



www.worldwideworx.com

www.fuseware.net

South African Social Media Landscape 2014

Executive Summary

Facebook leads SA social media up

Mxit maintains social loyalty

Contents

Obtaining the report

Facebook leads SA social media up

Facebook has become the biggest social network in South Africa, seeing its strongest growth yet in the past year – and overtaking Mxit for the first time.

This was one of the key findings of the SA Social Media Landscape 2014 research study, released today by World Wide Worx and Fuseware. The study showed that Facebook has 9,4-million active users in South Africa, up from 6,8-million users a year ago.

Mxit, the previous market leader, has remained stable at a little more than 6-million users (see next section), as it feels the effects of competing instant messaging services like WhatsApp and 2Go, as well as from the growth of social networking on phones.

Twitter saw the highest percentage growth among the major social networks, from 2,4-million to 5,5-million – showing 129% growth in 12 months.

“The most significant finding, aside from the growth itself, was the extent to which social networks are being used on phones in South Africa,” says Arthur Goldstuck, MD of technology market researchers World Wide Worx. “No less than 87% of Facebook users and 85% of Twitter users are accessing these tools on their phones.”

Google+ has remained the laggard among social networks, with only 466 000 active users, only marginally higher than a year ago. However, the photo sharing and special effects app Instagram has exploded in use in South Africa, from below 100 000 a year ago to 680 000 in August 2013.

“We can expect this number to grow even more dramatically in the coming year as Instagram becomes a popular app on Android phones, while Android itself is expected to grow significantly in South Africa in the coming year,” says Mike Wronski, MD of social network analytics company Fuseware.

Both social networking and instant messaging apps are dominant in downloads for smartphones and tablets.

WhatsApp is presently the most popular app in the Android, Apple and Windows app stores, with Facebook in second place in the Android and Windows stores, while Instagram takes the Apple store runner-up slot. The impact of BlackBerry extending BBM availability to Samsung devices is reflected in the BBM Android app taking third place in the Google Play Store.

The report highlights the intensified use of social media by South African corporations, revealing that 93% of major brands use Facebook, 79% use Twitter, 58% YouTube, 46% LinkedIn and 28% Pinterest. Fewer than 1 in 10 use Mxit, Foursquare or Instagram.

“The big trend in corporate use of social media is that internal marketing teams are taking charge, rather than outsourced agencies,” says Wronski. “Just over half of major brands (54%) rely on their own marketing team, a further 9% on public relations teams, and only 16% on third parties.”

That’s not all bad news for agencies, however: while 53% of respondents say they will build up their social media skills by investing in training existing teams, 27% will rely on specialist social media agencies.

“Such investment is critical,” says Goldstuck. “The survey shows that the measurement of social media effectiveness remains relatively unsophisticated. On Twitter, 83% of companies measure effectiveness by number of followers, while only 48% conduct sentiment analysis. On Facebook, 87% measure number of fans and 79% number of posts and comments, while only 54% are assessing the tone of those posts through sentiment analysis.”

The importance of social media as a business tool was acknowledged by almost all respondents: 91% agreed that it had the potential for building a business. However, only 19%

said they were getting as much value from social media as they could – indicating that most were still learning how to embrace the tool.

Nevertheless, analysis of South Africa's top 50 brands by value reveals a strong showing: they have an average of 58 000 Facebook fans each, growing at 4,8% a month. The average number of YouTube account views is 259 000 per brand, but with an average subscriber base for their YouTube channels of only 366. On Twitter, they have an average of 12 785 followers each, with an average of 1856 mentions a month.

The downside is that the average response time for these brands addressing customer issues on Twitter is 271 minutes.

“Taking more than four hours to respond to a customer in such an immediate environment shows a gap in social media that needs to be closed,” says Wronski.

Mxit maintains social loyalty

South Africa's home-grown instant messaging service, Mxit, may have been supplanted by Facebook as the country's biggest social network, but it has succeeded in maintaining the loyalty of its user base.

Initial findings showed that the Mxit user base had fallen significantly in the past year. However, when taking into account a change in the way the service measures active users – from being on the network over 90 days to being on in the last 30 days – Mxit appears have turned a corner.

In July 2012, a 30-day active measure gave Mxit 6,2-million subscribers. A year later, in July 2013, the active subscriber base had grown marginally to 6,3-million. In August, this number had grown to 6,5-million. This means that, despite a high churn rate among pre-paid cellphone users, which comprise most of Mxit's base, the network is winning back enough users and attracting enough new customers every month to make up for that churn. It suggests that a high proportion of those who change their pre-paid phone numbers return to register on Mxit again.

“This finding provides fascinating insight into the willingness of outgoing FNB CEO Michael Jordaan to take on the role of chairman of Mxit,” says Goldstuck. “Rather than coming in to rescue a dwindling brand, he has arrived to build on a relatively solid foundation.”

The *SA Social Media Landscape 2014* report describes the decision by new Mxit CEO Francois Swart to clean up how Mxit reported its numbers as a turning point for the network. However, this does not mean it's survival is guaranteed.

"Mxit is holding its own, but at a time when Facebook has grown by more than half and Twitter has more than doubled," says Wronski. "That is enough of a challenge, but then you also have local instant messaging service 2Go overtaking Mxit in active users across Africa, and WhatsApp in turn overtaking everyone, including Facebook."

Mxit currently has 7,4-million active users across Africa, while 2Go has 10,5-million.

The *SA Social Media Landscape 2014* research report is now available for purchase. It contains extensive data on both consumer and corporate use of social networks.

Contents

3 Introduction

4 Introduction by WWW

5 Headline Insights

15 key insights from 2013 findings

6 Agency Thought Leadership

16 Social Media Usage by SA Brands

Introductory article (Arthur Goldstuck)

17 Analysis and charts from corporate survey

33 Top brands introduction

Headline brand stats

36 Top 25 retweets of SA's top 50 social brands

37 Top 25 Facebook posts of SA's top 50 social brands

41 Top 25 videos of SA's top 50 social brands

45 Social Media & Mobile

Introductory article (Arthur Goldstuck)

46 Top apps in SA by App store

46 Social media usage of consumers on mobile

Note – this data will be delayed and released later in the year

48 Twitter

Introduction

48 Top 25 Most Followed South Africans on Twitter

55 Top Words

56 Top Retweets

57 Top hashtags

58 Top Tweet Platforms

59 Time Trends

60 Digital Case Study: Beacon Allsorts

By Tequila

70 Facebook

Introductory article (Arthur Goldstuck)

61 Relationship, age, education, cities data

74 Top 3 pages in SA by each category

79 Youtube

Introductory article (Arthur Goldstuck)

80 Top 50 SA Youtubers

82 Top 10 Most Viewed Videos

84 Google +

Introductory article (Arthur Goldstuck)

85 Key demographics - employment, gender, location, relationship status

87 Top users on Google+ in South Africa

90 LinkedIn

Introductory article (Arthur Goldstuck)

91 Africa map LinkedIn African users

92 Demographics, industry and occupational distribution

96 MXit

Introductory article (Arthur Goldstuck)

98 MX it stats, including top channels, advertising stats, and demographics

107 Pinterest

Introductory article (Arthur Goldstuck)

108 Profile Breakdown

109 Top 15 Users

111 Instagram

Introductory article (Arthur Goldstuck)

112 Top Stats for Johannesburg

115 Top Stats for Cape Town

118 2go

119 2go Audience Demographics

120 Phone Purchase Poll Summary

121 Data Partners

122 Acknowledgments

Obtaining the report

The full report is available for purchase from World Wide Worx at a cost of R14 000 (single site license) excluding VAT from World Wide Worx. To place an order, either request an order form to be mailed electronically, or send company name and address, VAT registration number, and name and e-mail address of person ordering and person who should be billed, to World Wide Worx by e-mail on info@worldwideworx.com or by fax on +27 11 782 7063. Please include a purchase order number where required.

Students who wish to obtain access to the research should enquire through the libraries of acquisition departments of their universities or learning institutions.