

SA

Social Media

Landscape 2018



**EXECUTIVE
SUMMARY**

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AT A GLANCE

THE SOUTH AFRICAN SOCIAL MEDIA LANDSCAPE 2018

By Oresti Patricios and Arthur Goldstuck

Research conducted by World Wide Worx and Brand Intelligence company, Ornico, for South Africa's most comprehensive social media study - The SA Social Media Landscape 2018, shows that Facebook is now being used by 29% of the population.

With almost a third of the population taking part in conversations and other activity in the same environment, it is clear that we are seeing a shift in the way people interact and socialise.

FACEBOOK LITE FUELS SOCIAL SURGE

No less than 16-million South Africans now use Facebook, up from 14-million in 2016. And a massive 14-million of these use cellphones or tablets for their access. In the past,

mobile use of social media was a smartphone-oriented activity, and tended to be focused on the upper income segments of the population.

Now, thanks to stripped down apps like Facebook Lite, which is often zero-rated for data costs by mobile network operators, the platform is spreading through South Africa's entire population. Facebook Lite was this country's 5th most downloaded app from the Google Play Store for Android phones in 2017, and this has had a direct impact on both Internet access and Facebook use.

The take up of this stripped down Facebook tool shows that it is geared towards the dynamics of the local market. Once other social networks and organisations like banks and retailers come to understand the

needs of emerging markets, and the limitations of mobile access, this kind of stripped-down app will become more common.

In fact, such apps will probably make a far bigger impact on the growth of Internet access than the clumsy attempts operators are making to structure data bundles for low-income users.

A good example of this is Capitec, the only bank in the list of top ten most downloaded apps in South Africa. Both its account and its app provides simple, intuitive choices for consumers, which translates into low costs for both the bank and its customers.





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TWITTER'S GROWTH STALLS

It is no surprise, then, that the app that generates the most noise, Twitter, does not feature in this list. Twitter as an organisation has stagnated from a strategic point of view, and has little concept of the varying user dynamics across the globe. In the United States, it has been like a rabbit caught in the headlights, unable to respond to the threat from most other social networks. Most of its competitors are growing healthily, while Twitter's American user base has fallen slightly.

Fortunately for Twitter, it is still growing outside the USA, so those new uses are balancing the American losses, so that the platform is maintaining its user numbers.

The international trend is reflected in South Africa, where Twitter continues to grow at a slow rate in South Africa. From 7.7-million users in 2016, it has grown slowly to 8-million users this year.

The key to this growth is that Twitter remains the social platform of choice for engaging in public discourse in South Africa. News, debates, celebrity spats and the like draw users in, and they are then able to weigh in with their own opinions. The result is that, even while user growth is slow, user engagement with the platform continues to grow strongly.

INSTAGRAM SLOWS

The biggest surprise trends in the survey was that the previously fastest

growing app in South Africa, photo-sharing network Instagram, has seen its growth slow down dramatically. It is now used by 3.8-million South Africans, up from 3.5-million.

On the contrary, the professional network, LinkedIn, has maintained steady growth, up from 5.5-million to 6.1-million, as entrepreneurs and small business employees learn of the same benefits that has drawn in the corporate world in recent years. The study included a survey of social media use by South Africa's biggest brands, with 118 participants providing insights into their social media practices, strategies and results.

The survey found significant shifts in each of the platforms used by brands, mostly upward. Facebook is now almost pervasive, in use by 97% of brands, from 91% the year before. Twitter has increased marginally, from 88% to 90%, while LinkedIn and Instagram continued their relentless rises, now both standing at 72%. YouTube has fallen slightly behind them, despite a marginal rise to 68%.

EVERYONE LOVES LINKEDIN

Declines were reported for Pinterest, Google+, WeChat, WhatsApp and SnapChat.

The findings of the Social Media Landscape 2018 underline the lesson that widespread consumer take-up of a platform, as seen with WhatsApp, does not readily lend itself to brands communicating with those consumers. A similar picture

emerged when brands were asked whether they advertised on social media. Facebook is by far the most popular for advertising, at 86% of brands, with Twitter and Instagram in distant second and third place at 45% and 40%. LinkedIn comes in fourth, on 35%.

Most advertisers believe they see a return on investment when they advertise on social media. By far the most common benefit they see is brand awareness, followed by customer insights and sales.

FACEBOOK, SA'S FAV MASS MEDIA

This is hardly surprising, when one considers the extent to which Facebook in particular has become a proxy for the adult population of a country. If it represents almost a third of the total population, it represents almost half of the over-13s in South Africa. As a result, it is now a rival to radio and TV for reaching the broader population.

And it has one massive advantage: that communication is two-way, and can be measured precisely. Don't be surprised when the social media version of South Africa becomes a more visible and measurable version of the country than the physical version. [SML2018]

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THE 2018 SOCIAL MEDIA LANDSCAPE REPORT

The South African Social Media Landscape Report 2018 contains everything brands need to know to successfully navigate social. Marketers, brand owners, public relations professionals, entrepreneurs, agency owners, strategists, Chief Marketing Officers and social media professionals will value this report.

INSIDE THE REPORT

The 2018 Social Brand Survey • Insight from Arthur Goldstuck • SA's Top Social Brands by Ornico • Measurement Matters • The Linked In Toolbox • 828 Social Marketing • How to win friends and social influencers • Dan Mace on how to conquer YouTube • Mobile Social • A Secret Guide To Influencer Marketing • The Next Big Wave - Mobile & Video • The Hidden World of SA's Youth & Their Video Habits • Ogilvy's Melissa Attree on Content • The Psychology Behind Branded Content • The A-Z of Twitter • SuperSport - SA's Social Media Champions • Celebrity Influencers & Brand Damage • Customer Service Goes Social Insights from Google's Luke Mckend, Facebook's Weera Saad, Crayg Hitzeroth of Ad Dynamo, Marius Greeff from Turn Left Media, Candice Goodman of Mobitainment, Bradley Elliott of Continuon, and more .

OBTAINING THE REPORT

The full report is available for purchase at a cost of R18 000 (single site license) excluding VAT from World Wide Worx and Ornico. 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 to Alexis Petje of Ornico on alexisp@ornicogroup.co.za. Please include a purchase order number where required.

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