, Health foods, Ice cream, Organic fruit/vegetables, Potato chips/ crisps, Snack foods, Soft drinks, Tea, Vitamins/supplements

Home & furniture

Air conditioning unit, Bed, Dishwasher, Garden furniture, Home exercise equipment, Household furniture, Housing/property, Iron, Microwave, Refrigerator, Sofa, Vacuum cleaner, Washing machine/tumble dryer

Household products

Air freshener/deodorizer, Cleaning products, Dishwasher tablets, Fabric conditioner, Laundry detergent/washing powder, Pet food (dry) for cats/dogs, Pet food (wet) for cats/dogs, Pet food for other animals

Luxury

Glasses/spectacles, Handbag/bag, Jewelry, Purse/wallet, Wristwatch

Medicine & healthcare

Cough/cold/flu medicine, First-aid items, Headache/migraine medicine, Heart medication, Medicines/pharmaceutical items, Mouth/oral care treatment, Pain relief medicine, Skin problem treatment

