

# ACF DIGITAL PLATFORMS LANDSCAPE STUDY

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**competition commission**  
south africa

# Purpose and scope of the study

- The study is a collaborative project led by the authorities from South Africa, Botswana and Mauritius
- Map out the levels of digital adoption and identify leading players in these markets within the ACF member states
- Identify opportunities for collaborative enforcement and capacity building between the ACF members in specific digital markets
- The Scope includes the following digital markets:
  - Search
  - E-commerce
  - Travel and Accommodation
  - Food Delivery
  - Online classifieds
  - Social Media and Social Media Advertising
  - Software Application
  - Online Media

# Timelines

- Survey Questionnaire issued on 18 October 2023
  - Responses received from 15 member states
- Drafting commenced on 19 February 2024
- First draft due on 08 March 2024
- Final draft due by 29 March 2024
- Publication in April 2024

# Preliminary Findings

- Most of the markets are not yet developed in the participating countries, although the levels of adoption have been gradually growing
- There is a positive linear relationship between digital adoption levels and income levels
- E-commerce is rapidly growing in all countries, with a mixture of local and international platforms- (Amazon has not yet dominated the African markets)
- Indigenous platforms still lead in most countries especially in food delivery and online classifieds
  - Strategies to preserve local markets are necessary
- Google Search dominates search in all participating countries and operates a similar model, with some features that had been identified to distort competition by different authorities
  - This presents an opportunity for collaborative enforcement
- Booking.com dominates travel and accommodation in most countries
- Generally, there is lack of reliable digital markets data in most ACF countries
  - Pro-active data collection is imperative for effective regulation of digital markets

Thank you

