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South African Social Media Landscape 2015

Executive Summary

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Facebook bridges SA gender divide

Facebook is the first high-tech service or platform in South Africa that has seen exactly equal take-up by males and females.

This is one of the fascinating findings of the SA Social Media Landscape 2015 report, released today by World Wide Worx and Fuseware. The headline findings, announced in September, showed that Facebook remained the most popular social network in South Africa, followed by YouTube and Twitter. The study excludes instant messaging services.

In a market where there is still a small male bias in the use of the Internet and e-commerce, the results underline the extent to which social media has become mainstream.

Of those Facebook users whose gender is identifiable, 5,6-million males and 5,6-females use the platform.

“This is a clear sign of both the maturity of the platform and its mainstream use as an everyday tool rather than as a high-tech choice,” says Arthur Goldstuck, managing director of technology market research organisation World Wide Worx.

“From a marketer’s point of view, an equally significant finding is that, of a total of 11,8-million South African users – 22% of the population – 8,8-million access it on their mobile phones. This means that targeting Facebook users is not a matter only of marketing on the Facebook web site – its mobile properties are probably more important.”

Mike Wronski, managing director of analytics company Fuseware, points out that the Facebook user base is beginning to resemble the South Africa urban population: “The highest growth in the user base is seen in three key economic hubs, namely Johannesburg (55%), Pretoria (49%) and Cape Town (44%). Interestingly, Nelspruit continues to show high growth, at 40%.”

The single biggest platform for Facebook from a phone operating system point of view is Android, growing from 1,26-million in 2013 to 3,2-million in 2014. BlackBerry has fallen from the top position to second, but dropping only marginally in user numbers, from 2,6-million to 2,4-million. Windows Phone is beginning to emerge from below the radar, rising from 124 000 to 260 000. iOS remains in third place, though, remaining relatively stable at 580 000 users.

“More important than the operating system numbers, however, is the split between feature phones and smartphones,” says Goldstuck. “Five million Facebook users still use feature phones. While smartphones only just dominate – at 5,6-million – it is clear that a large Facebook user base is still on a basic device.”

The single most commonly used handset for Facebook is the Nokia Asha, with 1,78-million users. In distant second and third place are the BlackBerry Curve 8520 at 660 000 and the Samsung Galaxy S4 at 400 000.

“This last statistic is also significant, bearing in mind the S4 is a premium device – underlining its social appeal in South Africa,” says Goldstuck.

Wronski points out that South Africa bucks the global trend of younger users reportedly falling dramatically as a proportion of the user base.

“There is much debate about teenagers abandoning the platform, but it’s not yet a factor in South Africa,” he says. “The 13-18 age group remains the single biggest on Facebook, with 2,5-million users.”

Visual content drives social media in SA

South Africa's fastest rising social networks are visual platforms owned by competing giants of social media.

The number of YouTube and Instagram users in South Africa increased, respectively, by 53% and 65% over the past year, according to the findings of the SA Social Media Landscape 2015 study.

By August 2014, YouTube had reached an active user base of 7,2-million South Africans, making it second only to Facebook's 11,8-million in social network use in South Africa. Instagram grew from 680 000 active users in 2013 to 1,1-million in 2014.

"We're seeing the beginning of the visual revolution in online usage in South Africa," says Goldstuck. "The global rise of video is now making itself felt here. Once the cost of mobile data comes down for the emerging smartphone market, video will become a dominant medium, strongly supported by other visual media."

Twitter's previously dramatic rise has slowed down, although still growing healthily by 20% in the past year – to 6,6-million users. The professional network LinkedIn has leaped by 40%, to 3,8-million users in South Africa.

Two networks have seen their numbers fall, most notably the homegrown Mxit, which has fallen from 6,5-million active users a year ago to 4,9-million in August 2014. However, it has among the most engaged users of any social network in South Africa, with the average user signing in five times a day, and spending 105 minutes a day on the network.

Pinterest, the "pinning" network, saw growth flatten globally in the past year, and dropping in South Africa, from 910 000 active users a year ago, to 840 000 in August 2014. However, the most popular South African user of the platform has more than 800 000 followers globally, compared to no South African having more than 20 000 followers a year ago.

"Every social network has its own dynamics," says Wronski. "The secret for companies trying to leverage social networks lies not only in numbers of uses, but also in how heavily those users engage in these networks. Twitter has more intensive engagement than Facebook, despite having substantially fewer users."

A survey of 65 of South Africa's biggest brands was included in the study. It revealed that most of the major brands are using Twitter and Facebook – respectively 95% and 92% – while YouTube and Instagram are likely to see the biggest first-time use by brands in 2015.

Just over half of these brands – 51% – intend increasing their social media budgets in 2015. The biggest focus of social spend will be on content marketing (73% of brands), followed by multimedia content (60%).

“Content marketing and influencer marketing are two big trends corporates are embracing as the market matures,” says Wronski. “For the brands, this makes social media more challenging than ever before, but it is going to enhance the consumer experience of social networks.”

Schoolboy is SA's social star of 2014

A schoolboy has been named South Africa's Social Media Star of 2014.

Nadav Ossendryver, who founded the Kruger Sightings website when he was just 15, was presented with the award for building his wildlife sightings service into the most viewed YouTube channel based in South Africa.

According to the SA Social Media Landscape 2015 research study, the Kruger Sightings YouTube channel had reached more than 75-million views by the end of August 2014. In September, it passed the 80-million mark. The next biggest South African-based YouTube channel had 53-million views at the time.

The previous South African YouTube leaders, drummer Cobus Potgieter and teen-appeal comedian Caspar Lee, are no longer based in South Africa. Ossendryver, who is now 18, is currently preparing to write his matric exams.

Presenting the award after the release of the research findings, Goldstuck said Ossendryver was an example to big brand marketers of how to build a community through compelling content.

“It also proves that one individual with a powerful vision can achieve what even the biggest marketing budgets cannot,” added Goldstuck.

““People are drawn to passion,” said Ossendryver. “If you make videos on topics you love, those people will watch. I have always been in love with wildlife and have wanted to share that love through the means of sharing people's experiences.”

He pointed out that his YouTube channel did not exist in isolation, but was the hub of activity across several social media platforms, going under the brand of Latest Sightings.

“It’s easy to see what he did right, but incredibly difficult to replicate the model,” said Wronski, who analysed the YouTube data for the study. “It takes a combination of understanding the topic and the community on the one hand, and on the other coming up with both great content and a great content-sharing model.”

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

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