THE NEW WAVE

WHO CONNECTS TO THE INTERNET,
HOW THEY CONNECT AND
WHAT THEY DO WHEN THEY CONNECT

Indra de Lanerolle
South African Network Society Project
University of Witwatersrand

Author Indra de Lanerolle, Visiting Research Associate, University of Witwatersrand.

Designed by Garage East

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Visiting Research Associate, Wits Journalism, University of Witwatersrand

Dr Mark Orkin
Consultant

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Any errors and omissions are of course my sole responsibility.


TERNET CAFE
INTERNET CAFÉ
FASTEST CONNECTION
WE DO
PHOTOCOPY
FAXING
SCANNING
PRINTING
LAMINATING
BINDING
INTERNATIONAL
CALLS


HAIR
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THE NEW WAVE

THE NEW INTERNET AND WHY IT MATTERS

One of the most exciting findings of the South African Network Society Survey is that the profile of Internet users has changed. Many Internet users are on very low incomes. In spite of the poor fixed-line infrastructure in South Africa, people are managing to connect using their mobile phones. But our research show they are also utilising increased opportunities to connect in schools and colleges, and in Internet Cafes. We are calling this the New Wave because this change in who uses the Internet and how they connect offers the prospect of changing what happens on it - changing its content and even its purpose.

The reasons people offer for first wanting to go online are an excellent demonstration of the wide-ranging potential of the New Wave.

Top five reasons for first using the Internet

1. To get information
2. To socialise
3. For study
4. For work/business
5. To look for a job

People want to participate in the information society. In the face of the high cost of calls, they want to make use of cheap and powerful ways of communicating to maintain their social relationships. They want to use the net to learn – informally and formally. They need it in their work or business and they want to use it to improve their prospects.

But our findings also identify not one digital divide – this New Wave is not static – but many digital divisions. We identify divisions in how people connect, how often they connect, in what they do online and of course in who is and is not connected at all. Half of those who don't use the Internet say they don't know what it is. Indeed we found that around 10% of Internet users were not aware they were using it.

This has economic, social and political implications. As more and more of the South Africa's – and the world's - communications converges on the Internet, the implications of being 'disconnected' for individuals and for groups of individuals is changing.

Government, retailers, media businesses and professionals, regulators, telecommunications providers, educators, activists and many others should be interested in understanding this New Wave better. There is nothing inevitable about what happens next. This report aims to inform these decision makers and the rest of us who are able to influence them.

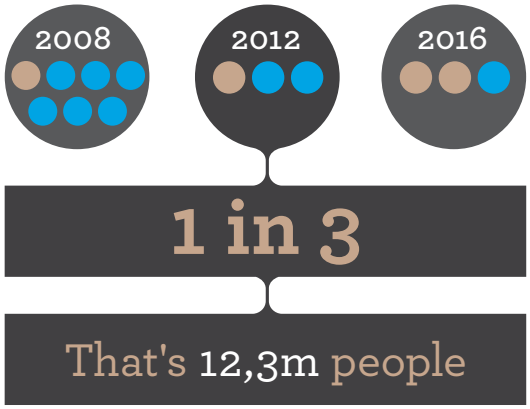
PEOPLE WANT TO COMMUNICATE.

PEOPLE WANT TO PARTICIPATE.

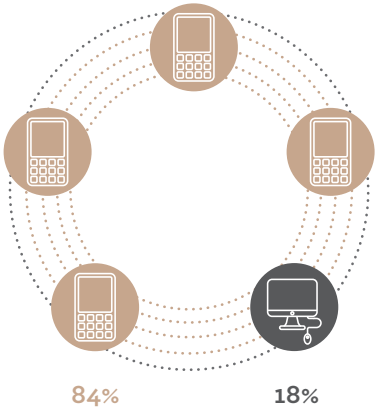
PEOPLE WANT INFORMATION.

ARE WE THERE YET?

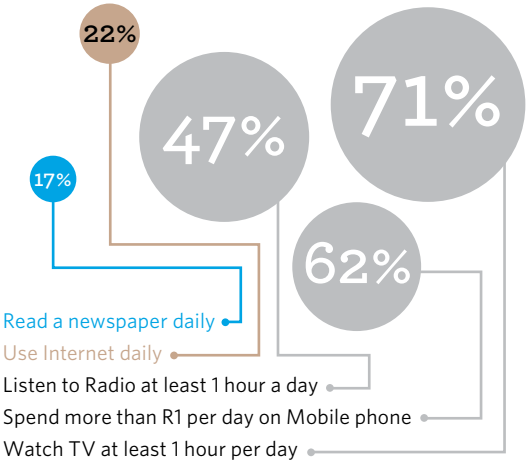
INTERNET USERS IN SOUTH AFRICA



% OF ADULTS WHO OWN A COMPUTER VS % WHO OWN A MOBILE PHONE



MORE POPULAR THAN NEWSPAPERS



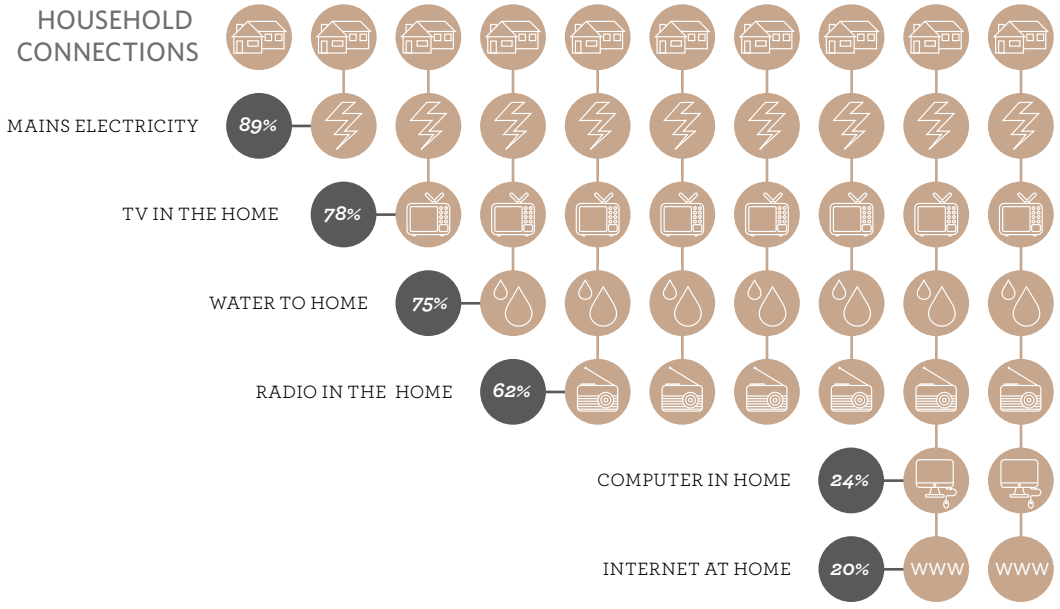
More people use the Internet daily than read a newspaper daily

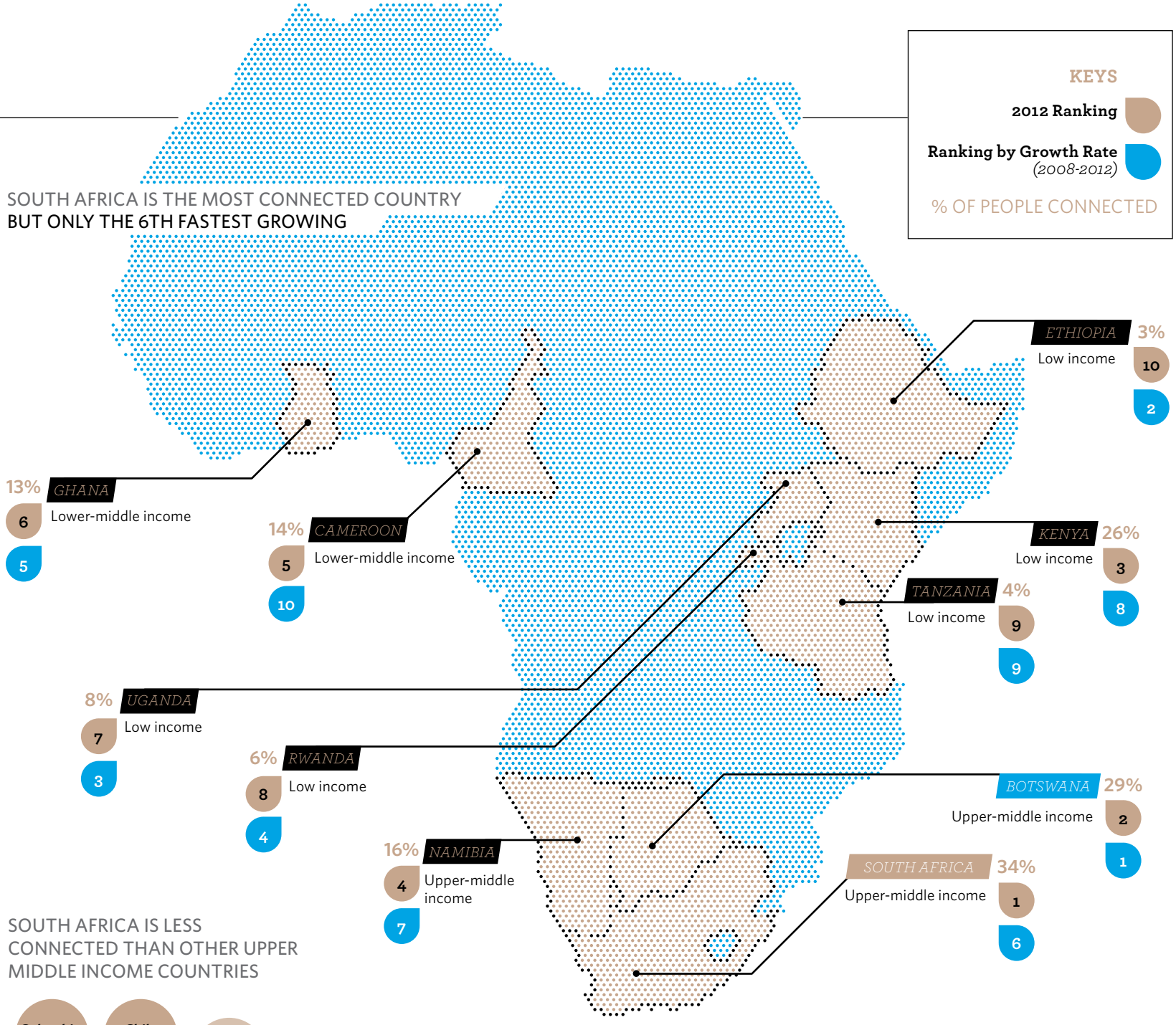
One in three adults use the Internet

12,3m adults in South Africa (aged 15 or older) now use the Internet – one in three of the population. Internet use has more than doubled in the last four years. If this rate of growth is maintained, then more than half of the population will be online by 2014 and more than two out of three could be online by 2016.

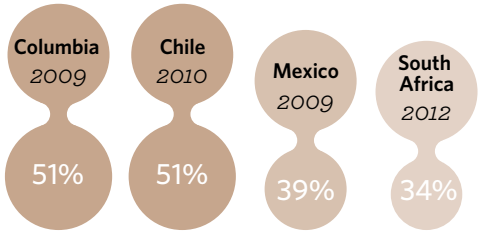
Internet use is becoming part of daily life

Those with access are also going online more often. Almost two-thirds of them use the Internet daily (or almost daily). More people now use the Internet every day (22% of all adults) than read a paper every day (17% of all adults)





SOUTH AFRICA IS LESS CONNECTED THAN OTHER UPPER MIDDLE INCOME COUNTRIES



Comparing South Africa to the continent and the world

South Africa is the most connected of the countries surveyed in Africa. Generally the richer countries are much more connected than the poorer countries. But Kenya, as a low-income country is doing far better than other low-income countries and Namibia is doing worse than other upper-middle-income countries.

Sources: South African Network Society Survey, Research ICT Africa

YOUNG, SCHOOL-EDUCATED AND BLACK

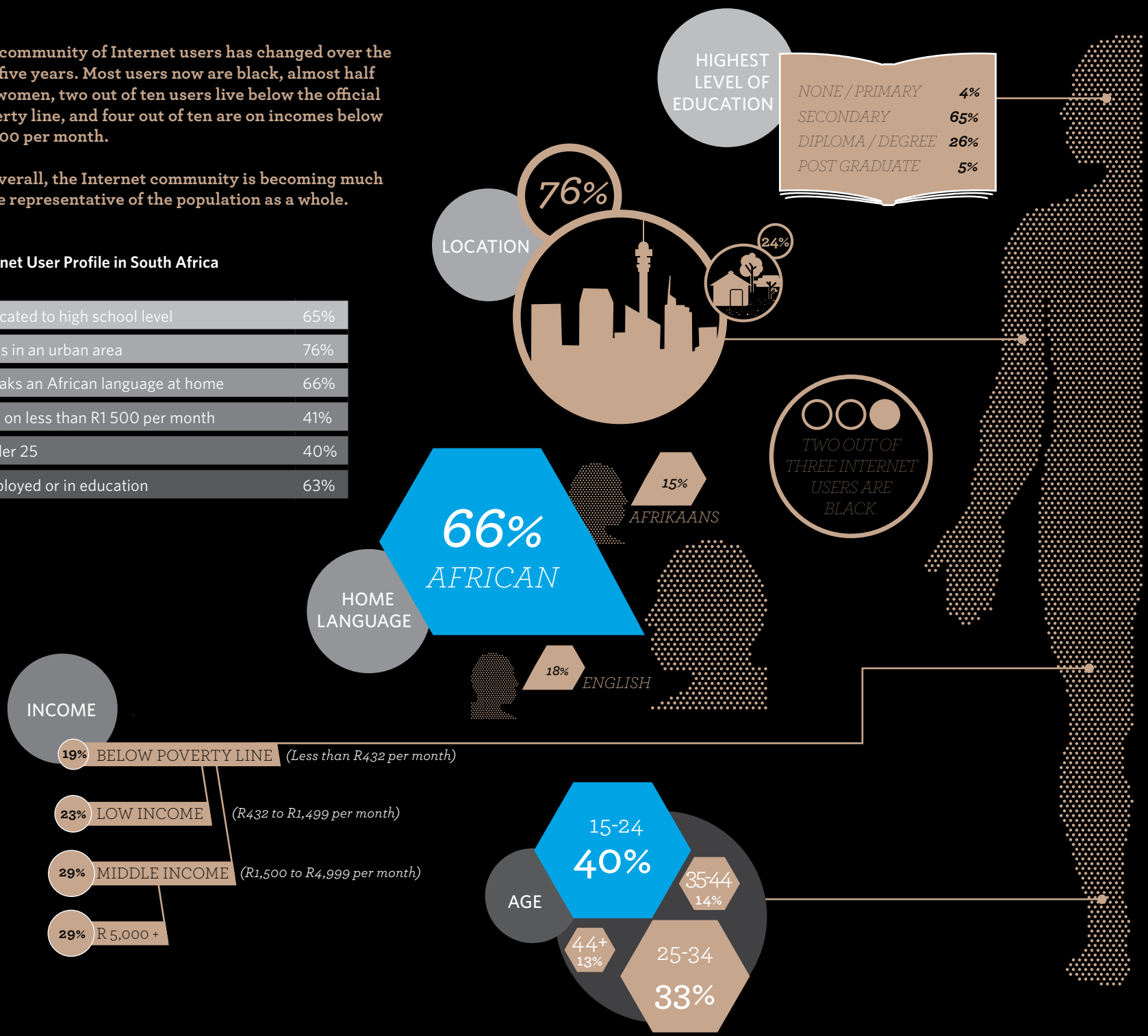
ALL INTERNET USERS

The community of Internet users has changed over the last five years. Most users now are black, almost half are women, two out of ten users live below the official poverty line, and four out of ten are on incomes below R1,500 per month.

So overall, the Internet community is becoming much more representative of the population as a whole.

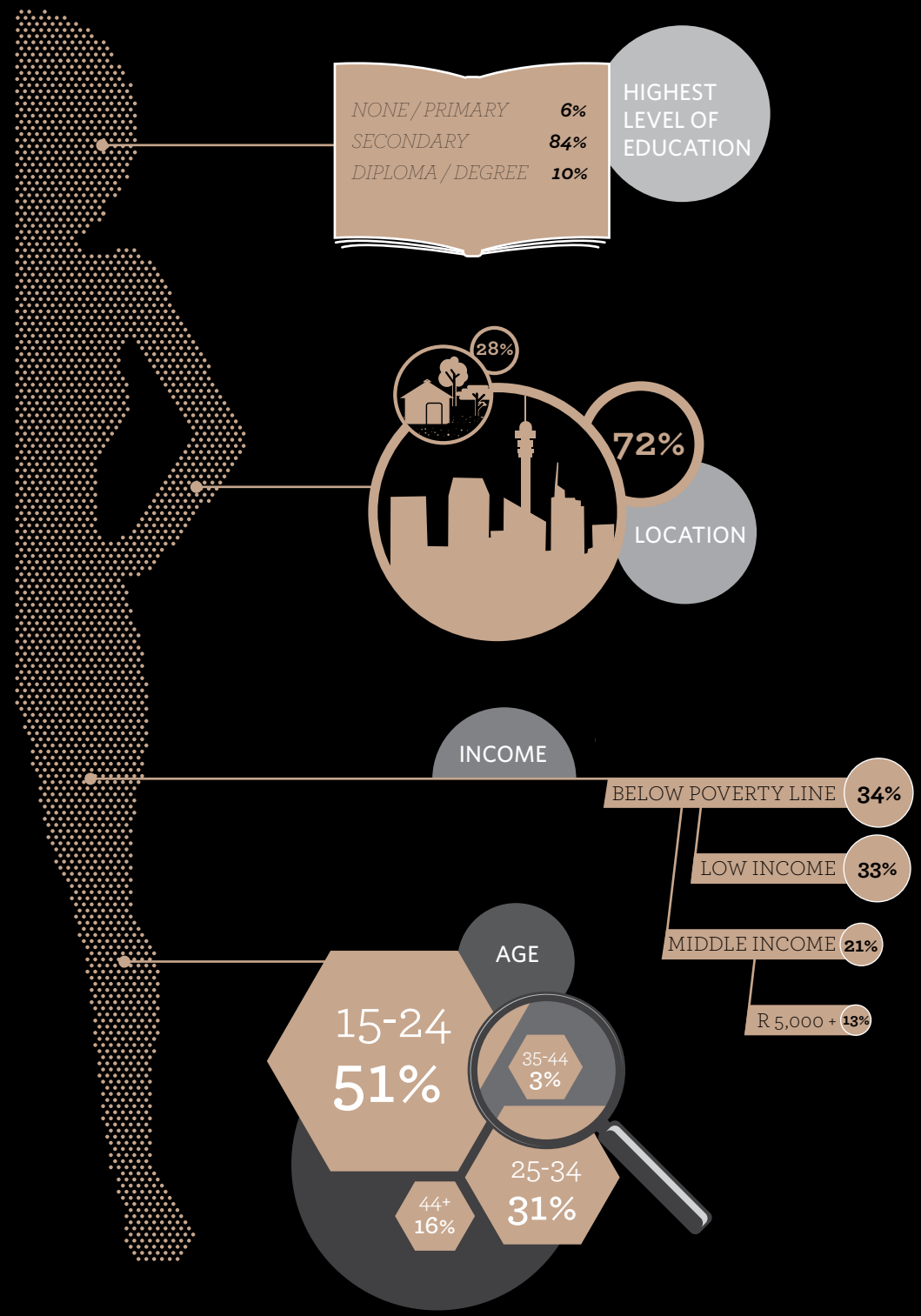
Internet User Profile in South Africa

Educated to high school level	65%
Lives in an urban area	76%
Speaks an African language at home	66%
Live on less than R1 500 per month	41%
Under 25	40%
Employed or in education	63%



NEW USERS

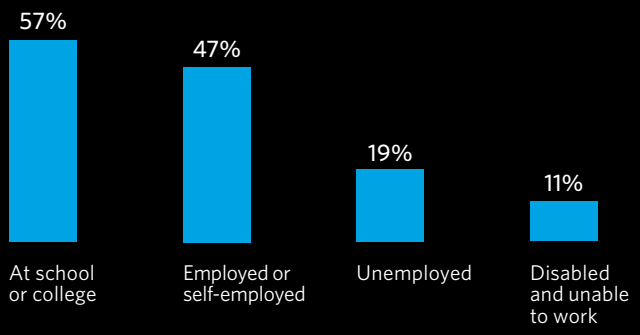
Those who have been using the Internet for two years or less



Language and Race
While we did not gather information on race directly, we did ask respondents what language they spoke at home. Two thirds of Internet users speak at African language at home and less than a fifth speak English.

Age
The younger you are the more likely you are to use the Internet. This pattern has been found in many countries. Almost 50% of those under 25 are Internet users while less than 20% of those 45 or older are.

Education
Most school and college learners are Internet users and learners are more likely to be Internet users than those in work.



Gender
Most new users are women. Although women make up only 46% of Internet users overall, the gender gap is closing. More than half of all new users are women.

Income
While the better off you are the more likely you are to use the Internet, significant numbers of those on low incomes are now Internet users. Almost one in five (19%) of Internet users live below the poverty line.

New users (those who have been using the Internet for two years or less) are most likely to be on low incomes. One third live on incomes below the poverty line and another third live on less than R1,500 per month.

Source: South African Network Society Survey

YOUNG, SCHOOL-EDUCATED AND BLACK

THE CONNECTED AND THE DISCONNECTED

There are some parts of society that the Internet is struggling to reach - those on the wrong side of South Africa's digital divide are the unemployed, the disabled, the uneducated, those over 45 and especially those who cannot easily read and write in English.

THE CONNECTED

If you are home language English speaker, if you are currently at school, college or in work, or if you have studied at university level you are very likely to be an Internet user

THE DISCONNECTED

If you cannot easily read or write English, if you are over 44, if you are very poor, if you are unemployed, or if you live in a rural area you are very unlikely to be an Internet user.

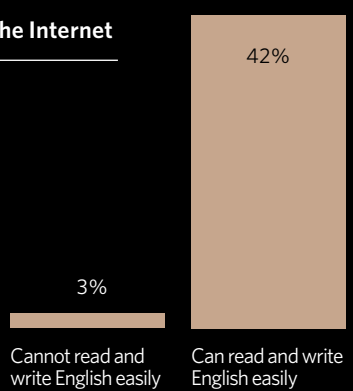
The greatest barrier to Internet use is literacy in English. This is more important than income, age, home language or occupation.

8 MILLION adults cannot read and write English easily and almost none of them use the Internet.

Literacy

Our research indicates that English language literacy is possibly the most important predictor of Internet use – more significant than age, income, gender or where people live. More than one in five respondents said they could not easily read and write in English. And virtually none of these people (3%) used the Internet. In countries with very fast and cheap Internet access, the Internet is becoming as much about photos, video and audio as text. But until most South Africans have access to cheap fast broadband literacy is a significant barrier for millions of South Africans.

English language literacy is required to use the Internet



HOW SOUTH AFRICA CONNECTS

The ability to access the Internet requires two things: a device capable of connecting online (an Internet capable phone, or a computer for example) and a connection to the telecommunciations network (via cell tower, wifi or fixed line).

Mobile phones and the wireless cell tower network that connects them has enabled South Africans to speak to each other in spite of the very low levels of fixed-line telephone connections. And mobile phones and networks are playing a similar role in enabling South Africans to connect to the Internet.

But for most of these users, mobile is not the only means by which they connect. Homes, workplaces, colleges and public facilities are also playing an important role in getting people online.

How people access the Internet varies greatly amongst users. A small minority are 'superconnected' – with access on computers at home and typically at work or college, as well as on their phones and other mobile devices like connected laptops or tablets. One in five Internet users (and about a third of new users) whom we have called '.mobi's' , rely on their mobile phones virtually entirely to get online

Devices

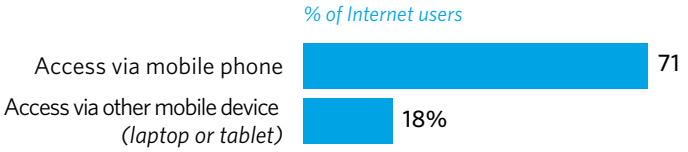
According to our estimates based on our survey, many more people (15,7m) have a mobile phone capable of connecting to the Internet than own a computer (6,4m).

But Internet usage is much lower amongst these phone owners than amongst computer owners or amongst those with access to a computer (for example at work or at an educational institution).

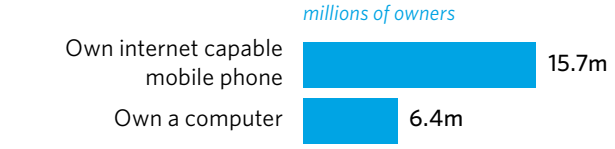
While mobile phones are clearly playing an important role in increasing Internet access, the majority of users are not solely reliant on their phones to connect.

After mobiles, homes are the most common point of access (43%) followed by work (36%) and commercial Internet Cafes (33%).

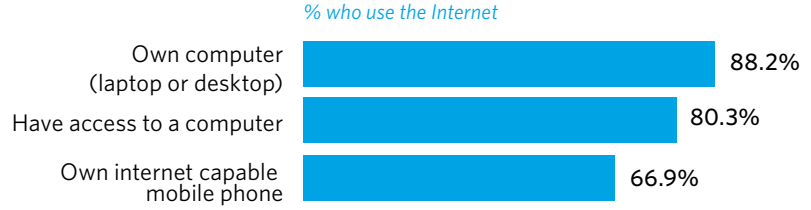
Over seven out of ten Internet users use their mobile phones to get online.



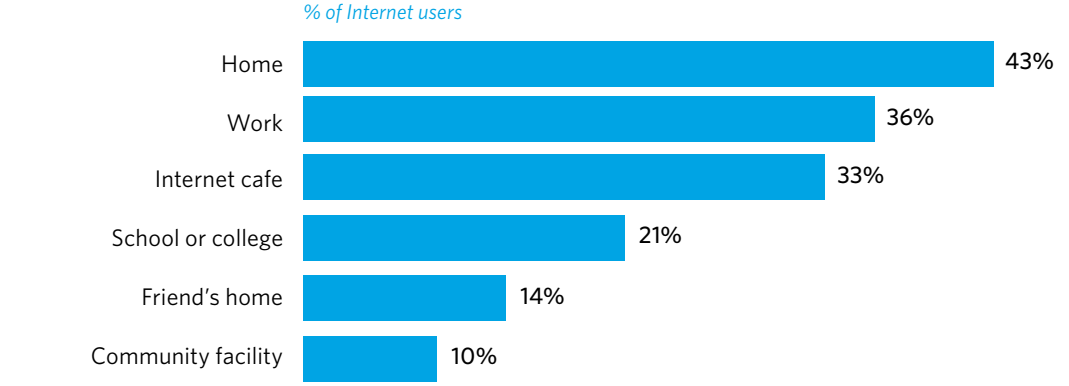
Many more people have Internet capable phones than own computers.



Almost nine out of ten computer owners are online, while a third of those with an Internet-capable phone do not user the Internet.



After mobiles, homes, work and Internet Cafes are the most common points of access.

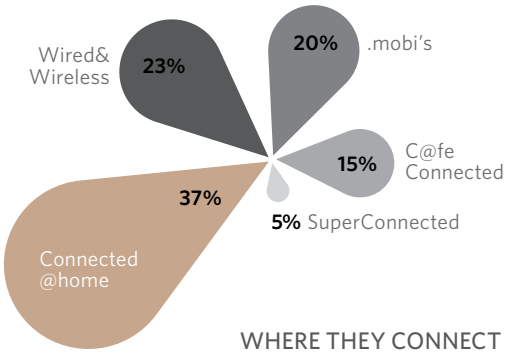


HOW SOUTH AFRICA CONNECTS

Our analysis of the survey data shows that users fall into five distinct access groups based on how they access the Internet via mobile devices and on PCs in various locations:

.mobi's – about one in four Internet users – only access the net from their phones; the **C@feConnected** – about one in seven – typically have no home or work access and no phone access but rely on public facilitites or shared facilities like colleges; the **Wired&Wireless** – about one in four – connect by phone and also use public or shared facilities; the **Connected@home** - about one in three - have home connections but also usually connect at work and the small group of **SuperConnected** – about one in twenty - connect almost everywhere.

SIZE OF ACCESS GROUPS



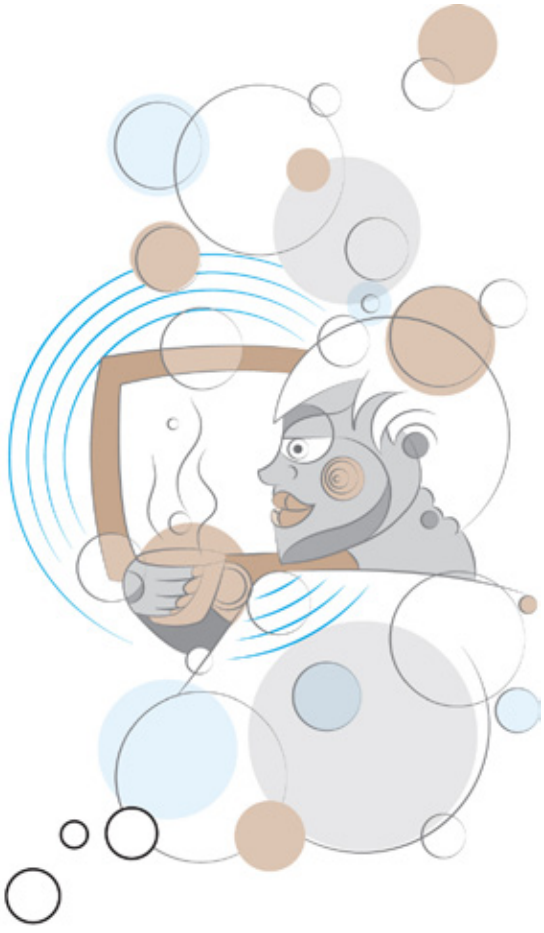
WHERE THEY CONNECT

	.mobi's	C@fe Connected	Wired& Wireless	Connected @home	Super Connected
Home	0%	7%	6%	88%	92%
Work	18%	8%	15%	61%	70%
Mobile	100%	0%	100%	61%	89%
Internet cafe	0%	65%	100%	3%	92%
Comm Int	2%	22%	12%	0%	70%
School/college	12%	30%	38%	8%	70%
Other mobile	1%	7%	13%	25%	85%
Friends	1%	25%	31%	5%	58%

.MOBI'S

A new generation of mobile-only users

The typical .mobi is entirely dependent on their mobile phone to access the Internet. He or she is young, black and on a low income. She or he started using the Internet in the last two years, and now connects daily. mobi's are the most likely to blame slow speeds for not using the Internet more.



C@FECONNECTED

The least connected, the least mobile and the least frequent users

This group are the only Internet users who don't use their phones to get online. One in five of them don't have a phone at all, and of the rest, only about half have phones capable of connecting online. Like .mobi's, they are young, black, on a low income and they only recently started using the Internet. They use the Internet less often than others and along with the Wired&Wireless, are more likely to blame cost for not using the Internet more.

WIRED&WIRELESS

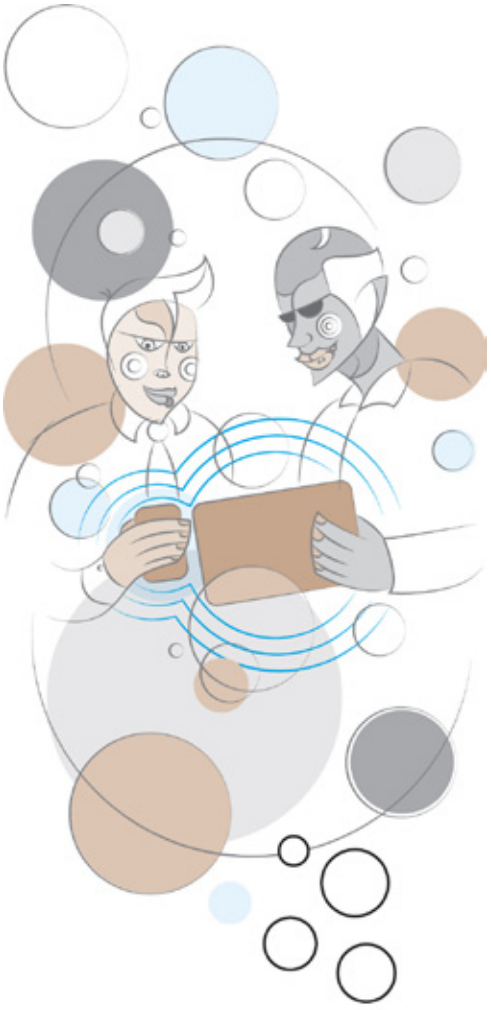
Combining phone and public access to get more out of the Internet

The Wired&Wireless use their phones but also Internet Cafes to get online, in some cases, also getting access at school or college. Like .mobi's and the C@feConnected, they are young but they are better-off and more experienced online –they are likely to have an income above R5,000 per month and to have used the Internet for at least three years. Only half of them use the Internet daily.

CONNECTED@HOME

The well-heeled and well-connected

The typical @home has a laptop, desktop or both. He or she has a home connection and a job that gives them access at work. He or she is educated at tertiary level and probably in his or her 30's. He or she first used the Internet on a computer at least five years ago though now uses their phone to connect as well.



SUPERCONNECTED

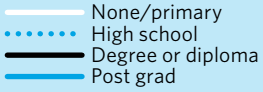
Prioritising living rich online lives

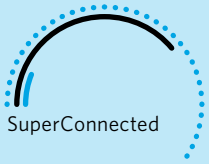
The typical superconnected user connects via their own computer, mobile phone and mobile device (like a tablet or a laptop with wireless connection) but he or she also uses facilities at work, college and Internet cafes. These users have been online less than five years. They are probably in their 20s, younger and less well off than the connected@homes.

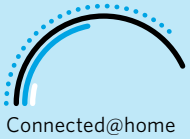
HOW SOUTH AFRICA CONNECTS

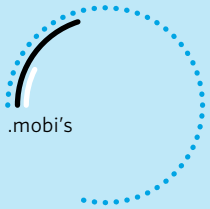
Education

The well connected groups with their own PCs at home or at work are very well educated. Those relying on mobile or Internet cafes are generally school educated.



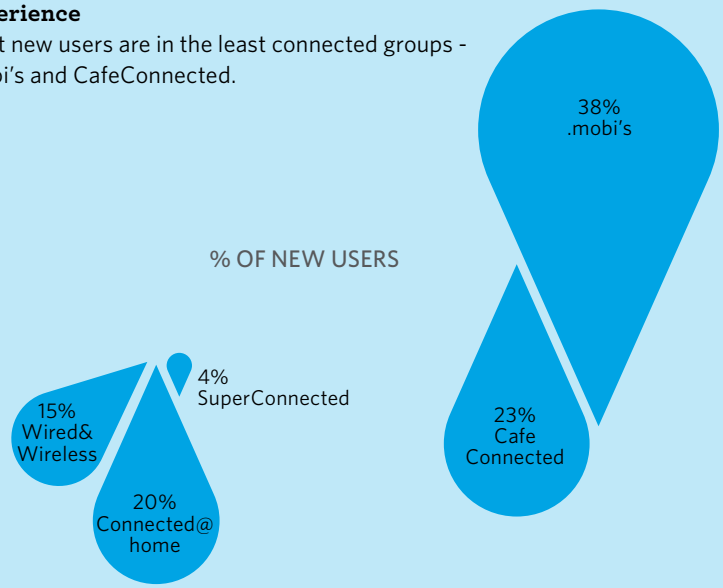






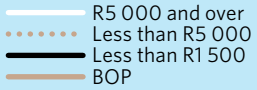
Experience

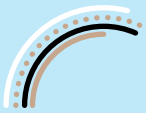
Most new users are in the least connected groups - .mobi's and CafeConnected.

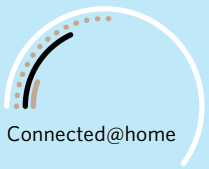


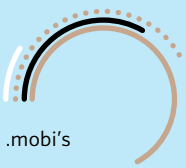
Income

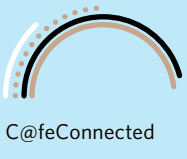
Most of the .mobi's and CafeConnected are on low incomes of less than R1,500 per month. Most Connected@home are in the highest income group.





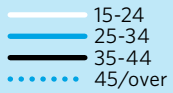


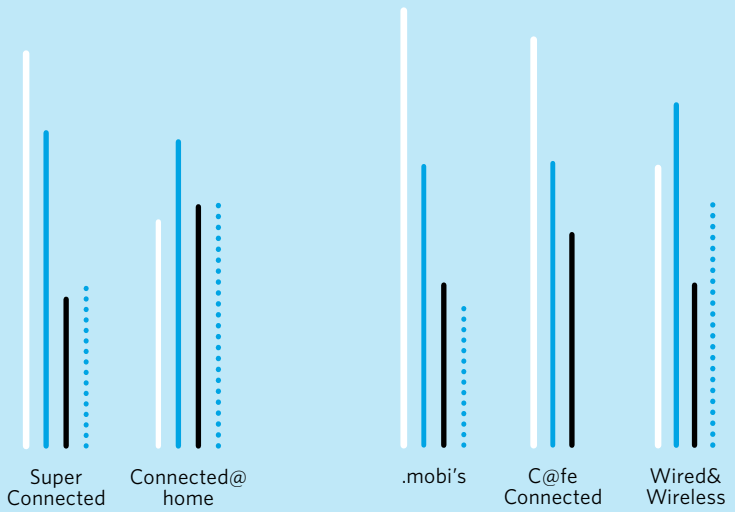




Age

.mobi's, the CafeConnected and the Wired&Wireless are generally young, most under 25. The Connected@home and Superconnected are older.






Telkom Khuluma Phoneshop
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HOW ACCESS AFFECTS WHAT PEOPLE DO ONLINE

Our research indicates that the differences in how people connect are significantly related to what they do when they connect and how often they do it.

Overall our study shows that the most connected – the ones with greatest access – tend to be those who frequently use the widest variety of services.

THE MOBILE INTERNET HAS LIMITATIONS

While mobile users without other access are usually frequent Internet users in general, with most of them (71%) connecting daily, they are generally less frequent users of information and educational tools and of news and entertainment services, inspite of the fact that most of them are very young. Those who use their phones most to connect to the Internet are the heaviest users of social networks.

This may not be only an indication of demand. Access – devices and network connections (and the costs associated with them) - may also be influencing users' choices. Media and entertainment online often involves large data transfers that mobile users may not be able to afford (especially at mobile data rates). Mobile transfer speeds may also make downloading large files impractical. And browsing for, or using, information or educational resources may be harder on a phone than on the larger screen of a computer.

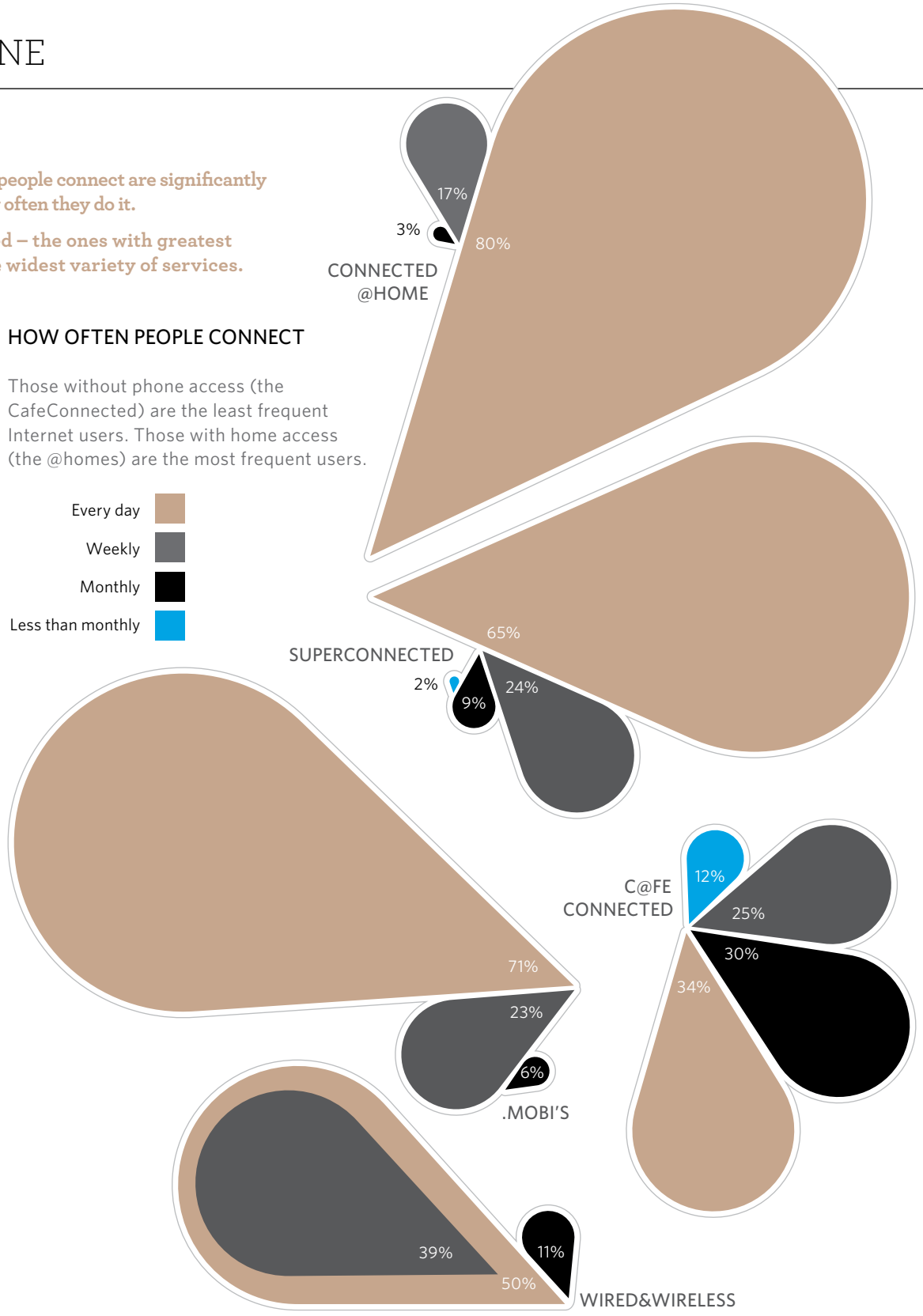
For most of those without access at home or work (about four out of five new users) our data shows that Internet cafés, and (to a lesser extent) schools and colleges, are often important point of access that may address some of these limitations of the mobile Internet and enable users to widen the range of online services that they use online.

HOME CONNECTIONS MAKE A DIFFERENCE

Those users with home connections are the most frequent users of the Internet, and those relying on Internet cafes the least frequent. @homes are much more likely to use the Internet for shopping or banking.

HOW OFTEN PEOPLE CONNECT

Those without phone access (the CafeConnected) are the least frequent Internet users. Those with home access (the @homes) are the most frequent users.



WHAT DO USERS DO ONLINE?

We asked respondents who were Internet users twenty questions about what kind of activities they used the Internet for and how often – from sending email to playing games. Analysis of these answers enabled us to identify five factors.

Searching – looking for information such as looking up a dictionary definition of a word to looking for formal or informal educational content on the web.

Public services – getting information from or about Government or public services which could include tax, health or municipalities.

Media and Entertainment – downloading music or movies, reading online news or magazines.

Ecommerce – getting information about products and services, online shopping and banking.

Social networking – using services such as Facebook, Mxit and LinkedIn and Twitter.

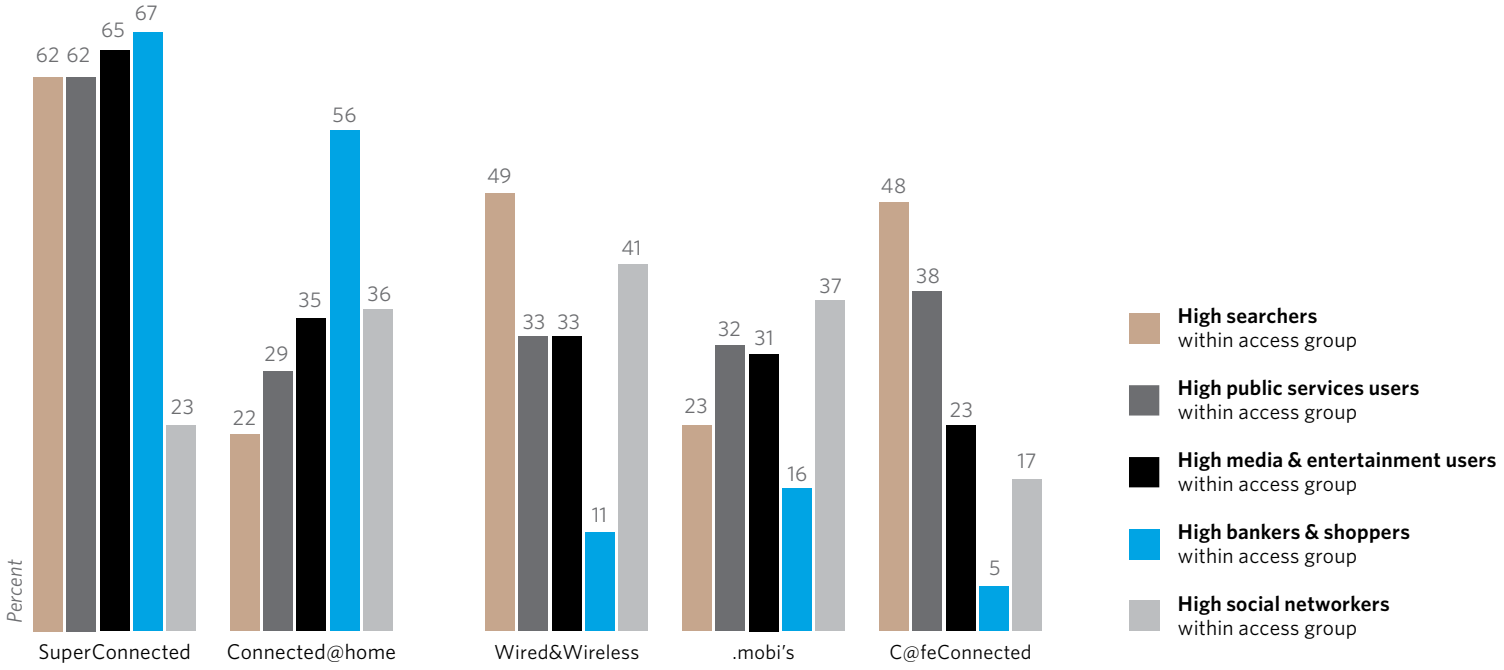
We then analysed the relationship between access and activities online, looking at those who were particularly high (frequent) users of these groups of services.

THE MOST CONNECTED MAKE THE MOST OF THE INTERNET

Those most connected make the greatest use of the widest range of Internet services. A majority of Superconnected users, who access the Internet in the widest range of locations as well as by mobile devices, are high users of information and education services and of media and entertainment services. Majorities of the Superconnected and the Connected@homes are amongst the most frequent users of ecommerce or ebanking services.

The Wired&Wireless and .mobi's have the greatest proportions of the most frequent users of social networks. 37% of .mobi's are amongst the most frequent social network users and almost 75% of them use a social network on their phone.

The least connected – the .mobi's and CafeConnected have the lowest proportion of high users of media and entertainment content. This is especially notable as they are also young users.



3 out of 4

Internet users are signed up for one or more social networks

More people have created social network accounts (75%) than have email addresses (66%).

ON MOBILE ALMOST AS MANY USERS SAY THEY USE SOCIAL NETWORK SERVICES AS BROWSE THE WEB.

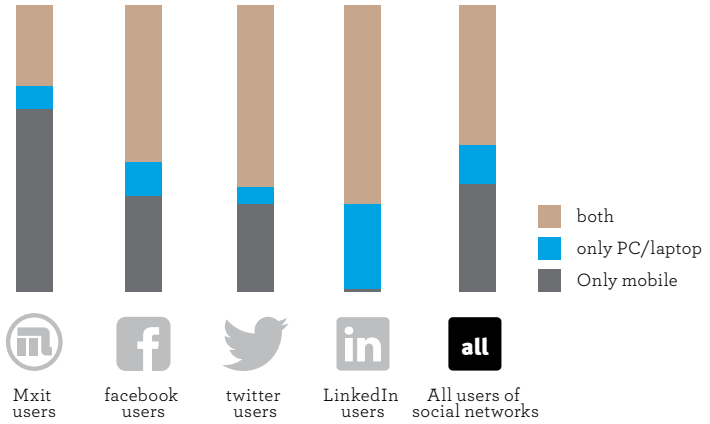
Uses of mobile phone	% of all mobile phone users
Use one or more online social networks	25%
Browse the Internet	28%

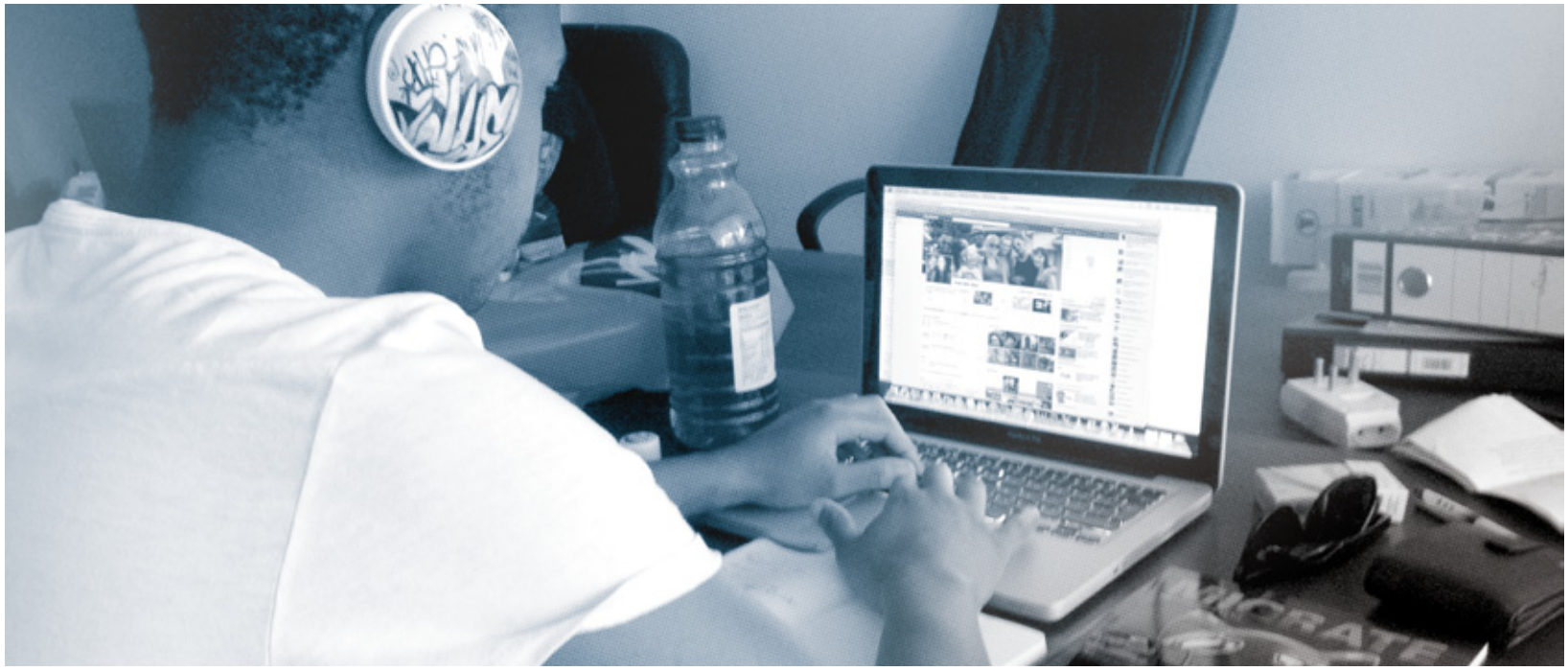
Most Mxit users connect only by mobile

The social wave is mostly mobile

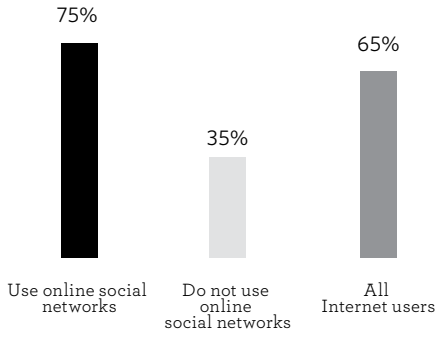
Overall, about half of social network users use their mobile phones and a computer to connect and nearly four out of ten connect using only their mobile. Looking at users of specific network services we find that most Mxit users connect only by mobile, while almost three out of ten LinkedIn users connect only by PC.

ALMOST NINE OUT OF TEN SOCIAL NETWORKERS CONNECT ON THEIR PHONES





PROPORTION OF SOCIAL NETWORK USERS/NON-USERS WHO USE INTERNET DAILY



Social users go online more frequently than other Internet users

Users of online social networks are more than twice as likely to go online daily (75%) than other Internet users (35%). Indeed they make up almost nine out of ten daily Internet users.

Is social networking swallowing the South African web?

We estimate that there are around two million Internet users who are using the Internet almost exclusively for social networking. But they are a minority of the nine million social network users. So our evidence supports the view that while social network services are certainly an important attraction for most new users, they are not the only services that users want.

WHAT ABOUT THE 66%?

WHAT ARE THE OBSTACLES TO BRINGING THE MAJORITY OF SOUTH AFRICANS ONLINE?

One in three adults now use the Internet. But that leaves 66% who do not. **What are the most important factors that prevent or inhibit this 66% from going online?**

Access

Access is the first barrier to getting online

The most commonly cited reason for not using the Internet is lack of access - to devices and networks. 87% of non-users state this as a reason compared to only 60% citing cost.

Device Ownership	% of non-users
Own Internet capable mobile phone	28%
Own Computer	4%

Less than one in three non-users have an Internet capable phone (or at least know that they have) and very few (four in a hundred) own a computer. Over time, new phones may address the first problem, but low PC ownership points to the importance of public and semi-public facilities at schools and colleges, Internet cafes and libraries. These locations are already helping many people connect but they are not available to all and everywhere.

More than half (52%) of non-users stated they would be interested in using the Internet if it was available within walking distance of where they live.

Knowledge and network effects

Half of those who don't use the Internet say they don't know what it is

Lack of knowledge is the second most important reason, according to respondents, for not using the Internet. Almost four out of five non-users cite not knowing how to use the Internet as the reason they don't go online. Half say that they don't know what the Internet is, a sobering thought for those people who's work, home and social lives are increasingly online and an indication of the depth of the knowledge and experience divide that exists between users and non-users.

This raises a question as to whether extensive education campaigns – whether by the state or by business - is required. Our view is probably not. Our research supports the theory that Internet use diffuses through social relationships in communities, workplaces, schools and even homes. As users come into contact with non-users they expose them to the Internet and the tools and services that can be accessed. And this process is accelerated by the social nature of so many of the services and applications that South Africans are using. Social Network Services like Mxit and Facebook give an incentive to users to recruit their friends onto these networks, making it more useful to them. This so-called 'network effect' is, we believe a powerful driver of Internet adoption.

However, while we believe that these processes are likely to drive wider adoption in the future, we also believe that they are likely to hit obstacles. One is cost. Another is capability.

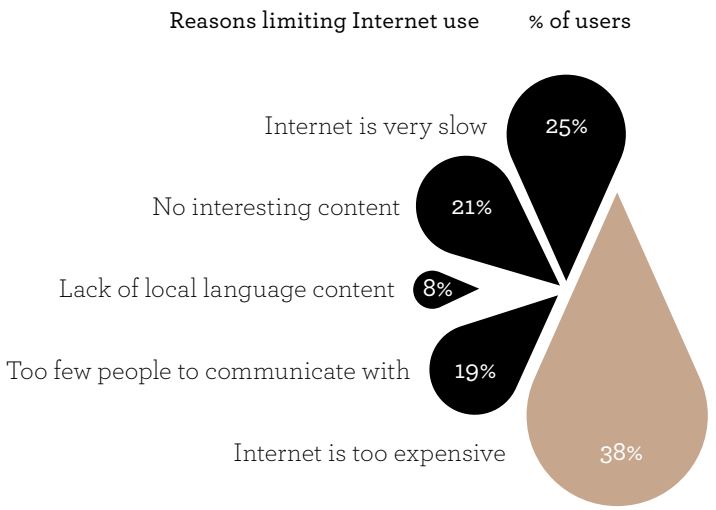
Cost

Six out of ten non-users cite expense as a reason for not using the Internet

After years without significant reductions in data costs in South Africa, the limited falls in price in the last few years may have been important drivers of the increased use since 2008. But without further reductions in cost, growth may not be sustained.

Even if the number of users continues to rise, cost has a significant impact on how much people use the Internet.

Our research suggests that the high cost of data on mobile networks may also be limiting use of services such as video and music.



Almost four out of 10 current Internet users say that cost limits their Internet use.

Capabilities

About a third (33%) of non-users say they cannot easily read and write English. For these people, even if exposure through social networks addresses their lack of knowledge of the Internet, their English language literacy may prove an insurmountable barrier unless the languages of content online changes. Google's multi-lingual search is a good start, but the results are still almost always in English. One of the trends that has not yet been researched sufficiently in South Africa is how much of social network application content – that is generated by users – is now in languages other than English.

THE NEXT WAVE

WHAT HAPPENS NEXT?

Will South Africa continue to be more connected than others on the African continent? Will the current growth in Internet usage be maintained? Will relevant content, applications and services be developed that are attractive enough to bring the next wave of users? Will the National Development Plan's vision of a broadband connected society be realised (and will it come about before 2030)? Our research points to many opportunities and also to many obstacles for the decision makers who will influence the answers.

SURFING THE WAVE

For the opportunities of the Next Wave of the Internet to be realised, decision makers in the public sector, the private sector and civil society need to engage with the New Wave that this report describes.

Government
Our survey shows that Government could be developing new e-services beyond its very successful tax applications. The cost for someone in a rural area at the 'bottom of the pyramid' making repeated trips to the nearest Home Affairs office can be no less than the cost of using an Internet café.

Demand for online educational resources is strong and educational institutions are vital means of connecting for many. Government has already funded the very impressive TENET network connecting Universities. The impact of connecting more schools and colleges could be significant.

Mobile and Fixed Line Operators
Our research shows significant pent up demand for low cost Internet services. While there are infrastructural challenges in meeting this demand, the opportunity is great. One in five non-users said they would be prepared to pay at least R100 to access the Internet within walking distance and almost half of non-users stated that they would be prepared to pay at least R50.

"Compared with the best international standards, South Africa's ICT infrastructure is abysmal."

Retailers
Banks, retailers and mass-marketers, with a small number of exceptions, are only beginning to respond to the shift in the online community we outline in this report. Our research confirms that ecommerce – transacting on the Internet using credit cards for example, is still a minority activity online done only by the highly connected, but the Internet is now an important part of millions of South African's lives and the home of many of their conversations. As the number of users approaches 50% of the adult population, those who fail to engage online are likely to fail to build – or even maintain – their brands.

Media
Until recently, South African mass media has been relatively sheltered from the digital storm that has challenged media business models and indeed businesses around the world. Now half of daily Internet users read a newspaper only infrequently - a challenge and an opportunity for South African media.

Civil Society
Some nine million people are using social networks which are capable of virally spreading ideas, creating public spaces for discussion and debate, building communities of interest and providing platforms for organising action. New forms of online/offline activism are becoming possible.

HITTING THE ROCKS

Most of the obstacles in the way of realising these opportunities are visible above the waterline: inadequate investment, a poor policy and regulatory environment and a lack of innovation in public and private sectors.

Government has the primary role in setting policy and regulation which directly affects prices and access. At the moment only 1,2m households have fixed-line broadband Internet connections. Unbundling the 'local loop' – the connection from the telephone exchange to your home - could enable competition in connecting households to the net. Using the Universal Access Fund to increase public access points – including Internet Cafes especially in underserved rural areas – could have a significant impact on uptake. Possibly most important of all are the government's and the regulator's roles in influencing investment and mobile data prices. This may require addressing Telkom's virtual monopoly in data traffic on the 'backbone' that connects phones and computers to the international telecommunications network. As the National Development Plan states, "Effective policies, regulation and institutional arrangements ... are urgently required."

INTERNET LITE

We can already see what could happen if those decisions are not taken or are poorly made. Sub-Saharan Africa is the least connected continent with the poorest infrastructure and the slowest connection speeds. The National Development Plan is scathing in its description of South Africa's current position: "Compared with the best international standards, South Africa's ICT infrastructure is abysmal." Our research paints a picture of a diverse community of Internet users who are working around this status quo - most of them patching together their Internet access, very aware of its value but limited in their ability to access all the benefits it can bring.

Globally, the Internet is speeding up. Unlike telephone networks or television and radio, most Internet services and applications are not national. They are global. As users in very connected countries get greater bandwidth, these services and applications start to exploit the capabilities of this additional bandwidth and become less useful for those with slow connections. The National Development Plan sets the objective of making high-speed broadband Internet universally available at competitive prices by 2030. It is unlikely that we have that long if we want all South Africans to experience the benefits of these global services.

RESEARCH METHODOLOGY

The data presented in this report is drawn from the South African Network Society Survey (SANSS), a project of Wits Journalism, University of Witwatersrand in collaboration with Research ICT Africa. The report is based on a survey of 1,589 South African adults aged 15 and over representative of the national adult population. All interviews were conducted face-to-face. Though the questionnaire was in English, interviews were conducted in multiple languages.

Sampling Methodology
For further information on the sampling and weighting methodology see http://www.researchictafrica.net/docs/HH%20survey%20methodology%20brief.pdf

Questionnaire
The SANSS questionnaire was drawn up by Indra de Lanerolle in collaboration with Dr Christoph Stork and Alison Gillwald of Research ICT Africa with inputs from other members of the RIA network in twelve African countries. Some of the questions were based on the World Internet Project 'common questions'. The World Internet Project – www.worldinternetproject.net - is a network of Internet researchers in thirty-four countries. These common questions enable many of these findings to be compared directly to findings from other countries in Asia, Europe and the Americas.

The Internet survey formed part of a wider survey of telecommunciations and media use conducted by Research ICT Africa with the support of the International Development Research Centre. This survey was conducted in 12 African countries. Reports based on these surveys will be available on RIA's website www.researchictafrica.org

NOTES AND REFERENCES

1. The figure for the total number of Internet users takes account of the latest census (2011) data on the national adult (15+) population published in October 2012 by StatsSA *(http://www.statssa.gov.za/census2011/default.asp)*

2. References to 2008 Internet use are drawn from Research ICT Africa ICT survey 2007/8 published in Gillwald, Alison and Stork, Christopher 'ICT access and usage in Africa' Volume One, Policy Paper Two. Research ICT Africa. Available at *www.researchictafrica.org*

3. Country income level categories are those defined by the World Bank, drawn from World Bank Data Bank *(http://databank.worldbank.org/Data/Home.aspx)* For an explanation of the methodology see *http://data.worldbank.org/about/country-classifications*

4. Quotes from the National Development Plan are drawn from the National Development Plan Executive Summary published by the National Planning Commission available at *http://www.npconline.co.za/pebble.asp?relid=25*

5. *Some %s do not add up to 100 due to rounding.*