Trends in digital advertising in South Africa: An industry and consumer perspective

Report by the Digital Media & Marketing Association (DMMA)
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Introduction

In early 2010, the DMMA (formerly OPA) kicked-off a new research project and secured the services of Marcela Ospina from I for Instinct. The previous research report entitled: “Online Media in South Africa 2009” was commissioned in 2008 and authored by Arthur Goldstuck from World Wide Worx. This report consists of graphs and tables compiled using survey data, which shows the impressive growth of online advertising in South Africa. The report also compares the growth of online advertising in South Africa to other countries and includes information on Internet penetration and revenue models. A copy of this report is still available from World Wide Worx (www.worldwideworx.com).

Due to the fact that the data in the 2008 report was still relatively recent, and the OPA membership base had grown considerably since the report was released, especially agencies, the DMMA executive committee made the decision to commission a unique study in 2010. The research objective was to take the “how” from the previous report and use it as the basis to investigate the “why”.

The report you are about to read is actually made up of two different bits of research. The first part of the report is an ethnographic perspective on how Internet users from different backgrounds consume and perceive digital media in South Africa. The second part of the report is based on surveys and interviews with industry insiders on how they view the state of the industry and what, in their opinion, the obstacles are to growth and increased media spend.

We hope that you find this report informative and learn something from the unique insight that it offers from conversations with South African Internet users and industry professionals from all walks of life.

Enjoy!

Colin Daniels
DMMA: Head of Research
Executive Summary

This research report presents the main findings from the observations and interviews conducted with Internet users as well as with key players in the digital industry including digital and media agencies, and advertisers. The report has five main sections, which address the research objectives.

The first section, “How Internet users behave: different ways to connect with them”, presents case studies of Internet users across different age groups, and from various socio-economic backgrounds. The section explains how they engage with technology; integrate it into their daily activities, and it describes the role that social networks play in their day-to-day lives. The analysis explores the similarities and differences in online and offline behaviour amongst different types of users, and how the dynamics of socialisation vary by type of connection (at home, mobile phone, or Internet café). The section concludes with how users connect through the Internet at a functional, emotional, and instinctive level.

The second section, “Digital Advertising: how it is perceived by desktop and mobile Internet users”, focuses on how Internet users perceive digital advertising, and suggests possible ways of connecting with them while they are online and offline, as per the insights presented in the previous section. Key challenges are outlined according to different types of Internet users.

The third section, “Business to Business research: an assessment of the digital advertising industry”, offers an overall picture of the digital industry from the perspective of key stakeholders and advertisers. The aim of doing a business analysis was to summarise how stakeholders in the digital industry view themselves, including what they see as the main challenges, as well as lessons learned and success stories.
On the other hand, the analysis includes the advertisers’ views on the process of implementing digital strategies and their perception of the digital industry as a whole. The fourth section, “Challenges facing the digital advertising industry”, summarises the archetype of an Internet user and makes recommendations on the best ways of reaching consumers, regardless of the type of connection they use.

Recommendations are presented based on insights gathered from Internet users and the current perceptions that key digital players have of them.

The final quantitative section completes the report. It describes findings obtained from an online survey conducted with key decision-makers in the industry including: advertisers, strategists, and directors of digital and media agencies. The findings stress what factors key-decision makers base their strategies and buying decisions on, and their views on the future of the digital industry in South Africa.
Key Findings

01/ Consumer insights

Based on our observations, digital users can be segmented into two groups depending on how early, or how late in their lives; they first adopted the Internet.

For early Internet adopters, connectivity is fully incorporated into their day-to-day activities, which means that besides simultaneous interaction with multiple digital platforms, the Internet is natural to them. This group tends to strengthen offline social relationships in the online space.

Late Internet adopters, who in this country tend to have lower access to resources, give more status to online connectivity, because it is difficult to access and it becomes something they aspire to. Technology gives them symbolic status, thus, they make an effort to access it.

Practical implications:
Within the online space there is merit in looking at consumer segmentation based on when individuals first engaged with the internet, combined with their socio-economic background.

Strategies targeting specific users:
Late adopters with lower access to resources, tend to focus much more on content delivered to them via their mobile phones. Early adopters and late adopters with higher access to resources, on the other hand, consume bits of information from different digital sources. They also pay attention to personalised emails (e.g. offers and promotions).
**02/ Offline relationships influence early and late Internet adopters’ online activities**

Internet users in this sample, and users observed in previous fieldwork conducted in South Africa, all belong to offline communities such as church groups.

When observing their participation in online social networks they seem to trust those who belong to a similar community, even if they don’t know each other in the offline space.

Offline social networks also seem to influence the type of online content that people search for. Religious blogs and emails were commonly mentioned.

Amongst the late and early adopters, there is a group of people who give technology a high status. This may influence what they do while they are online, and probably the content they access is less influenced by their offline activities. They tend to gravitate towards aspirational content and brands, including gadgets, cars, and sports websites.

**Practical implications:**
It is important to consider and understand the online and offline behaviour of your target audience in order to deliver relevant messages to them. Some Internet users are interested in content that is directly related to offline activities. Only by knowing what these are, is it possible to identify behaviour trends amongst users.

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**03/ Individual differences from shared Internet use**

It is increasingly common in South Africa to find people who connect from Internet cafés, and who share their phones as modems at home with other family members. This practise is known as “tethering”.
The dynamics of connecting from public places differs from those who connect from home or via their mobile phones.

It is common to find groups of friends sharing one computer. This helps them save money, because they split the hourly fee between them. The singularity is that the browsing session becomes interactive in the offline space; because users give feedback to each other regarding the content they access or view. This means that offline habits influence online behaviour.

Practical implications:
When tracking digital trends this research shows that thorough knowledge, as far as offline social practices go, can help in understanding the rationale behind online behaviours (whether users connect when they are alone or in a social setting, and from where, which determines how long they remain online).

It is common for users to tether their own mobile phone or a friend’s mobile phone to their home computer. This often determines how long they remain online, because it is more expensive than going to an Internet café, or using an ADSL connection. Content that is viewed when connecting this way include searches that are very specific, and of mutual interest.

Tracking and understanding these behaviours can lead to the creation of more accurate and engaging content aimed at users who alternate between the mobile Internet and sharing their phones as modems.

04/ “Instant gratification” is a popular concept in digital advertising.

This consists of engaging with Internet and mobile users by offering them a tangible reward (e.g. competitions via mobile advertising or rich multimedia content).
Psychological research has shown, however, that levels of satisfaction are connected to the anticipation of the reward, but this decreases as soon as it materialises. The trick, applied to digital advertising, is to surprise users constantly so that there is ongoing gratification in the short and long term.

The research findings support the above, as messages that were once relevant to users, often become repetitive and boring, even if the contents are aligned to their interests (e.g. mobile operator offers via text message).

On the other hand, even if their views on digital advertising are based on misconceptions (e.g. pop-up ads only), users remember content and information that is relevant to them. In general, when asked if they remembered particular ads, interviewees recalled content that they received on a constant basis. They remembered newsletters containing information about services and shops that they visit regularly (e.g. Ster-Kinekor, Makro, Jet, HiFi Corporation).

The previous finding indicates that even when marketing messages are repetitive, people still remembered the message provided they regularly consume the product or service.

**Practical implications:**
It is likely that brands or products will have a greater impact on people if they remember the contents of the message, as this shows a degree of connection.

According to this finding, when communicating with users it is advised to create campaigns that not only engage them in the short term, but also stimulate and surprise them. This means that if there is a competition for example, all the information should not be completely disclosed at the start.

It largely depends on the campaign’s goals, but ideally people achieve satisfaction by being constantly rewarded (instant gratification) and surprised.

Messages delivering the same content repeatedly eliminate the element of
surprise, hence, people feel disengaged after a while. One alternative to this approach would be to deliver the messages via other media (e.g. email or phone call), or by prompting users to actively participate (e.g. encourage them to save messages on their phones or email accounts).

These strategies must be delivered in combination with a good knowledge of people’s offline practices, as some of the reasons for disengagement include the campaign’s lack of relevance to them. For instance if a person likes soccer, it is possible that they are also interested in sports blogs and participate by commenting and chatting with other members. Good communication can target these channels with related information.

05/ Business to Business

In the media industry (agencies and advertisers), there is a general perception that digital advertising requires highly specialised knowledge.

Because a certain level of expertise is required, the value placed on knowledge of the topic is extremely high. This is common amongst people within the industry as much as it is amongst decision-makers at media agencies and advertisers.

This can be daunting to those who are responsible for making purchasing decisions and planning media strategies.

Practical implications:
It is likely that the perception of the digital industry as highly specialised intimidates advertisers and media buying decision-makers, and makes them feel that they lack the required knowledge. As a consequence, companies rely heavily on their digital managers, for example, as opposed to gaining some of that knowledge themselves.

A recommendation is that industry experts place much more of an emphasis on training and coaching within the broader media industry. This includes human
resource departments, as the criterion they use to hire digital managers is directly related to buying decisions.

A lot of the uncertainty businesses place on the digital advertising industry is based on the fact that they do not know what to expect from digital experts. In other words, their specialty has become inaccessible as those responsible for selling, delegate the digital responsibilities to the relevant manager.

In order to make digital strategies everybody’s concern, members of the digital industry must share knowledge in the simplest ways, as many still do not know what the basics behind a digital campaign are.

**06/ The Internet (desktop and mobile) user experience should generate curiosity and eventually achieve some level of satisfaction.**

This can be achieved by creating relevant content, which is measurable, but beyond that, and more often than not, the value of the experience is determined by the users’ level of emotional engagement with the message.

**Practical implications:**
Although digital media is highly measurable, digital marketing and advertising should not be cold and clinical. Digital leaders should communicate to clients, media agencies, and consumers that the industry is both creative and measurable. The research amongst consumers shows that this is actually possible by measuring the levels of satisfaction they experience when interacting with digital advertising.

- Whenever possible, communicate to clients that the number of clicks or the click-through rate does not always determine the success of a campaign; as people may already be aware of a product or brand, and yet not click on the
ad due to a lack of airtime or money for Internet access. Awareness can be measured in different ways, such as by how many emails containing marketing messages are stored for example. This requires paying particular attention to content-driven curiosity.

• Expand communication strategies to target those who connect from Internet cafés and mobile phones.

Qualitative sample

A total of 14 people were interviewed. They were segmented as follows:

13-15 years old: 3 interviewees /

Peter
13 years old, 7th grade
Lives in the North of Johannesburg
Early Internet adopter (Desktop)
Owns a computer
Uses MXit from his phone and plays online games

Manuella
15 years old, 10th grade
Lives in the North of Johannesburg
Early Internet adopter (Desktop)
Uses a Blackberry
Owns an Apple Macbook
Uses BB chat and MXit

Emma
16 years old, 10th grade
Lives in the North of Johannesburg
Uses a Blackberry
Shares laptop with her mom
Uses BB chat and MXit

15-21 years old: 3 interviewees /

Lawrence
17 years old, 10th grade
Grew up in Diepsloot township
Late Internet adopter (PC at school at age 13)
Uses school computer
Uses MXit

Kyle
17 years old, 12th grade
Lives in the North of Johannesburg
Early Internet adopter (Desktop and phone)
Uses a Blackberry and a PC at home
Uses MXit and BB chat to communicate with his mom

Claire
19 years old
Lives in Midrand (North of Johannesburg)
Fashion design student
Early Internet adopter (Desktop at home)
Access to Internet from mobile phone and desktop at home
Uses MXit

21-26 years old: 4 interviewees /

Nhlanhla
24 years old
Lives in Yeoville (Johannesburg centre)
Finished technical studies (looking for a job at present)
Late Internet adopter (PC at school and Internet café)
Access to Internet from her phone (Facebook predominantly)
Uses MXit

Kabelo
University student
Lives in Soweto
Late Internet adopter (Desktop & phone)
Accesses the Internet at friends houses, Internet cafés, and university computers
Connects to the Internet from his phone and also uses it as a modem
Uses a desktop computer at home
Uses MXit

Neo
22 years old
Lives in Soweto
University student
Late Internet adopter (Desktop)
Uses a computer at home
Uses phone as a modem and goes to Internet cafés
Uses MXit

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Tapelo
23 years old
Lives in Benoni
Late Internet adopter (phone as a modem)
Built his own computer
Accesses Internet at school, uses phone as a modem, and connects from Internet cafés
Uses MXit

26-34 years old: 2 interviewees /

Adeline
30 years old
Originally from Cameroon
Masters student
Works with sister
Lives in Westdene (West of Johannesburg)
Early Internet adopter
Connects using phone as modem, 3G card, and Internet cafés
Her main social networks include Facebook and Hi 5

Mpho
30 years old
Lives in Soweto
Early Internet adopter
Works at an Internet café
Has broadband access at work
Doesn’t use the mobile Internet
Built his own computer 5 years ago
Main sites include sports blogs and house music websites
30-34 years old: 3 interviewees /

Theresa
34 years old
Studied at technical institute
Sells vegetables for a living
Lives in Rosettenville (South of Johannesburg)
Late Internet adopter
Accesses the Internet from Internet cafés
Doesn't own a computer
Visits jobs websites

Morgan
34 years old
Works at an IT department
Lives in the North of Johannesburg
Early Internet adopter
Owns a laptop
Access to the Internet from work and home (3G card)
Uses Facebook
My work

I have done work in Colombia my home country, and South Africa where I have lived and worked for 7 years. People often ask me whether it is difficult or not for me to do research in a foreign country, because of all the obvious cultural barriers. My answer is always that precisely because of that, doing work here is in some ways easier. I believe that when I approach people as a foreigner, I am an outsider, some kind of creature that has come here to observe them. I approach a task, whether it is to find out how technology fits into people’s lives, to how a brand can connect with a certain racial group, as an observer that wants to understand the way other people live.

The value of my findings does not come from the information that people decide to share with me, but from the sense this makes in their cultural and social contexts. I take into account these, and the symbolic value that a category or a product, have for them.

My previous clients include brands such as:

- **SAB (Colombia and South Africa) - 4 categories**
  Positioning strategy for ad campaign and insights gathering in order to improve communication channels between beer distributors and shop owners

- **Heart radio station (South Africa)**
  Positioning strategy and insights gathering

- **Multi-choice (South Africa)**
  Mobile TV testing amongst DStv and non-DStv users

- **Media 24 (South Africa)**
Research on cultural reasons for the decrease of Afrikaans newspaper readers in Cape Town and Port Elizabeth

- **Vodacom (South Africa)**
  - **01/** Business-to-business research in order to find out how to increase sales of mobile advertising amongst media agencies
  - **02/** Research amongst social network users in order to understand their use of technology, their behaviour while connected to the Internet from their computers or mobile phones, and their use of social networks

- **Added Value strategy (UK & South Africa)**
  - **01/** Cultural analysis of South African trends in regards to power and media
  - **02/** Cultural trends gathering amongst women in 3 South American countries including Mexico, Colombia and Mexico

### Qualitative research

Its main strength lies in the richness of the data gathered via in-depth interviews and focus groups. Data is analysed based on common themes that emerge during interviews.

### Ethnography

It provides us with an overall view of the social context in which an actor lives, and offers a deep understanding of the circumstances in which someone uses a product. Diaries, including pictures or video footage, are kept in order to put together a picture of people’s lives.
Quantitative research

It is numeric and quantifiable. Data is necessary in order to produce generalisable findings that can be applied to a bigger sample of individuals. Data is analysed statistically, by variables that are considered relevant to the study (e.g. demographics such as age and education level etc.)

Ideally, solid research should combine these methods, in order to understand phenomena from a holistic perspective. Each one of these methods has particular relevance depending on the nature of the research question.

Examples of multinational companies and researchers that use ethnography and/or a combination of these methods:

- **Apple** (Ethnographic research amongst potential iPod and iPhone users)
- **Intel** (Hardware and software research)
- **Ideo** (Integrated industrial design company)
- **Nokia** (Mobile technology)
- **Microsoft** (Hardware and software research)
- **Danah Boyd** (American academic specialising in social networks)
How was the research conducted?

The research had 3 components that gave account of 2 different areas of the digital industry.

14 in-depth interviews and observations were conducted in Johannesburg, with people aged 13-35 years. The interviews took place at people’s houses, when they had access to ADSL or 3G cards, or at Internet café. Observations of the social dynamics in these places were taken into account in the analysis.

In addition, 12 interviews were held with key members of the digital and media industry, and various advertisers. This formed part of the business-to-business research component of the report, which gave account of how players in the industry currently view it, and what the main challenges are to its growth.

35 surveys were sent out to DMMA members, with questions similar to those asked in the interviews. Their purpose was to complement the qualitative research and to clarify findings that emerged in the interviews.
How Internet users behave: different ways to connect with them

01.1/ Participant observation of 2 proficient Internet users

Emma is a typical 15 year old, always connected to her friends through her Blackberry, and, when she’s at home, through her computer. I spent some time with her and her best friend while they were deciding on a movie to watch at the cinema.

The interview took place during their school holidays, so the two friends had a lot of time on their hands, and were looking for things to do. Their main activity while they were online was downloading movies and music.

Emma’s computer is an Apple Mac Pro that her parents bought for her. She loves it because she likes designing things on Adobe Photoshop. She told me that she does almost all her homework online, particularly since starting grade 10.

The two friends each had their own Blackberries, which was not expected from young teens in this age group. When asked why they use these phones the girls explained that they share a contract with their parents and chose these phones when they were given the option to upgrade. The parents also have their own Blackberries, and all of them chat to each other on what they call ‘BB (Blackberry) chat’.

The two girls knew exactly how much their parents’ Internet and phone bills were, even though they themselves do not make any contribution to the costs (individually, their
portion of each bill came to approximately R300).

The girls talked about the way they use the Internet on their phones and their computers at home. There were obvious differences:

- They don’t access Facebook from their phones because its features are not the same as when it’s accessed from a desktop browser. Instead, when using their phones, they browse for movies, or do quick searches as and when required.

- They performed searches on their phones at school. When asked for information they don’t know by teachers, they use Google instead of going to the library.

- The predominant activity on their phones, according to the observations and the interviews, is instant messaging with their friends.

- They use BB chat, because they both have Blackberries, but since some of their friends don’t, MXit is also very popular. They did point out, however, that their friends are increasingly getting smartphones like the Blackberry on a daily basis.

Emma had mixed feelings about Facebook, and even though she uses it a lot, she said the following:

“"You read what people are doing, look at pictures and put pictures on, it is kind of boring. I don’t know why, it’s not that exciting. You must be pretty bored to see what others are doing in their lives. If you miss friends, you write on their wall, but I don’t do that much”."
How technology is incorporated into their lives

According to Paul Adams, a senior user experience researcher at Google, when studying people’s relationship with technology, designers and social scientists must approach it as a social, and not a technical matter. It is key, then, to understand why people use certain devices or platforms, concomitantly to how technology drives rapid change processes.

In this section, participant observations of people using the Internet, and their narratives about how technology fits into their lives are examined, in order to identify different ways of engaging with the Internet. The information gathered is classified according to people’s type of Internet connection, age group, highest level of education, and access to resources.

Advanced users aged 13-21 years: functional, emotional, and instinctive behavioural trends

In the figure above, insights about users are classified according to their online activities on computers and mobile phones, socialisation processes that are enhanced by this media, and the cultural trends that are driven by changes in online interaction.

Out of all the interviewees, people aged 13-21 were the ones who seemed to focus on specific activities, such as downloads, watching videos, and instant messaging, for longer periods of time. They use both computers and mobile phones in order to connect, although the latter is more popular for instant messaging. It is important to point out the difference between instant messaging and connecting, as the research participants themselves make this distinction clear.
“Connecting” in their minds means searching and browsing the web, whereas instant messaging is about “communicating”, and enhancing existing, or creating new, emotional connections. When doing so, being online is not strictly necessary. This will be explained below.

Useful Internet: functional connections

The most commonly mentioned instant messaging platform was MXit, which characterises the category amongst people this age. The interviewees explained that they need to have airtime in order to chat with friends, but they don’t need to be online when chatting.

The main reason given as to why MXit was their platform of choice is because it is relatively cost efficient. They all agreed that communicating this way saves them money. The fact that everybody knows about it and it has reached critical mass in South Africa makes it even more appealing.

The instant messaging trend amongst those with better access to resources can largely be explained by the practicality of using the same products and services as other family members. For instance, it suits parents that their children have Blackberries because they can all communicate via BB chat. This saves everyone money, plus BB chat is free on most Blackberry contracts. This is a major selling point for young people because they don’t have to worry about spending their own airtime.

For Kyle, a 17 year old, his phone is the one thing he could not live without. He recently got a Blackberry and explains why:

“You need to know what’s happening and what’s going on, and what people are doing, I think that’s why Facebook is so good. My mom got me a Blackberry, and we chat, and a lot of friends are on BB chat”.
In addition to instant messaging, there are other activities that individuals in this group deeply engage in, at a functional level.

Their Internet use is driven mainly by the need for information, but also by personal interests.

Sharing information is a key activity. Whether it be movies or music, if people didn’t share it with one another, accessing it would be impossible. What this entails goes beyond the functional, as the second stage of the analysis will show.

The excitement of sharing: emotional connections

Consumers directly benefit from searching and browsing as the Internet solves immediate queries, but this is not how they seem to engage at an emotional level. What brings out emotional connections with the Internet, is the possibility of sharing information with people they were not in touch with before, and have now found, or engaging in conversations with those who they have something in common with.

The perpetual sharing, and exchange of information results in deeper connections than the connections usually prompted when users benefit from getting the information they require. Social networks play a role in this regard. However, the trend indicates that people in this age group are discontented with Facebook. Based on the observations, the level of engagement with pages that have shared content was higher. Downloads were very popular, including music, movies, and games, and YouTube was one of the most visited sites. Regardless of the content (artists, video game pages, and blogs), these websites promote participation of some sort, and groups or individuals with whom they can identify create the content, which engages them at deeper levels.

Lawrence, aged 17, for instance, could not believe that I didn’t know who Lil Wayne is. He told me that his blog is one of his favourite sites because the artist regularly updates the content:
“I also go to Lil Wayne’s site. A rapper. This is his blog, (it’s an) everyday thing he does and his latest music and all that. He’s one of my favourite artists so I check the website about him.”

Many times during the interview, he referred to the fact that the site’s content changes regularly. He also said that the best part is that the artist shares details about his life, posting this himself, similar to a status update. Lawrence didn’t mention posting comments on the website, thus, what made him tick was consuming information that the artist chose to share, as opposed to commenting on the blog.

When comparing the level of engagement with these kinds of sites to that of Facebook, people admitted updating their profiles often, but added that the whole thing has become a bit boring. Some mentioned that it is becoming more popular with older people: “My gran has Facebook, she lives in England” (Female, 15 years old, 10th grade student).

This is not a general consensus, though. A 17 year-old student said the exact opposite:

“If they are away, my friends, we chat on Facebook. We also use Gmail but not the chat. A lot of my friends use Skype, but I think it’s more for parents, because one of my friends was in Australia and his parents Skyped him. I think a lot of old people don’t like Facebook” (Male, 17 years old, 11th grade student).

Since these are the interviewees’ perceptions, they must be treated as such; subjective opinions based on personal experiences. In the USA, however, younger people think that Facebook is for older people, so they use MySpace and Twitter instead (see http://www.danah.org/papers/talks/ICA2009.html).

Very popular amongst the youngest member of this group (13 years old), was looking for video game cheats which enables conversations with other peers too. Gaming involves connecting with other people online and offline; therefore sharing information plays a crucial role. This enhances emotional connections with certain sites or online activities.
Observations in this regard raise a number of questions, which are crucial to the development of new digital platforms, and the understanding of social changes prompted by digital interactions.

**Are social networks, specifically Facebook, too generic and therefore less appealing to members of this age group?**

Since observations point to people’s preferences for specialised websites, is it sensible to think that those in this age group have lost interest in Facebook because they consider it to be limited and aimed at an older demographic?

On the other hand, it was also observed that the use of social networks is highly driven by functional and practical considerations, such as low prices and a high number of users. This could explain why MXit is so popular amongst interviewees in this age group, as all of them agree that it is the cheapest way to communicate with one another, and all of their peers seem to actively use it.

The story above indicates a trend that was common with people in this age group. They seem to integrate BB chat into their lives, but combine its use with MXit, which is still the most popular platform amongst this generation.

The functional reasons were explained earlier, but the next section will explore another level of connectivity, which uncovers the possible drivers for digital behaviour amongst advanced Internet users (desktop and mobile).
Changes driven by instinctive digital interaction: cultural trends

A common theme in the theoretical debate about the increasing use of digital technology is the division between the virtual and the real world. This report argues that such a separation is deceiving, because the rules of online interactions are socially and culturally dictated in the same manner as the ones in the real world.

Based on the latter, this section addresses a major theme that emerged from observing advanced Internet users, and has to do with the role of digital interactions in the construction of their identity.

The role and significance of digital technology in defining individual identities

Lawrence grew up in Diepsloot, a township outside Johannesburg, but he was awarded a scholarship to study at Dainfern High School. He has been studying there for three years and he shared with me his experience of living in two different worlds.

This section focuses on the role that digital technology plays in his, and other people’s lives, at present. In Lawrence’s case, the main insight concerns how his online interactions differ from the ones of his township friends.

Diepsloot is one of the biggest townships in the Northern suburbs of Johannesburg. Dainfern, on the other hand, is a wealthy suburb located close to Johannesburg. When Lawrence got accepted to Dainfern High School, he not only faced the challenges of speaking English all the time and getting accepted into a different social environment, but he also suffered rejection from his old township friends, who judged him because he was not ‘one of them’ anymore.

The first year, he told me, was extremely hard because he had to leave the township early in the morning to catch the bus to go to school. He came back home late at night, and he was
usually very tired and lonely. At school it was not easy to gain acceptance from the other kids, either. They also discriminated against him, because he came from such a different background.

Lawrence’s first experience with the Internet took place under these circumstances. It was at school that he became computer literate and learned how to use the Internet. He started using applications, browsing the web, and downloading information much sooner than any of his township friends.

At the moment his life is split between two worlds. The one at school differs greatly from the one at home because his school world guarantees him access to education and the Internet. The implications of these contradictions are complex when analysing his answers to other questions, and the importance he attaches to technology.

Amongst the things they cannot live without, the role that others play in their lives is hugely important. They mentioned some devices too, which had to do with their hobbies or the things in life that they are most passionate about. For instance, they named iPods or guitars, because they love music, as well as their pets, because they have an emotional connection with them. They often referred to their parents and friends because, according to them, it is impossible to live without them at this stage.

This is crucial when analysing their relationship with the Internet and digital technologies, because this has to do with the value they attach to a certain device. Such a value depends on the extent of emotional connections it generates, and hence, it varies according to each person’s social and cultural context.
Lawrence’s example illustrates this clearly because his mother plays the main role in his life while, at the same time, his phone is of great importance to him and there is a very instinctive reason for this.

**Instinctive and symbolic value of mobile digital technology amongst early users**

- **Connector between the two worlds he lives in**
  - Instinctive attachment
- **Symbolic value/construction of identity**
  - Status amongst peers in township
This device is the link between the two worlds he lives in, so when he visits his mother in the township for example, his phone guarantees him access to school friends and the Internet. When he is at school, or staying over at a friend’s house, it keeps him in touch with his mother and friends in the township, who represent the place where he comes from, his “roots”.

On the other hand, he aspires to have a Blackberry because it would make him look ‘cool’ and ‘professional’. This means that owning such a phone has a high value to him because it is a status symbol. The phone would make it possible for him to show others who he is now. Thus, it would validate his newly formed identity.

This report argues that, for someone like him, early access to digital technology (Internet from a computer at school and from his mobile phone) has played a key role in building his identity. Or put differently, he expresses who he is, or aspires to be, through his interaction with digital technology. To an extent, this applies to other advanced Internet users with high access to resources as well, as this section explains.

The fact that Lawrence accessed the Internet earlier than his township peers puts him in a different position from someone like Dylan, who is 13 and started using the Internet when he was 9, and doesn’t know what it’s like not to have Internet at school or at home.

Digital technology is now a crucial part of these two interviewees’ lives. However, for Dylan the connection is so natural that it is almost intrinsic to his life. He does his homework online, and at an emotional level he gets excitement from finding cheats for video games.

Lawrence, however, experiences things differently, as access to technology has a symbolic value. That is, access to the Internet transcends its function, and it becomes a status symbol that affects how other people perceive him.

Lawrence can do a range of things online when he accesses the Internet from school, from watching YouTube videos, to downloading music. When he goes back to Diepsloot to visit his mother, however, he feels like an outsider. This difference was observable to the extent that he couldn’t tell me accurately how much an hour at an Internet café costs.
Culturally and instinctively, his relationship with digital technology shows how he wants to be seen by others, and more importantly, it defines his first impression of the Internet. This very first experience will consequently determine his perceptions of digital advertising.

**Communication code for people with better access to resources**

- **INTERNET ACCESS IS INTRINSIC TO MY LIFE**
- **IT ALLOWS ME TO BELONG**
- **IT MAKES ME FIT INTO MY CURRENT CONTEXT**

**Communication code for people with better access to resources**

- **INTERNET ACCESS ARRIVED LATE**
- **I LIVE MY LIFE TO ITS FULLEST POTENTIAL**
- **IT SHOWS OTHERS WHO I’VE BECOME**
01.2/ Behavioural trends amongst those who connect from Internet cafés (22-34 year olds)

Nhlanhla is 24 and has just finished her studies, so she spends a lot of time online searching for a job. We met at the Internet café she regularly goes to in Yeoville, close to where she stays. The place was quite full, as it was a Saturday, and there was a lot of movement inside and outside the shop.

There were a lot of individuals coming and going, as well as groups of two or three friends sharing computers. Some were watching videos on YouTube together, and others were sharing the experience of viewing a wide variety of content.

Nhlanhla started by showing me what she does when she is online. She went straight to the Jobmail site and posted several job applications. This, she said, doesn’t differ much from what she does every time she goes online at this particular Internet café. The sites she visits, however, do differ when she connects from her phone.

She explained that, for her, checking Facebook when she’s paying for one hour only is expensive, so she mainly accesses it on her phone, and usually only changes her status. I confirmed this information when I observed her updating her status daily and yes, many of the updates came from her mobile phone.

I asked her who her Facebook friends were, and she told me that she actually personally only knows four out of all her friends. She said that she just accepts friend requests, even from strangers. This contradicted what she said about her behaviour when using MXit though. She said that she was scared of meeting strangers this way. However, later in the interview, she mentioned a boy she had met on Facebook, who shares her love for soccer.

She talked about the first time she used the Internet and social networks, and she told me that her younger brother had introduced her to Facebook and MXit.

With regards to digital advertising, she referred to ‘clicking’ the pop-ups on the sites she visits. She explained:
“If you click it just changes, and what you’re looking at, it just disappears and I don’t like that. Sometimes you don’t have enough money and you can just do one thing. It is only if you are curious”.

In general, even though she showed more confidence online than other interviewees who also don’t have access to the Internet at home, it took her a long time finding sites in a search engine. Every time she wanted to return to a site that she frequently visits, she either typed it in Google, or typed in the wrong address (such as www.facebook.co.za).

What Internet cafés users do online (PC & mobile): functional connections

Internet users aged 20-25 years old are focused on finding jobs. They have a limited weekly budget for internet access, so they spend it at an Internet café. They go online at least three times a week for an hour or two at a maximum. They visit different job sites from which they post job applications, and while they update their Facebook status they also check the news.

Sharing computers is a common occurrence at Internet cafés. People do so for two different reasons. The first reason is to share Internet costs by splitting a one-hour session into half. The second reason is to make it easier to share and comment on online content.

This finding is relevant when analysing online behavioural trends. Sharing content is related to the human inclination to have both offline and online conversations with friends.

This applies mainly to content such as videos and blogs, which were observed to be popular amongst groups of friends.

It would be worth doing more research into shared online behaviours, because while online, people pay attention to different things.
The main insight regarding shared connectivity, based on my observations, was the mix of offline and online interaction.

The ‘user experience’ between a single person and a computer is completely different from what was experienced by pairs or groups of people. The latter prompts deeper levels of socialisation, and thus, more offline dialogue.

A Saturday afternoon in downtown Johannesburg was a social experience, even though the interviewees were glued to their computers at an Internet café.

There was an interactive computer stand downstairs from the café, where the interview took place. Groups of friends were coming and going from stands with Mac, or ‘Apple’ computers, that were connected to the Internet. The most popular website was Facebook. They also took pictures of each other, so that the activity became more fun.

Internet cafés have become places where both old and new friends socialise together, both off and online. For instance, when the interviews were conducted, some users were dressed up, as if it was a hub for entertainment and meeting new people.

While the interviews took place, there were constant interruptions from others who asked questions and initiated conversations.

This trend varies from the one observed amongst members of the youngest group. They focus on more than one medium simultaneously, which leaves little opportunity for offline socialisation. Or, from a different perspective, their social interactions take place in the online arena, or are focussed on online content which they share, such as videos, games, music, and movies.

The conversation amongst younger users with Internet access at home takes place mainly in the digital space, whereas being online still prompts offline socialisation amongst people who access the Internet from Internet cafés.
Online behaviour: technology guarantees survival

Interviewees in this age group referred to the things they can’t live without. The most commonly mentioned items were their computers. Differing from the younger users, who named their families and friends, people in this group view their computers as indispensable.

The reasons for this can be explained as follows:

The role that technology plays in this group of users’ lives is crucial because they are either looking for a job or need to work from their computers.

These two activities guarantee survival, as opposed to the younger interviewees’ use of the Internet, which is focused around entertainment and socialisation.

According to Adeline, a 30-year-old woman:

“I don’t think I can do without a computer lately. I log onto my university website every day, given that I am looking for bursaries and things like that so I also log onto other universities websites. I am a Christian, there’s an evangelist who I met online, what he does, is that every 2 days he sends a video of something spiritual. I download them and listen to them in my leisure time”.

There are valuable insights to be gained from examining how Adeline uses the Internet. They illustrate the crucial role that the Internet plays in allowing users to access content that has a deep meaning for them (such as spiritual messages), as well as updates related to their career or industry.
Even though people don’t attach the same importance to these two, in both cases, the instinctive relationship that exists with the digital space, is stressed.

This finding becomes more relevant to the analysis when comparing it to the younger users’ relationship with the Internet. Its main function, for them, is communication and enhancing existing social ties.

Sometimes the aim is to create new friendships or relationships of some sort. This is important to them, and at this stage of their lives it guarantees social survival. As a 15-year-old interviewee stated, “without friends I couldn’t live, I couldn’t even go to school”.

For people aged 22-34 in this sample, which included people with relatively good access to resources, accessing the Internet meant, survival but not only in a social context. On the contrary, “Internet survival” included getting a job so that they could feed their children, advance their careers, and pay their bills.

A 34-year old network manager stressed that he is always online, mainly due to his work. He has two Nokia mobile phones, which he uses for work and personal reasons. He also has a 3G card so that he can connect to the Internet from home.

His regular online activities consist of browsing cars and technology gadgets. His behaviour is consistent with others in this age group who have the same access to resources as him. He engages with digital media through different channels such as his computer at work, his wireless device at home, and his phones. This does not necessarily reflect on his use of instant messaging, but it definitely influences his engagement with social networks.

He said that, Facebook is useful for connecting with old friends, and he even setup his own Facebook group for school friends, which he also manages.

Advanced Internet users who connect for specific purposes, also tend to pay more attention to promotions and digital advertising as long as this it is relevant. The common finding amongst this group was that they could always recall targeted information (e.g. insurance ads), whether this was accessed from their computers or phones. However, they don’t necessarily act on it immediately.
This was observed amongst primary Internet users as well, although they tend to save relevant information on their phones (mainly text messages).

When these findings are seen in the context of promoting and selling digital advertising, they open up possibilities because they show that even though some users are not within the target audience that drives major trends in online behaviour, they are deeply connected with the media, at both an emotional and instinctive level.

**Job hunting, Internet use and survival: online behaviour at an instinctive level**

Theresa (34), learned how to use the Internet in order to help her find a job. She completed a technical degree four years ago, but has since then been unable to find a job as a personal assistant. So, at the moment she is a street vendor, selling vegetables. She lives with her sister and her own child, so having a ‘proper job’, as she calls it, is crucial to her so that she may be able to have things like everybody else.

She normally spends about 45 minutes to an hour online, which costs her R16. This, for her, is quite expensive so she ‘keeps herself busy’ until her time online expires.

Her sister showed her how to browse, how to go onto Google to find websites and how to submit job applications. In this regard, she said:

“You need skills to be online”, which, according to her, she lacks.

As the interview progressed, she was finding the observation exercise difficult. She seemed very self-conscious about her Internet skills, and she kept going back to the Google site when she was asked to show what she usually does online.

This is a remarkable story because it shows how someone with limited access to resources, and little knowledge of the digital space, managed to learn how to search and send information, so that she could improve her life. More importantly, accessing the Internet for her, may guarantee her own survival, and that of her child.

The practical applications of this example range from a more accurate strategy in selling products to someone like Theresa, to the simple understanding of online behaviours amongst beginners.
01.3/ Blackberry and ‘Apple’: totems of the present

Many of the interviewees aspired to have a Blackberry mobile phone and an Apple computer. The motivation amongst the youngest interviewees was ‘to look cool’, and amongst those in their 20s was ‘to look more professional’.

The role that these devices play in both cases is one of social status, and owning them would have an effect on the way other people see them. Understanding this is key, because users are starting to symbolically value technology more than they value cars, for instance.

One interviewee even said that the first thing he is going to buy when he gets a job is an Apple computer. He said that he would not mind still having to catch the bus to get home, as long as he had a computer. This graduate lives in Soweto and already has a desktop at home. For him, owning an ‘Apple’ would represent the shift from his life as a student, to that of a working professional.

The older group (30-35) also aspired to have either a Blackberry or an iPhone. They do not quite know why they want these so badly, since they already have phones that work well, and, with the exception of Theresa, they already own laptops.

The symbolic value of accessing technology should be explored further amongst people in this age group, as they have a lot of ‘buying power’. Current and previous research undertaken in this field shows that people will make a plan to buy either a phone or a computer to gain increased social status amongst their peers, even if they don’t have the money at the time. This applies to people in their early twenties as much as it does to those aged 30+.
Digital Advertising: how it is perceived by desktop and mobile Internet users

02.1/ What digital advertising means to Internet users

Interviewees were asked to comment on what digital advertising means to them. In general, they understood that ‘digital’ has to do with connecting to the Internet from their computers. In terms of advertising, there was one sentiment shared by everyone, across all age groups; they prefer not to click on display advertising (banners ads and pop-ups) on the screen.

The reasons given for this varied, but there were two recurring issues. Firstly, the potentially high cost associated with connecting, and particularly downloading. Secondly, the less-than-ideal context in which the ads are normally received.

This section poses two questions: how best to understand, on a qualitative level, the way people engage with digital advertising, and how best to connect with them, given the way in which individuals access, use, and experience technology.
Seizing the moment: 
How to create the element of surprise

Current scientific evidence on the functioning of the brain provides valuable insight which helps to explain the experience of satisfaction, and the factors that determine just how ‘satisfied’ we feel (see http://goo.gl/te4J9).

Behavioural patterns, established, and often deeply entrenched in the brain largely determine how we perceive and experience gratification and pleasure. Scientists have shown that humans grow accustomed to, and even come to expect, rewards from certain situations or subsequent to certain behaviour.

Two things create the experience of pleasure associated with reward. The first cause is the mere existence of desire for the (anticipated) reward. The alternative, or added determinant of pleasure is the gratification of the ‘real’ reward actually materialising (i.e. when we get what we want).

Interestingly, the levels of pleasure and satisfaction decrease if the reward has been anticipated. Novelty, or an element of surprise has the opposite effect. In the case of unexpected rewards, a level of dopamine (a chemical involved in the regulation of our moods and feelings) increases significantly, resulting in ever increasing levels of pleasure and satisfaction.

The consequences of this discovery in terms of understanding people’s online behaviour, and the impact that digital advertising has on their emotions, are quite important.

This finding is pivotal in the quest to understand how online behaviour and emotions influence the impact of digital advertising.

It is essential then to understand online behaviours and how to create an element of surprise. An in–depth study on this topic would be necessary to accurately address these issues. Nevertheless, the observations gathered for this report, provide several valuable insights on the matter.
Following the principles explained above, the table below shows how consumers react to pop-ups and click-throughs, functionally and instinctively.

**Functional (limited resources)**

“I always see ads for various products, whether you need them or not, and it’s a bit of a hassle. A lot of the time it uses quite a bit of data and if you have a limited amount of data it uses up your airtime. If you’re using the mobile Internet, pictures use up data quickly. I don’t like staying on a site with a lot of pop-ups, as you can get viruses” (Male, 22).

**Curiosity leads to satisfaction**

“If you click it just changes (the site you’re in) and what you’re looking at just disappears and I don’t like that. Sometimes you don’t have enough money and you can just do one thing. It is only if you are curious (that you go onto the link)” (Female, 24).

**Code for clicking on digital ads:**

Curiosity leads people to click on the ad. They find pleasure not only in the reward (e.g. what they will find afterwards) but also in the anticipation.

**Code:** pop-ups only lead to satisfaction when making people curious at the right time.

Responses are analysed from two different perspectives. The first is functional and identifies the economic constraints of downloading data, from phones especially. The second refers exclusively to how users experience pop-ups and banner ads. This concerns the emotional and instinctive implications of how consumers perceive digital advertising within the
context of their online experience. Limited access to financial resources and/or online facilities makes having to download unnecessary content a problem. Three of the interviewees, aged between 20 and 22, were looking for jobs at the time. Their Internet use was limited exclusively to job hunting, reading the news, and visiting Facebook. For them, pop-ups and banner ads meant wasting precious money on things that were seen as unnecessary and this automatically put them off the ads.

Furthermore, people expressed a dislike for ads received at random. They would react more favourably were it possible to choose the most convenient circumstances to read, click, and/or watch ads. Some expressed the wish for rapid developments in technology, to give them the freedom to decide if and when to receive ads.

Subconscious influences play a key role in the online experience, and in determining how consumers react to digital advertising.

This is why it is so important to understand how users behave offline and online, and what does or does not give them satisfaction. Nhanlha (24) referred to her user experience being interrupted by the pop-ups that cause “what you’re looking at disappear”.

When such a disruption occurs, the ‘process of getting satisfaction’ from digital advertising is interrupted or inhibited as well. Thus, an interruption results in time wasted, and in a less positive online experience as a whole. The digital ad is perceived to be the cause of this. More importantly, because banners and pop-ups have become such a regular occurrence, consumers have come to expect them. Anticipation, or expectation as explained earlier, reduces levels of pleasure. In other words, disruption is the worst enemy of curiosity.
What arouses curiosity?

Observations made in this regard indicate two ways to arouse the curiosity of people when they are connected (whether from a computer or phone).

One is relevant content and the other is intrigue. Being made aware of a new possibility leads to increased interest and the curiosity to find out more.

The following quote shows how another interviewee experiences digital advertising and it illustrates what makes him curious about mobile ads.

“Digital advertising is electronic. It works on the Internet. It can always be updated, unlike newspapers. Mobile advertising is not precise, it doesn’t have much info, they give you bits. It doesn’t make you see more, I want to see the full ad, if I don’t understand it I don’t go (follow the link). I received an ad recently, it was from Vodacom, and they were asking me to join. They send videos often. I look at them, but if they don’t interest me, I delete them. I also get ads from Gumtree. Nedbank wanted to give me a loan. I remember that, but since I don’t have a job I can’t get one.”

(Male, 22 years old).

Sapelo’s user experience is less pleasurable when connecting from his mobile phone because it doesn’t result in making him curious. This may be, in part, due to a lack of airtime. However, this report stresses that the underlying reason is that the ads he receives have become predictable. For instance, he often gets Vodacom ads with similar content. He could not show me a single ad when I requested it, which means that he deletes them all.
The content seems relevant to his stage of life, even though he can’t do anything about it right now. The message arouses Sapelo’s curiosity based on content. According to Morgan, on the other hand, online ads do not always aim at selling something to people. As he explains:

“I think it is for people to spice up the site, you need something else. Some other things that appeal to the eyes, it’s nice looking. Most of the time I don’t look at it that way. I don’t think all the ads are for sale” (Male, 30 years old).

The key to curiosity, according to people’s insights, is to motivate people so that they become aware of the presence of online ads. This awareness doesn’t have to be invasive, in fact it shouldn’t be. In addition, curiosity ideally arises from relevant content presented in an exciting way.

02.2/ Online behaviour trends: what people do while they are connected from computers and phones

Based on observations of the behaviour of digital technology users, this section analyses what people are gaining from digital advertising. The analysis includes desktop and mobile phone Internet access.

Participants were asked what their favourite websites were, and why. The findings showed that individuals favour sites that make possible, and simplify, staying in touch with existing relationships, establishing new relationships, and keeping up-to-date with the things that matter to them such as news, sport, careers, or other more personal areas of interest.
The figure below shows the most popular websites, and the reasons for their popularity:

- **Instant messaging via BB**: Chat is becoming a trend amongst the youth, with access to resources.
  - **FACEBOOK**: Is popular amongst teenagers and adults, although the trend indicates that it is considered boring amongst pre-teens.
  - **NEWS & SPORTS SITES**: Popular amongst males across all age groups. Keep people updated on the latest news & sport scores.
  - **MUSIC, VIDEO & GAMES SITES**: Preferred by pre-teens. The trend is growing, as Internet access improves.
  - **EMAIL & JOB SITES**: Especially popular with the unemployed & job seekers and people aged 20 - 35.

YouTube is very popular across all age groups. A growing trend amongst teens is to search online for game cheats.

Staying up-to-date and the 'unexpected' factor came up once again when analysing why people like some websites more than others. One 30-year-old woman said that she keeps going back to a certain website because of the frequent newsletters it sends out, which keeps her up-to-date with innovations and job offers in her field.

It was quite clear after observing people’s online behaviour that it can’t be separated from the way in which they live, nor from their current life stages. In this sense, the role that the Internet plays in a 14-year-old student’s life is different from the role it plays in the life of a 22-year-old graduate.
At a functional level, finding a job or improving their current lives was at the top of the minds of those aged 20-35. Their actual behaviour, however, differed from this at times. For instance, they spent at least half an hour of a R10 session at an Internet Café on Facebook. The things they did on it varied, but they mainly updated their status, looked at, and commented on, other people’s pictures. Differing from the younger interviewees, the older ones (26-35 years) did not use their phones or other devices to interact whilst they were online in front of a computer.

During visits to people’s houses, it was observed that they were connected to more than one device or platform at once i.e. ‘multitasking’. This included chatting on MXit or BB chat, watching TV, and searching for a movie online.

When the observations took place at an Internet café this behaviour was different. Users seemed more focused on what they were doing at the time. This may be advantageous for digital advertising, as this group of users paid more attention to what they were doing online. The rationale behind it could be that, especially for groups of people with more limited access to resources, there is no extra money to spend online and thus they are obliged to remain focused when they go to the café.

The user experience at an Internet café is totally different from the one at home or from a mobile phone for that matter. Here, the user seems to be far more disciplined, knowing exactly which websites to visit. However, the skills needed to effectively search for information appear to still be lacking. The majority of the interviewees did not know website addresses off hand, frequently accessing sites via Google. This even applied to their favourite sites.

Facebook instant messaging is also very popular at Internet cafés, especially amongst those in their 20s. They meet new people via this media channel too, even though they are reluctant to openly admit it.
How do people connect with mobile and desktop advertising?

When interviewees were asked to talk about their experiences with digital advertising they focused on pop-ups, banners, and emails. They did not immediately consider mobile advertising, so questions had to be used to prompt the topic.

Overall, ads received as mobile phone messages were more memorable than their desktop counterparts. Ads with content perceived to be relevant were even saved on mobile phones.

In this regard, the user experiences of mobile and desktop advertising are quite different from one another. While participants had strong emotional opinions about displayed advertising (banners and pop-ups), their views on mobile ads focused on content only.

Users pay attention to certain content when it interests them, such as airtime promotions, competitions, and updates on Ster-Kinekor, or Edgars and Clicks clubs.

Regarding online advertising accessed from their computers, user opinions were on the contrary; quite strong and more emotional, at times even negatively so. When people referred to pop-ups for instance, they used words such as ‘distrust’, ‘irritation’, ‘unrealistic’, and ‘curiosity’. These pointed to deeper emotions than the ones that text ads prompted.

The interviewees referred to the lack of legitimacy of a lot of pop-ups, which offer them prizes with extraordinary amounts of money. Some also mentioned that they don’t click because they don’t want to get viruses. This is why the words ‘distrust’ and ‘unrealistic’ were commonly used.

The low occurrence of emotive language when talking about text ad messages may have to do with lower levels of satisfaction that users reach from connecting via their mobile phones. It is necessary, then, to go back to what one of the interviewees said about mobile ads: “they only provide bits of information”.

www.dmma.co.za
Trends in digital advertising in South Africa 2010
It is important, however, to make a distinction between text messages and the multimedia messages that people receive on their mobile phones. The latter may arouse curiosity, because emotions such as excitement are produced.

*As Morgan said (referring to a media card he’s just received):*

“It’s got a voice. It is exciting. I am planning to use the colour your tunes. I am planning to go onto the website but haven’t checked it out yet” (Male, 30 years old).

On the other hand, people seemed very excited when asked about the TV ads they found most memorable. They often laughed when explaining what the ads were about. When they viewed them on YouTube, the experience was intense because it lasted longer, it connected people with humour, and it enabled them to show exactly what it was about the ad that they liked so much.
The graphic below shows a comparison between desktop and mobile advertising:

**Online ads**
- Stronger emotional reactions;
- Experience lasts longer and its more conducive to satisfaction;
- People don’t remember contents so much, but what they felt when they watched them or read them.

**Mobile Banners**
- Remembered because of contents;
- User experience is less conducive to pleasure/satisfaction;
- Mobile banners and text messages are effective when reminding users about new products;
- Competitions promoted via mobile banners are popular;
- Less invasive than an online pop up

Digital advertising culture
Trends in online behaviour and digital advertising: how people perceive the future

Possible developments in online behaviour and digital advertising, according to the participants, were discussed. Their views and observations included:

100% personalised ads:

Personalised ads mean the freedom to choose what, when, and if at all, to receive the information.

The youngest interviewees believe that advertising in the future is about receiving information that advertisers know is relevant to users. They mentioned the Ster-Kinekor club, which, based on what is known about its club members’ demographics and interests, could send updates on movies that may be of interest to them.

Those users, whose thoughts turn to pop-ups as soon as online advertising is mentioned, associate this with disruption, which is the opposite of the excitement they seek from their online sessions. They believe that the trend should be moving towards allowing consumers to receive only the information that they want, when it is convenient for them to do so.

According to the observations, online behaviour is random, but it is also clear that the best time to receive ads is when people are focused on one media channel only. In addition, the ad should not be intrusive, or distract them from the content they are searching for; otherwise, the ads become teasers as opposed to being the focus of their attention.

Ads don’t disappear but access to the media changes with people’s context

There was general agreement that TV ads are not likely to disappear. The media through which they are accessing information is changing, though. The devices predominantly used to watch media content are TVs, computers, Xbox, and MP3 players. This was a characteristic of all people.

The difference amongst those with better access to resources is that they consume information from multiple sources at any given time. For instance, they watch TV and...
You Tube at the same time. These two can even happen in conjunction with chatting on the phone and submitting Facebook status updates from their computers. Sometimes one activity complements the other, such as when they chat about how to win a game being played, or other content being accessed at the time.

**Consumer-generated content (excluding blogging) that they find funny and can be shared with everyone**

People tend to share personal information and details more freely online. Sites like YouTube as well as interactive sports sites, for instance, are the most popular.

The content doesn’t always have to be relevant or useful. Its function is secondary. What users seek is the satisfaction or pleasure derived from sharing and watching, or even just reading content. This includes videos and comments about a post.

The content must be funny or sarcastic. In an interviewee’s own words:

“*We upload content on YouTube of stupid things that are stupid, but funny*”.

Publishing chat history on a website is also a trend. Because people get to read what others think, it tends to make them laugh. Users would like to see pictures next to the names, thus making the experience of commenting more personal, similar to a Facebook profile.

With regards to producing content, people do not show a great deal of interest in blogging. All the interviewees liked reading what others have to say about a topic they found funny, but none of them seemed keen to spend time writing long opinion pieces.

The explanations they gave for this ranged from lack of time, to feeling intimidated by other people reading, and expressing their opinions on their thoughts. They feel that online content has to be relevant or up to other people’s standards in order to be published.
Parents are using Blackberry chat to communicate with their children

Teenagers in the age group 13 to 15 seem to think that their parents don’t use the Internet as much; thus, they believe digital advertising is not for their parents’ generation.

However, parents do use instant messaging, which is becoming a trend, especially amongst families. Getting a Blackberry contract for their children is an attractive method for parents and family members to communicate with one another. ‘BB chat’, as they call it, saves money that would otherwise have to be spent on airtime.

This trend is common amongst people with better access to resources that can afford it.

Internet cafés are the new social hub

Given the vast number of people who use Internet cafés in South Africa, and considering that for many of them these cafés are the only gateway to the Internet, the trend amongst those with more limited access to resources is to continue making use of them. It is important to note that with the increase in Internet connectivity, the scope of things that users will be able to do online from Internet cafés will continue to grow.

In addition, observations show that these locations enhance offline social skills as users usually arrive with a partner, or even in small groups, therefore much of their online activity is shared. New friendships are also formed as a result of the offline socialising and mingling that takes place.

This trend is common among those who don’t have Internet access at home, or are more limited in terms of their access to resources.

Internet accessible to everyone

Lastly, what people would like to see happening in the digital space is the availability of equal Internet access for all. They desire the freedom to connect, and download, at fair, affordable rates.
The general perception is that equal access will happen, but there is uncertainty as to when. Some also question whether this access will ever truly be affordable.

Business to Business research: an assessment of the digital advertising industry

This chapter presents the opinions that leaders in the field(s) of digital media, marketing, and advertising have of their own industry. Their views on both, the challenges presently faced by the industry, the opportunities, and the success stories of the past year are discussed.

The chapter approaches a number of issues within the industry, which have perhaps not previously been given much consideration. Furthermore, it offers perspective on the key challenges faced by digital advertising in South Africa.
03.1/ The industry in perspective: the digital advertising organisational structure

One of the main objectives of this research is to gain a more thorough and objective understanding of how media buying decisions are taken by advertisers, and to recognise what the principal concerns and challenges of digital advertising in South Africa are. In answering this, the current section analyses the interviewees’ opinions and perceptions. It also considers the notion of ‘expertise’ in digital advertising and looks at who the experts are.

The structure of the digital advertising industry

The interviewees ranged from digital media managers on the advertisers’ side, to managing directors and founders of digital marketing and media agencies.

In terms of the sample, only 3 of the 12 interviewees were females. One of them was an advertiser, and the other two ran digital advertising agencies. They ranged in age from 29 to 47 years old and they had all been in the industry for at least five years. Some of them had been involved in the digital space for longer than a decade.

Their educational background was varied, and included social sciences, marketing, sales, and technical degrees in some cases. Despite the differences in their age, gender, and professional and educational backgrounds, they all seemed to share the same passion, which, as this report will show, is a key ingredient for successful connections with clients and digital technology users.

In terms of the social structure and ‘corporate culture’ of the industry, there are complex social dynamics involved in the way the players position themselves in the digital space. This has an impact on the way advertisers and consumers perceive the industry, as will be explained in this chapter. The complexities have to do with the specialised nature of the business and with the way it is structured.
The symbolic value of expertise

A number of interviewees referred to the presence and the need for experts in digital advertising.

Opinions vary on the expertise that people require in order to be good at creating and selling effective digital advertising.

One of the reasons for this is the complexity of the word ‘digital’. In South Africa, ‘digital spaces’ is synonymous with access to technology, specifically Internet access.

There is an ongoing debate about this, because some advertisers and media agencies base their buying decisions on the fact that the majority of South Africans have no access to the Internet. This perspective has impacted the industry’s growth, which has been slow in comparison to developed countries with higher levels of access and connectivity.

There are some who base their buying decisions on the premise that many people with limited access to resources are only able to connect using their mobile phones. And there are those who believe that desktop advertising is where the immediate future is headed, and encourage their clients to invest in the online space. Overall, all interviewees in the digital industry felt strongly that Internet access will continue to improve in South Africa. They also believe that there are great business opportunities in the mobile space, given the high percentage of the population who own mobile devices.

Developing expertise in the digital field is extremely important in order to build credibility, as the industry needs to show clients that it knows where digital trends are headed.

Experts then, need to rely one hundred percent on their experience.

The other consideration of looking at the pressure of being an expert is the high levels of competitiveness. In this plane, people’s expertise has a symbolic value, which the graphic below shows:
Other factors at play include the pressure associated with being an expert and the high levels of competitiveness. As the graphic above shows, expertise is of symbolic value.

The graphic explains that there are different dimensions to the expert’s archetype and the concept of expertise. Digital players highly value intellectual capital, thus, there is some degree of internal hierarchy within the digital industry’s social organisation. Knowledge gives people status, which is an asset when faced with stiff competition, and in the establishment of a legitimate industry.

On a different level, there is a great need to adopt a democratic approach with regards to educating people within and outside the advertising world. The group of experts are aware of their responsibility and that they would benefit from sharing their knowledge. As one of
the interviewees said, “the more others know about digital technology, the more qualified people will be in the industry doing good work”.

03.2/ Main players’ views of their industry: advertisers and digital media experts

Digital players have a critical view of their own industry because currently they feel that the budgets could be bigger, and the level of spending could increase substantially. This section aims at showing the advertisers views on the matter, their decision-making process, and how digital players can address some of their needs, according to what they value.

Overall, the advertisers had an optimistic view with regards to the increase in connectivity and they seemed to be content with the results of some of their mobile and desktop campaigns. For instance, a digital media manager said:

“The media industry has taken some changes and knocks in certain areas with the recession and world cup. We have seen media expenses minus 9 percent so we had to work a lot harder to get the message out, and to make sure that it is relevant. We have been exploiting a number of media deals, so there has been value. We have to look at how to leverage that value. We have seen huge growth in online, mobile, and Google. The interesting part of this is measurability” (Female, 29 years old).

This interviewee referred to the value of spending more on digital advertising. She stressed the accuracy and the measurability of this type of media, which players and clients agreed with. Another digital media manager added to this point:

“There’s a lot of expectation from digital because
everything can be monitored. With traditional media we don’t know how effective that media is. If I can show that digital media is effective in a campaign with the amount of spend we have, then it is easy to get more money. But if I can’t justify it, then it is difficult. We use traditional media to broadcast to the masses” (Male, 30 years old).

The most important part of the quote above is the meaning of the word ‘expectation’, which in this context has an emotional connotation that digital players did not seem to have on the top of their minds. The focus until now has been the functional successes of their business, as the quotes above shows.

The efforts to avoid randomness

When analysing the business-to-business data according to the interviewees’ opinions, the main insight was something that this report calls the ‘efforts to avoid randomness’. The concept has its roots in a criticism of conventional advertising, whose success is often measured based on people’s emotional response to advertisements, as opposed to an accurate measure of results and marketing effectiveness. The latter is the added value of digital advertising, or to put it in the interviewees’ own words, it is “what makes their work relevant to their clients”. This has to do with a results-oriented work ethic (Male, 37 years old).

Another Managing director of a media agency added:

“Numbers are critical, so we need to make sure to track those numbers. The way we get people to invest is by showing them the numbers; otherwise we will always say that the penetration is the same. We can track what people
do on a website with ads. With the technology we use, we can tell people the click, plus what they did afterwards. What goes beyond that” (Female, 37 years old).

Challenging the previous perspective, the data gathered amongst consumers, and information provided by the advertisers, implies that there are other areas that the digital industry could be leveraging, in order to increase sales and market themselves better. Hence the reference to the ‘illusion of avoiding randomness’ in this section.

On the one hand, facts are crucial to the sale of digital advertising. On the other, because of the complexities of the digital world, some things cannot be measured and they depend on people’s random behaviour.

Emotions play a crucial role in understanding why people do, or do not, click on an ad and in understanding how to increase the number of responses. At present, the main advantage of the digital business is its ability to show how effective digital strategies are, but another important aspect includes a fair understanding of what drives consumer behaviour.

The latter did not come across strongly in any of the digital players’ interviews. Increasing their understanding of this element would address many of the other concerns they had raised too.

The recommendations will explain further what the industry can do in order to meet the needs of consumers and to understand them better, without compromising the functional side of the business.

The following section gives account of success stories that players are proud of, and how they made them work.
03.3/ The functional: key to a successful digital story

In general, digital players do business with a wide variety of clients and often agencies have more than one client from the same industry.

Some of the major advertisers mentioned were South African Tourism, Standard Bank, FNB, various online casinos, Toyota, Outurance, Nike, and Adidas amongst others.

“The way Standard Bank has done it with the cricket has been successful. When it works it works but it is difficult to market complex products in that space because of the limitations (referring to mobile advertising). A good digital campaign has simplicity, and engagement. Competitions are good for this. People have a huge hunger for entertainment and content. If you look at things such as please call me ads, that’s very successful. Click through rates are huge on that.” (Male, 37 years old).

“I have a successful example of a mobile campaign. I have to say, it was a very limited budget 18 months ago. And we put it on MXit. We got very positive levels of engagement, and it was so successful that we use it as a case study. I was directly involved in the campaign. We booked something like 120 000 impressions, we delivered 372 000 and in 30 days we got 870 000 impressions delivered, we got 67 000 back and you had to be registered as an online banker. 3.2 million interacted
with the guy who manages Moola (the virtual currency used on MXit). And in 10 days we got 2 million interactions and logins” (Female, 29 years old).

These are some of the success stories that interviewees shared, and the principles behind them:

According to the case studies, the key to the success of digital campaigns is arousing people’s interest in the brand and achieving high levels of engagement. The way this is done is by creating simple and entertaining messages.

Interviewees agreed that some digital strategies are more appropriate than others. For instance, mobile advertising is the best channel for talking to younger people, while online works well when advertising cars. This is because of the target market's age group and its access to resources.

Mobile advertising remains a general concern, as a lot of players think that it is not easy to display ads on this medium. The trend within the industry is to propose strategies that adapt to products, and the right target audience. If mobile advertising meets a certain need, then it is used accordingly.

**Decision-making process**

One of the themes that the research explored was how digital advertisers make decisions.

Given that the digital industry is changing rapidly because of the increase in the number of Internet users and changes in the way that they access the Internet, it seemed important to ask what, according to the players, drives such a transformation.

A respondent answered this question as follows (before making decisions):

“I thought that the only way I could make this little engine work, was to make it into a portal. I didn’t do previous
research; I just felt it was the right strategy. A lot of it was gut feeling” (Male, 47 years old).

Relying on their gut feeling when making decisions was commonly mentioned, as this industry is relatively new and not all the decisions made can be based on previous experience. This indicates that despite the levels of accuracy in digital advertising, there is a visceral component to this business, which plays a key role as the industry evolves and changes.

Some other respondents said that they still use research, because they believe in facts. According to one sales manager (before making a decision):

“I saw facts, competition, keyword areas, accommodation, and how the performance of pages went down. The change was inevitable. I always look at the data from Nielsen as a secondary tool and draft a 2-page analysis stating reasons. I love showing people the truth. People love to live in a dream world” (Male, 37 years old).

Data and available facts are necessary in the digital industry because they measure how online and mobile strategies are working and how successful or unsuccessful they are. The key, according to the interviewees though, is relying both on their expertise and their intuition, because the digital world is an ever-changing space.
To accurately assess the current position and situation of the digital industry, it is crucial to carefully consider barriers to growth and what must be done to overcome them.

The main challenges are as follows:

• 01/ Educating clients
   Internally, certain players seem to be considered experts in their fields. These experts assert this notion and justify their status as experts through statements about the complexity of their business. This creates an impression of inaccessibility, which is unfortunate given the dire need to educate clients and media agencies, who have little understanding of what digital advertising entails.

The way the interviewees talk about the digital industry is crucial to how people outside of it perceive them.

• 02/ Lack of true experts
   The novelty and complexity of the industry means that knowledge, and expertise, has been limited almost exclusively to a few major players. The number of new experts is increasing, but training from the main experts remains vital.
This can only be achieved when appropriate structures are in place within universities and at digital and media agencies. A substantial buy-in is necessary from the advertising industry in general.

• **03/ The industry is perceived as cold and clinical**
  An important insight from the research was that the industry and its clients highly value the measurable nature of digital advertising. This report also questioned to what extent the digital industry was paying attention to the emotional element. When direct questions were asked in this regard interviewees did not seem to grasp its true meaning within this context. A number of interviewees referred to how passionate they are about their work, and how emotive their campaigns were. It still remains uncertain, however, whether potential clients know about the passion driving the advertising campaigns and whether customers perceive the industry as creative and warm.

Moreover, a criticism of traditional advertising has been its lack of accurate measurability. However, what this kind of advertising still seems to do very well, is to create emotional connections with a brand or a product. Though these connections are not measurable, they do account for what customers remember, and connect with.

Exploring new ways to connect with people is a must, if players in the industry want to stay on top of their game.

• **04/ Experts do not spend enough time on the ground**
  In conjunction with all of the above, due to the lack of knowledge from the advertisers’, media, and traditional agencies’ side, digital budgets suffer. Strategies have been put in place in order to sort out the lack of understanding in the industry, but somehow what has happened is that people at these organisations tend rather to rely on the expertise of the digital players, since they themselves already have a lot to worry about.

This perception needs to change, even if it does so slowly. The best strategy would be to address the above-mentioned challenges. If hierarchical structures are replaced by inspirational communication strategies that bring experts closer to the people, surely decision-makers will also feel inspired to gain more knowledge, or to at least see the importance of investing in digital.
05/ People don’t consume media in silos

People often engage with different media simultaneously, thus they are not exclusively focused on a single media channel. The challenge is to grab, and hold, the attention of someone who is connecting to a variety of online content, whilst using his or her mobile phone for instant messaging.

The findings indicate that people who access the Internet from Internet cafés tend to be more focused on the content than those who connect from home. Every minute spent online is charged for at Internet cafés. Advertisers must develop strategies to engage with these consumers without being disruptive or invasive.

06/ Technological limitations in South Africa

There are two kinds of technological challenges affecting the growth of the digital industry in South Africa. The first one concerns limited access to the Internet, especially via computers. Some argue that the number of people who have Internet access on their phones is still small. This is a problem that goes beyond any strategies that digital agencies can develop in order to grow their businesses.

Secondly, digital players mentioned that due to high Internet costs and slow download speeds in South Africa, they often have to host their ads or data files in America or Europe, which increases costs and adds to the complexity of the digital advertising business.
05/ Archetype of the digital advertising consumer

- Connect mainly from internet cafes & mobile phones
- Spend money on the internet for entertainment & information purposes
- Trend is driven by those whose social survival depends on online interaction
- Focus heavily on online activities because internet charges are time based
- Online activities amongst those aged 22-35 is focussed on family & life improvement

www.dmma.co.za
Trends in digital advertising in South Africa 2010
06/ Culture code for digital advertising consumers

Code for Digital Advertising (desktop & mobile)

“Curiosity leads to a satisfactory online experience. This is awoken by relevant content that creates an element of surprise.”
07/ Recommendations

01/ The importance of understanding social and cultural contexts

As this report pointed out earlier, the study of online behaviour cannot be isolated from the context surrounding those using technology. In the end, the degree to which technology does, or does not improve the lives of people, depends on the meaning that individuals attach to the said technology.

Emotional connections with the Internet, regardless of which device it is accessed from, can be deeper than the relationships consumers have with other kinds of media (e.g. radio or newspapers).

The reasons for this were explained throughout this report, but these mainly include an instinctive need to share content and to consume shared content. Secondly, and particularly significant given South Africa’s high levels of poverty, is the accessibility of instant messaging for example. Being able to interact via these platforms is a notable money saver. Even though not everyone has access to instant messaging, the trend indicates that individuals within society have a preference for communicating with others in this way. For those who connect from Internet cafés, the online experience is more social. At those venues, the levels of connectivity when watching a video on YouTube with a friend or partner are exciting and surprising.

Digital advertisers must pay attention to the following when they develop strategies. The first has to do with users’ levels of engagement with content.

For those who connect from Internet cafés and only have one or perhaps a maximum of two hours to look for a job and sort out urgent issues, digital advertising should focus on relevant content that does not interfere with whatever the users are doing online. Email is a good channel when consumers have opted in, as well as an ad that combines pictures and some text, or maybe some kind of media with sound (multimedia). The most important
aspect is that it must not divert the person away from the site that they are on.

On the other hand, mobile advertising strategies should aim to make people curious and motivate them to seek more information (about whatever they are interested in). Text messages tend to be memorable and recipients will usually keep the details if the content seems to be (personally) relevant.

This finding prompts questions regarding new ways to measure successful digital campaigns. However challenging this may be, it is important that players in the industry take time to look at the mobile and desktop behaviours of consumers qualitatively and quantitatively.

Internet users mentioned things that generated curiosity and have an element of surprise. These include devices they aspire to own such as Blackberries, Apple computers, and iPhones. Competitions that arouse their curiosity, even though an instant reward isn’t necessarily given, are recommended too.

These include anything that they may not have heard of before. In order to get this right, the trick is to ensure that the offer sounds realistic, as consumers are weary of suspicious or illegitimate desktop and mobile strategies.

**02/ Understand how people’s brains work**

It is hardly debatable that chemicals in the brain control levels of pleasure and satisfaction. This finding needs to be at the top of digital advertisers’ and their clients’ minds when developing strategies to engage people with a brand or product. The levels of engagement will depend on how pleasurable the person’s online experience is.

This report showed that satisfaction amongst the interviewees was prompted by curiosity. Content and ad creative were important, as was whether there were any elements of surprise.

The key to grabbing users’ attention at the precise moment is to understand what they do online, and when, so that the content becomes more relevant and always surprises them.
The main recommendation in this regard is to send the same message in different formats, rephrase the wording, combine multimedia and text, and not force people to open pop-ups. They have a limited amount of money and airtime to spend online and their levels of satisfaction will depend on how much they get done in a certain period of time.

03/ The digital advertising industry must tackle emotions

This is one of the main insights highlighted at different stages of this report. The fact that measurable and accurate results are necessary to convince clients to buy digital advertising is not debatable. The findings confirm that everybody recognises the value of this. However, there is an aspect that did come through strongly when observing consumer behaviours, but it did not come through when talking to digital advertisers.

The desktop and mobile user experience must generate curiosity and eventually achieve some level of satisfaction. This can be done by creating relevant content, which is measurable, but beyond that, more often than not, the value of the experience is determined by people’s level of emotional engagement with the message.

There are a number of ways to achieve this. The ones that can be deduced from this study are:

- 01/ Branding the digital industry in a less cold or clinical way. This does not mean that the digital industry has to become superficial. What this entails is showing clients, media agencies, and consumers that they can be creative, and accurate, at the same time. The consumer research showed that this is actually possible.

- 02/ Whenever possible, communicate to clients that the number of clicks does not always determine the success of a campaign, as people may be aware of a brand or a product, and yet not click because of lack of airtime or Internet budget. With mobile advertising, there is strong awareness when people are interested in the content and they will often keep the ad. This entails paying particular attention to relevant, content-driven curiosity.
03/ Expand communication strategies to include those who connect from both Internet cafés and mobile phones.

04/ Connect with people aged 22-34 at an instinctive level

The research showed that Internet connectivity (from computers and mobile phones) amongst those aged 22-34, is very instinctive because of the life stage they are in.

For the younger ones in this age group, the Internet is the medium through which they find jobs. This represents the possibility of accessing things they aspire to own, and to be more independent from their parents and families. For the older ones in this age group, the Internet represents a catalyst for self-improvement. Whether they search for bursaries to study somewhere, want a better car so that they can visit their hometowns, or want to find a better job, to a certain extent all of them use the Internet in order to improve their lives. This is a powerful insight for the digital advertising industry, as agencies and advertisers can focus on meaningful ways to connect with people based on the importance they attach to content that is linked to spirituality, employment, cars, and sport to name a few.

Communication strategies that relate to things that improve people’s lives are also recommended. The trick is to clearly state how people can benefit from storing an advert on their phones, to offering a strong enough value proposition for clicking on a link.

05/ Digital advertisers must leverage off existent offline relationships

In line with the social dynamics that take place at Internet cafés, advertisers must focus on how real life (offline) social networks are enhanced by the time that friends and acquaintances share with one another when they connect from these places. Real world connections tend to influence the Internet users’ online behaviour. When couples share the experience of viewing content together, the said content may be unknown to one of them but they are exposed to it on the recommendation of the friend or
partner. At the same time, social ties instantaneously grow stronger because friends often discuss content after they have accessed it. These conversations may feed the user’s interest in a certain site or topic.

Research conducted in the digital space generally focuses on online activities. This data can be quantified, which leads to accurate results. Paying attention to offline levels of connectivity, however, can explain inconsistencies in the data gathered quantitatively.

For instance, a common concern amongst digital advertisers is to understand what motivates users to select a certain type of content, and what drives online behaviour change. This report suggests that industry stakeholders can find the answers to these questions by looking at how people influence each other offline.

Given that a high number of users in South Africa access the Internet from Internet cafés, these places should be seen as hubs for the expansion of social networks and are therefore a great starting point for understanding how offline interactions influence people’s online behaviours.
01. Digital Agencies

01.1/ Respondent characteristics
This section describes the socio-demographic characteristics of the respondents as well as the position they occupy in the companies they work for, and their personal use of the Internet. Gender differences are also highlighted.

Gender, age, and number of years employed at the company
The survey was answered by 23 people who work in digital agencies (15 men and 8 women). The majority of the respondents are aged between 30 and 39 years old (54.2%; n=13). A high percentage of them have worked in their companies between 1 and 3 years (56.5%; n=13).

Position in the company
Most of the male respondents occupy the position of MD in their companies (53.3%; n=8). The second most common position for male respondents is that of strategist (20%; n=3). Most female respondents occupy the position of account manager (37.5%; n=3) and digital manager (5%; n=2).
The majority of respondents defined their position within the company as key decision maker. Women, however, are in less influential positions than men. 75% of males are key decision makers (n=11) versus 50% of female respondents (n=4). Only women indicated direct involvement in operations and sales.
The MD of the agency had generally been with the organisation for longer than 4 years, and in some instances, over 10 years. All respondents who held the position of strategist in the organisation had been with the company for less than 3 years. After MD, the second most common position for male respondents was that of strategist.

01.2/ Personal use of the Internet, social media, and blogs

Use of the Internet amongst respondents from digital agencies

Almost all the respondents claimed to have Internet connections at home (except for one person who didn’t connect from home). Overall, two types of connections are commonly used: ADSL and 3G (47.8%; n=11 for each type). The use of ADSL connections was higher amongst males than females and most women preferred to connect via 3G. Mobile phones were not frequently used to connect to the Internet with only 13% (n=3) of respondents using their mobile phones as modems, and 8.7% (n=2) for Internet browsing. Dial-up, Neotel, and iBurst were not used by anyone in the sample.
Use of social media amongst respondents from digital agencies

While all respondents claimed to be active on a social media site in their personal capacity, the type of platform varies slightly according to gender:

Both male and female respondents actively used Facebook (100%; n=23). The business social network LinkedIn is also popular (82.6%; n=19). However, slightly more women than men use LinkedIn. Twitter is used by 69.6% of the respondents (n=16) and is also used slightly more by women than men.
YouTube is used by 60.6% of the respondents (n=14), and it is more popular amongst men than women. Other social networks such as MySpace and MXit are infrequently used by both genders.

Blog publishing amongst respondents from digital agencies
One third of the respondents have a personal blog 30.4% (n=7; 3 women and 4 men).

02/ Media Buyers and Advertisers

2.1 Respondent characteristics

This section describes the socio-demographic characteristics of the respondents. It also provides information on the positions they occupy in their companies. In addition this section presents information on the respondents’ personal use of the Internet. Gender differences are also highlighted.

Gender, age, and number of years employed at the company
The survey was answered by 20 media buyers and advertisers (11 men and 9 women). The majority of respondents are between the ages of 30 to 39 (55%; n=11) and have been with their companies for at least 10 years (40%; n=8). However, women had worked for the same company for a longer period of time than men on average (44% of them have worked for the same company for 4 to 6 years; n=4).

Position in the company
The majority of respondents were digital managers (42.1%; n=8) with an almost identical male/female split. 31.6% of respondents defined their positions as 'Other’. There were an equal number of MDs and account managers (10.5%; n=2) in the sample, however, both MDs were male whereas both account managers were female. Only one of the respondents was a strategist.
Most respondents (male and female) defined their position as key decision maker within the company (50%; n=10), 25% (n=5) defined their position as operations orientated, and 15% (n=3) as sales orientated.

### 02.2/ Personal use of the Internet, social media, and blogs

#### Use of the Internet amongst media buyers and advertisers

All respondents have Internet connectivity at home. Overall two types of connections were commonly used: ADSL (75%; n=15) and 3G (45%; n=9). The third most popular method of connecting to the Internet was by using a mobile phone as a modem, which is also known as ‘tethering’ (35%; n=7). There are no differences by gender in these three forms of accessing the Internet, however, a slight difference was observed in the use of the less popular connections.

A small minority of male respondents used a mobile phone and iBurst to browse the Internet (n=2 and n=1 respectively). Dial-up and Neotel were not used by anyone in the sample.
Use of social media amongst media buyers and advertisers

All respondents were active on at least one social media platform. There was no difference between genders in the usage of the three most popular social networks (Facebook, Twitter, and LinkedIn). There was, however, a slight male skew in the use of less popular platforms (YouTube and MXit).

Male and female respondents are equally active on Facebook and Twitter (88.9%; \(n=16\) for both). LinkedIn was the third most popular social network for both genders (77.8%; \(n=14\)).
Only one male respondent used MySpace. The users of MXit and MySpace are also active on other social networks. One of them is between 20 and 29 years old, and the remaining three are between 30 and 39 years old. They define their responsibilities as operations (n=2), marketing (n=1), and sales (n=1).

Blog publishing amongst media buyers and advertisers
Only 15.8% of respondents have a personal blog (n=3).

Comments
All the respondents from media agencies and advertisers indicated that they were active on at least one social media site. Facebook was the most popular social network by a large margin followed by LinkedIn and Twitter.

Media buyers and advertisers are equally active on both Facebook and Twitter, whilst LinkedIn came in third place. In both groups, the number of users who access the Internet from their mobile phones is relatively small. It would appear that people within these two industry groups prefer to connect via their computers. This finding is in contradiction to the growing trend of Internet connectivity via mobile phones in South Africa. However, this is not really surprising given that the majority of mobile Internet users have less access to resources than those who connect via 3G cards or ADSL.

Blog publishing is not common amongst both groups of respondents. This finding is in line with the consumer behaviour described in the previous chapters of this report. The reasons for this were not explored further in the survey, but the consumer research in the qualitative section of the report gives account of why this may be the case.

02.3/ Social media and blogs as marketing channels

A high proportion of advertisers (94.1%; n=18) used social media and blogs as part of their marketing strategies. Respondents were asked about the sites on which their companies were active. The graphic below shows the results.
The most popular social network is Facebook (94.1%; n=16), followed by Twitter (88.2%; n=15), and YouTube (70.6%; n=12). LinkedIn and blogging platforms were used by 47.1% (n=8) and 41.2% (n=7) of the companies respectively.

Person responsible for updating the blog
When asked about who was responsible for updating the company’s blog, the majority of respondents indicated that the responsible person was ‘other’ (56.3%; n=9), followed by a social media expert and digital agency.
When ‘other’ was selected, respondents provided the following detail:

- Key people in the organisation for each brand
- CEO, Operations people
- New Media content administrators
- Staff
- Managed internally
- PRO agency
Internal Marketing and corporate affairs teams
The blog is updated by others such as marketing dept., editors

Comments
In general, advertisers have started paying more attention to their digital strategies than in the past. This can be seen through the increased number of digital and social media experts employed at companies. The use of social media tools and blog platforms is an indication of the attention paid to this space. The main challenge for digital experts, however, is reaching a consistent behavioural change amongst those who make decisions at companies that buy digital advertising. For instance, key decision-makers amongst advertisers are seldom involved in writing a personal or corporate blog, which severely limits their understanding of the tools and the industry. This ideal level of engagement with digital platforms is something that digital agencies should consider tracking, as this information would serve as a benchmark for real growth and sophistication within the industry.

03/ Trends in the digital industry: how is this changing?

This section presents the changes identified by both groups of respondents who have highlighted different areas of the digital industry, which have gone through numerous changes in a relatively short timeframe.

The responses of digital agencies are presented first, followed by those of media buyers and advertisers.

03.1/ Changes perceived by digital agencies
The majority of respondents assert that the digital industry is “forever changing” (45.8%; n=11), yet one third of the sample only noticed this trend about 2 years ago (33.3%; n=8). Almost all respondents confirmed that their departments have experienced changes in the last 5 years in response to trends in the digital industry (96%; n=23).
These changes can partly be explained by the following:

**Dynamic expansion**
The dynamic expansion of the industry manifests itself at a number of different levels. One respondent explains that the digital space has changed over time in an exponential manner. This has been to a great extent, driven by an increase in Internet access and the resulting increase of digital players competing for a limited number of clients. According to one respondent:

“…the widening of the digital space… the increase in client knowledge about digital marketing… the increase in bandwidth to our customers… the increase in mobile penetration within the wider SA marketplace… the growth of competition within our industry.”

**Changes within the company**
Respondents referred to transformation within their companies as a consequence of the recent trends in the digital industry:

“We’ve grown dramatically to cope with the increase in demand for digital media solutions. We are now able to handle display, email, search, mobile media and social media in-house with dedicated teams and expertise.”

“We’ve re-oriented our strategic planning approach around channel-neutral thinking, whilst also enhancing our planning tools and processes to ensure that we can execute across the full-spectrum of digital and mobile platform developments.”
“(There has been) massive growth (and) diversification to meet the current trends.”

Some companies have created social media departments, hired more staff, and adopted new technology in response to the trends in the digital industry as expressed below.

“For one, the department did not exist 5 years ago... we have to constantly adjust to the changing media landscape and customer media consumption.”

“(Changes in trends have resulted in the) formation of a social media department; mobile and emerging media development; rich media skills upgrade.”

“Our HR has doubled, with the additions of various IT software tools.”

New skills and a new language
The transition from traditional media to digital media involves the acquisition of new skills and the adoption of a new language, which is quite different to the status quo.

“We had to experiment, learn, (and) train across all digital platforms.”

“Traditional strategists (have been) force(d) to take Digital Training.”
“(We are) integrating more traditional media strategies, (and better) integration with the creative agencies... (We have also) introduced more specialist services and employees.”

“(There has been a) move away from banners/buttons to other forms of digital - including of course mobile.“
“(There is a) shift to mobile advertising and content.”

Focused solutions
Products and services offered to clients have also changed. Some respondents emphasise the importance of providing clients with more focused and specialised solutions as well as short term strategies:

“….Instead of splashing budget all over the place, we sell a solution instead of impressions.”

“(The) focus (is) on strategy including social and (a) shift towards mobile up skill across (a) broad range of channels e.g. mobile and social.”

“(We have a) much shorter strategic lead time and more of a response based on opportunity/risk rather than long term strategic imperatives.”

“(There is) more specialization in specific sectors within the department.”
New challenges
Several challenges have emerged due to the rapid growth of the industry such as higher levels of competition, a need to constantly adapt to the changing media landscape, and customer media consumption. Additional challenges include the need to experiment, learn, and train across digital platforms, which some describe as “forced training”.

The need for education is stressed as something that transcends the advertising role of digital companies:

“Clients and agencies are becoming a lot more digitally savvy with regards to what is out there, but at the same time the pace of the education is not happening fast enough. Our role currently is more of an educational one than a media strategy one.

“We started as a result of this change and the need for education in this space.”

3.2 Changes perceived by media buyers and advertisers
The majority of respondents believe that change is a characteristic of the digital industry. 55% (n=11) believe that the digital space is forever changing. 30% (n=6) began to notice this change more clearly 2 years ago and 15% (n=3) of them noticed this change 5 or more years ago. All respondents agreed that changes have taken place within their respective companies in response to trends in the digital industry over the last 5 years.

The respondents described changes in the digital industry as akin to a technological revolution. These trends have impacted companies at a number of levels. Some of them include: the use of new marketing strategies, new technology, new skills, new media, and new ways of interacting with customers.
Multi-level responses: new strategies, investment in technology and skills
The technological revolution of the digital industry requires a full transformation of the manner in which digital companies conduct business. Examples of the strategies employed by some companies include:

“Shift of budget spend, technology advances and focus on global new media in both internal and external environments.”

“Acquired new business, sourced new partners and hired staff.”

“Increased technological investment in a robust CMS, increased number of platforms we now publish on, more highly skilled people required.”

“We completely restructured our editorial division.”

”…the company has had to re-strategise and position itself differently for the future.”

New services and markets
Companies have re-positioned themselves in the digital industry because of a need to expand their services and enter new markets:

“(We have) included additional service offerings into our portfolio and transitioned into a consultancy.”
“(There is a) massive focus on digital in a traditional print company.”

“(Our) company is entering the mobile market.”

“Exposure to new media trends in the industry. Increased Internet traffic, increased mobile traffic, and a dramatic increase in online competition.”

Online interaction with more engaged customers
The possibility of interacting with customers in real-time online has changed advertising forever. Customers have become more receptive and capable of providing immediate feedback on the contents and messages that advertisers send out. Advertisers, agencies, and media owners have responded to this shift in numerous ways:

“(By) changing the way we run the portal, using social media to create hype around product launches, building handset specific applications.”

“Online audiences are more engaged, social media is a big reality and mobile web usage is accelerating.”
“A lot more focus on real-time, video, and mobile.”
“(There is a) stronger focus on educating clients on online and mobile (media). (There is) an increase in the ‘need-to-be-online’ from clients.”

“We have moved a lot towards live coverage, video, and mobile.”
“(The) launch of (a) mobile social media platform.”

“(We have) always aimed to be at the cutting edge of digital innovation but in the last 5 years we have experienced a definite shift towards the use of social media, a focus on integrated campaigns with a digital element, and rich media experiences.”

“(We have a) bigger focus on (the) mobile web and application development, integration of our media platform with broadcast platform (and a) heavy shift towards social media engagement.”

04/ The decision-making process: from a digital agency and advertiser perspective

This chapter presents information based on the perceptions of both groups of respondents. A comparison after each section will highlight the differences and similarities between the way digital agencies and advertisers perceive the decision-making process, the real and estimated expenditure on digital advertising, and expected expenditure trends in the future.

4.1 Main factors influencing the decision-making process

Agencies
A key factor influencing the decision-making process is the digital budget allocation. The majority of respondents from digital agencies (72.7%; n=16%) stated that initially they base all their decisions on the client relationship. Thereafter, they base their decisions on financial targets (54.5%; n=12).
While respondents tend to give priority to the client relationship, they also stress that important decisions on budget allocation are dependent on the media strategy used (and its potential return), the target market, and the client’s budget. Other factors that are taken into consideration include:

“Potential campaign performance.”

“(The) media objective is taken into account.”

“All decisions are made (based) on how they impact ‘end actions’ or conversions. Budget is allocated according to the optimum Cost per End Action (CPEA) achievable.”

“Digital is a measurable medium, so decisions on budget allocation are usually based on return on media spend.”

“Return on investment and measurability.”

“Return on Investment counts.”

According to respondents from digital agencies, factors related to the marketing strategy of the company are also considered:

“Long term brand value/equity.”

“Profile of our business and our longer term growth strategy.”
Advertisers
The majority of the respondents based their digital budget allocation decisions on financial targets (61.1%; n=11), followed by their relationship with the agency (33.3%; n=6).

While respondents tend to give priority to ‘financial targets’, they also base their key decisions on various factors, which can be broadly described as “investment decisions”. These are strategic areas considered vital for the company’s future growth and positioning within the market, such as:

“Market growth, market size, addressable audience, market share.”

“Providing our audience with cutting edge digital experiences that truly differentiate our brand.”

“Boost web traffic.”
“Expanding our user base.”

“Growing user base to get to critical mass.”

“Building scalability.”

Comments
Both groups valued financial targets and relationships differently when making key decisions concerning digital budget allocation and spend. Agencies make key decisions based primarily on their relationship with their clients. Secondly, they take financial targets into consideration. Advertisers make key decisions based on financial targets first, followed by their relationship with the agency.
Whilst agencies considered the specific media used, its measurability, and possible returns in the decision-making process, advertisers view their media expenditure more strategically. They look at the “big picture” and see their investment in digital advertising as a way in which their brands and/or products can obtain better market share and positioning within the market.

04.2/ Sources of information when making a key decision

Agencies
The sources of information commonly used by digital agencies to make key decisions are internal data. However, respondents combine this with other sources of information such as survey data and gut feel.

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey data</td>
<td>20.8%</td>
<td>5</td>
</tr>
<tr>
<td>Internal data</td>
<td>41.7%</td>
<td>10</td>
</tr>
<tr>
<td>Gut Feel</td>
<td>12.5%</td>
<td>3</td>
</tr>
<tr>
<td>Combination of the above</td>
<td>25.0%</td>
<td>6</td>
</tr>
<tr>
<td>Responses</td>
<td></td>
<td>24</td>
</tr>
</tbody>
</table>

Advertisers
The sources of information most commonly used by media buyers and advertisers to make key decisions include survey and internal data (29.4%; n=5 in each case). Only a few respondents mentioned “gut feel” as one of the factors influencing key decisions (17.6%; n=3). Respondents often combine these various sources of information when making decisions (23.5%; n=4).
What, in your opinion, is the main reason(s) why your clients buy online advertising?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Based on recommendations</td>
<td>50.0%</td>
<td>12</td>
</tr>
<tr>
<td>Cost effective</td>
<td>58.3%</td>
<td>14</td>
</tr>
<tr>
<td>Measurable</td>
<td>75.0%</td>
<td>18</td>
</tr>
<tr>
<td>Target specific demographics</td>
<td>58.3%</td>
<td>14</td>
</tr>
<tr>
<td>Part of cross-channel marketing strategy</td>
<td>75.0%</td>
<td>18</td>
</tr>
<tr>
<td>Other</td>
<td>4.2%</td>
<td>1</td>
</tr>
<tr>
<td>Responses</td>
<td></td>
<td>24</td>
</tr>
</tbody>
</table>

Comments
Both groups value their sources of information differently when making decisions. Digital agencies use internal data as a primary source of information. This may be due to having access to reliable data from measurement systems, a database of historical ad campaign performance, and their ability to quantify site traffic and/or audience. This data are invaluable to their clients and, to a great extent, the main reason why advertisers choose to outsource their digital advertising to agencies.

On the other hand, advertisers rely heavily on data provided by research firms or their own consumer research departments.

Digital agencies play a pivotal role in providing clients with accurate figures and in-depth insights about the online and mobile behaviours of users.

The decision-making process is not a simple one, thus, advertisers and agencies combine various sources of information such as survey data and their gut feel. The reason why the latter influences buying decisions is because the digital industry is relatively new therefore advertisers trust their previous experience in buying other kinds of media, while agencies observe international trends. The two groups acknowledge that there is still a lot to learn through experience.
04.3/ Main reasons for buying online advertising: from a digital agency and advertiser perspective

Agencies
According to the respondents, the two main reasons why advertisers buy online advertising are: 1) the fact that their results are measurable and; 2) are part of a cross-channel marketing strategy. The second one relates to the fact that this type of advertising is cost-effective and allows for the targeting of specific population groups. Some 50% of the respondents from digital agencies also believe clients make decisions based on recommendations. It is not clear from the survey, however, where these recommendations come from.

Another reason given by agencies for why they believe their clients prefer online advertising is because their competitors are also starting to use digital media. Some respondents believe that their clients are aware of the growing penetration of digital advertising: “they (the clients) are knowledgeable to the fact that digital cannot be excluded from any advertising budgets and strategies.”
For another respondent, the exponential growth of digital advertising influences their clients’ decisions greatly. The compatibility of the product and the media used when advertising is a factor that respondents stressed.

Respondents from digital agencies identify “their clients’ lack of digital media knowledge/understanding” as one of the main barriers to selling digital advertising (91.7%; n=22). A second reason given by 20.8% (n=5) of the sample is the (relatively small) size of the digital audience (in South Africa). The general lack of knowledge of clients on the matter and how often they overvalue the role that social media plays in a digital campaign, were also stressed as challenges for selling advertising; as well as:

“Prevailing perceptions that digital and/or mobile is too expensive for small to medium businesses.”

“Obsession with the CTR (Clickthrough rate)... and the ‘we have to be on Facebook and Twitter’ herd mentality, where this is not necessarily the best move for all brands.”

One respondent described the recent trend of including digital advertising as standard on most media plans:

“Online is only now becoming part of the original media strategy. In the past it was a bolt on.”

While agencies may be able to slowly overcome barriers such as their clients’ limited knowledge of the digital space, the low Internet penetration rate in South Africa is a structural factor that is out of their control.

**Advertisers**

When asked about the role that digital marketing plays in their business, the majority of respondents said that this was branding/exposure (89.9%; n=16). They named the increase
in sales (61%; n=11) as the next most influential aspect of marketing. When asked about the reason for investing in digital advertising, branding was once again the main reason (87.5%; n=14). Respondents also stated that advertising helps reach sales targets (68.8%; n=11).

Comments
According to digital agencies, the two main reasons why clients’ buy online advertising is because results are measurable and online advertising is part of a cross-channel marketing strategy.

When media buyers and advertisers were asked about the role that digital marketing plays in their business, most agreed that this was branding/exposure. The increase in sales was next in terms of importance.

The responses from advertisers and digital agencies differ somewhat from each other. Agencies highlight the profitability and measurability of digital advertising campaigns as factors that enhance and motivate advertisers’ buying decisions. On the other hand, advertisers are more concerned about branding and the exposure that their brand or product receives than actual sales, according to the survey.

This is an important finding that should be taken into account when digital agencies develop strategies for their clients. While it might be true that advertisers are concerned about budgets, they seem to value the role of an effective digital strategy in strengthening their brand.

Agencies identified the advertisers’ limited understanding of the digital industry as a barrier to selling digital advertising. The response from advertisers suggest that digital agencies need to share their knowledge more and they also need to understand what the priorities of advertisers really are (brand positioning, increased sales, and budget management).
04.4/ Digital advertising spend

Agencies
75% (n=18) of the respondents from digital agencies stated that they knew how much their clients spent on digital advertising as a percentage of their total media budget; 10 respondents said that the percentage is less than 10%, and 8 respondents estimated the percentage to be between 10-30%.

41% (n=9) of respondents thought that 31-50% of the total campaign budget should be allocated to digital advertising. 37% (n=8) thought that this allocation should be 10-30%.

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 10%</td>
<td>13.6%</td>
<td>12</td>
</tr>
<tr>
<td>10 - 30%</td>
<td>36.4%</td>
<td>14</td>
</tr>
<tr>
<td>31 - 50%</td>
<td>40.9%</td>
<td>18</td>
</tr>
<tr>
<td>51 - 70%</td>
<td>9.1%</td>
<td>14</td>
</tr>
<tr>
<td>71 - 90%</td>
<td>0.0%</td>
<td>18</td>
</tr>
<tr>
<td>&gt; 91%</td>
<td>0.0%</td>
<td>1</td>
</tr>
<tr>
<td><strong>Responses</strong></td>
<td></td>
<td><strong>24</strong></td>
</tr>
</tbody>
</table>

Advertisers
In terms of the actual budget spent on digital advertising, 50% (n=8) of the respondents said that the amount exceeded 20% of their total marketing budget.
How much of your marketing budget do you spend on digital advertising?

Responses

- < 10
- 11 - 30%
- 31 - 50%
- 51 - 70%
- 71 - 90%
Some advertisers spend less than 6% (n=5) of their total advertising budget on digital advertising.

The majority of respondents (72.2%; n=13) said that their companies are planning to increase the amount spent on digital advertising, which is good news for the industry. A smaller group of respondents (22.2%; n=4) did not know what their future budget allocations would be.
One respondent said that no increase in digital advertising was planned for the immediate future and gave the following reason:

“we will use our own platforms (print and digital) to market our brand”.

50% of respondents claimed to know what the budget increases for digital advertising would be and estimated the following percentages:

<table>
<thead>
<tr>
<th>Estimated increase</th>
<th>Response count</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>3 respondents</td>
</tr>
<tr>
<td>20%</td>
<td>2 respondents</td>
</tr>
<tr>
<td>25%</td>
<td>1 respondent</td>
</tr>
<tr>
<td>8%</td>
<td>1 respondent</td>
</tr>
</tbody>
</table>

25% (n=4) of advertisers said that their companies spend less than 10% on above the line media. The same number of respondents (n=4) said that their companies spend between 11-30% on above the line. Finally, an equal number of respondents said that their expenditure is between 71-90% (as a percentage of the total marketing budget).

8.9% (n=7) of advertisers expected above the line expenditure to change in the foreseeable future. 27.8% (n=5) stated that expenditure will not change, and 33.3% (n=6) didn’t know what the expenditure pattern would be in the future. As respondents assert, the final decision to buy digital advertising is made mainly by the marketing department (60%), followed by the MD/CEO (30%). Digital agencies usually don’t make these types of decisions.
Comments

Digital agencies indicated that in most cases their clients spent less than 10% of their total marketing budget on online advertising and in other cases between 10-30%. According to one group of advertisers, they spent above 20% of their total marketing budget on digital advertising, but for another group it was less than 6%.

In terms of future trends, both groups identified the potential for growth and increased digital ad spend. The majority of advertisers said that their companies were planning on increasing their digital advertising budgets by up to 20% in the near future. More than one third of all respondents anticipated an increase in above the line media spend in the future. On the other hand, a quarter of all respondents believed that this percentage would remain the same.

The findings highlight a current trend in cross-media marketing campaigns, which incorporate both above the line and below the line elements, and are popular with advertisers and media agencies. Currently, above the line media still plays a dominant role in marketing campaigns in South Africa, however, the increase in digital advertising budgets year-on-year may be an indication that this trend will change in the future.
The Digital Media and Marketing Association (DMMA) is an independent, voluntary, non-profit association focused on growing and sustaining a vibrant and profitable digital industry within South Africa.

Trends in digital advertising in South Africa: An industry and consumer perspective

Report by the Digital Media & Marketing Association (DMMA)
Marcela Ospina (I for Instinct)
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