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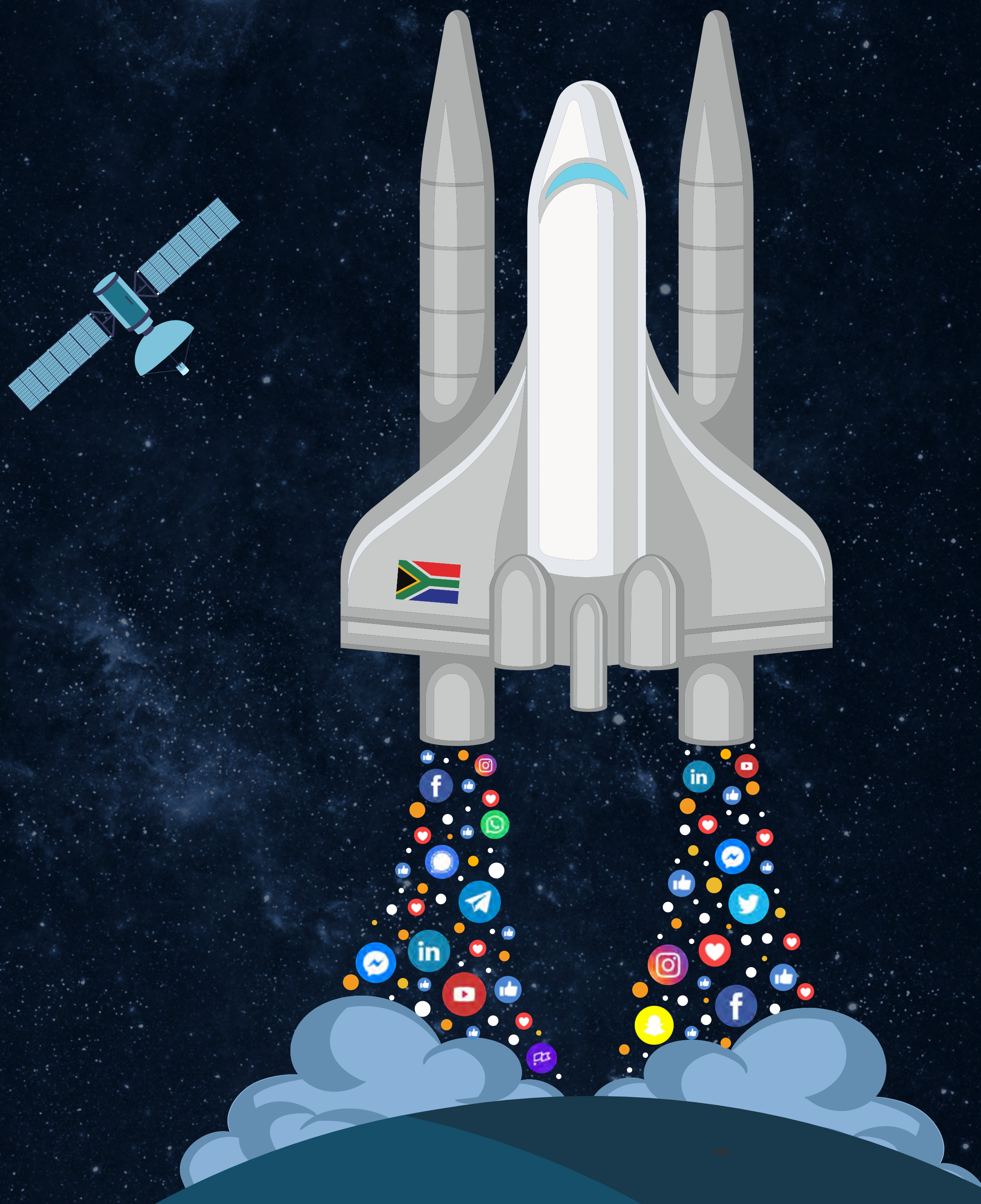

# SA SOCIAL MEDIA LANDSCAPE REPORT 2021

## "SOCIAL MIGRATION"

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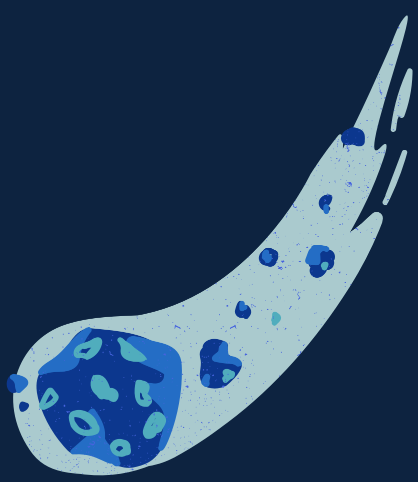
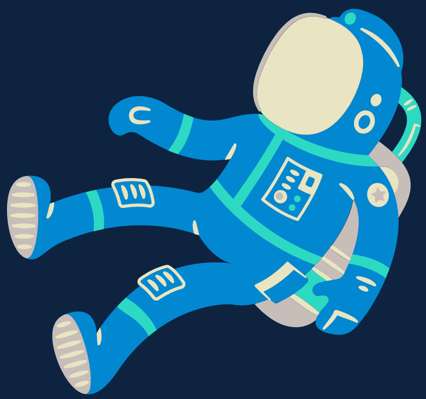




# THE SA SOCIAL MEDIA LANDSCAPE

ARTHUR GOLDSTUCK, MD,
WORLD WIDE WORX

The South African Social Media Landscape 2021 study, conducted after a full year of Covid-19 lockdowns, provides the most in-depth picture yet of the shifts in online behaviour brought about by the pandemic.

As everywhere in the world, South Africans have needed to take a new approach to staying connected whilestaying apart. The result was a surge in both online access and social media use. According to the Digital 2021 report from We Are Social and Hootsuite, at the beginning of 2021 64% of South African adults were using the Internet, amounting to 38,19-million users. While this represented only a 1.7-million increase over the previous year, it should be noted that the data collection methodology changed this year. It is likely that previous methodologies were returning unfeasibly high numbers, and the base from which we saw this growth was probably somewhat lower than the 2020 figure of 36,54-million.

**"As live video and audio become increasingly popular, just under two in three brands have not yet increased their budgets for this type of post. "**

The number correlates closely with the total number of active mobile data users on the Vodacom and MTN networks, respectively at 21-million at the end of March 2021 and 14.7 million at the end of October 2020. Bearing in mind that Telkom Mobile reported a further 10-million mobile broadband users at the end of March, it is clear that many users have multiple accounts – even on the same network. At the same time, however, it is also clear that most growth in Internet use – and therefore social media use – is via mobile devices.

We can therefore conclude that the social media explosion in South Africa goes hand in hand with an explosion in the use of mobile apps. [SocialSA2021]

# THE GREAT SOCIAL MEDIA TREK - OR JUST PERCEPTIONS OF PRIVACY?

By Oresti Patricios
CEO, Ornico Group

It was barely sixteen months ago that the Covid-19 pandemic initiated the biggest evolution of human behaviour in modern times. In April 2020, Microsoft CEO Satya Nadella said that the pandemic boosted two years of digital transformation into only two months. More than a year later, “two years” seems a bit understated, and the “new normal” is beginning to feel “normal”.

Just how the pandemic has driven digital change is clear when looking at the Datareportal’s Digital 2021 – Global Overview Report which shows that social media usage, adoption of ecommerce, streaming content and video games all saw significant growth globally between January 2020 and January 2021.

By January 2021, 4.66 billion people globally were using the internet – a growth of 316 million (7.3%), and 4.2 billion social media users, growing by 490 million users (13%) from the year before.

The research further showed that the number of internet users in South Africa grew by 1.7 million to 38.2 million users (4.5% increase) for this period. Social media users in South Africa grew to 25 million which represented an increase of 3 million users (14% increase) in the twelve months.

The pandemic lockdowns clearly showed how people turned more towards digital channels to be entertained, stay connected to friends and family, and to shop.

An interesting finding from the Social Media Landscape 2021 survey is that there has been a 59% increase in respondents saying that social media is an effective public relations channel and 123% increase in respondents saying that it lowers the cost of communication. This could well be due to most brands having less financial resources available during the pandemic and communicators had to rely on cost effective channels and solutions. It is then no surprise that 67% of respondents in the SML 2021 survey also indicated that they plan to increase their budgets for social media.

A recent report by World Wide Worx also shows that the pandemic increased South Africa's e-commerce sales by 66% last year to more than R30-billion, as South Africans became more accustomed to buying goods and services through digital channels.

This growth has however also created opportunities for online fraudsters, with research, released in April 2021 by TransUnion, showing that online fraud increased exponentially in South Africa since the Covid-19 pandemic began. Suspected fraudulent digital transaction attempts against South African businesses increased by 43.62% when compared to March 2020, with 37% of South African consumers having recently being targeted by Covid-19 related digital fraud.

It is then no wonder that privacy concerns have seen a major increase in recent times as well. Since the Facebook / Cambridge Analytica data scandal created major global headlines, we have seen the implementation of the GDPR (General Data Protection Regulation) in the EU in 2018, and locally the South African Protection of Personal Information (POPI) Act in 2020 – with all entities expected to be fully compliant with the provisions of the POPI Act by 1 July 2021.

With privacy issues being in the spotlight, WhatsApp's announcement of a new privacy policy In January 2021 created an immediate and massive backlash. Users believed that the update meant that WhatsApp would now share more personal data with parent company Facebook, and many threatened to stop using the app – while many others migrated to alternative services such as Telegram and Signal.

Though WhatsApp delayed the implementation of the new policy by three months, and clarified that the changes did not mandate new data collection, but only affected the way that users interacted with businesses, many were unconvinced.

This was evident in the 51 million new downloads for Signal in January 2021 (compared to 1.2 million in December 2020) and 64 million downloads for Telegram in the same month (vs 29 million in December) – a massive spike, as reported by SensorTower. However, the following few months saw downloads for the alternative platforms taper down quickly – with an additional 14 million Signal downloads between February and April 2021, and 98 million for Telegram in the same period.


Considering that WhatsApp still saw 45 million downloads in January 2021, with another 128 million from February – April 2021, it does appear that the messaging app will weather the storm. Whatsapp has even launched a major privacy-focused campaign in June 2021 in the UK, soon to be rolled out elsewhere, to clarify the "confusion" their original announcement had created.

Apple has taken note of these privacy issues and released a much-anticipated update to its operating system in April 2021. The iOS 14.5 update sees Apple being one of the first technology companies making serious privacy changes, and will allow users to limit the amount of user data that apps like Google, Facebook, Amazon and others can collect.

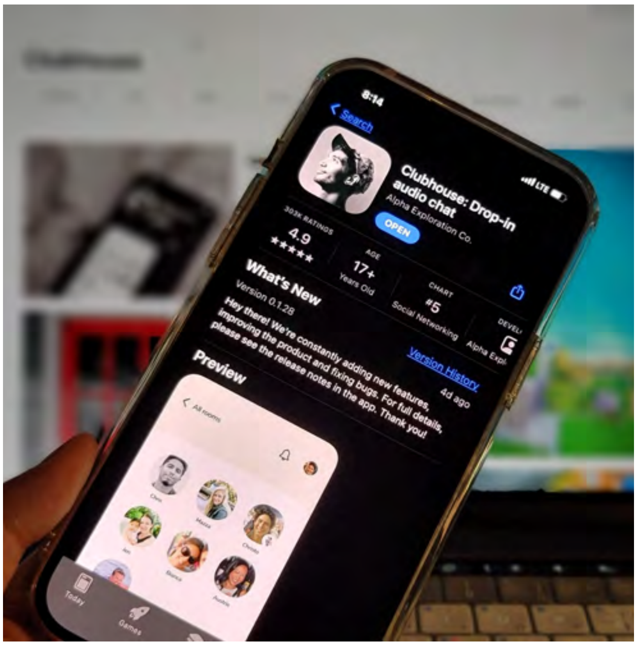
Despite some concerns expressed by some of the apps, the only real impact on users would be to maybe see less relevant advertisements. Should they opt-in however, they may get served much more relevant ads. But the decision now ultimately lies with the user.

Based on personal experience my timelines are flooded with many advertisements of which most remain irrelevant or indeed irritating. So how will platforms navigate this new world where privacy concerns are at the fore? How will they make advertisements more relevant and engaging to audiences? Will we see more augmented or virtual reality experiences, so much taunted in the past?

Or will brands invest more in reaching relevant audiences in gaming or streaming platforms? Will we see influencers become more important in the future?

The Social Media Landscape 2021 research shows that marketers are certainly starting to understand the most influential people in their social media spheres better than before – with 55% indicating that they know, compared to only 35% of respondents the year before – an increase of 59%. This shows the growing importance of influencers to brands. But it also highlights the need for brands to identify the correct influencers to align with the brand values.

The Influencer Marketing Hub's Research Influencer Marketing Benchmark Report 2021 shows some interesting findings. Though there was a major slow-down in influencer marketing spend in the early days of the pandemic (March - July 2020) campaigns started increasing again from August. The Influencer Marketing Industry is now expected to grow to approximately $13.8 Billion in 2021, with up to 90% of research survey respondents believing influencer marketing to be an effective form of marketing.




Though Instagram is used by the majority of respondents for campaigns (67%), TikTok has seen a massive rise in popularity for marketing campaigns. Influencer fraud, though still a concern, appears to be much less of an issue as in the past.

Twitter is also now focusing on the influencer and content creator space, recently launching is first subscription service called Twitter Blue, designed for users willing to pay a monthly fee for exclusive features. Twitter aims to double its revenue by the end of 2023 and grow its user base to 315 million daily active users. Advertising is currently making up more than 86% of the company's revenue, and the content creator space is seen as an additional way to diversify Twitter's revenue streams.

Increasing legislation and guidelines governing the advertiser and influencer relationship, such as the South African Advertising Regulatory Board's Social Media Code (2019), now enforces that any promoted posts be identified as such – by using terminology such as #AD, #Advertisement, #Sponsored.

Will the authenticity of these influencers really be affected by identifying their content as paid-for? Or can we expect further regulation down the line?

One also has to look at the new entrants in the social media space, with one of the most notable being Clubhouse. Inspired by the rising popularity of podcasts, this audio-only app hosts live discussions in voice chat rooms that can accommodate hundreds of people, and enables users to participate in the discussions. Launched in March 2020 as an invitation-only social media app on iOS, the app was valued at US$100 million within two months. By December 2020 it had more than 600 000 users, and it then saw rapid growth during the following two months with 8 million downloads by February 2021, as celebrities such as Elon Musk and Mark Zuckerberg made appearances on Clubhouse. A beta version for Android was also launched in May 2021 – which should see much wider adoption of the app.

The other major platforms have taken note and Facebook, Twitter, Discord, Spotify and even LinkedIn are already trailing or launching similar features. No wonder, as Clubhouse was valued at US$4 billion in April 2021, barely thirteen months after its launch.

Does Clubhouse give us a glimpse of social media's future – a social media app with a very specific purpose? Or are we seeing all the platforms merging into indistinguishable wallpaper - with all platforms having the same features such as messaging, video, stories, and now, a "clubhouse"-like audio functionality?

Or will governments bring an end to the power of big tech and behemoths such as Facebook, Apple and Google – as playing out in the US Congress - and Nigeria's banning (and India's tussles) with Twitter?

What I do know from my many years of observing social media trends is that the next trend always comes from left-field, greatly innovative, absolutely delightful and totally unexpected. [SocialSA2021]


# Smarter Goals Means Smarter Measurement

**FRANCOIS VAN DYK**
Ornico Head: Operations
AMEC Global Board Director

I have seen it in so many award-winning campaign case studies - a highly creative campaign, executed beautifully, and normally, at the end of the case study, impressive numbers being dished-up.

For instance, "*the campaign created 1.6 billion impressions*" or "*it achieved a "PR Value" of hundreds of millions of Dollars or Rands*" or "*it had a great engagement rate*". And always, the higher these numbers, the better. If you do not believe me, go look up some case studies on YouTube.

But surely these campaigns were not created with the goal to reach ever-higher impressions or "PR values", so why do we report these high numbers as a measure of success?

***"Measurement is fabulous. Unless you're busy measuring what's easy to measure as opposed to what's important."***
***– Seth Godin***


I see many requests for proposals on monitoring and measurement crossing my desk. As a standard, most of these always list requirements such as volume of coverage or conversations, sentiment measurement, provision of an AVE (Advertising Value Equivalent), and so forth, in the scope of services required.

What I very seldom see is what the brand or organisation is trying to achieve through their communication or social media activities. What is the actual goal? Surely not impressions? And that is the problem with measurement and evaluation.

When brainstorming a beautifully creative campaign it becomes an after-thought. We surely did not become creatives and communicators to worry about things such as maths, sales, IT or even human resources data.

Have we even considered if our communication goals align with the organisational objectives? Do we even have specific goals? And anyway, measurement and evaluation are complex and expensive and we do not have budget for it, we must rather spend it on influencers..

The reality is that the problem does not lie with measurement and evaluation, but rather with proper goal and objective setting. How can you measure and evaluate a campaign if you do not know what success is supposed to look like?

The International Association for Measurement and Evaluation of Communication (AMEC) has long emphasised the importance of setting communication goals. The association, with membership in 86 countries, created the Barcelona Principles in 2010, which became the major global framework to guide best practices around measurement and evaluation.

The Barcelona Principles are a set of seven principles which gives great guidance to help brands and organisations improve their communication planning and measurement practices. Since the original declaration in 2010, the principles had also evolved during the next decade to accommodate the ever-increasing complexities around communication.

Let us explore the evolution of the Barcelona Principles' first principle, and in my opinion, the most important one:

BARCELONA PRINCIPLES 3.0

amec

The original Barcelona Principles (2010) emphasised **"The Importance of Goal Setting and Measurement".**

The updated Barcelona 2.0 principles (2015) amended this to **"Goal Setting and Measurement are Fundamental to Communication and Public Relations"**.

While the latest Barcelona 3.0 principles (2020) now states that **"Setting Measurable Goals is an Absolute Prerequisite to Communication Planning, Measurement, and Evaluation"**.

It is clear that best practices have moved from goal setting being important, to now being an absolute prerequisite. And this is not just based on some academics' opinions, but also on the much-improved results communicators have experienced globally by implementing these practices.

But many will argue that they do indeed have goals when planning their campaigns. For instance, they needed to create awareness around a brand or specific product.

But let's be clear – creating a "buzz" around a brand is not a goal. Neither is aiming for a hundred billion "impressions".

Why do you need to create this "awareness"? Why do you need to get a hundred billion "impressions"?

It becomes much easier if you make your communication goals smart, or even smarter.

*But let's be clear – creating a "buzz" around a brand is not a goal. Neither is aiming for a hundred billion "impressions".*

**SMART** goals may be familiar to many, and can be used in any area where goals may be set.

- Specific
- Measurable
- Attainable
- Relevant
- Time-based

But by adding the following elements it can be even **SMARTER**:

- Evaluated
- Recognized / Rewarded or Revisited

If you start a weight-loss programme you certainly start by measuring how much you weigh, what your desired weight would be, how much time you will give yourself to achieve that goal weight, how you will need to change your diet and exercise regime and so forth.

And you keep an eye on the scale during the programme to see how you are progressing towards that goal.

Just by using this example we can already see that measurement and evaluation can't be an after-thought – it needs to be done before, during, and after, an activity.

By setting communication goals and applying the **SMARTER** tools you would be surprised at how much easier measuring campaigns can become.

So, let's make the usual standard "creating a buzz around the brand" goal a bit **SMARTER** – and apply it to my (still fictional) pizzeria.

Fran's Pizzeria has just opened in Norwood, Johannesburg, and obviously needs some customers.

So, firstly, the business objective is to increase sales from a zero-base to a turnover of R100 000 per month, within six months.

The communications objective (campaign) then needs to support this business objective – otherwise it is useless.

(By the way, the pizza also needs to be good, otherwise the campaign will only help so much!)

We can then define our **SMARTER** goal.

### SPECIFIC

Fran's Pizzeria's communication objective is to create awareness around the take-away restaurant in Norwood and surrounds – to create thirty in-store visitors and thirty online orders per day by the end of six months. Resulting in a turnover of R100 000 per month.

### MEASURABLE

We will be running a campaign on Facebook to increase Fran's Pizzeria's follower numbers. We can create a "discount code" specific to the Facebook audience which gives them a 10% discount on their first pizza order.

Instore visitor numbers, online orders and sales can be tracked and compared to the Facebook campaign.

You can then also compare the increase in customer numbers during the campaign to the average before the campaign launched. But for that you needed to do those measurements before the launch.

### ATTAINABLE

Though a challenging target (as it should be) the goal is indeed attainable – and at a cost of R100 per pizza an average of 32.25 pizzas needs to be sold daily within six months to achieve the goal.

### RELEVANT

It is certainly relevant to the business goal as we need to drive awareness and subsequent sales.

### TIME BASED

Yes – within six months. Weekly or monthly milestones can also be determined.

### EVALUATED

Progress can be measured by comparing social media performance against actual sales. Are we doing better or worse than anticipated – and how can we amend the campaign for better results? Which type of posts works better? Images, videos? Discount coupons, competitions?

### RECOGNIZED / REWARDED OR REVISITED

It is then of critical importance to identify the elements in the campaign that worked, or not, and then to learn from these, as this will now inform your future campaigns.

The reality is that the majority of communicators are scared of measurement – hence the focus on high but meaningless numbers.

The reality is that many campaigns are failures, but as we do not like failing, we "manipulate" numbers to make it look successful.

By making goals much smarter it also exponentially increases the learning opportunities. You should not be scared to fail, rather be scared not to learn from it – and your successes as well. As the great inventor Thomas Edison once said: "I have not failed. I've just found 10,000 ways that won't work." [SocialSA2021]

# GOING BEYOND SOCIAL LISTENING

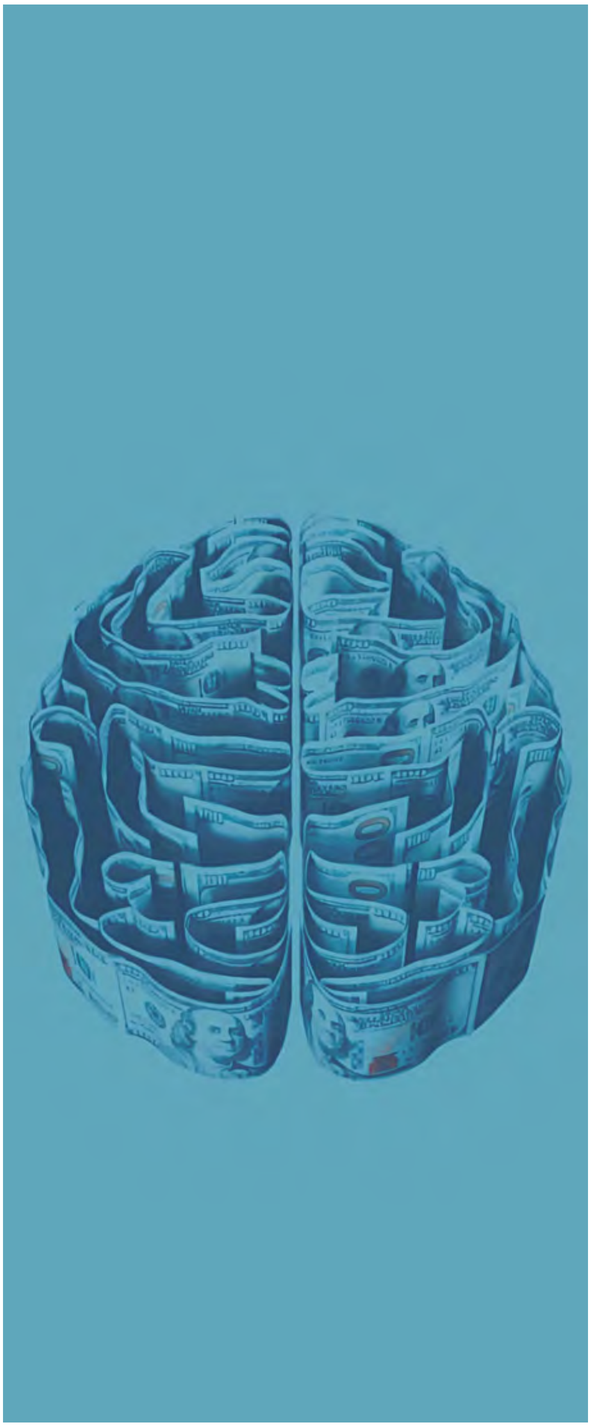
**Meghan Holmes,**
Onboarding and Adoption Manager, YOUKNOW

Social Media data has given organisations a glimpse into the lives of their customers, their behaviours and preferences. The power of this data has allowed these businesses a unique opportunity to build strategies on impactful insights that come straight from the customers' mouths - or fingers, rather. Social intelligence is becoming more pertinent as organisations navigate the ever-evolving social landscape of their customers.

Social media intelligence is a collection of tools that an organisation will use to collect, aggregate and analyse key trends across multiple content sources. By doing this, an organisation is able to make data-driven decisions that are based on customer preferences.

Oftentimes, social listening plays a big role in the collection and analysis of unsolicited social media data. This allows organisations an overall and holistic view of brand or industry conversations. These insights can often allow us to see what we are doing well and what we can do better as brands. But is this the full picture?

*"...it is unlikely someone would reveal their income status on Twitter but they will reveal where they are spending the money they do have - be it whether they can afford to or not. This still doesn’t tell us the full picture of their experience as the digital customer."*



How do we go from reading a tweet about someone’s favourite supermarket to understanding their full customer experience with that retailer?

We know data is a source of truth for us and insights are the meaning we apply to data. Organisations have many sources of truth that are often isolated and siloed into their respective areas. However, what if we were to bring all these sources of truth together to paint the full experience of the customer?

Behavioural psychology has proven that humans will behave differently in various environments and under different circumstances. The same is true for social media and digital platforms. There are distinct differences between what people will share unsolicitedly on social media platforms, and what they will reveal about themselves in anonymous digital surveys.

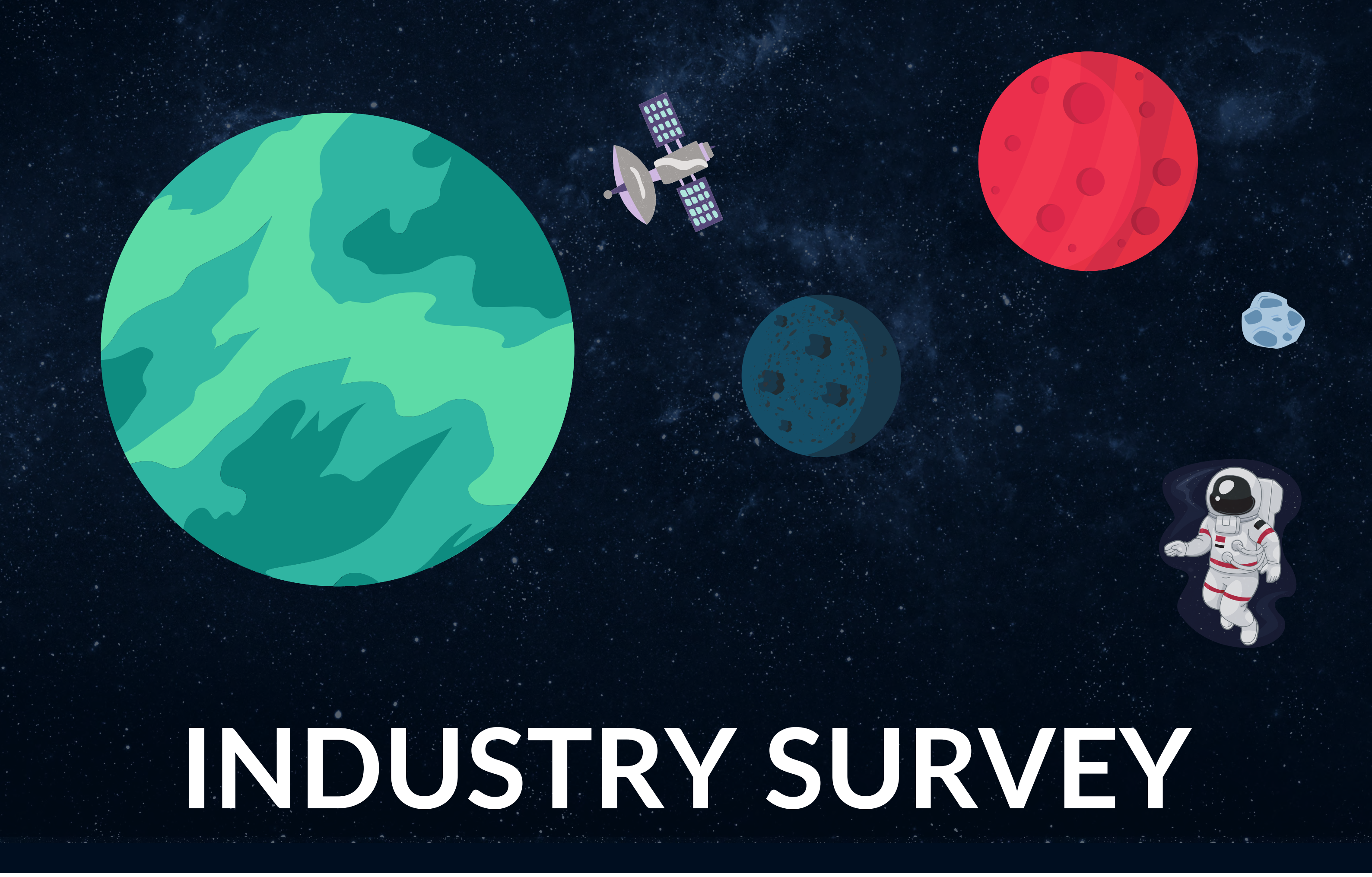
For example, it is unlikely someone would reveal their income status on Twitter but they will reveal where they are spending the money they do have - be it whether they can afford to or not. This still doesn’t give us the full picture of their experience as the digital customer. What we really need is to discover the digital personalities of our customers from various data points.

In order to do this, we need to combine social data, behavioural analytics, market research and other content sources to fully understand the digital customer and all their sides. When we do this we get the full, multi-sided, 360 view of the customer and not just who they say they are on social media.

To achieve this would entail the diversification of digital data products that allows an organisation access to various types of analytics. By combining social listening data in tools like Brandwatch or Netbase, competitive benchmarking data in tools like RivalIQ or Hootsuite, and overlaying this with solicited data points from survey platforms like GWI, we can powerfully enrich our insights to fully understand a customer across channels, as well as understand how well these channels are performing in comparison to competitors.

In conclusion, the best way to propel a business forward into the digital future is to ensure that we fully understand the digital customer through multiple data points and analytics. This will empower us to build strategies on who the customer actually is and not just who they say they are. When we achieve this the digital sky is the limit. [SocialSA2021]

**"What we really need is to discover the digital personalities of our customers..."**



# INDUSTRY SURVEY

As with consumers, during the Covid-19 pandemic, businesses have had to implement creative methods to keep productivity up while maintaining employee health and safety. Our survey of South Africa's major brands showed that over 90% of large businesses are currently active on Facebook, which also happens to be the most used social network by South African consumers over the last year. With fewer customers being on the road to look at billboards or in malls to be exposed to advertising and activations, the shift to digital advertising has been exponential as brands accommodate the change.

With nearly three in four businesses using a team or agency to manage their social media, social media networks have become a multi-person endeavor for businesses as more South Africans begin interacting with online brands.  Despite this, half of the brands – just under 50% – are still spending under R10,000 per month on social media advertising, which may suggest they are interacting directly with customers that are active on their own platforms, with little outreach to new customers. Word of mouth is still one of the strongest methods of marketing and businesses with popular and sharable content probably do not need to have a huge marketing budget if their consumers are sharing their content to their networks.

That said, one on five major brands, or just over 20%, is spending more than R50,000 a month on social media advertising. This represents a massive overall budget that appears to be making a major impact on brand interaction with the public.

As South African consumers have been bitten more than ever before by the immediacy and sense of connectedness of social media during lockdowns, businesses can be expected to allocate more resources in getting their online presence cleaner and more engaging.

### *HAS YOUR BRAND INCREASED SPEND IN SOCIAL MEDIA LIVE STREAMING IN THE PAST YEAR?*

As live video and audio become increasingly popular, just under two in three brands have not yet increased their budgets for this type of post. This may be due to the tools all being in place, as many brands can get going with streaming video by using just a smartphone or computer webcam to get going.

As services like Houseparty, Facebook's Live Audio Rooms, Twitter's Spaces, and many others begin to pop up, businesses will start interacting directly with their customers in an open platform using voice or video. This is especially important to increase a personal connection, and brand will likely get prominent figures like celebrities to guide these conversations and increase engagement.

The key questions addressed in the survey were:

### *IN THE PAST 12 MONTHS HAVE YOU DELETED YOUR BRAND ACCOUNTS ON ANY SOCIAL MEDIA PLATFORMS?*

Generally, brands have kept their social media channels open, with less than 1 in 10 of closing brand accounts. Facebook is one of the most closed accounts by brands, at 8% of respondents, with Twitter and Instagram following at 5% and 4% respectively. This is partly explained by an interesting shift seen in some businesses starting to use email newsletters, instead of social media, to target their consumers more effectively while keeping costs low.

In the last year, Twitter has leveraged this trend by launching a newsletter service called Revue, which brands can use to highlight their most prominent tweets from a certain time period to show up in one roll-up newsletter, sent to consumer inboxes. This trend, as well as missteps in brand messaging, may continue to cause brands to curtail social media activity.

## *WHAT RETURNS HAS SOCIAL MEDIA BROUGHT?*

Over three in four businesses saw positive returns from using social media, with only a tiny 1 in 20 reporting no returns from it. When used correctly, social media has the power – at the very least – to increase brand awareness and, in the best case scenario, drive direct sales from customers interacting with the ad. This comes down to design, intrusiveness and intuitiveness of the ad, and pre-existing customer affinity for the product or service being showcased.

As expected, the most common benefit was an increase in brand awareness, reported by just under two in three respondents. Because ad exposure generally makes a product top of mind for a consumer, this tends to be the main purpose of online advertisements. Enough online advertisements cause a memory jamming effect, where a consumer will think frequently about a product. Just over a third of businesses experienced direct sales, which may be put down to the design of the ad. Ads with a call to action, like text reading “click here to find out more” tend to have more engagement than those that don’t.


### *WHICH OF THE FOLLOWING TECHNOLOGIES DO YOU UTILISE?*

Chatbots are the favourite technology of South African marketers at the moment, with nearly half of the brands surveyed reporting they want to use chatbots. Chatbots provide a simulated “word of mouth” interaction with the consumer and, if scripted correctly, can create a positive brand experience. The converse can also be true: if consumers have a bad chat bot experience, this may decrease the perception of the brand’s quality.

Cloud applications also became more common during the pandemic thanks to a more physically distributed workforce. Microsoft recently attributed its landmark of being the “second company to reach a $2-trillion market cap” to a dramatic uptake in cloud services over the past year. The power these applications have for marketers is growing, as off-site analytics grows stronger and more insightful with more powerful cloud computing tools. This ties in with artificial intelligence as a service, which is often built-in to cloud services, among others to provide multiple potential customer profiles by simulating AI personas.


### *AGREEMENT WITH STATEMENT: "SOCIAL MEDIA CHANNELS POST SIGNIFICANT RISKS TO REPUTATION"*

Despite “cancel culture” becoming a hot topic in social media, less than a third of brands agree that social media channels can pose significant risks to their company’s reputation. While this perception of risk is true for individuals, it can be less applicable to online brand accounts. However, the potential dangers are ignored at the peril of large businesses.

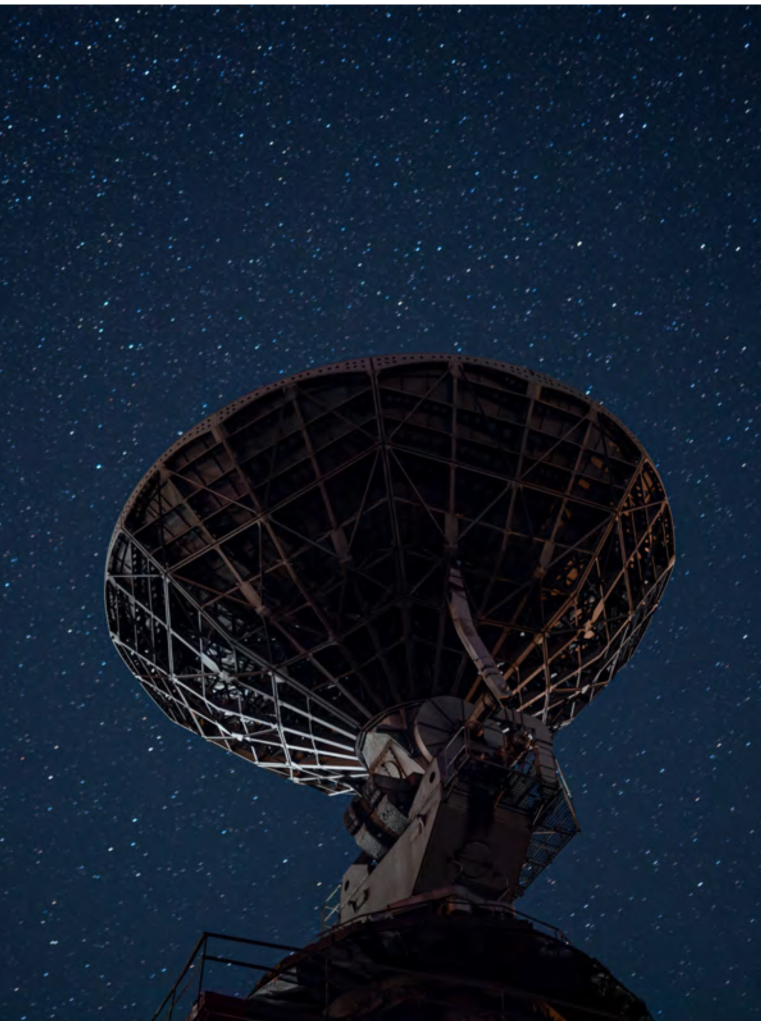
With the fuses of social media users being shorter than ever during the pandemic, and opinions becoming more polarised through an echo chamber effect, it’s easy to see how the equivalent of angry mobs have participated in the ruse of“cancel culture”. While this scared some businesses, just under 70% were unsure about it being a risk or did not find social media to pose a risk to brand reputation. These businesses probably understand that business accounts are controlled by teams, which are far more likely to vet and brainstorm content. In particular, diverse teams are likely to check that messages are culturally relevant and appropriate.

## *AGREEMENT WITH STATEMENT: "WE ARE GETTING AS MUCH VALUE AS WE CAN FROM SOCIAL MEDIA"*

Nine in ten brands agree that social media has potential to help their business grow, which shows an understanding of the reach social media. It also shows, to an extent, a willingness to learn all the techniques needed to optimise content to maximise benefits. Most businesses view social media posts as a virtual market place, where the timeline is a street and the posts are everything along the roadside: sometimes there are friends and sometimes there are businesses.

With social media marketing tools becoming increasingly feature packed, 30% of businesses said they are getting as much value from social media as they can. This low figure can be linked to a lag in uptake of the wide array of additional tools, features, and analytics frequently added to these platforms. Half, or 50%, of brands were neutral about getting as much value from social media as they could, which indicates they understand enough to get by, but aren’t using the entire toolset to engage with their customers.

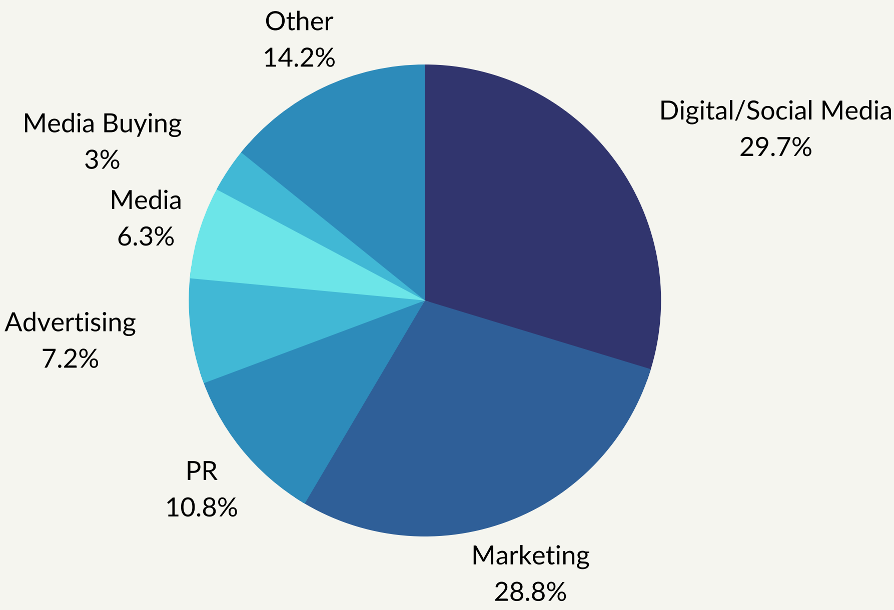
## *WHICH SOCIAL MEDIA STRATEGIES ARE YOU PLANNING TO IMPLEMENT?*



Most businesses plan to put more focus on social media analytics, which offers a seemingly ever-growing field of data and information. Analytics also represent an easy sell to the boss, the sales department, or the financial manager. Over half of businesses intend to improve on this element in the next 12 months. Clearly, becoming well versed in all the analytics tools is vital for a marketer, not only for reporting back to other parts of the company, but to see if their designs are working and gaining traction with customers.

A multimedia content strategy is a priority for a similar proportion of brands, reflecting the consumer direction of social media usage. From Twitter video to TikTok live, brands need to produce multimedia content to remain relevant amid a plethora of multimedia content available to the consumer. [SocialSA2021]

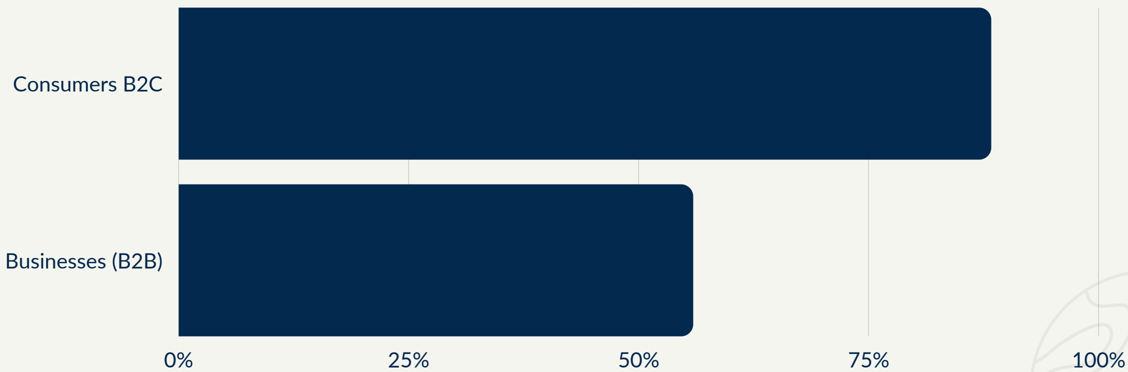
# WHICH INDUSTRY/PROFESSION/ROLE ARE YOU IN?



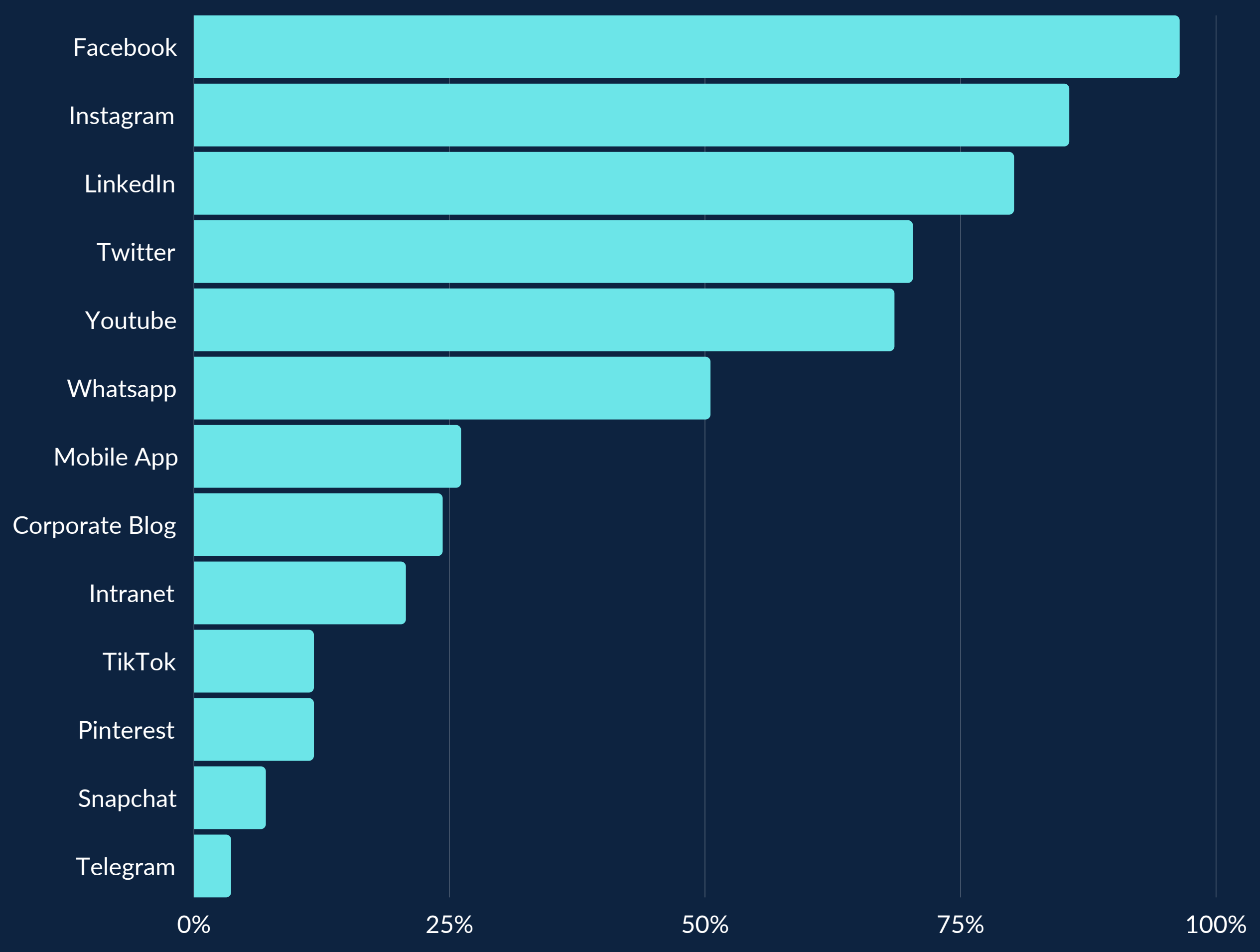

| | Digital/ Social Media | Marketing | PR | Advertising | Media | Other |
|---|---|---|---|---|---|---|
| 2021 | 29.7% | 28.8% | 10.8% | 7.2% | 6.3% | 14.2% |
| 2020 | 25.5% | 17.6% | 17.6% | 10.8% | 8.8% | 19.7% |
| 2019 | 25% | 25% | 19% | 11% | 7% | 13% |

# DO YOU HAVE FORMAL SOCIAL MARKETING STRATEGIES FOR B2C OR B2B?

| | Consumers B2C | Businesses (B2B) |
|---|---|---|
| 2021 | 88.3% | 55.9% |
| 2020 | 76.5% | 57.8% |

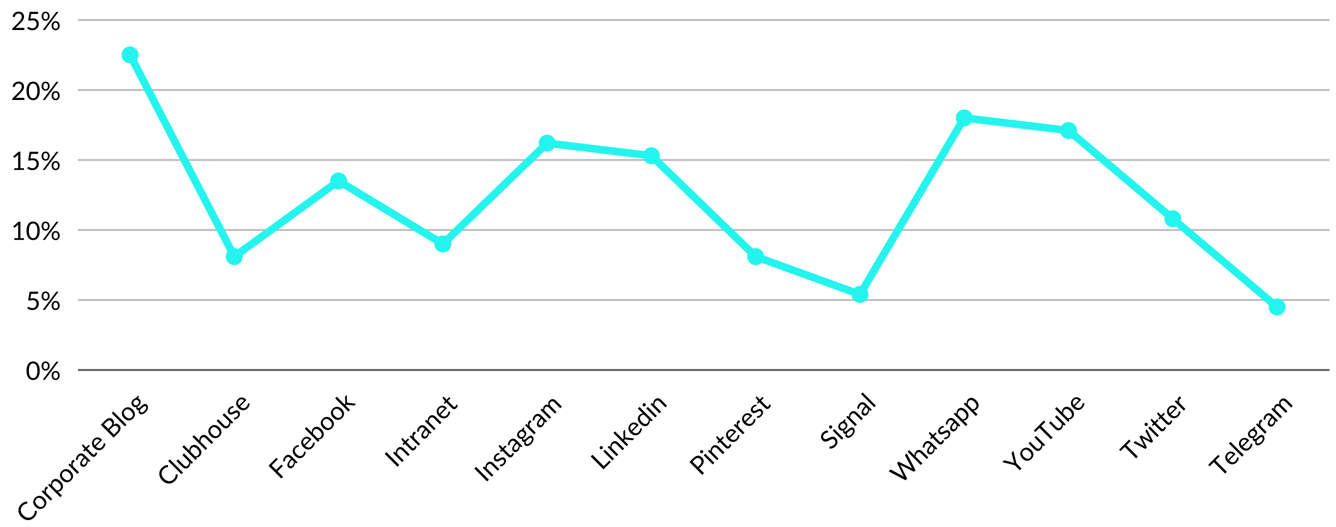


# ON WHICH PLATFORMS IS YOUR COMPANY OR CLIENT CURRENTLY ACTIVE?



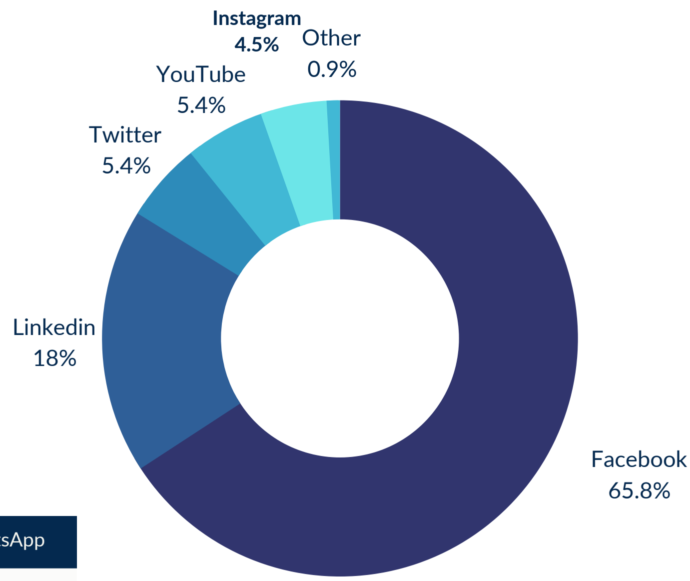

| | Corporate Blog | Clubhouse | Facebook | Intranet | Instagram | Linkedin | Pinterest | Signal | Whatsapp | YouTube | Twitter | Telegram |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 22.5% | 8.1% | 13.5% | 8.1% | 16.2% | 15.3% | 8.1% | 5.4% | 18% | 17.1% | 10.8% | 4.5% |
| 2020 | 25.5% | n/a | 15.7% | n/a | 21.6% | 21.6% | n/a | n/a | 25.% | 23.5% | 11.8% | n/a |
| 2019 | 22% | n/a | n/a | n/a | 26% | n/a | n/a | n/a | 36% | 26% | n/a | n/a |
| 2018 | 13% | n/a | n/a | n/a | 14% | n/a | n/a | n/a | 13% | 16% | n/a | n/a |
| 2017 | 14% | n/a | n/a | n/a | 26% | n/a | n/a | n/a | 14% | 16% | n/a | n/a |

# IF YOU'RE NOT ACTIVE ON ANY OF THE ABOVE, WHERE DO YOU PLAN TO BE ACTIVE ON IN THE NEXT 12 MONTHS?



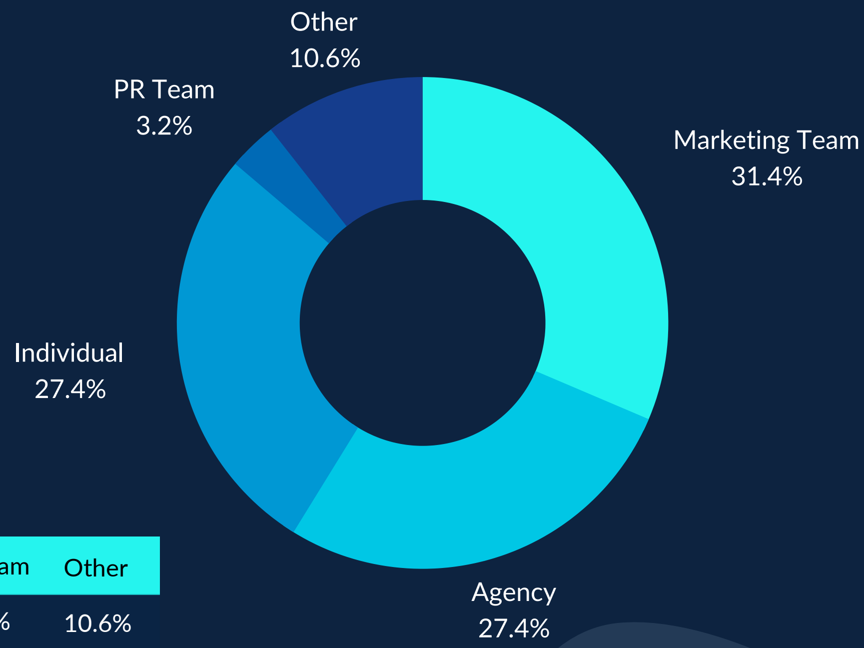

| | Corporate Blog | Clubhouse | Facebook | Intranet | Instagram | Linkedin | Pinterest | Signal | Whatsapp | YouTube | Twitter | Telegram |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 22.5% | 8.1% | 13.5% | 8.1% | 16.2% | 15.3% | 8.1% | 5.4% | 18% | 17.1% | 10.8% | 4.5% |
| 2020 | 25.5% | n/a | 15.7% | n/a | 21.6% | 21.6% | n/a | n/a | 25.% | 23.5% | 11.8% | n/a |
| 2019 | 22% | n/a | n/a | n/a | 26% | n/a | n/a | n/a | 36% | 26% | n/a | n/a |
| 2018 | 13% | n/a | n/a | n/a | 14% | n/a | n/a | n/a | 13% | 16% | n/a | n/a |
| 2017 | 14% | n/a | n/a | n/a | 26% | n/a | n/a | n/a | 14% | 16% | n/a | n/a |

# WHICH PLATFORM ARE YOU SPENDING MOST OF YOUR SOCIAL MEDIA ADVERTISING BUDGET ON?



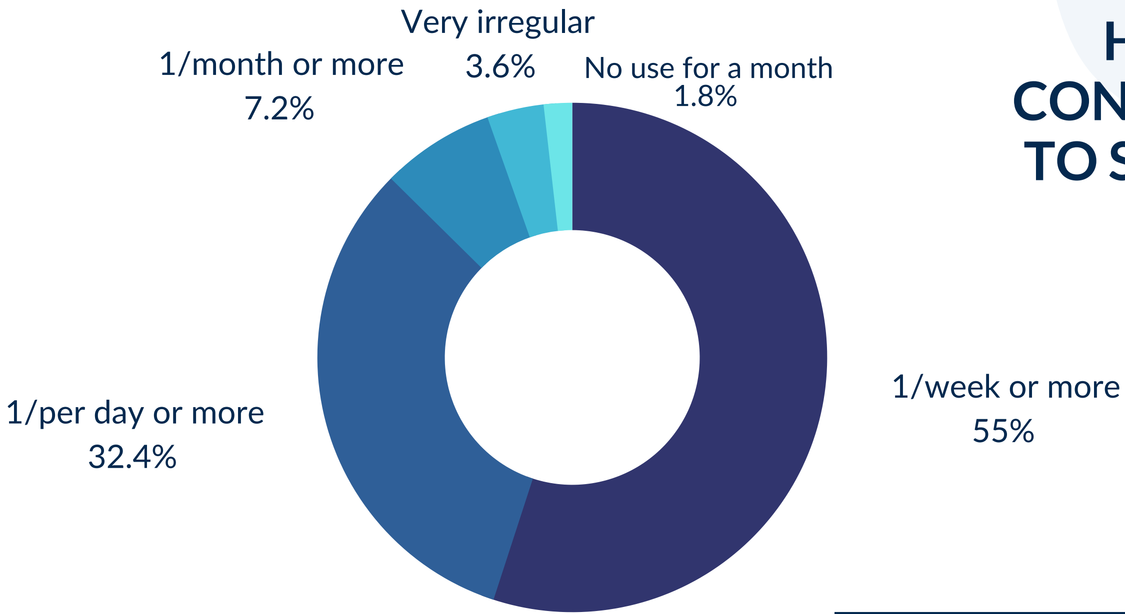

| | Facebook | Linkedin | Instagram | Twitter | Youtube | Google+ | WhatsApp |
|---|---|---|---|---|---|---|---|
| 2021 | 65.8% | 18% | 4.5% | 5.4% | 5.4% | - | - |
| 2020 | 38.2% | 15.6% | 11.5% | 5.2% | 2.1% | 3.1% | 2.1% |
| 2019 | 61% | 11% | 13% | 8% | 3% | 2% | 2% |

# WHO IS MANAGING THE SOCIAL MEDIA ACCOUNTS?



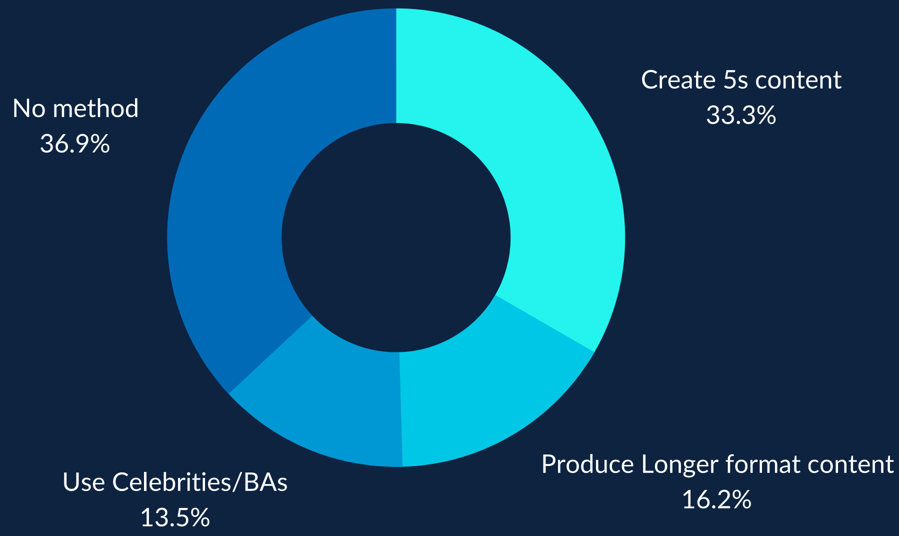

| | Marketing | Agency | Individuals | PR Team | Other |
|---|---|---|---|---|---|
| 2021 | 31.4% | 27.4% | 27.4% | 3.2% | 10.6% |
| 2020 | 38.2% | 15.7% | 20.6% | 8.8% | 9% |
| 2019 | 42% | 14% | 16% | 11% | 6% |
| 2018 | 44% | n/a | 13% | 16% | 11% |
| 2017 | 39% | n/a | 12% | n/a | 16% |

# HOW OFTEN IS CONTENT POSTED TO SOCIAL MEDIA PROFILES?



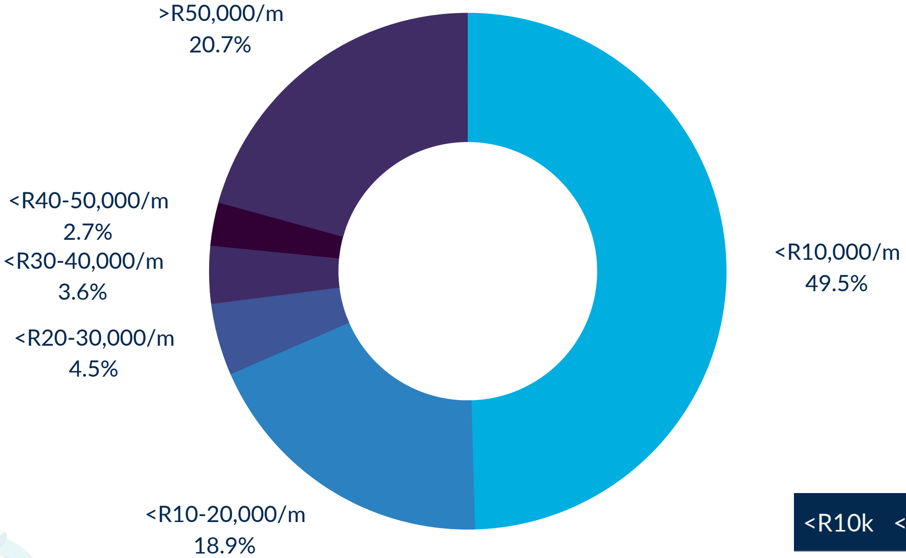

| | 1/pd | 1/pw | 1/pm | Very Irregular | Not for a month |
|---|---|---|---|---|---|
| 2021 | 32.4% | 55% | 7.2% | 3.6% | 1.8% |
| 2020 | 31.4% | 52% | 7.8% | 5.9% | 2.9% |
| 2019 | 50% | 43% | 4% | 3% | 2% |

## HOW DOES YOUR BRAND MITIGATE AGAINST ADVERTISING BEING SKIPPED BY POTENTIAL CUSTOMERS ON SOCIAL MEDIA?



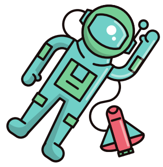

| | Celebs/Brand Ambassadors | Create 5s content | Longer Content | No Method |
|---|---|---|---|---|
| 2021 | 13.5% | 33.3% | 16.2% | 36.9% |
| 2020 | 2.9% | 35.3% | 14.7% | 47.1% |
| 2019 | 11% | 33% | 18% | 38% |

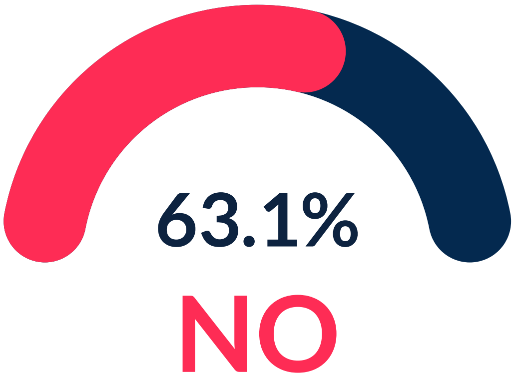
## HOW MUCH DO YOU SPEND ON SOCIAL MEDIA ADVERTISING PER MONTH?




| | <R10k | <R10-20k | <R20-30k | <R30-40k | <40-50k | >R50k |
|---|---|---|---|---|---|---|
| 2021 | 49.5% | 18.9% | 4.5% | 3.6% | 2.7% | 20.7% |
| 2020 | 65.7% | 6.9% | 3.9% | 3.9% | 1% | 18.6% |
| 2019 | 55% | 13% | 7% | 5% | 3% | 18% |

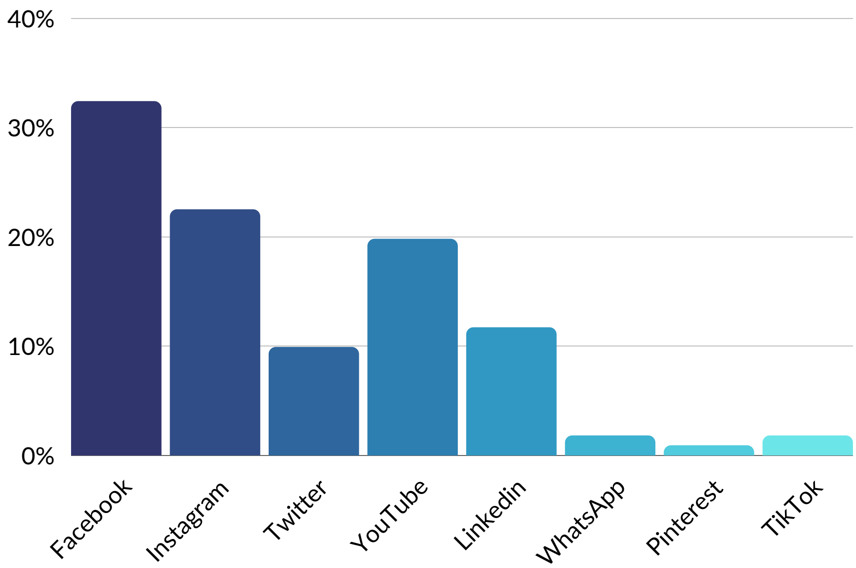
# HAS YOUR BRAND INCREASED SPEND IN SOCIAL MEDIA LIVE STREAMING IN THE PAST YEAR?






| | Yes | No |
|---|---|---|
| 2021 | 36.9% | 63.1% |
| 2020 | 28.7% | 71.3% |
| 2019 | 32.1% | 67.9% |

## IF YES, WHICH PLATFORMS




| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Facebook | 32.4% | 43.1% | 42% |
| Instagram | 22.5% | 29.3% | 21% |
| Youtube | 19.8% | 12.1% | 12% |
| LinekdIn | 11.7% | 8.6% | 6% |
| Twitter | 9.9% | 15.5% | 11% |
| Whatsapp | 1.8% | 5.2% | 3% |
| TikTok | 1.8% | n/a | n/a |
| Pinterest | 0.9% | 1.7% | n/a |

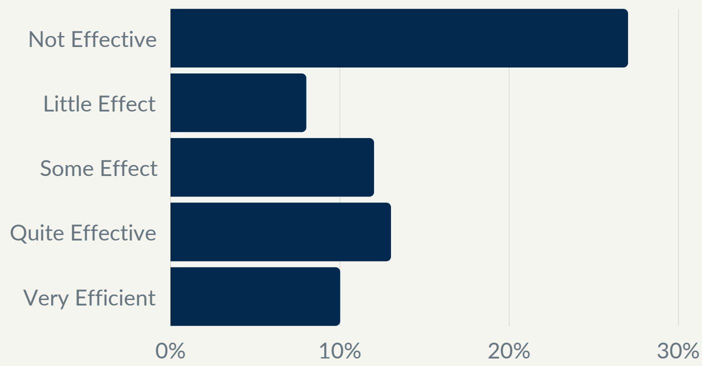
The participants of the survey have been asked to share insights about their spending behavior towards social media live streaming in the past year. It is evident that there has been a considerable increase from 28.7% in 2020 to 36.9% in 2021. This is the highest it has been in the last three years. We can assume that the coronavirus crisis did impact overall spending budget, thus the decrease in 2020 compared to a higher percentage in 2019.

The percentage of the participants who answered yes have decided to increase their spending and allocate it towards Facebook, Instagram, Youtube, LinkedIn and Twitter. The landscape is shifting from a Facebook dominated arena towards a more balanced one with more players. Significant decreases from Twitter and Facebook have been rebounded by Youtube and LinkedIn.

# HOW WOULD YOU RATE YOUR EFFECTIVENESS OF USING SOCIAL MEDIA?

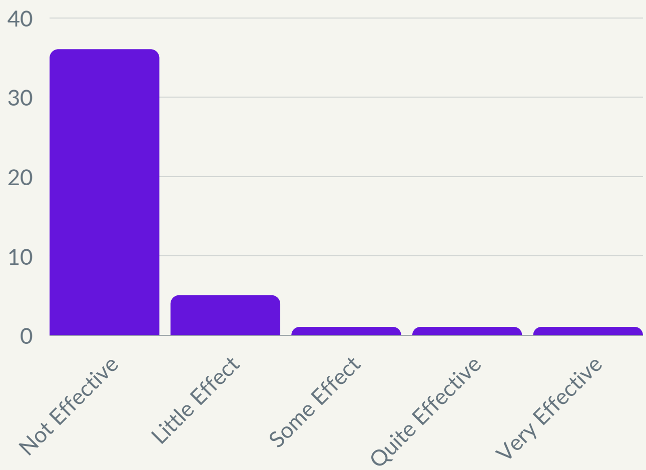
**Nine out of ten** strongly agree that social media has the potential as a tool to help their business grow. This is a considerable change compared to the last three years. It is evident that social media has and will keep playing a strong role in the minds of decision-makers.

## Corporate Blog



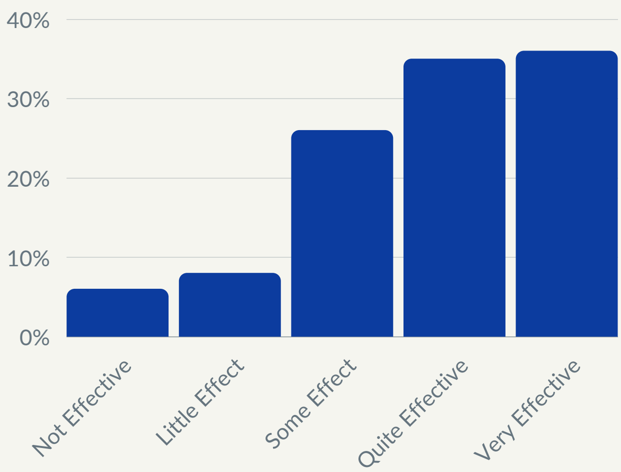

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 27% | 8% | 11% |
| Little Effect | 8% | 3% | 5% |
| Some Effect | 12% | 6% | 13% |
| Quite Effective | 13% | 11% | 6% |
| Very Effective | 10% | 6% | 7% |

## Clubhouse

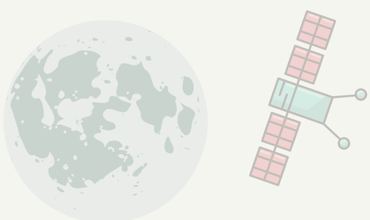



| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 36% | n/a | n/a |
| Little Effect | 5% | n/a | n/a |
| Some Effect | 1% | n/a | n/a |
| Quite Effective | 1% | n/a | n/a |
| Very Effective | 1% | n/a | n/a |

## Facebook

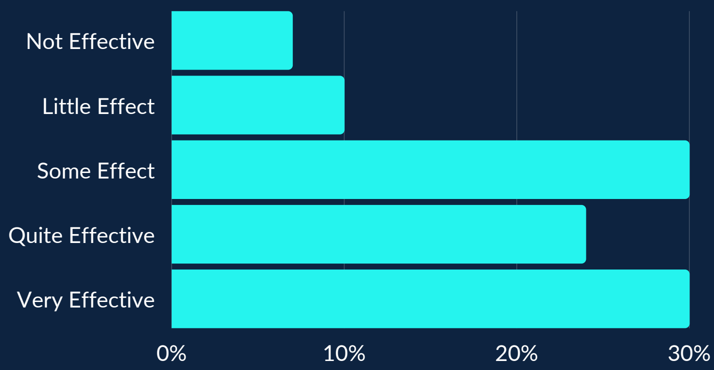



| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 6% | 4% | 3% |
| Little Effect | 8% | 12% | 8% |
| Some Effect | 26% | 28% | 24% |
| Quite Effective | 35% | 29% | 30% |
| Very Effective | 36% | 20% | 43% |

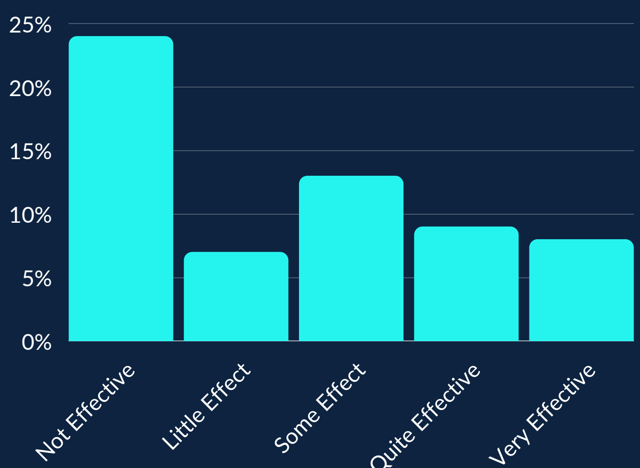


## Instagram

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 7% | 3% | 1% |
| Little Effect | 10% | 12% | 10% |
| Some Effect | 30% | 24% | 24% |
| Quite Effective | 24% | 20% | 31% |
| Very Effective | 30% | 11% | 17% |



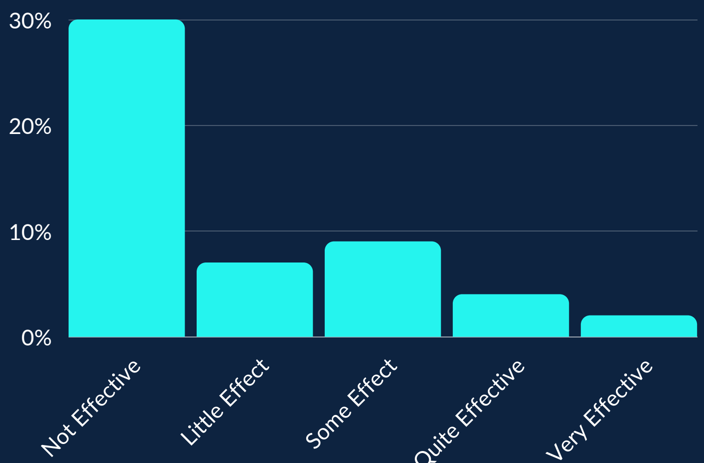

## Intranet



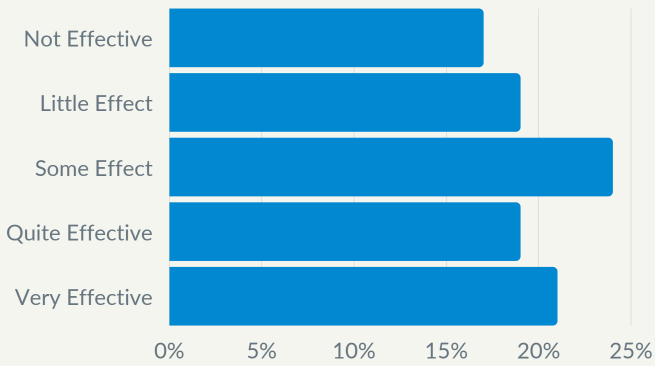

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 24% | 7% | 20% |
| Little Effect | 7% | 4% | 4% |
| Some Effect | 13% | 6% | 2% |
| Quite Effective | 9% | 3% | 6% |
| Very Effective | 8% | 2% | 4% |

## Pinterest

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 30% | 15% | 24% |
| Little Effect | 7% | 9% | 12% |
| Some Effect | 9% | 3% | 45% |
| Quite Effective | 4% | 1% | 3% |
| Very Effective | 2% | 0% | 0% |

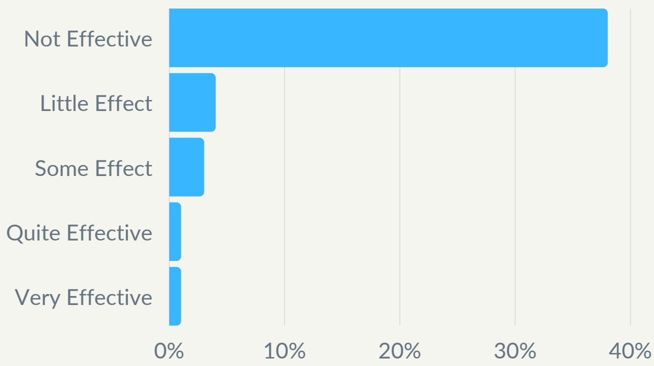


## LinkedIn



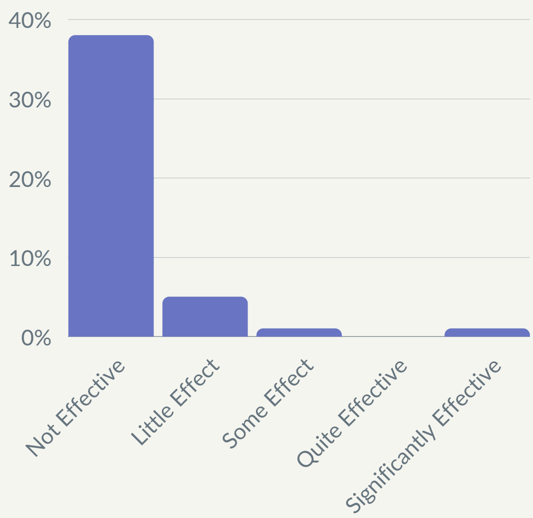

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 17% | 5% | 10% |
| Little Effect | 19% | 16% | 17% |
| Some Effect | 24% | 31% | 30% |
| Quite Effective | 19% | 16% | 18% |
| Very Effective | 21% | 10% | 11% |

## Telegram



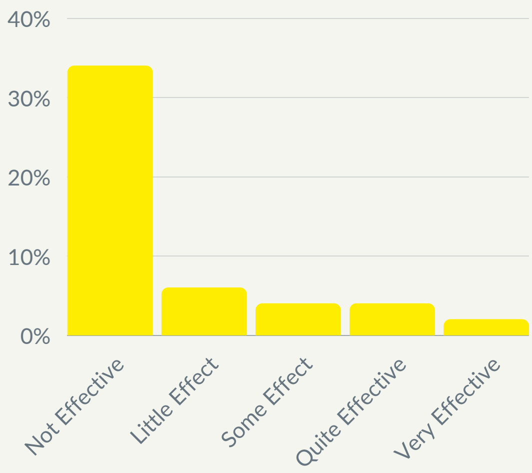

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 38% | 15% | 25% |
| Little Effect | 4% | 1% | 2% |
| Some Effect | 3% | 3% | 2% |
| Quite Effective | 1% | 0% | 0% |
| Very Effective | 1% | 0% | 0% |

## Signal



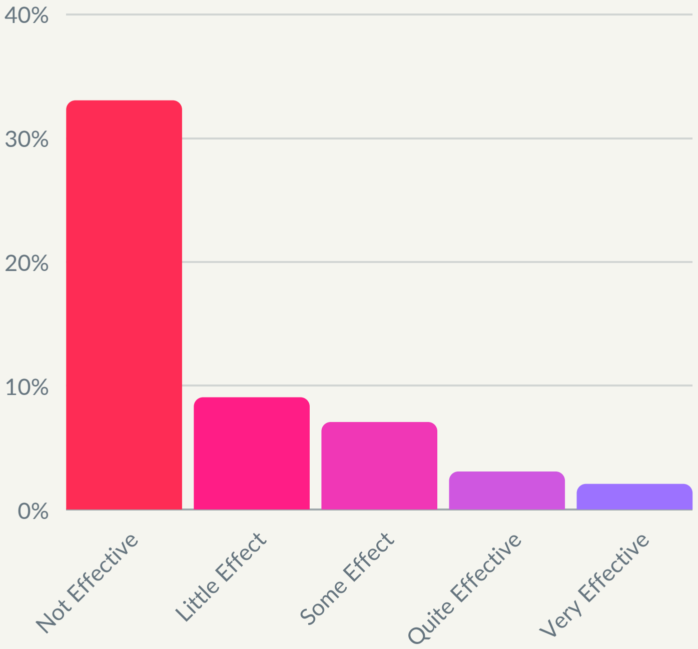

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 38% | n/a | n/a |
| Little Effect | 5% | n/a | n/a |
| Some Effect | 1% | n/a | n/a |
| Quite Effective | 0% | n/a | n/a |
| Very Effective | 1% | n/a | n/a |

## Snapchat



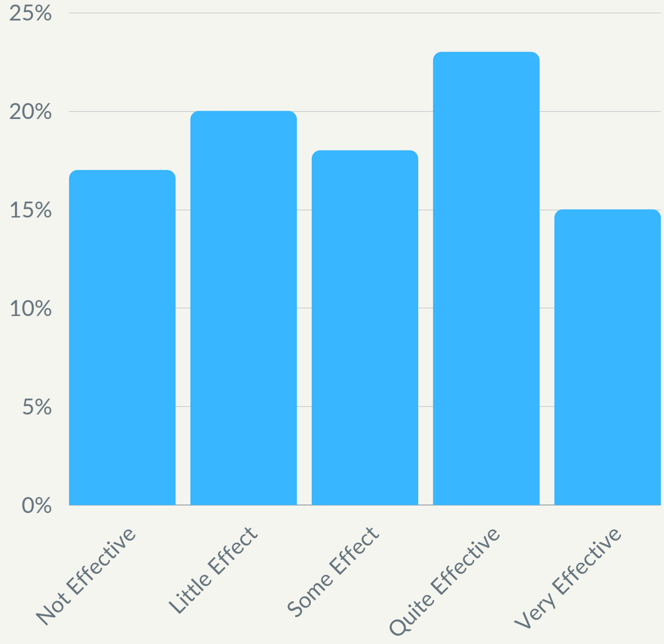

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 34% | 13% | 23% |
| Little Effect | 6% | 1% | 4% |
| Some Effect | 4% | 2% | 1% |
| Quite Effective | 4% | 2% | 1% |
| Very Effective | 2% | 0% | 1% |

## TikTok



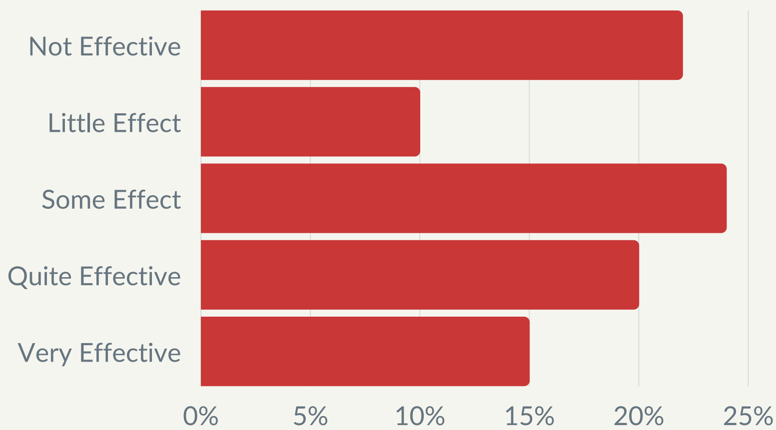

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 33% | 12% | n/a |
| Little Effect | 9% | 4% | n/a |
| Some Effect | 7% | 2% | n/a |
| Quite Effective | 3% | 1% | n/a |
| Very Effective | 2% | n/a | n/a |

## Twitter

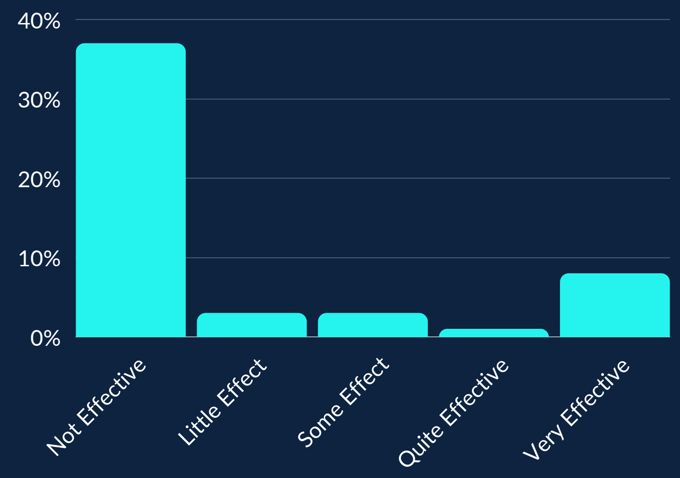



| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 17% | 9% | 11% |
| Little Effect | 20% | 15% | 25% |
| Some Effect | 18% | 32% | 25% |
| Quite Effective | 23% | 18% | 26% |
| Very Effective | 15% | 10% | 15% |

## YouTube

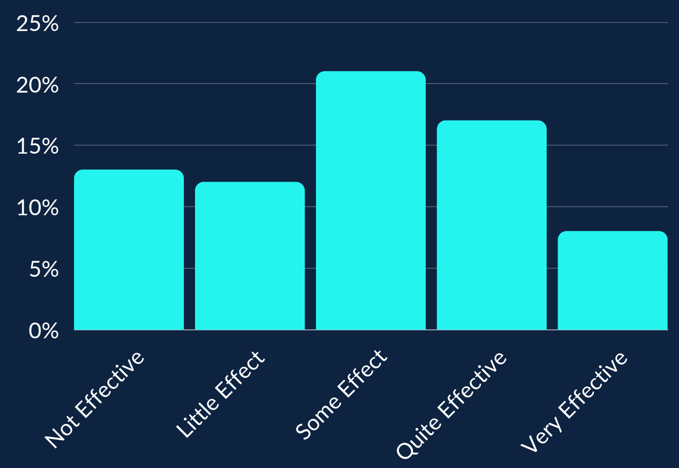



| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 22% | 9% | 11% |
| Little Effect | 10% | 14% | 18% |
| Some Effect | 24% | 24% | 21% |
| Quite Effective | 20% | 9% | 21% |
| Very Effective | 15% | 6% | 15% |




## WeChat

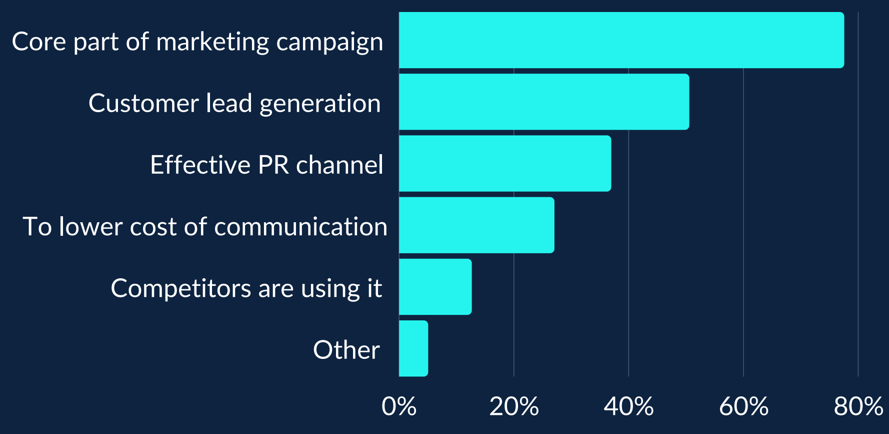
| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 37% | 16% | 29% |
| Little Effect | 3% | 1% | 1% |
| Some Effect | 3% | 2% | 1% |
| Quite Effective | 1% | n/a | n/a |
| Very Effective | 2% | n/a | n/a |




## Whatsapp

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Not Effective | 13% | 9% | 16% |
| Little Effect | 12% | 3% | 5% |
| Some Effect | 21% | 20% | 6% |
| Quite Effective | 17% | 6% | 9% |
| Very Effective | 8% | 3% | 11% |

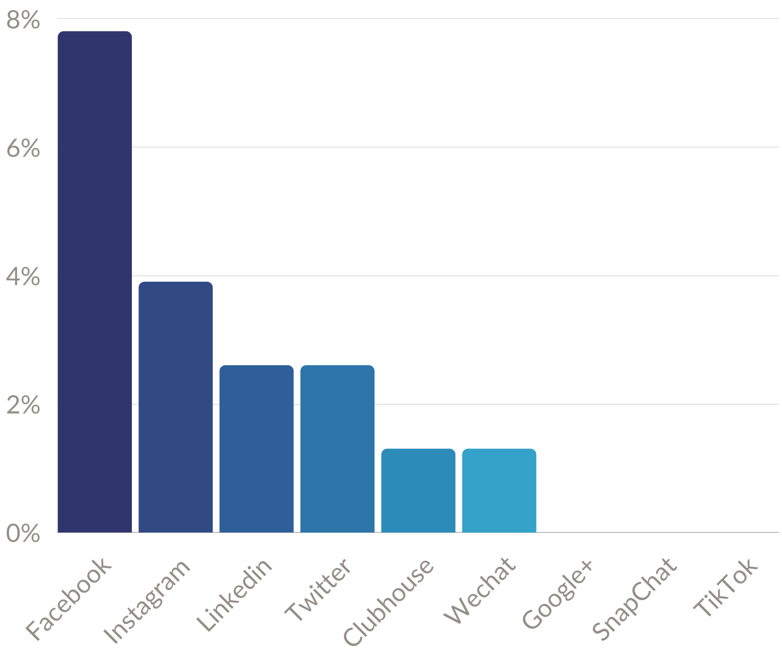
# WHY IS YOUR COMPANY USING SOCIAL MEDIA?




| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| Core part of marketing campaign | 77.5% | 69.7% | 78% | 82% |
| Customer lead generation | 50.5% | 44.4% | 51% | 47% |
| Effective PR channel | 36.9% | 23.2% | 32% | 27% |
| To lower cost of communication | 27% | 12.1% | 19% | 16% |
| Competitors are using it | 12.6% | 46.5% | 46% | 50% |
| Other | 5% | 6% | 7% | 11% |

# IN THE PAST 12 MONTHS HAVE YOU DELETED YOUR BRAND ACCOUNTS ON ANY SOCIAL MEDIA PLATFORMS?


| | Yes | No |
|---|---|---|
| 2019 | 8.1% | 91.9% |
| 2020 | 10.8% | 89.2% |
| 2019 | 5.4% | 94.6% |



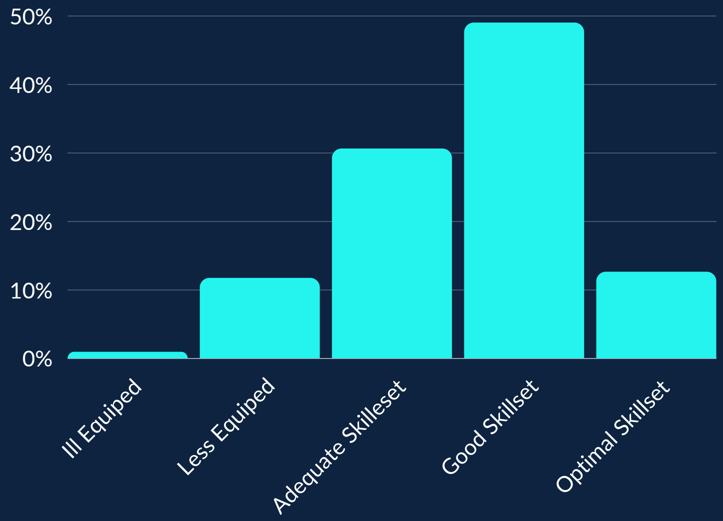

# IF YES, WHICH PLATFORMS?

| | 2021 | 2020 | 2019 |
|---|---|---|---|
| Facebook | 7.8% | 3.9% | 5% |
| Twitter | 4.9% | 4.9% | 4% |
| Instagram | 3.9% | 2% | 2% |
| LinkedIn | 2.6% | 1% | 2% |
| WeChat | 1.3% | 1% | 4% |
| Clubhouse | 1.3% | 1% | n/a |
| Snapchat | 0% | 1% | 1% |
| TikTok | 0% | 1% | n/a |
| Google+ | 0% | 2.9% | 2% |
| Other | 84.4% | 83.3% | 81% |

The participants of the survey have been asked to share insights about their activity regarding deleting certain social media accounts. There is a resounding NO (at 91.9%) which is higher than 2020. We can assume that this is because of the introduction of social media like Clubhouse and Houseparty that have considerable download numbers during the lockdowns but have seen a drop once restrictions were lifted.

However, looking at the participants who answered yes, the most prominent social media are Facebook, Twitter, Instagram, and LinkedIn. What is interesting in this graph, is the high percentage on "other" which shows the large amount of different social media that could not all be listed in one answer. There are at least 103 different social media platforms/applications that users have access to in 2021.

# DO YOU HAVE THE RIGHT SKILLS IN PLACE TO LEVERAGE AND MANAGE SOCIAL MEDIA EFFECTIVELY IN 2021?

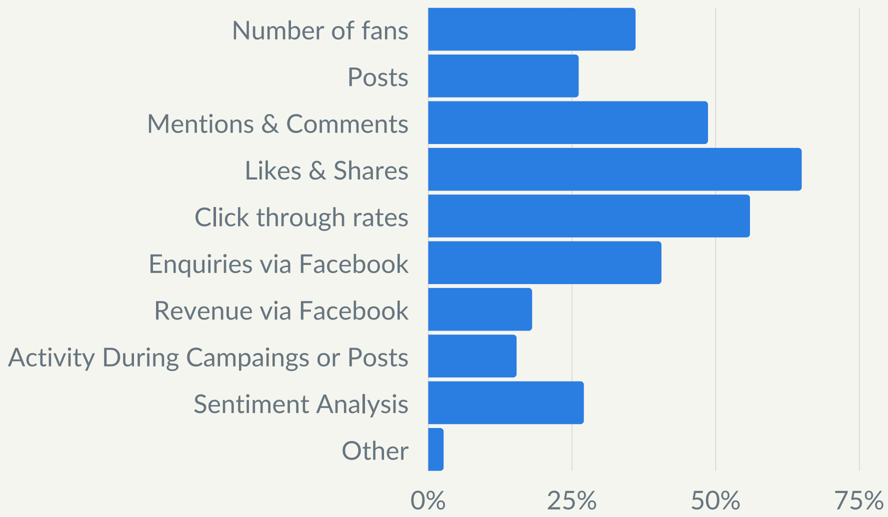



| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| Ill Equiped | 0.9% | 3.9% | 2% | 3% |
| Less Equiped | 11.7% | 8.8% | 8% | 6% |
| Adequate Skilleset | 30.6% | 40.2% | 37% | 25% |
| Good Skillset | 49% | 37.3% | 38% | 50% |
| Optimal Skillset | 12.6% | 9.8% | 15% | 16% |

# HOW DO YOU PLAN TO IMPROVE SOCIAL MEDIA SKILLS AND COMPETENCIES IN 2021?

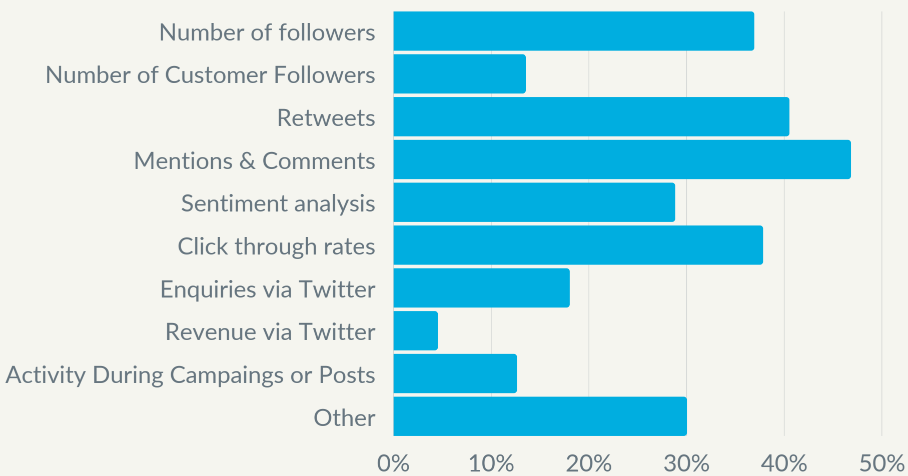

| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| Invest in training our current people | 64.9% | 53.5% | 78% | 60% |
| Use specialist social media agencies | 20.7% | 16.2% | 7% | 10% |
| We currently have no plans | 16.2% | 17.2% | 15% | 16% |
| Hire in experts in this area from your sector | 13.5% | 7.1% | 4% | 4% |
| Hire a social media consultant | 12.6% | 5.1% | 11% | 13% |
| Hire in experts in this area from another sector | 5.4% | 23.2% | 14% | 27% |

# HOW ARE YOU MEASURING YOUR SOCIAL MEDIA EFFECTIVENESS ON FACEBOOK?



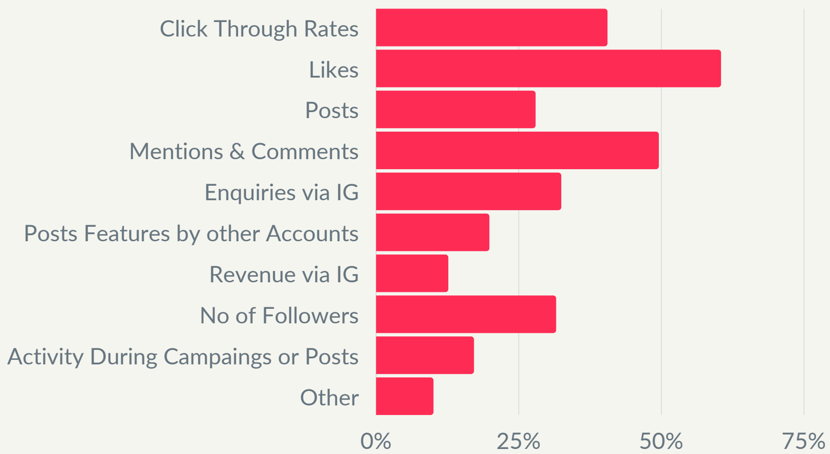

| | Number of fans | Posts | Mentions & Comments | Likes & Shares | Click through rates | Enquiries via Facebook | Revenue via Facebook | Activity During Campaings or Posts | Sentiment Analysis |
|---|---|---|---|---|---|---|---|---|---|
| 2021 | 36% | 26.1% | 48.6% | 64.9% | 55.9% | 40.5% | 18% | 15.3% | 27% |
| 2020 | 34% | 22.3% | 55.3% | 58.5% | 62.8% | 48.9% | 19.1% | 13.8% | 20.2% |
| 2019 | 48% | 27% | 66% | 75% | 63% | 38% | 15% | 25% | 17% |
| 2018 | 64% | 36% | 74% | 72% | 70% | 39% | 24% | n/a | 33% |
| 2017 | 57% | 28% | 67% | 78% | 51% | 40% | 35% | n/a | 33% |

# HOW ARE YOU MEASURING YOUR SOCIAL MEDIA EFFECTIVENESS ON TWITTER?

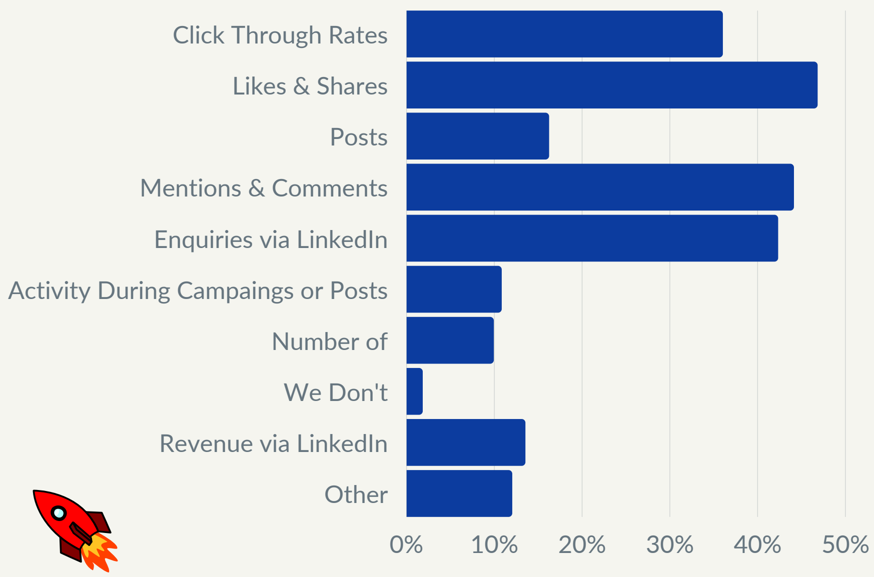



| | Number of followers | Number of Customer Followers | Retweets | Mentions & Comments | Sentiment analysis | Click through rates | Enquiries via Twitter | Revenue via Twitter | Activity During Campaings or Posts | Other |
|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 36.9% | 13.5% | 40.5% | 46.8% | 28.8% | 37.8% | 18% | 4.5% | 12.6% | 30% |
| 2020 | 44.4% | 14.4% | 43.3% | 56.7% | 35.6% | 48.9% | 20% | 8.9% | 12.2% | 8% |
| 2019 | 53% | 19% | 54% | 67% | 35% | 51% | 17% | 5% | 23% | 5% |
| 2018 | 59% | 22% | 62% | 73% | 45% | 45% | 24% | 13% | n/a | n/a |
| 2017 | 69% | 23% | 69% | 74% | 43% | 51% | 26% | 6% | n/a | n/a |

# HOW ARE YOU MEASURING YOUR SOCIAL MEDIA EFFECTIVENESS ON INSTAGRAM?



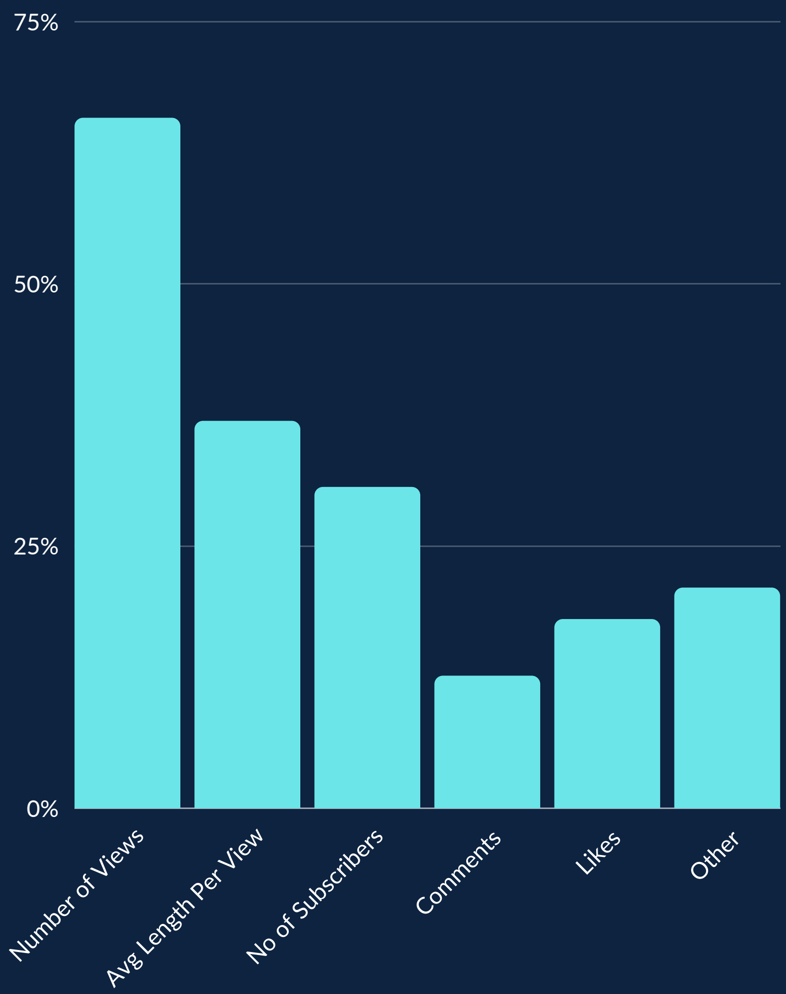

| | Likes | Mentions & Comments | Click Through Rates | No of Followers | Enquirires via IG | Posts | Activity During Campaings or Posts | Revenue via IG | Posts featured by other Accounts | Others |
|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 40.5% | 60.4% | 27.9% | 49.5% | 32.4% | 19.8% | 12.6% | 31.5% | 17.1% | 10% |
| 2020 | 51% | 43.1% | 41.2% | 22.5% | 22.5% | 21.6% | 13.7% | 9.8% | 11.8% | 12% |
| 2019 | 64% | 60% | 32% | 27% | 20% | 23% | 15% | 6% | 21% | 11% |




# HOW ARE YOU MEASURING YOUR SOCIAL MEDIA EFFECTIVENESS ON LINKEDIN?

| | Likes & Shares | Click Through Rates | Mentions & Comments | Enquiries via LinkedIn | Posts | Activity During Campaings or Posts | Number of group members | We Don't have Linkedin | Revenue via LinkedIn | Other |
|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 36% | 46.8% | 16.2% | 44.1% | 42.3% | 10.8% | 9.9% | 1.8% | 13.5% | 12% |
| 2020 | 52.9% | 43.1% | 38.2% | 34.3% | 18.6% | 13.7% | 11.8% | 2% | 9.8% | 10% |
| 2019 | 36% | 41% | 43% | 31% | 24% | 12% | 7% | N/A | 6% | 17% |
| 2018 | 46% | 37% | 36% | 33% | 22% | n/a | 11% | n/a | 13% | n/a |

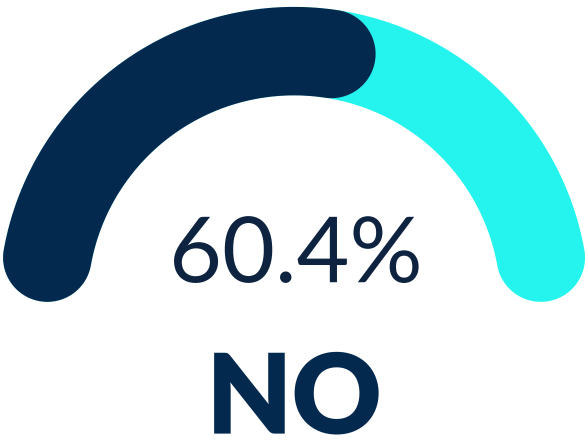
# HOW ARE YOU MEASURING YOUR SOCIAL MEDIA EFFECTIVENESS ON YOUTUBE?




| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| Views | 65.8% | 61.8% | 73% | 54% |
| Average Length Per View | 36.9% | 36.3% | 43% | 29% |
| No of Subscribers | 30.6% | 25.5% | 30% | 29% |
| Comments | 12.6% | 12.7% | 18% | 19% |
| Likes | 18% | 10.8% | 14% | 14% |
| Other | 21% | 10% | 20% | 43% |

# DOES YOUR BRAND MAKE USE OF PAID SOCIAL MEDIA INFLUENCERS?

A huge increase since last year

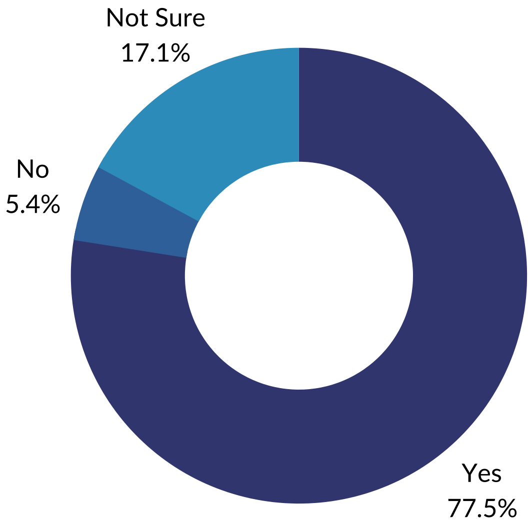



| | Yes | No |
|---|---|---|
| 2021 | 39.6% | 60.4% |
| 2020 | 29.4% | 70.6% |

# WHAT RETURNS HAS SOCIAL MEDIA BROUGHT TO YOUR BRAND?

Return of Investment (ROI) is incredibly difficult to point down in a single number. The participants of the survey feel that the highest return of investment on social media has come in the form of brand awareness, sales and customer insights.


| | Brand Awareness | Sales | Greater Appeal to Targeted Audiences | Improved Search Rankings | Greater Cost Efficiencies | Customer Insights | Improved Brand Loyalty | Inbound Traffic | Increased Market Share | Better Customer Satisfaction |
|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 64% | 35.1% | 16.2% | 17.1% | 10.8% | 31.5% | 16.2% | 19.8% | 9.9% | 5.4% |
| 2020 | 54.1% | 13.3% | 8.2% | 6.1% | 5.1% | 4.1% | 4.1% | 3.1% | 2% | 1% |
| 2019 | 39% | 14% | 11% | 6% | 4% | 6% | 9% | 6% | 2% | 4% |




# HAS USING SOCIAL MEDIA BROUGHT BRAND RETURNS?

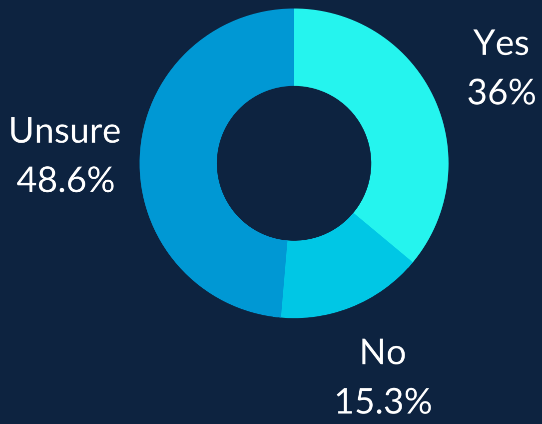
| | Yes | Unsure | No |
|---|---|---|---|
| 2021 | 77.% | 17.1% | 5.4% |
| 2020 | 66% | 31% | 3% |
| 2019 | 78.2% | 20% | 1.8% |

Although the majority of participants have answered to the question "has using social media brought brand returns?" with a strong YES (77.5%), there is still a small portion of marketers who are not sure if social media has actually brought brand returns. This is again evident by the lack of a single metric that social media returns can be tracked with.

What we can also observe by looking at the comparison table above is the steady increase of participants who think that social media is not bringing them brand returns. There is a dip in 2020 for the "yes" group and a major increase for the "unsure" that can be justified by the COVID-19's impact.

## HAVE PROGRAMMATIC ADVERTISING TOOLS IMPROVED YOUR ROI?

# UNSURE




| | Yes | No | Unsure |
|---|---|---|---|
| 2021 | 36% | 15.3% | 48.6% |
| 2020 | 25.8% | 12.8% | 61.9% |

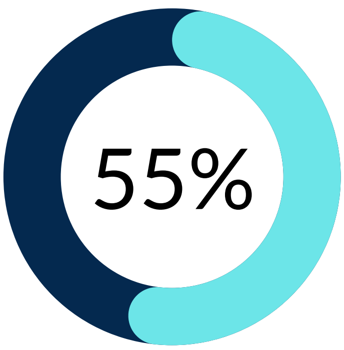
## DO YOU USE PROGRAMMATIC ADVERTISING TOOLS?

# NO


| | Yes | No |
|---|---|---|
| 2021 | 45% | 55% |
| 2020 | 36.4% | 63.6% |

## DO YOU KNOW THE OVERALL INFLUENCE OF YOUR SOCIAL MEDIA COMMUNITIES?

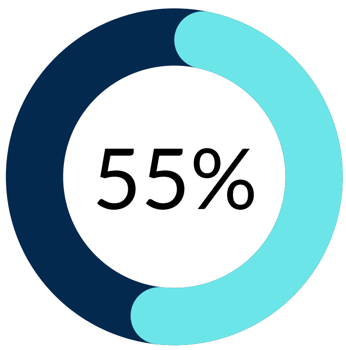
# NO




| | Yes | No |
|---|---|---|
| 2021 | 45% | 55% |
| 2020 | 58.8% | 41.2% |

## DO YOU KNOW WHO THE MOST INFLUENTIAL PEOPLE IN YOUR SOCIAL MEDIA COMMUNITIES ARE?

# YES

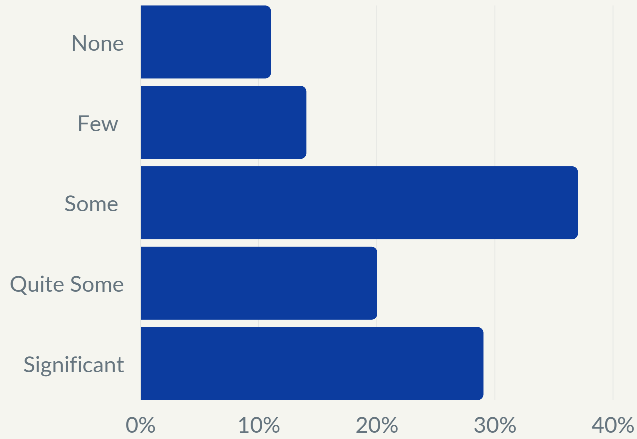



| | Yes | No |
|---|---|---|
| 2021 | 55% | 45% |
| 2020 | 35% | 65% |

# WHAT ARE THE BARRIERS PREVENTING MARKETERS FROM GETTING MORE VALUE OUT OF SOCIAL MEDIA?

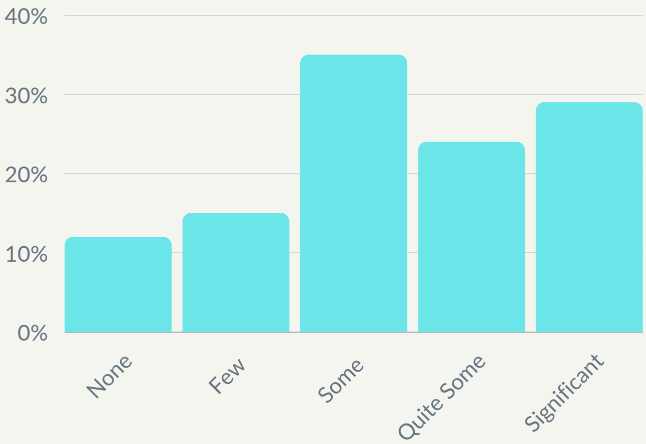
**Nine out of ten** strongly agree that social media has potential as a tool to help their business grow. This is a massive change compared to the last three years. We can clearly see that social media is playing a strong role in the minds of decision makers.

## Lack of Budget

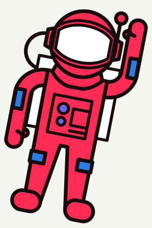



| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 11 | 4 | 11 | 15 |
| Few | 14 | 14 | 12 | 12 |
| Some | 37 | 40 | 37 | 34 |
| Quite Some | 20 | 19 | 15 | 19 |
| Significant | 29 | 25 | 37 | 36 |

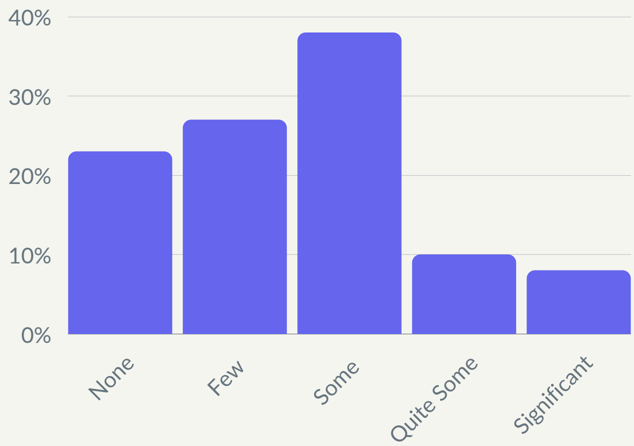
## Time to Properly Manage These Channels




| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 12 | 4 | 13 | 19 |
| Few | 15 | 20 | 8 | 11 |
| Some | 35 | 26 | 20 | 34 |
| Quite Some | 24 | 22 | 39 | 30 |
| Significant | 29 | 18 | 32 | 22 |

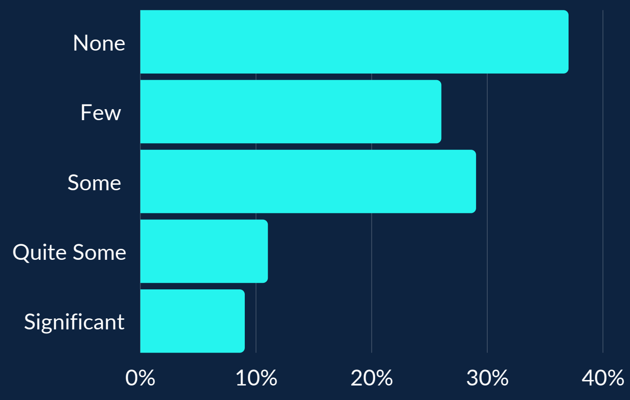


## Inability to Measure




| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 23 | 17 | 15 | 27 |
| Few | 27 | 20 | 8 | 11 |
| Some | 38 | 26 | 20 | 34 |
| Quite Some | 10 | 22 | 39 | 30 |
| Significant | 18 | 18 | 32 | 22 |

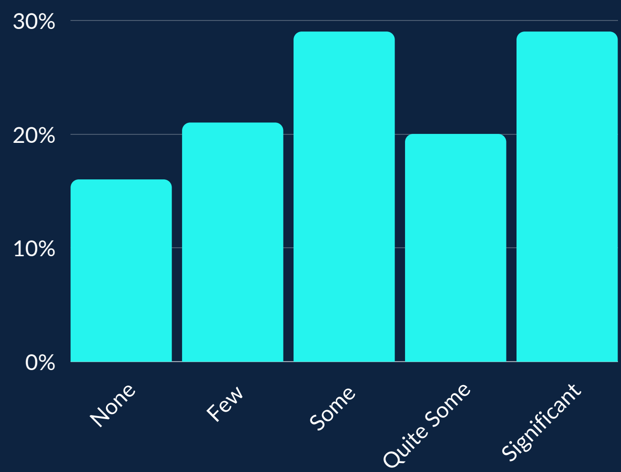
## Lack of Technology



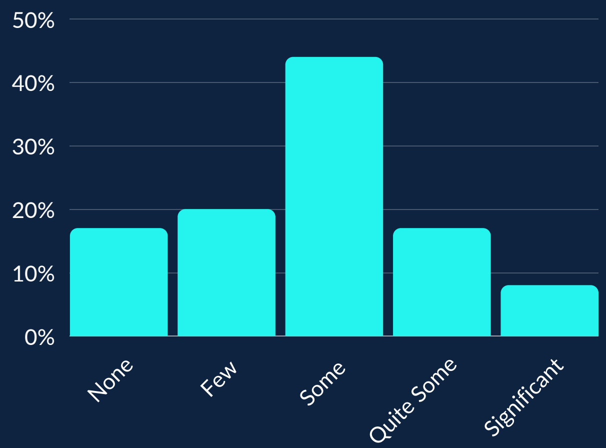

| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 37 | 31 | 33 | 42 |
| Few | 26 | 26 | 28 | 30 |
| Some | 29 | 26 | 25 | 26 |
| Quite Some | 11 | 15 | 15 | 12 |
| Significant | 9 | 4 | 11 | 6 |

## Lack of Management Understanding

| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 16 | 4 | 13 | 19 |
| Few | 21 | 20 | 8 | 11 |
| Some | 29 | 26 | 20 | 34 |
| Quite Some | 20 | 22 | 39 | 30 |
| Significant | 25 | 18 | 32 | 22 |



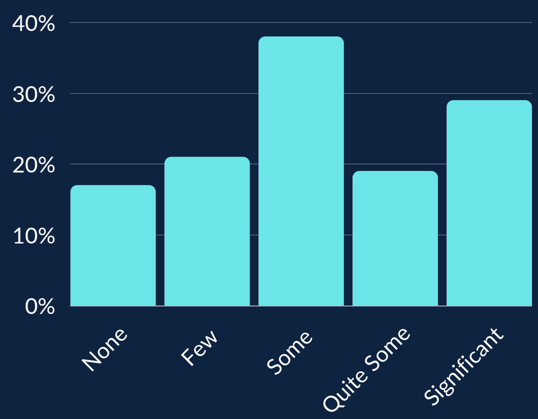

## Level of Change In Digital



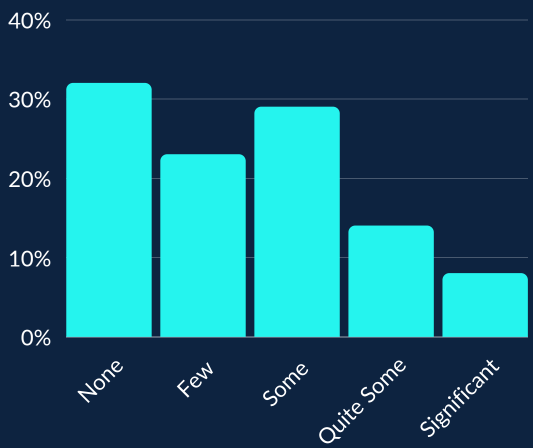

| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 17 | 14 | 13 | 26 |
| Few | 20 | 34 | 16 | 26 |
| Some | 44 | 32 | 36 | 36 |
| Quite Some | 17 | 17 | 34 | 21 |
| Significant | 13 | 5 | 13 | 7 |

## Skills of Marketing/ Brand Teams

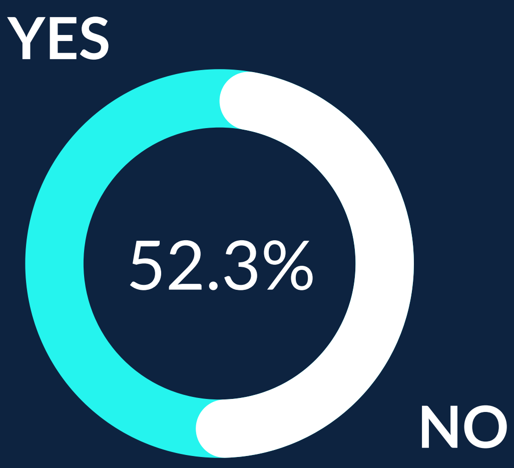
| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 17 | 17 | 15 | 27 |
| Few | 21 | 20 | 8 | 11 |
| Some | 38 | 26 | 20 | 34 |
| Quite Some | 19 | 22 | 39 | 30 |
| Significant | 16 | 18 | 32 | 22 |




## Quality of Agency Partners




| | 2021 | 2020 | 2019 | 2018 |
|---|---|---|---|---|
| None | 32 | 17 | 15 | 27 |
| Few | 23 | 20 | 8 | 11 |
| Some | 29 | 26 | 20 | 34 |
| Quite Some | 14 | 22 | 39 | 30 |
| Significant | 13 | 18 | 32 | 22 |

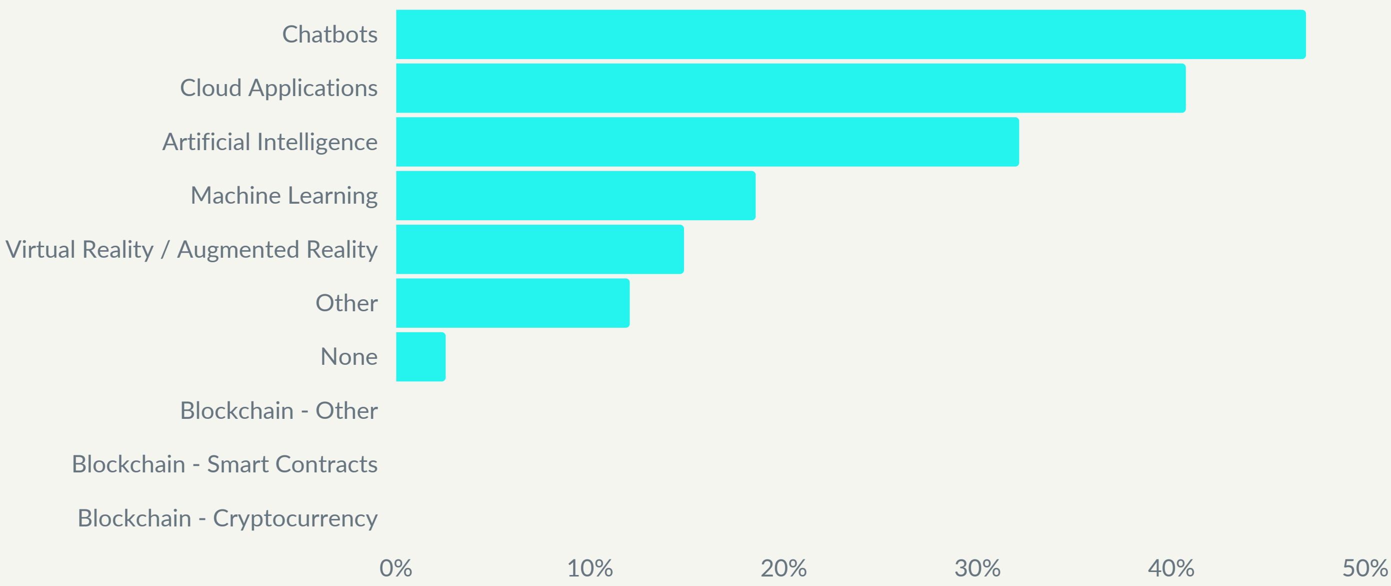



## HAVE YOU ALLOCATED BUDGET TOWARDS NEW TECHNOLOGY FOR MARKETING PURPOSES?

| | Yes | No |
|---|---|---|
| 2021 | 52.3% | 47.7% |
| 2020 | 35% | 65% |
| 2019 | 42% | 58% |

# IF YES, WHICH OF THE FOLLOWING TECHNOLOGIES DO YOU UTILIZE?

**Innovation is the driving force of any new initiative. We asked the participants to allocate their new technology investment budget for marketing purposes.**




| | Artificial Intelligence | Chatbots | Cloud Applications | Machine Learning | Virtual Reality/ Augmented Reality | None | Blockchain - Other | Blockchain - Smart Cotnracts | Blockchain - Cruptocurrency | Other |
|---|---|---|---|---|---|---|---|---|---|---|
| 2021 | 32.1% | 46.9% | 40.7% | 18.5% | 14.8% | 2.5% | 0% | 0% | 0% | 10% |
| 2020 | 55% | 18% | 52% | 22% | 31% | 24% | 30% | 31% | 31% | 31% |
| 2019 | 53% | 9% | 64% | 50% | 29% | 30% | 29% | 32% | 31% | 31% |

Artificial Intelligence has been dominating this field for the past 2 years alongside cloud applications, blockchain technologies and Virtual Reality. However, in 2021, we can observe a large increase in chatbots. According to our participants, marketers will allocate more budget towards chatbots. Chatbots are software applications that use Artificial Intelligence & natural language processing to understand what a human wants, and guides them to their desired outcome with as little work for the end user as possible. Like a virtual assistant for your customer experience touchpoints.

There is an overlap when it comes to AI and chatbots, as chatbots use AI technology to operate. The emergence of chatbots can be justified by providing marketers with some unique advantages such as offering your audience a personalized experience, reaching a wider audience, gather and analyze customer feedback and data as well as move your customers seamlessly through the sales funnel. Thus, there is no surprise that chatbots have gained such popularity in the last year.

# "SOCIAL MEDIA CHANNELS POSE SIGNIFICANT RISKS TO OUR COMPANY'S REPUTATION"

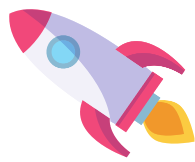
The participants were quite divided when it came to social media posing a risk to their brand reputation. Many organizations aren't fully aware of the risks posed by social media or taking enough steps to minimize them. Although social media can amplify positive sentiment, it can equally promote negative sentiment and spread it like wildfire.

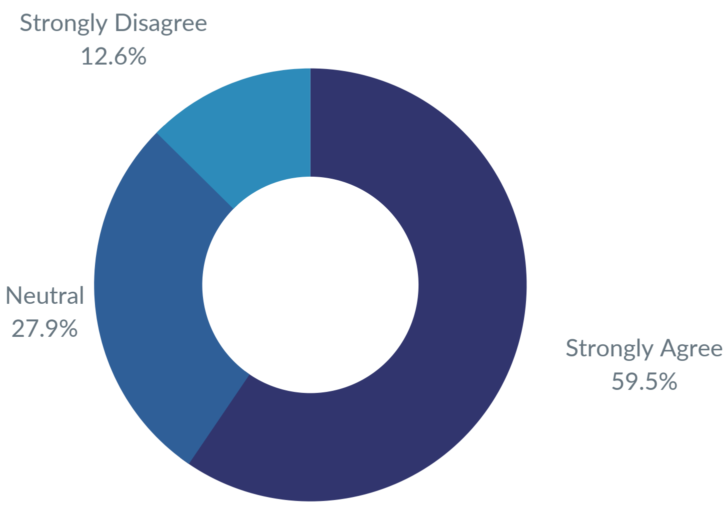
**31.%**
*Strongly Agree*

**37.8%**
*Neutral*

**30.6%**
*Strongly Disagree*

| | Strongly Agree | Neutral | Strongly Disagree |
|---|---|---|---|
| 2021 | 31% | 37.8% | 30.6% |
| 2020 | 29.4% | 48% | 22.5% |
| 2019 | 28% | 46% | 27% |
| 2018 | 45% | 28% | 27% |

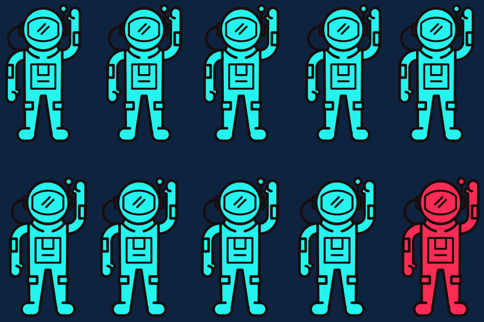





# "OUR SENIOR MANAGEMENT FULLY UNDERSTAND WHY WE ARE USING SOCIAL MEDIA"

| | Strongly Agree | Neautral | Strongly Disagree |
|---|---|---|---|
| 2021 | 59.5% | 27.9% | 12.6% |
| 2020 | 61.8% | 26.5% | 11.8% |
| 2019 | 47% | 36% | 15% |
| 2018 | 56% | 23% | 21% |

It is important for organizations, and especially marketers, to understand the dangers and benefits of social media influence towards brand reputation. Brand Intelligence and measurement are always needed to mitigate those risks. As we can see from the comparison table, the results have been dominated from a neutral perspective. We can assume that this is because the majority of marketers recognize the importance and the risk that social media can expose them to. Although the importance of social media is widely known to most marketers, there are quite a few management stakeholders that fail to fully understand it. This has been the dominant trend of the past four years, as there is a very small fluctuation between the data.

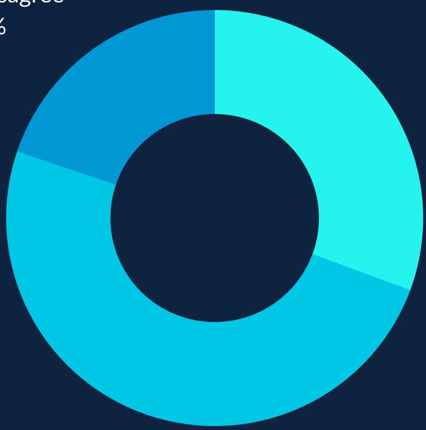


# "SOCIAL MEDIA HAS POTENTIAL AS A TOOL TO HELP OUR BUSINESS GROW"

| | Strongly Agree | Neautral | Strongly Disagree |
|---|---|---|---|
| 2021 | 91% | 9% | 0% |
| 2020 | 79.4% | 19.6% | 1% |
| 2019 | 91% | 9% | 0% |
| 2018 | 94% | 4% | 2% |

# "WE ARE GETTING AS MUCH VALUE FROM SOCIAL MEDIA AS WE CAN"

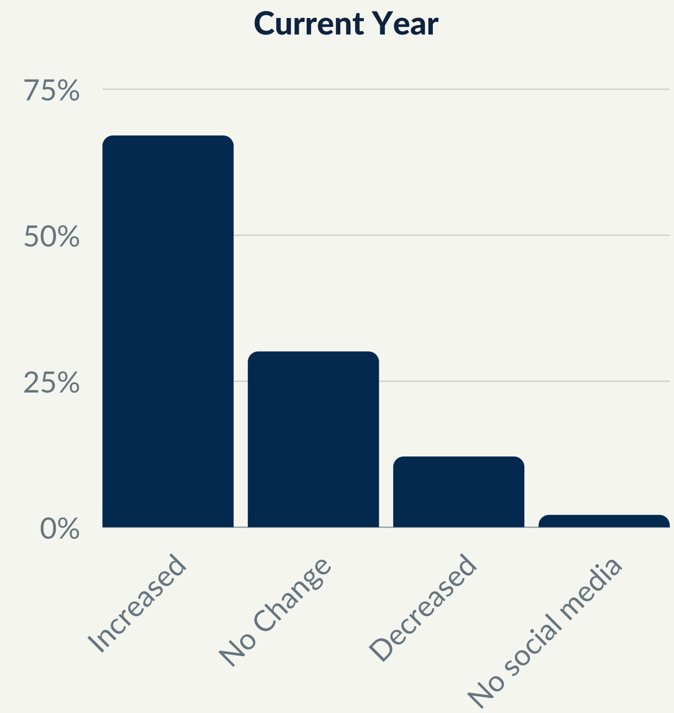
| | Strongly Agree | Neautral | Strongly Disagree |
|---|---|---|---|
| 2021 | 19.8% | 49.5% | 19.8% |
| 2020 | 24.5% | 52.9% | 22.5% |
| 2019 | 30% | 49% | 21% |
| 2018 | 32% | 45% | 23% |



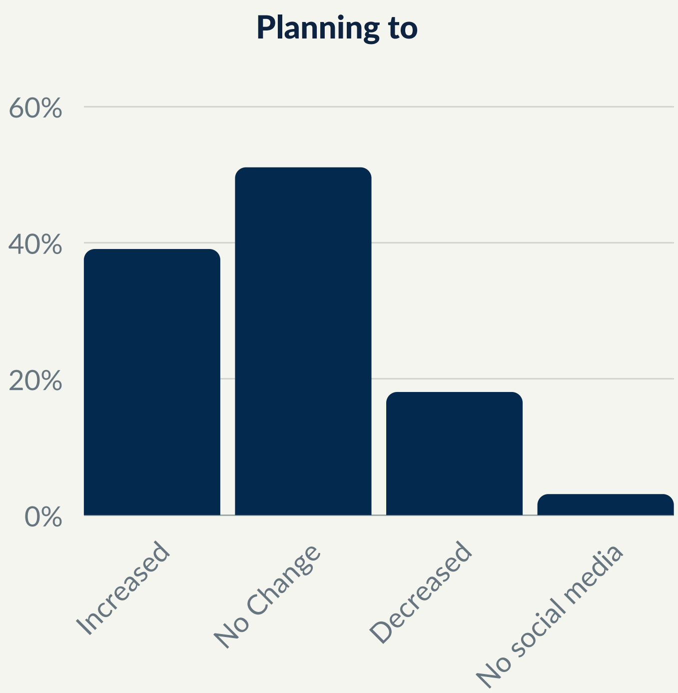

The 2021 participants strongly believe that social media has the potential as a tool to help their brand grow. Again, as in previous tables and questions, the COVID-19 crisis has affected negatively the belief of marketers towards social media capabilities. What is interesting, is that none of the participants believe that social media is not a tool for growth when it comes to their business growth.

What is not clear, according to the data, is the maximum or minimum potential value that can be generated by using social media. Participants are equally split between those who strongly agree on the notion that they are getting the maximum value possible from social media and those who don't. The majority is neutral toward this topic and has been for the last four years.

# HAS SOCIAL MEDIA BUDGET ALLOCATION CHANGED SINCE THE PREVIOUS YEAR?



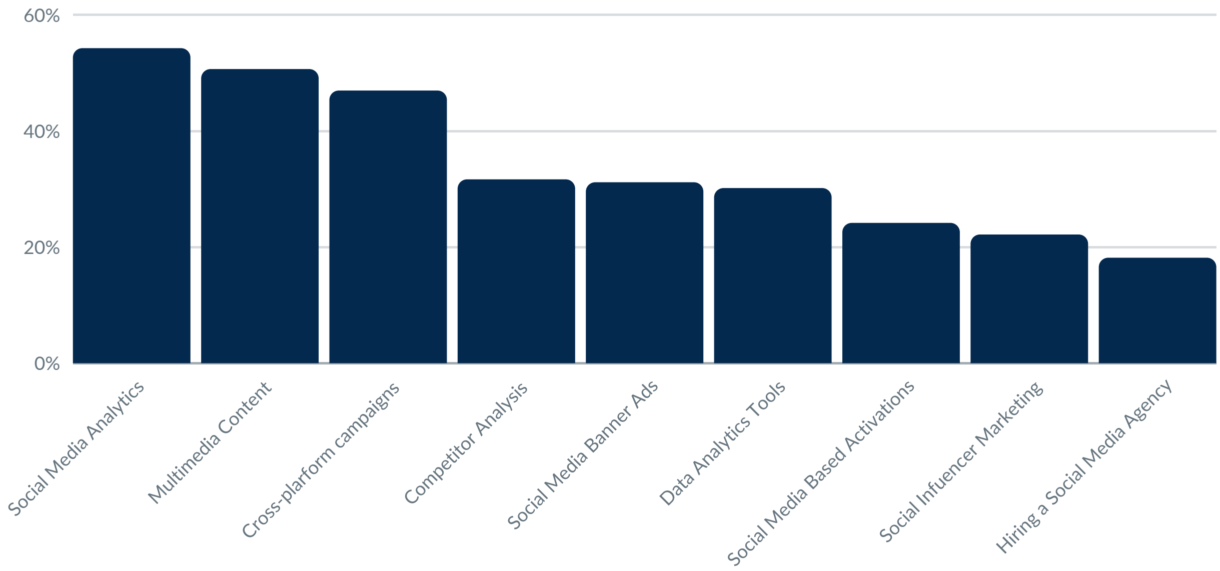

| | Stay the same | Increased | No Social Media | Decrease |
|---|---|---|---|---|
| 2021 | 67% | 30% | 12% | 2% |
| 2020 | 42.1% | 30.3% | 18.6% | 5.8% |
| 2019 | 44% | 44% | 1% | 4% |
| 2018 | 42% | 36% | 5% | 9% |




| | Stay the same | Plan to Increase | No Social Media | Plan to decrease |
|---|---|---|---|---|
| 2021 | 39% | 51% | 18% | 3% |
| 2020 | 50.9% | 32.3% | 8.8% | 6.8% |
| 2019 | 25% | 62% | 3% | 0% |
| 2018 | 31% | 57% | 7% | 2% |

# WHICH SOCIAL MEDIA STRATEGIES ARE YOU PLANNING TO IMPLEMENT IN THE NEXT 12 MONTHS?

**We asked marketers, media buyers, media analysts, PR directors and specialist and social media experts, what type of social media strategies they are planning on implementing in the next twelve months. This was a multiple choice question with more than one possible answer per participant.**




| | Social Media Analytics | Hiring a social media agency | Multimedia Content | Social Influencer Marketing | Social Media Banner Ads | Social Media Based Activations | Data Analyticss Tools | Competitor Analysis | Cross Platform Campaigns |
|---|---|---|---|---|---|---|---|---|---|
| 2021 | 54.1% | 17.1% | 50.5% | 36% | 34.3% | 26.1% | 33.3% | 31.5% | 46.8% |
| 2020 | 55% | 18% | 52% | 22% | 31% | 24% | 30% | 31% | 46% |
| 2019 | 53% | 9% | 64% | 50% | 29% | 30% | 29% | 32% | 42% |
| 2018 | 57% | 8% | 66% | 44% | 26% | 36% | 47% | 7% | 5% |

According to our survey, marketing professionals widely prefer implementing social media strategies that include social media analytics, multimedia content, and cross-platform campaigns. The dominance of analytics and content has been the norm over the previous years with Social Media Influencer Marketing and Social Media banner ads gaining significant acknowledgement.

What is really interesting is the rise of hiring a social media agency. This option is gaining some popularity as managing a large portfolio of social media, measuring its performance, and implementing content strategies takes a lot of time, effort and requires specialization and expertise. We can assume that marketers prefer to outsource this to agencies.

INDUSTRY OVERVIEW

# TOP 5 INDUSTRIES

**AUTOMOTIVE**

**BANKING**

**MOBILE TECHNOLOGY**

**SUPERMARKETS**

**TELECOM**

# TOP 5 INDUSTRIES BREAK DOWN

Industry overview and breakdown amongst social media. The social media analysed are Facebook, Twitter, Instagram and YouTube

The figures below are the industry averages and the period we are examining is January 2020 - March 2021

## AUTOMOTIVE

**5.22 MILLION**

**CROSS CHANNEL AUDIENCE**

The total average number of followers across all tracked social channels.

**982 POSTS**

**CROSS CHANNEL POST**

The total average number of posts across all tracked social channels.

**226 THOUSAND**

**CROSS-CHANNEL ENGAGEMENT**

The total average number of engagement actions across all tracked social channels.

facebook

### Industry averages for facebook

**4.9 MILLION**

**FACEBOOK PAGE FANS**

The total average number of Page Fans for the automotive industry on Facebook.

**292 POSTS**

**FACEBOOK POSTS**

The total average number of posts published during the selected time period.

**226 THOUSAND**

**FACEBOOK ENGAGEMENT TOTAL**

The total average number of interactions (reactions, comments, and shares) of posts published on by automotive companies pages during the selected time period.

# Instagram

## Industry averages for Instagram

**4.9 MILLION**

### INSTAGRAM FOLLOWERS

The average number of people following companies within the automotive industry on Instagram.

**197 POSTS**

### INSTAGRAM POSTS

The total average number of posts published during the selected time period.

**226 THOUSAND**

### INSTAGRAM ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of posts published by automotive companies pages during the selected time period.

# twitter

## Industry averages for Twitter

**201 THOUSAND**

### TWITTER FOLLOWERS

The average number of people following companies within the automotive industry on Twitter.

**470 TWEETS**

### TWITTER TWEETS

The average number of normal tweets (non-retweet, non-reply) published by automotive companies during the selected time period.

**226 THOUSAND**

### TWITTER ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of tweets published by automotive companies pages during the selected time period.

# YouTube

## Industry averages for YouTube

**9.16 THOUSAND**

### YOUTUBE SUBSCRIBERS

The average number of people subscribing to an automotive company on YouTube.

**36.63 POSTS**

### YOUTUBE POSTS

The total average number of posts on an automotive companie's YouTube channel during the selected time period.

**226 THOUSAND**

### YOUTUBE ENGAGEMENT TOTAL

The average total number of likes, dislikes, and comments of videos published on an automotive company's YouTube channel during the selected time period.

# TOP 5 INDUSTRIES BREAK DOWN

Industry overview and breakdown amongst social media. The social media analysed are Facebook, Twitter, Instagram and YouTube

The figures below are the industry averages and the period we are examining is January 2020 - March 2021

## BANKING

**589** THOUSAND

### CROSS CHANNEL AUDIENCE

The average total number of followers across all tracked social channels.

**1.53** THOUSAND

### CROSS CHANNEL POST

The average total number of posts across all tracked social channels.

**323** THOUSAND

### CROSS-CHANNEL ENGAGEMENT

The total average number of engagement actions across all tracked social channels.

## facebook

### Industry averages for facebook

**389** THOUSAND

### FACEBOOK PAGE FANS

The total average number of Page Fans for the banking industry on Facebook.

**597** POSTS

### FACEBOOK POSTS

The total average number of posts published during the selected time period.

**250** THOUSAND

### FACEBOOK ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of posts published on by banking industry company pages during the selected time period.

# Instagram

## Industry averages for Instagram

**34.9 THOUSAND**

### INSTAGRAM FOLLOWERS

The average number of people following companies within the banking industry on Instagram.

**138 POSTS**

### INSTAGRAM POSTS

The total average number of posts published during the selected time period.

**15.4 THOUSAND**

### INSTAGRAM ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of posts published by banking industry company pages during the selected time period.

# twitter

## Industry averages for Twitter

**151 THOUSAND**

### TWITTER FOLLOWERS

The average number of people following companies within the banking industry on Twitter.

**577 TWEETS**

### TWITTER TWEETS

The average number of normal tweets (non-retweet, non-reply) published by banks during the selected time period.

**54.5 THOUSAND**

### TWITTER ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of tweets published by banking industry company pages during the selected time period.

# YouTube

## Industry averages for YouTube

**14.2 THOUSAND**

### YOUTUBE SUBSCRIBERS

The average number of people subscribing to a bank on YouTube.

**218 POSTS**

### YOUTUBE POSTS

The total average number of posts on a bank's YouTube channel during the selected time period.

**3.23 THOUSAND**

### YOUTUBE ENGAGEMENT TOTAL

The average total number of likes, dislikes, and comments of videos published on a bank's YouTube channel during the selected time period.

# TOP 5 INDUSTRIES BREAK DOWN

Industry overview and breakdown amongst social media. The social media analysed are Facebook, Twitter, Instagram and YouTube

The figures below are the industry averages and the period we are examining is January 2020 - March 2021

## MOBILE TECHNOLOGY

**1.38 MILLION**

### CROSS CHANNEL AUDIENCE

The average total number of followers across all tracked social channels.

**1.12 THOUSAND**

### CROSS CHANNEL POST

The average total number of posts across all tracked social channels.

**1.14 MILLION**

### CROSS-CHANNEL ENGAGEMENT

The total average number of engagement actions across all tracked social channels.

## facebook

### Industry averages for facebook

**1.1 MILLION**

### FACEBOOK PAGE FANS

The total average number of Page Fans for the mobile technology industry on Facebook.

**311 POSTS**

### FACEBOOK POSTS

The total average number of posts published during the selected time period.

**35.6 THOUSAND**

### FACEBOOK ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of posts published on by mobile technology company pages during the selected time period.

Instagram

## Industry averages for Instagram

**531 THOUSAND**

### INSTAGRAM FOLLOWERS

The average number of people following companies within the mobile technology industry on Instagram.

**396 POSTS**

### INSTAGRAM POSTS

The total average number of posts published during the selected time period.

**1.09 MILLION**

### INSTAGRAM ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of posts published by mobile technology company pages during the selected time period.

twitter

## Industry averages for Twitter

**23.4 THOUSAND**

### TWITTER FOLLOWERS

The average number of people following companies within the mobile technology industry on Twitter.

**254 TWEETS**

### TWITTER TWEETS

The average number of normal tweets (non-retweet, non-reply) published by mobile technology companies during the selected time period.

**3.84 THOUSAND**

### TWITTER ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of tweets published by mobile technlogy company pages during the selected time period.

YouTube

## Industry averages for YouTube

**9.37 THOUSAND**

### YOUTUBE SUBSCRIBERS

The average number of people subscribing to a bank on YouTube.

**59 POSTS**

### YOUTUBE POSTS

The total average number of posts on a bank's YouTube channel during the selected time period.

**2.22 THOUSAND**

### YOUTUBE ENGAGEMENT TOTAL

The average total number of likes, dislikes, and comments of videos published on a mobile technology company's YouTube channel during the selected time period.

# TOP 5 INDUSTRIES BREAK DOWN

Industry overview and breakdown amongst social media. The social media analysed are Facebook, Twitter, Instagram and YouTube

The figures below are the industry averages and the period we are examining is January 2020 - March 2021

## SUPERMARKETS

**1.96 MILLION**

### CROSS CHANNEL AUDIENCE

The average total number of followers across all tracked social channels.

**1.75 THOUSAND**

### CROSS CHANNEL POST

The average total number of posts across all tracked social channels.

**828 THOUSAND**

### CROSS-CHANNEL ENGAGEMENT

The total average number of engagement actions across all tracked social channels.

facebook

## Industry averages for facebook

**1.41 MILLION**

### FACEBOOK PAGE FANS

The total average number of Page Fans for the supemarket industry on Facebook.

**800 POSTS**

### FACEBOOK POSTS

The total average number of posts published during the selected time period.

**383 THOUSAND**

### FACEBOOK ENGAGEMENT TOTAL

The total average number of interactions (reactions, comments, and shares) of posts published on by supermarket company pages during the selected time period.

## Instagram

### Industry averages for Instagram

**239 THOUSAND**

**INSTAGRAM FOLLOWERS**

The average number of people following companies within the supermarket industry on Instagram.

**337 POSTS**

**INSTAGRAM POSTS**

The total average number of posts published during the selected time period.

**385 THOUSAND**

**INSTAGRAM ENGAGEMENT TOTAL**

The total average number of interactions (reactions, comments, and shares) of posts published by supermarket company pages during the selected time period.

## twitter

### Industry averages for Twitter

**298 THOUSAND**

**TWITTER FOLLOWERS**

The average number of people following companies within the supermarket industry on Twitter.

**501 TWEETS**

**TWITTER TWEETS**

The average number of normal tweets (non-retweet, non-reply) published by supermarket companies during the selected time period.

**58.8 THOUSAND**

**TWITTER ENGAGEMENT TOTAL**

The total average number of interactions (reactions, comments, and shares) of tweets published by supermarket company pages during the selected time period.

## YouTube

### Industry averages for YouTube

**17.3 THOUSAND**

**YOUTUBE SUBSCRIBERS**

The average number of people subscribing to a supermarket brand on YouTube.

**114 POSTS**

**YOUTUBE POSTS**

The total average number of posts on a supermarket brand's YouTube channel during the selected time period.

**1.11 THOUSAND**

**YOUTUBE ENGAGEMENT TOTAL**

The average total number of likes, dislikes, and comments of videos published on a supermarket company's YouTube channel during the selected time period.

# TOP 5 INDUSTRIES BREAK DOWN

Industry overview and breakdown amongst social media. The social media analysed are Facebook, Twitter, Instagram and YouTube

The figures below are the industry averages and the period we are examining is January 2020 - March 2021

## TELECOMMUNICATIONS

**1.98 MILLION**

**CROSS CHANNEL AUDIENCE**

The average total number of followers across all tracked social channels.

**3.01 THOUSAND**

**CROSS CHANNEL POST**

The average total number of posts across all tracked social channels.

**521 THOUSAND**

**CROSS-CHANNEL ENGAGEMENT**

The total average number of engagement actions across all tracked social channels.

## facebook

**Industry averages for facebook**

**1.46 MILLION**

**FACEBOOK PAGE FANS**

The total average number of Page Fans for the telecoms industry on Facebook.

**1.15 THOUSAND**

**FACEBOOK POSTS**

The total average number of posts published during the selected time period.

**433 THOUSAND**

**FACEBOOK ENGAGEMENT TOTAL**

The total average number of interactions (reactions, comments, and shares) of posts published on by telecommunication company pages during the selected time period.

## Industry averages for Instagram

**54.9** THOUSAND

### INSTAGRAM FOLLOWERS
The average number of people following companies within the telecoms industry on Instagram.

**326** POSTS

### INSTAGRAM POSTS
The total average number of posts published during the selected time period.

**15.9** THOUSAND

### INSTAGRAM ENGAGEMENT TOTAL
The total average number of interactions (reactions, comments, and shares) of posts published by telecommunication company pages during the selected time period.

## Industry averages for Twitter

**440** THOUSAND

### TWITTER FOLLOWERS
The average number of people following companies within the telecoms industry on Twitter.

**1.37K** TWEETS

### TWITTER TWEETS
The average number of normal tweets (non-retweet, non-reply) published by telecommunication companies during the selected time period.

**69.4** THOUSAND

### TWITTER ENGAGEMENT TOTAL
The total average number of interactions (reactions, comments, and shares) of tweets published by telecommunication company pages during the selected time period.

## Industry averages for YouTube

**18.4** THOUSAND

### YOUTUBE SUBSCRIBERS
The average number of people subscribing to a telecoms brand on YouTube.

**164** POSTS

### YOUTUBE POSTS
The total average number of posts on a telecoms brand's YouTube channel during the selected time period.

**2.67** THOUSAND

### YOUTUBE ENGAGEMENT TOTAL
The average total number of likes, dislikes, and comments of videos published on a telecoms company's YouTube channel during the selected time period.

# SOCIAL MEDIA OVERVIEW

TIK TOK

LINKEDIN

TWITTER

FACEBOOK

INSTAGRAM

YOUTUBE

SNAPCHAT

# SOCIAL MEDIA OVERVIEW 2020 - 2021

## SOUTH AFRICA

Essential headlines for mobile, internet and social media use

Changes in data sources for internet users and social media users meant that values are not comparable with previous reports

**59.67 MILLION** — **TOTAL POPULATION**
67.6% urbanisation

**38.19 MILLION** — **INTERNET USERS**
vs. population 64%

**100.6 MILLION** — **MOBILE CONNECTIONS**
vs. population 168.5%

**25 MILLION** — **ACTIVE SOCIAL MEDIA USERS**
vs. population 41.9%

## ANNUAL DIGITAL GROWTH

The year-on-year change in key indicators of digital adoption

Changes in data sources for internet users and social media users meant that values are not comparable with previous reports

**+1.3%** — **TOTAL POPULATION**
January 2021 vs. January 2020
+741 thousand

**+4.5%** — **INTERNET USERS**
January 2021 vs. January 2020
+1.7 million

**+0.8%** — **MOBILE CONNECTIONS**
January 2021 vs. January 2020
+817 thousand

**+13.6%** — **ACTIVE SOCIAL MEDIA USERS**
January 2021 vs. January 2020
+3 million


# SOCIAL MEDIA OVERVIEW 2020 - 2021

## SOUTH AFRICA

Use of social media networks and messenger services, with detail for mobile social media use

Changes in data sources for internet users and social media users meant that values are not comparable with previous reports

**25 MILLION** — TOTAL NUMBER OF ACTIVE SOCIAL MEDIA USERS

**+13.6%** +3 million — ANNUAL CHANGE IN THE NUMBER OF SOCIAL MEDIA USERS

**41.9%** — SOCIAL MEDIA USERS AS A PERCENTAGE OF THE TOTAL POPULATION

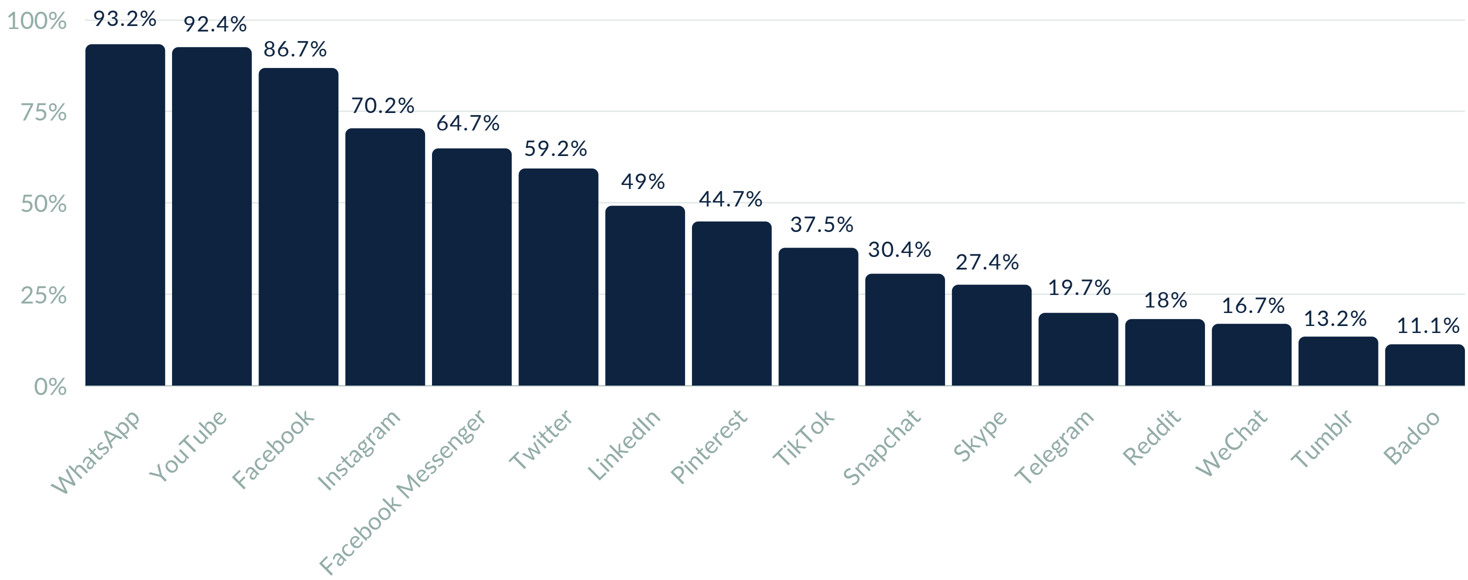
**24.63 MILLION** — NUMBER OF SOCIAL MEDIA USERS ACCESSING VIA MOBILE PHONES

**98.5%** — PERCENTAGE OF SOCIAL MEDIA USERS ACCESSING VIA MOBILE PHONES

# SOCIAL MEDIA OVERVIEW 2020 - 2021

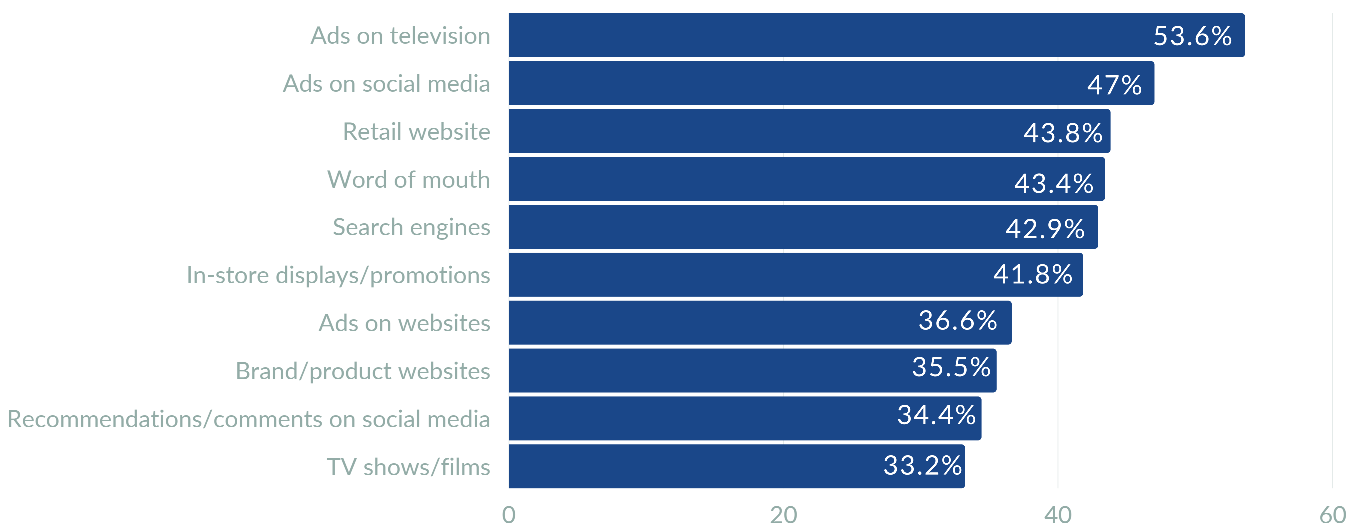
## MOST USED SOCIAL MEDIA PLATFORMS

Percentage of internet users aged 16 to 64 that has used each platform in the past month



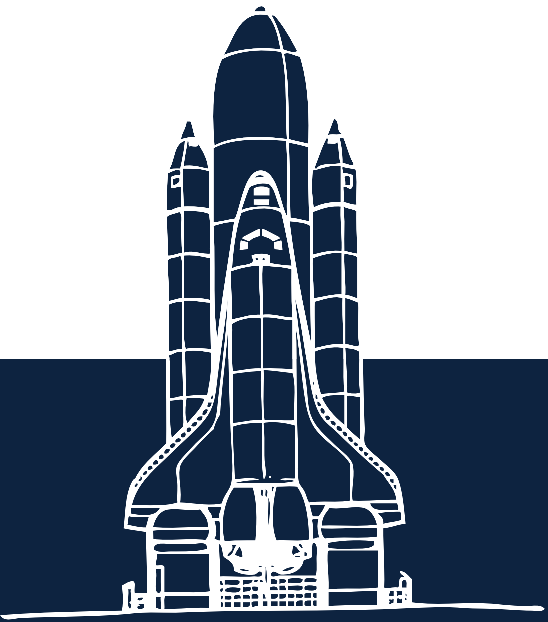

## SOURCES OF NEW BRAND DISCOVERY

Percentage of internet users aged 16 to 64 that discovers new brands or products through each channel



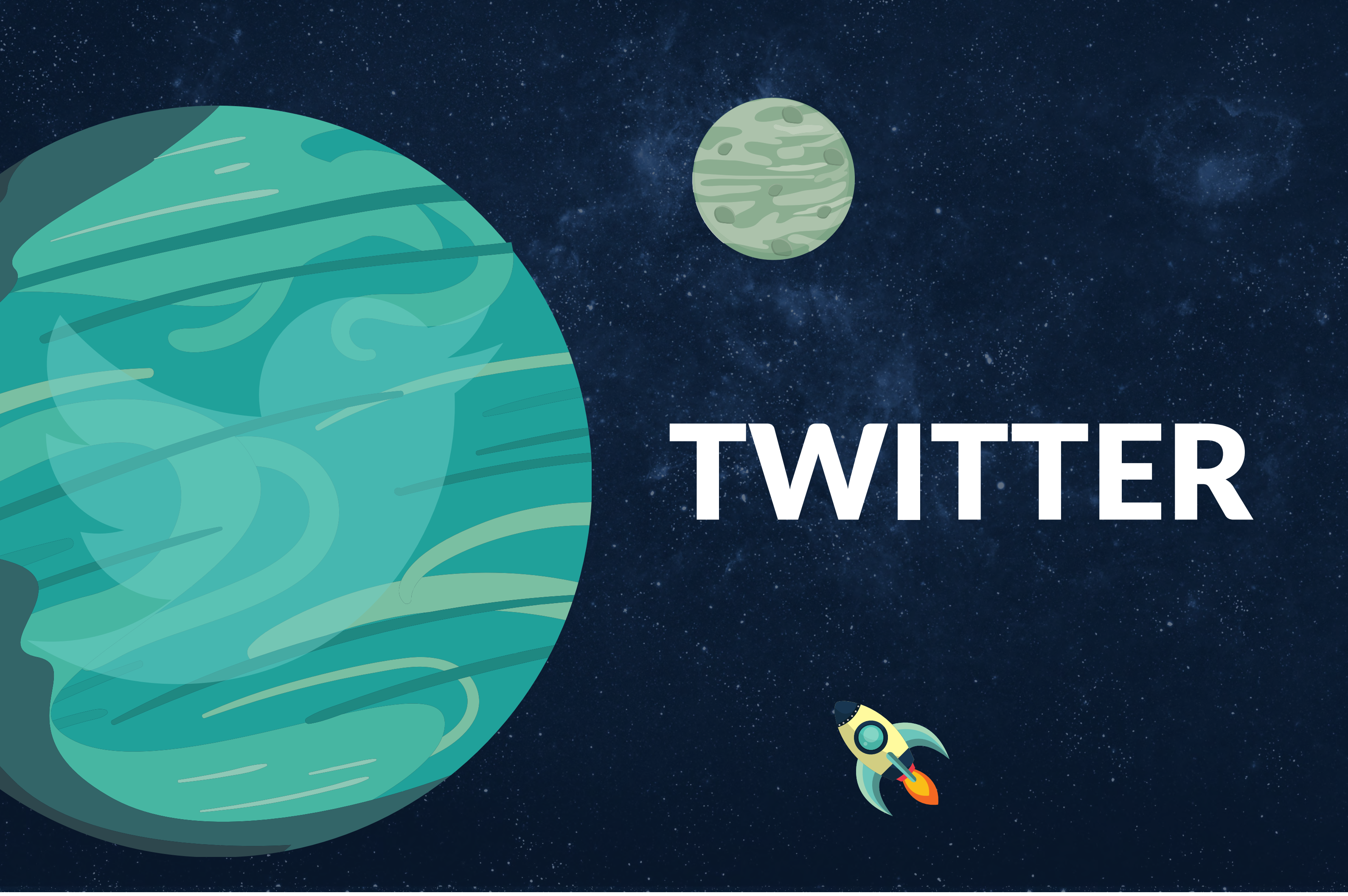
# METHODOLOGY

Our partner, TGI/askafrika, annually interviews 24,000 respondents, aged 15+ living in urban areas with 8000 or more inhabitants, using a stratified random probability sample. The data is weighted to the STATS SA population estimates, which allows for an accurate representation of 27 million South Africans. To ensure a nationally representative sample, the survey is based on enumerated area (EA) sampling. The data is collected in two waves of 12,000 interviews each and is collected over a 10-month period, through continuous fieldwork, and data released every six months, to ensure you stay abreast of changes and trends. The following sections are breakdowns of the active social media population and not the population as a whole.



# DATA COLLECTION

During 2020, when South Africa, and the world, was hit with the COVID pandemic and restrictions, Ask Afrika was one of the only research houses that continued to collect data and consumer sentiment, providing you now with a pre- and post-lockdown variable. Field work started on 25 February 2020 and halted due to Level 5 restrictions from 25 March 2020 – 11 May 2020. Luckily, field work resumed a mere 10-days later and ended on 28 July 2020 for 2020A. For the 2020B data collection (which when combined with 2020A, results in the full year for 2020 – called 2020C), field work commenced on 12 August 2020 and was completed on 12 November 2020. The audience overview part of the next sections is data based on Hootsuite Reseach.



# TWITTER

Twitter saw a fascinating demographic shift during the pandemic. While the makeup pf the Twitter user base has been broadly representative of the makeup of socio-economic levels, penetration within race groups had been heavily skewed, with far deeper penetration among white compared to black South Africans. However, during 2020, as revealed by the data for users over the previous two days, the figures balanced out: both black and white populations ended the year with 42% penetration in Twitter use.

This also reflected a massive swing in overall population distribution of Twitter users, represented in the data on users over the previous month. This shows that 67% of the Twitter user base is black, and 22% white, with the platform for the first time coming close to representing the demographic makeup of the country.

However, these figures must be seen in the context of the overall growth of Twitter in South Africa being relatively stagnant. We estimate the size of the user base at around 9,3-million, up around 4% from the 9-million figure the previous year. That this low growth occurs at a time of a major demographic shift is a clue to large scale departure from theplatform by white users, and substantial growth in the number of black users.

The latter trend is partly explained by a growing perception that Twitter is a representative space for black users. In South Africa, it has given rise to the phenomenon referred to as Black Twitter, which covers a wide range of topics, from politics to fashion, and not confined to issues of the day. This creates a sense of belonging for black users, which is likely to be further enhanced by the manner in which Twitter is beginning to roll out changes...

*Platform changes:*

The social network has prioritised giving new features to the historically disadvantaged, by enabling its Clubhouse-style audio room feature, called Spaces, for users from largely underrepresented backgrounds. It achieves this through the use facial of recognition, applied to profile pictures, to know who is probably not white and who is female, and then pushing those users to the front of the line. This is likely to be a major attraction for previously disadvantaged users, not because of being first to use the features, but because of knowing their voices are heard, and that the platform puts social conscience into practise.

## # Top Hashtags

#stop #lockdownhouseparty
#djsbu #covid19 #bbnaija
#coronavirus #southafrica
#sabcnews #endsars #covid19sa

## Most Mentioned Tweeters

@julius_s_malema @hermainem
@kulanicool @news24 @kaizerchiefs
@cyrilramaphosa @casspernyovest
@danielmarven @advobarryroux

## Top Emojis

😂 🤣 😭 ❤️ 🔥 😍 💔 🖤 🙏 🥺

## Top Tweeters

**@SuperSportTV**
3M followers
697 084 mentions

**@BridgitteLesley**
64K followers
223 991 mentions

**@watsupafrica**
54K followers
175 828 mentions

**@Unathi_Kwaza**
47K followers
193 680 mentions

**@Pizzazz_Books**
26K followers
161 186 mentions

**@RulzKay1_**
18K followers
119 637 mentions

**@jdjongumzidenga**
9051 followers
162 021 mentions

**@desicool21**
2633 followers
130 041 mentions

**@gofdfrey_G_**
1366 followers
147 829 mentions

**@TheJohnMario**
522 followers
127 857 mentions

# Social Media Users In South Africa
## Used Twitter Yesterday And Today

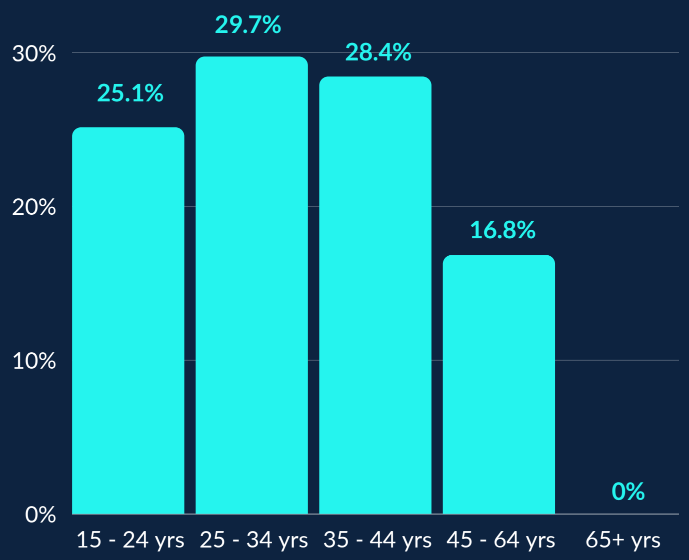
## 2020 - H1

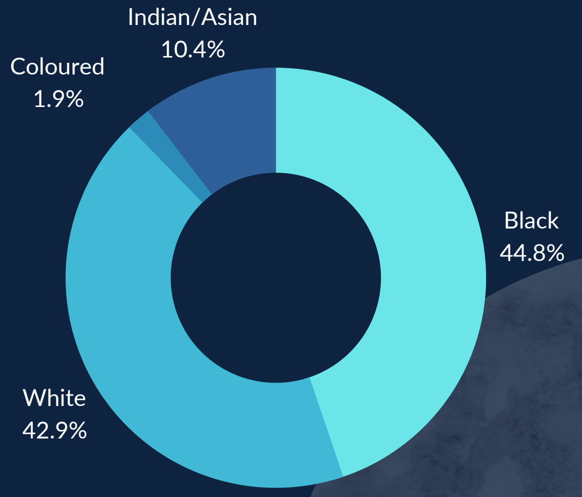
**23.9%** Total Twitter Users

52.8% female

47.2% male

### Age of Users



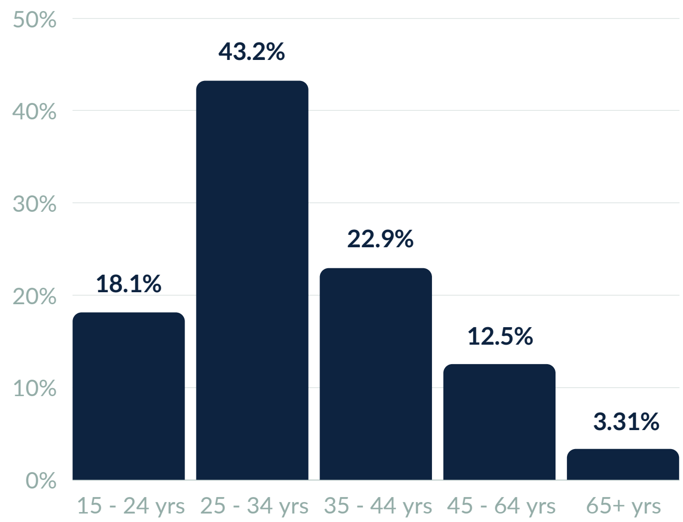

## 2020 - H2

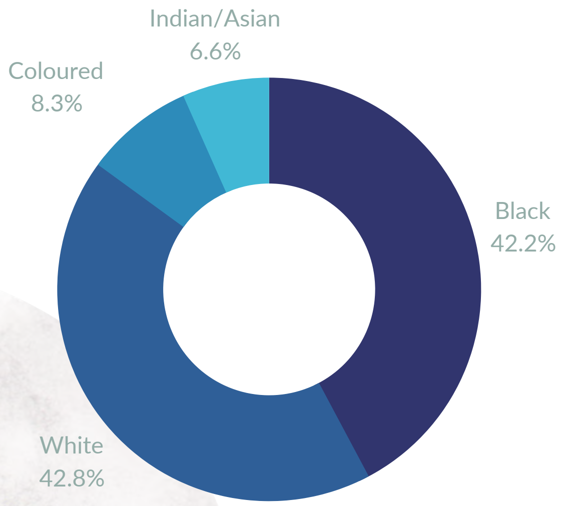
**20.7%** Total Twitter Users

34.3% female

65.7% male

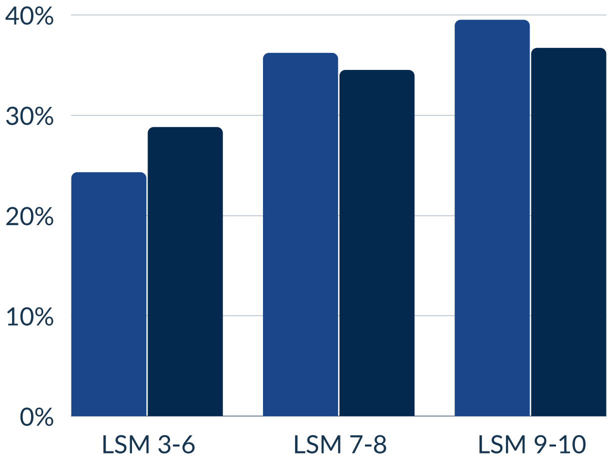
### Age of Users



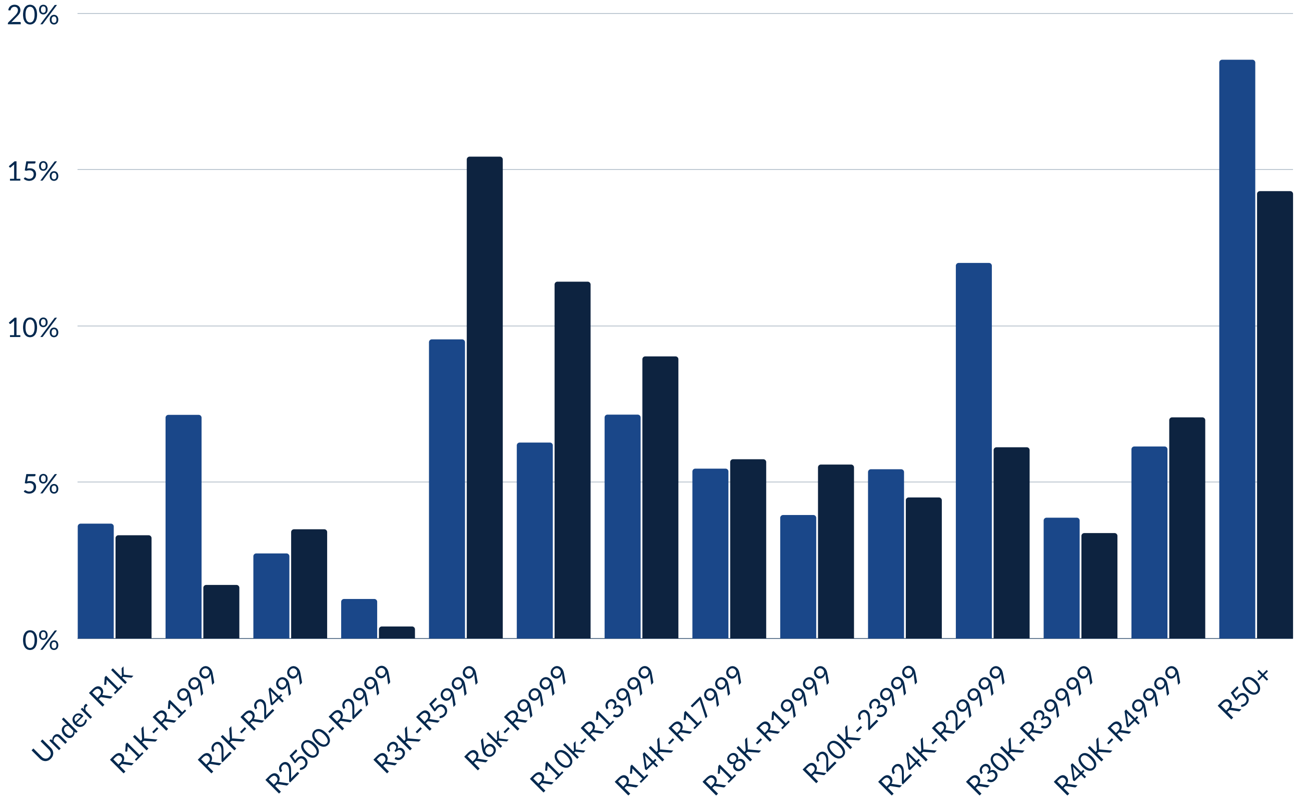
# Social Media Users In South Africa
## Used Twitter Yesterday And Today

2020 - H1 | 2020 - H2




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 H1 | 24.3% | 36.2% | 39.5% |
| 2020 H2 | 28.8% | 34.5% | 36.7% |

### Level of Income

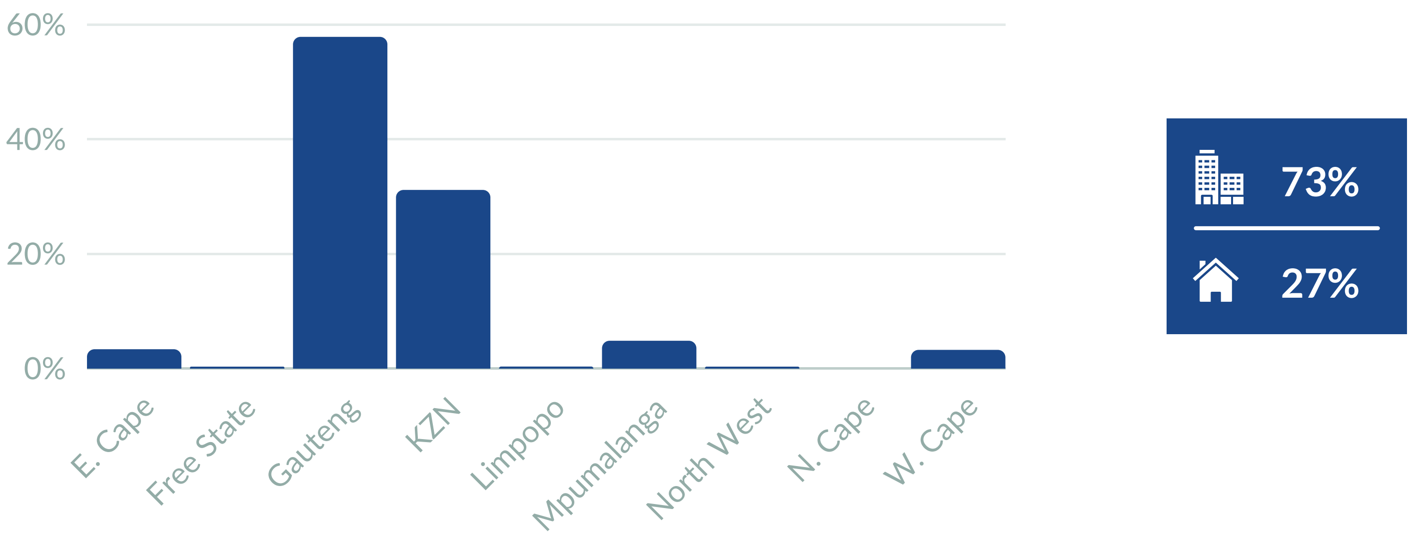


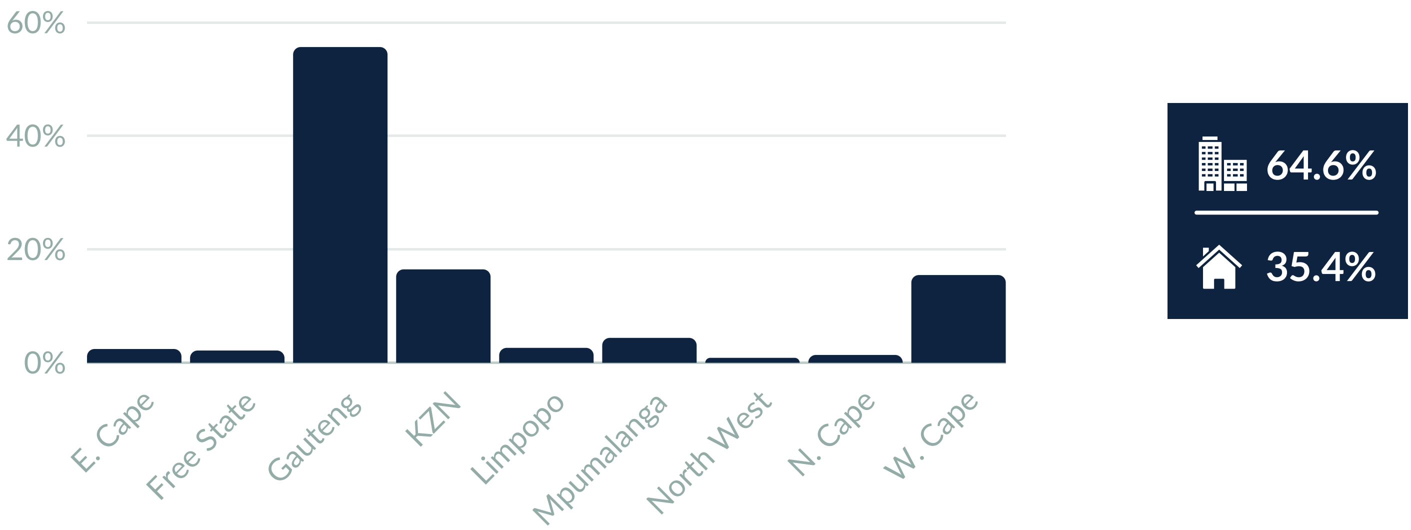

| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 - H1 | 3.66% | 7.14% | 2.71% | 1.25% | 9.56% | 6.26% | 7.15% | 5.42% | 3.94% | 5.4% | 12% | 3.85% | 6.13% | 18.5% |
| 2020 - H2 | 3.29% | 1.71% | 3.48% | 0.38% | 15.4% | 11.4% | 9.01% | 5.72% | 5.55% | 4.5% | 6.11% | 3.36% | 7.06% | 14.3% |

# Social Media Users In South Africa

## Used Twitter Yesterday And Today

2020 - H1 | 2020 - H2 | City/Town | Township

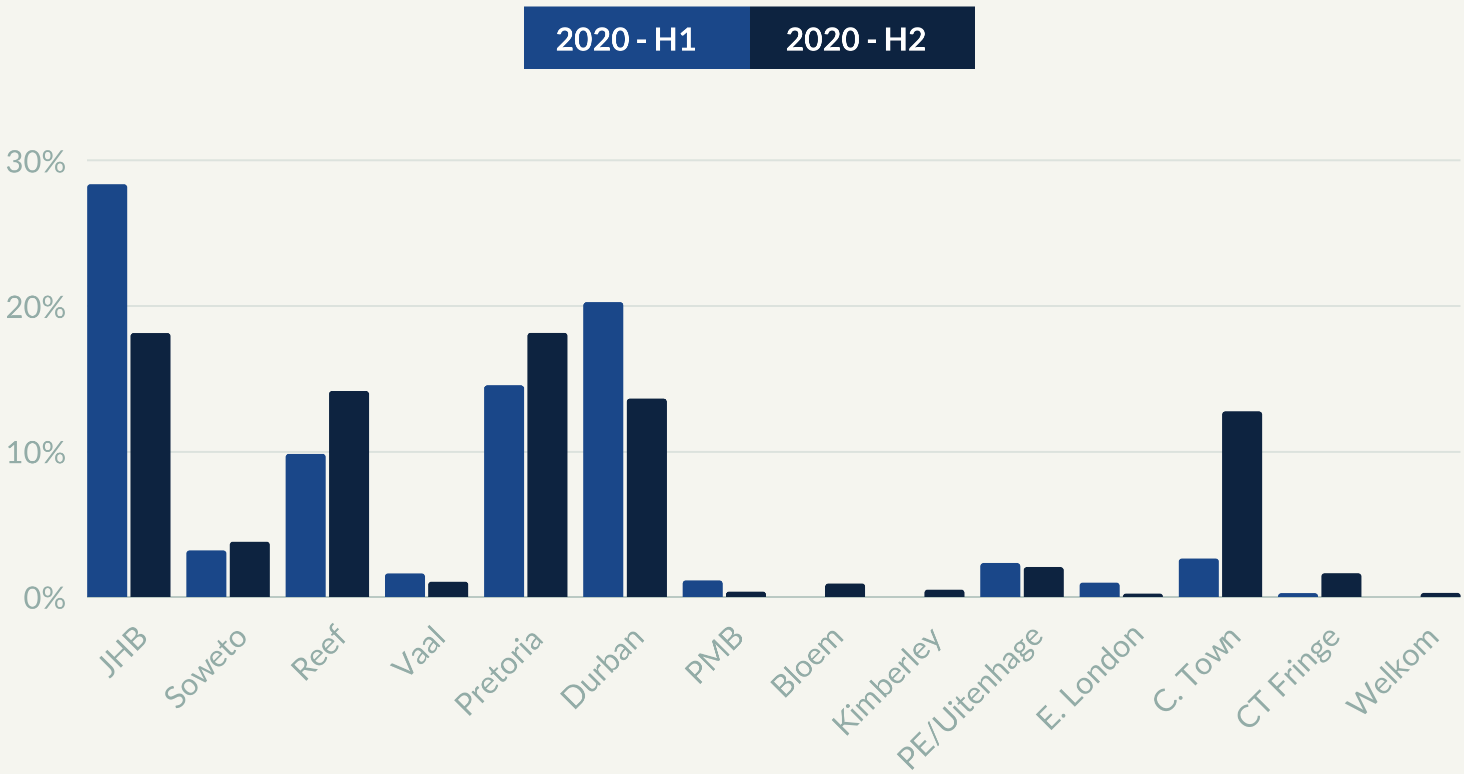



| | E. Cape | Free State | Gauteng | KZN | Limpopo | Mpumalanga | North West | N. Cape | W. Cape |
|---|---|---|---|---|---|---|---|---|---|
| 2020 - H1 | 3.21% | 0.03% | 57.7% | 31% | 0.19% | 4.69% | 0.09% | 0% | 3.1% |
| 2020 - H2 | 2.26% | 1.99% | 55.5% | 16.3% | 2.46% | 4.22% | 0.7% | 1.21% | 15.3% |

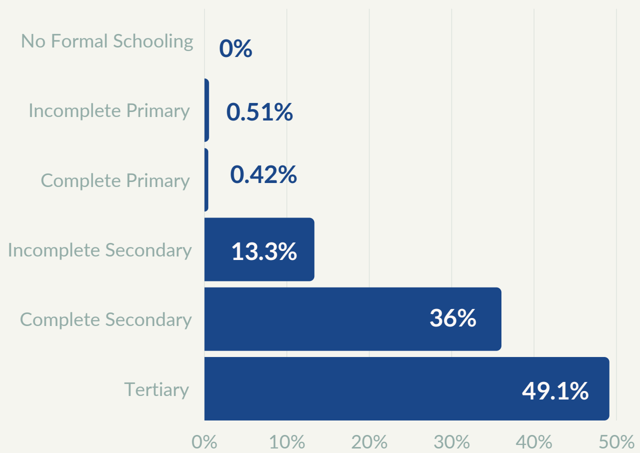
# Social Media Users In South Africa

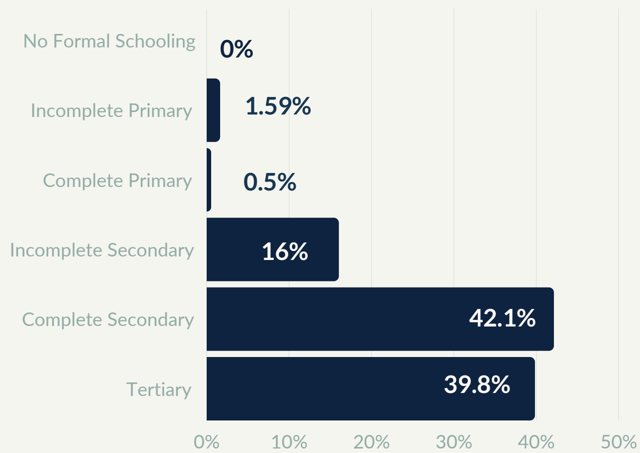
## Used Twitter Yesterday And Today




| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | C. Town | C. Town Fringe | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 28.3% | 3.16% | 9.8% | 1.57% | 14.5% | 20.2% | 1.09% | 0% | 0% | 2.28% | 0.94% | 2.64% | 0.26% | 0% |
| 2020 H2 | 18.1% | 3.75% | 14.1% | 1.02% | 18.1% | 13.6% | 0.36% | 0.82% | 0.4% | 2.01% | 0.23% | 12.7% | 1.58% | 0.17% |

## Level of Education



## TWITTER AUDIENCE OVERVIEW

The potential audience that marketers can reach by using adverts on Twitter

**2.3 MILLION**

The potential audience that Twitter reports can be reached with adverts on Twitter

**5.1%**

Twitter's potential advertising audience compared to the total population aged 13+

**-2.1%**

-50 thousand

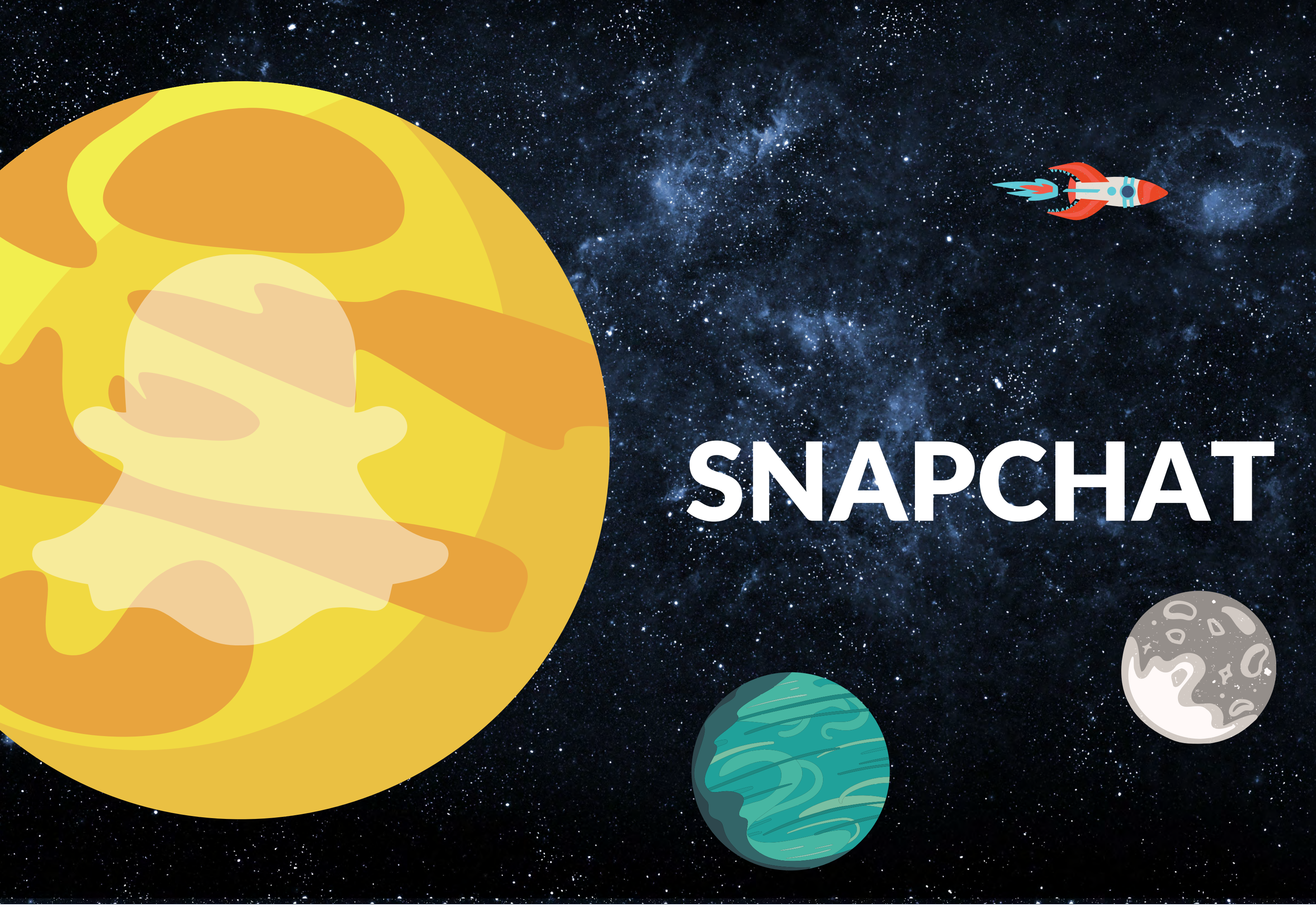
Quarter-on-quarter change in Twitter's advertising reach

**43.1%**

Percentage of its ad audience that Twitter reports is female

**56.9%**

Percentage of its ad audience that Twitter reports is male



# SNAPCHAT

The multimedia-focused social network Snapchat is being used by just under 7-million South Africans, but the high number is just one element of its significance. Users of the app are generally hyper-focused on personal matters, with the Discover page featuring ad-supported popular content like beauty tips and epic fail videos.

At nearly equal split, 44% of Snapchat users are black and 43% white. Compared to pre-lockdown levels, the proportion of coloured Snapchat users more than halved, from 17.6% to 7.4%.

The 15-24 year old age group saw a sharp increase in Snapchat usage over the pandemic, climbing to 25% from 11%. The 65+ age group also picked up its usage, rising sharply from 0% to 13%. All other age groups experienced a drop in usage of the app.

There is also an increasing usage shift in the rural areas, from 28% to 32%. This may be attributed to more mobile service providers including the app in their social media bundle offerings.

With the largest proportion of users not having completed secondary school education among all the social networks, at 25%, and combining this with the large 15-24 age group, Snapchat is most likely used by those in high school or having just completed school.

*Platform changes*

Snapchat has also recently taken a stab at short-form video, copying TikTok with an identical interface called Spotlight. Ads are also featured among Spotlight content to support the app. It also offers powerful advertiser tools to ensure an advert is not featured alongside competing products. Those with a large enough marketing budget can also opt to make filters for users to try on, which enables branding on user's multimedia content. Notable examples of companies who make use of this feature are FNB, Coca-Cola, and LG South Africa.

# Social Media Users In South Africa

## Used Snapchat Yesterday And Today

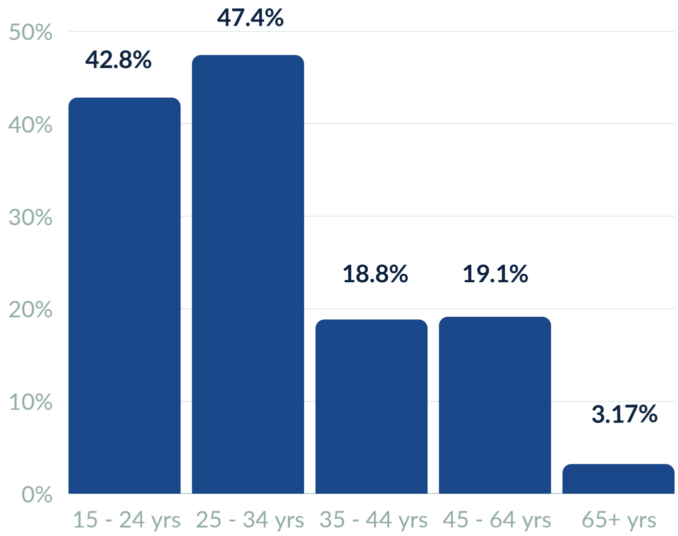
### 2020 - H1

**5.24%** Total Snapchat Users

57.2% female

42.8% male

Age of Users



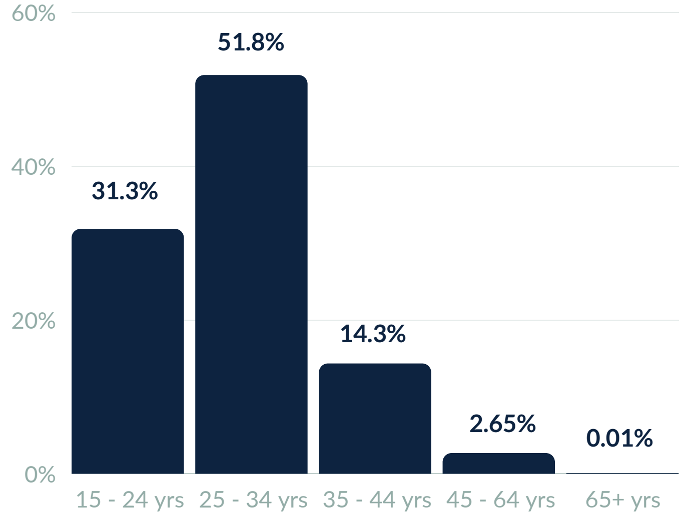

### 2020 - H2

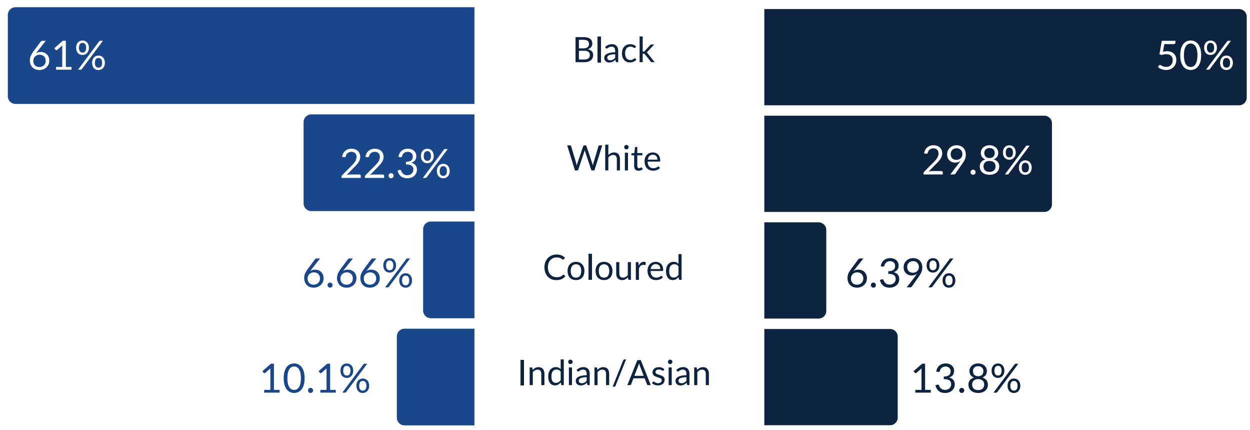
**8.22%** Total Snapchat Users

67.8% female

32.2% male

Age of Users

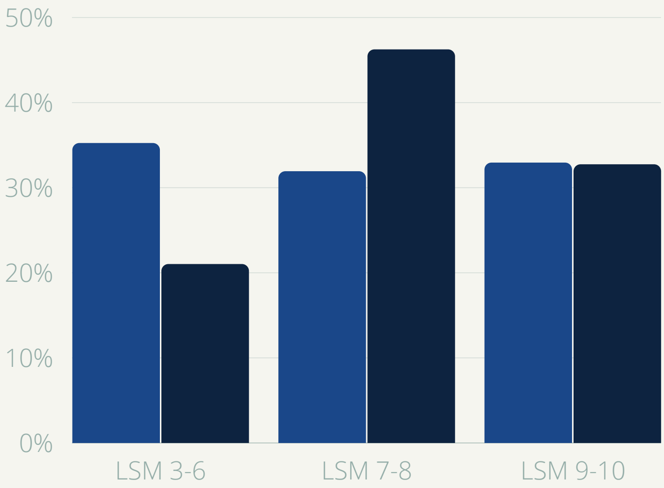


# Social Media Users In South Africa

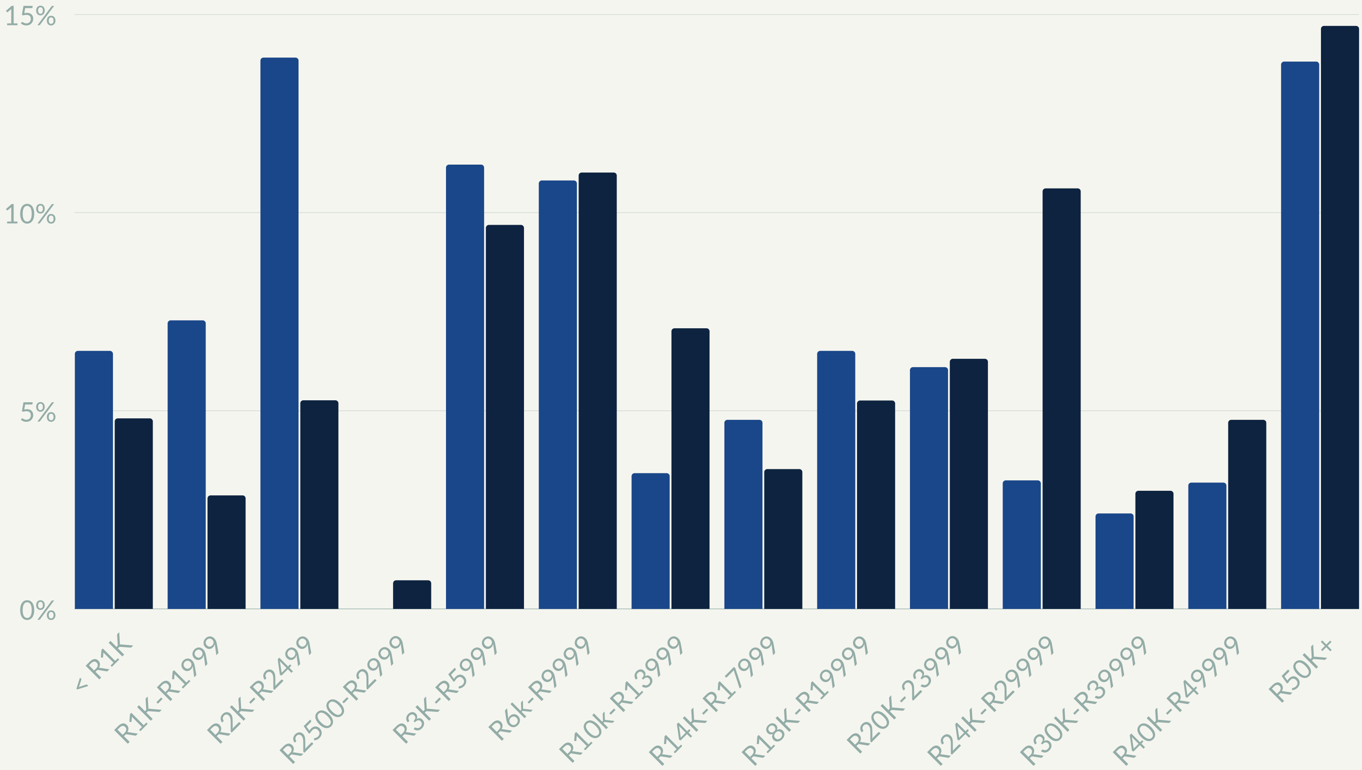
## Used Snapchat Yesterday And Today

2020 - H1 | 2020 - H2




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 H1 | 35.2% | 31.9% | 32.9% |
| 2020 H2 | 21% | 46.2% | 32.7% |

## Level of Income

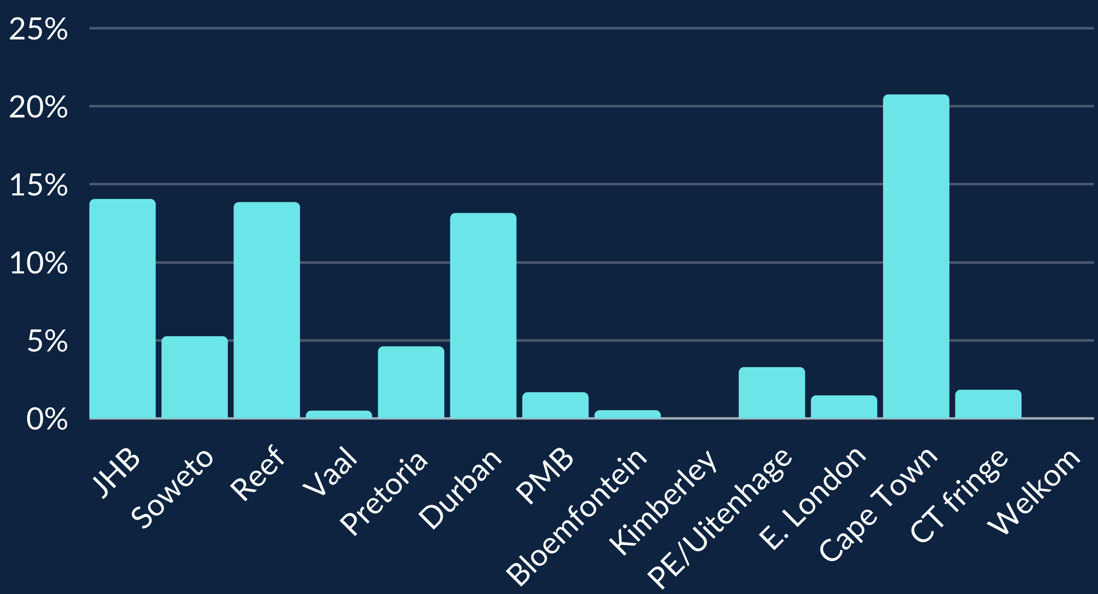



| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 6.53% | 7.27% | 13.9% | 0% | 11.2% | 10.8% | 3.42% | 4.76% | 6.50% | 6.09% | 3.24% | 2.40% | 3.18% | 13.8% |
| 2020 H2 | 4.80% | 2.86% | 5.26% | 0.7% | 9.68% | 11% | 7.07% | 3.52% | 5.25% | 6.30% | 10.6% | 2.97% | 4.76% | 14.7% |

# Social Media Users In South Africa

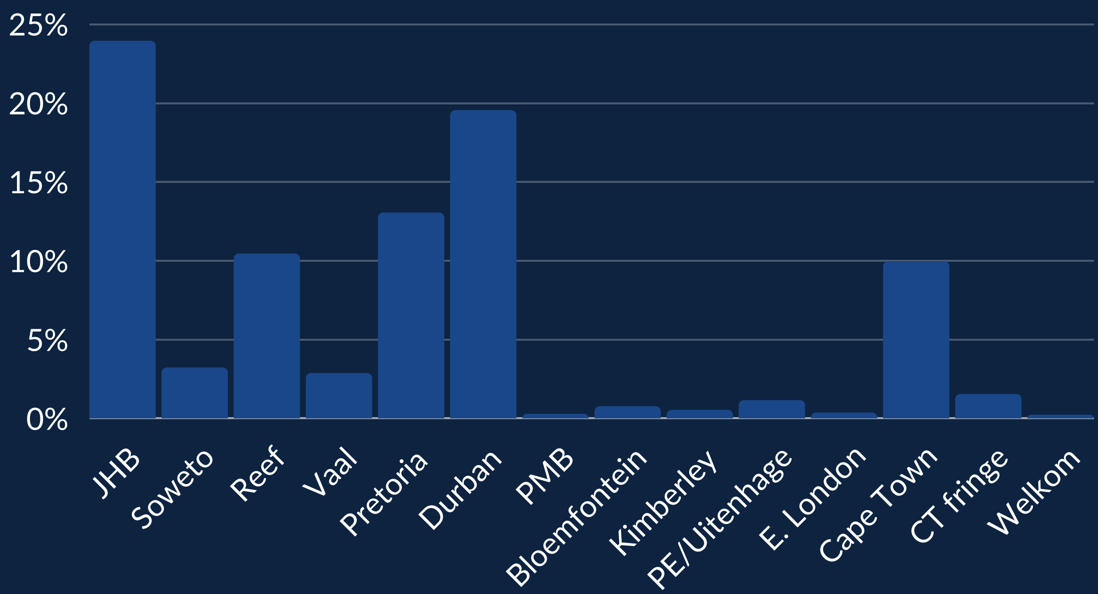
## Used Snapchat Yesterday And Today

2020 - H1 | 2020 - H2 | City/Town | Township




City/Town: 48.1%

Township: 51.6%




City/Town: 58.6%

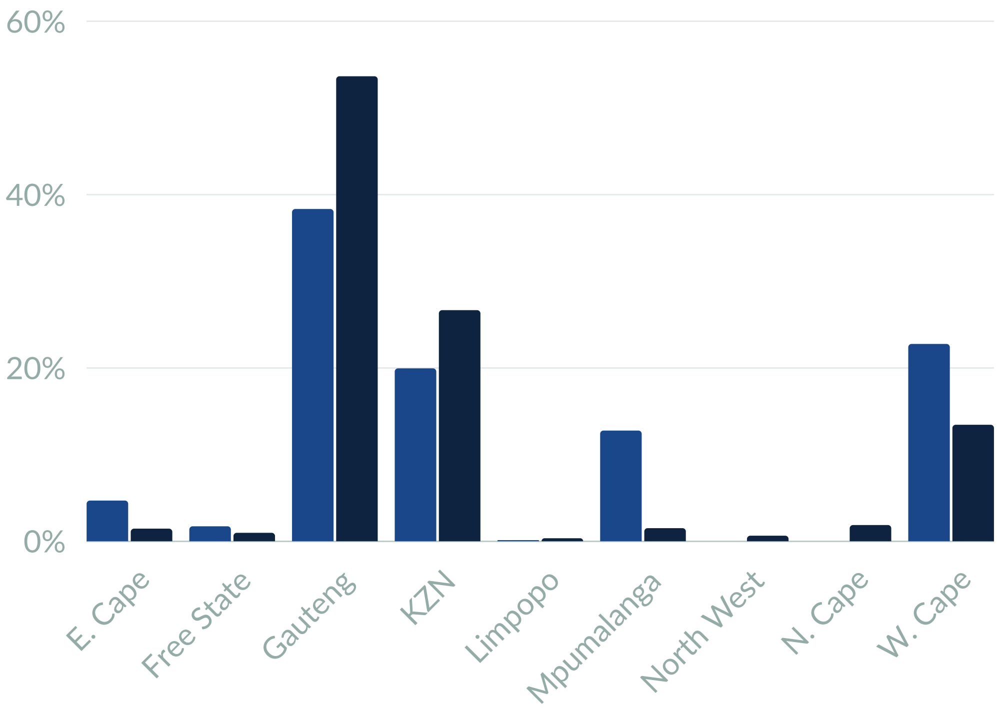
Township: 40.4%

| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | Cape Town | Cape Town (fringe) | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 14% | 5.20% | 13.8% | 0.43% | 4.55% | 13.1% | 1.61% | 0.46% | 0% | 3.22% | 1.41% | 20.7% | 1.77% | 0% |
| 2020 H2 | 23.9% | 3.17% | 10.4% | 2.82% | 13% | 19.5% | 0.23% | 0.71% | 0.48% | 1.10% | 0.31% | 9.91% | 1.49% | 0.17% |

# Social Media Users In South Africa

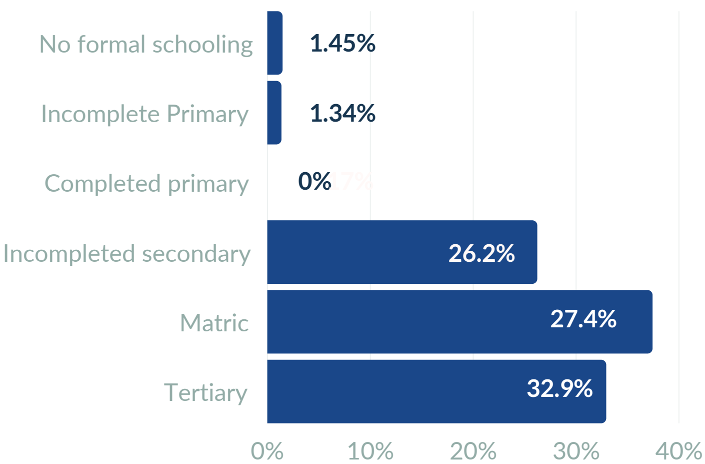
## Used Snapchat Yesterday And Today

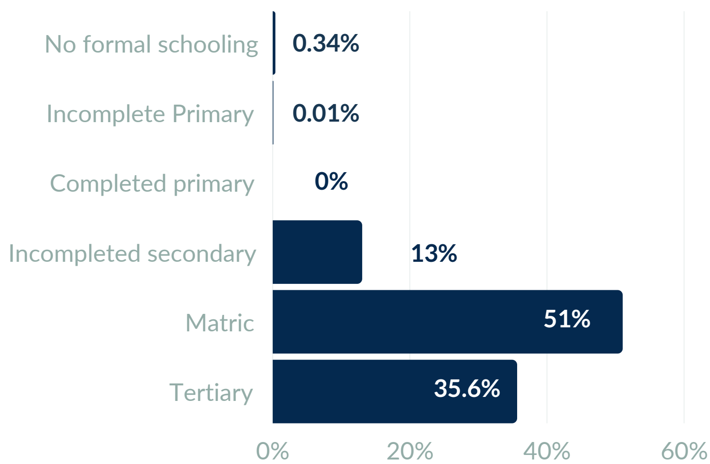
2020 - H1 | 2020 - H2




| | 2020 H1 | 2020 H2 |
|---|---|---|
| Eastern Cape | 4.62% | 1.43% |
| Free State | 1.65% | 0.93% |
| Gauteng | 38.3% | 53.6% |
| KZN | 19.9% | 26.6% |
| Limpopo | 0.10% | 0.27% |
| Mpumalanga | 12.7% | 1.50% |
| North West | 0% | 0.49% |
| Northern Cape | 0% | 1.72% |
| Western Cape | 22.7% | 13.4% |

## Level of Education



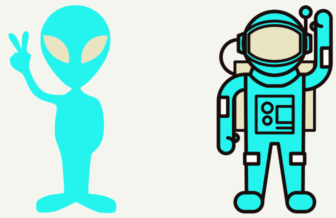



## SNAPCHAT AUDIENCE OVERVIEW

The potential audience that marketers can reach by using adverts on Snapchat

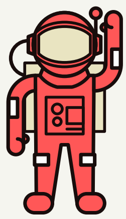
**4.8 MILLION**

The potential audience that Snapchat reports can be reached with adverts on Snapchat



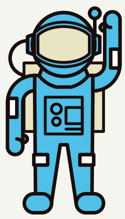
**10.7%**

Snapchat's potential advertising audience compared to the total population aged 13+



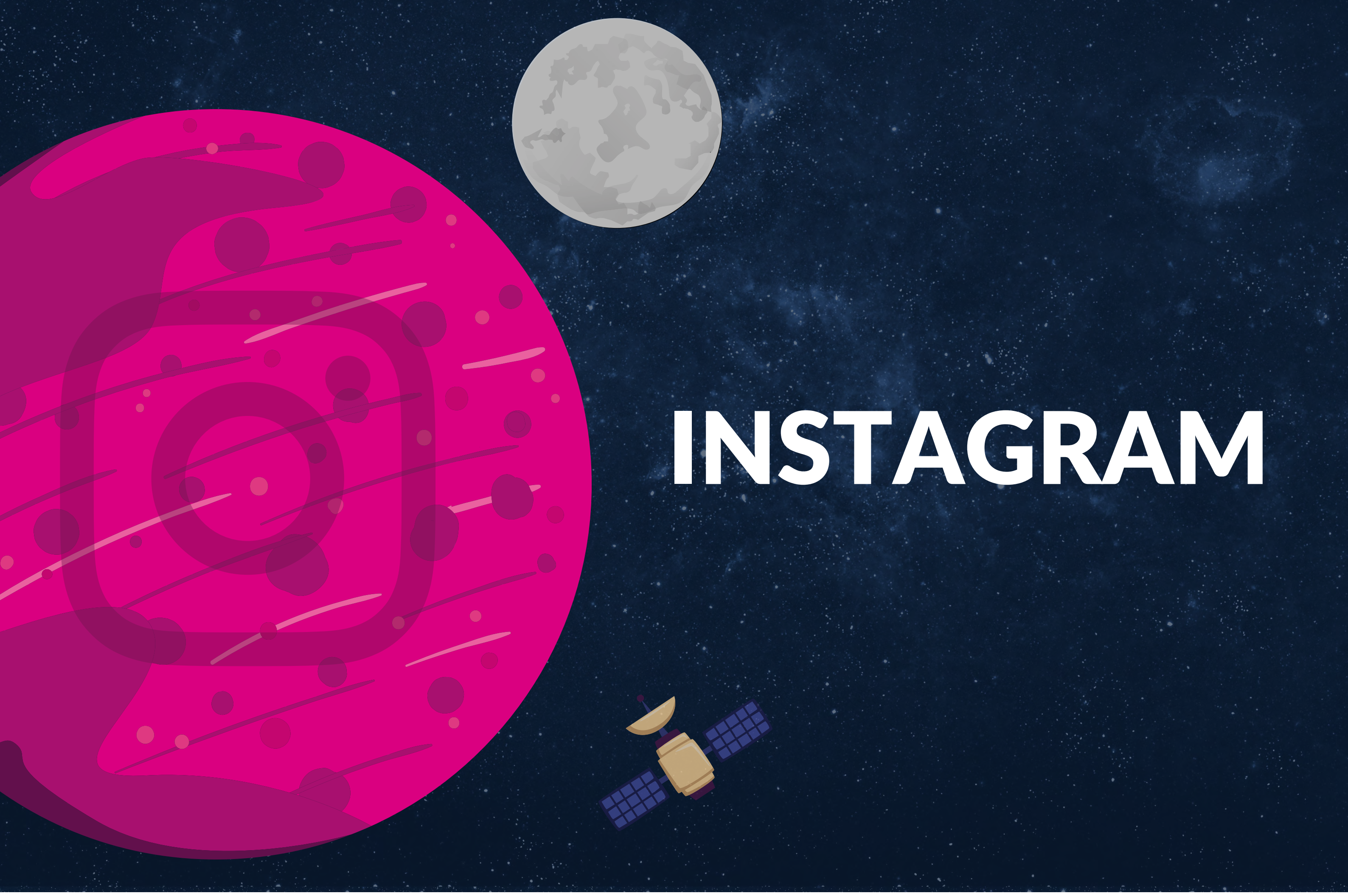
**78.5%**

Percentage of its ad audience that Snapchat reports is female



**18.6%**

Percentage of its ad audience that Snapchat reports is male



# INSTAGRAM

Instagram, an image-oriented social platform owned by Facebook, is expected to see steady growth in South Africa as it adds new features to its platform. In particular, the launch of Reels – a clone of TikTok – is expected to win over numerous younger users who had embraced the relative newcomer. It is gaining over 200,000 additional South African users every quarter, and this could accelerate as a result of Reels. More significantly, its number of highly active users (last 2 days), increased dramatically, from 4,7-million to 7,1-million. This suggests a total user base of well over 10-million, making it a formidable social platform.

With roughly equal levels of usage between white and black South Africans, the platform shows a heavy skew towards heavy multimedia and large data usage. This is especially a factor of it being a mobile-only app, with a limited web interface that denies use on, for example, work computers. In terms of highly active users, the strongest age group is 15-34.

In terms of lifestyle measures, the statistics reveals the impact of heavy data usage, with those in higher groups being more likely to use the platform frequently. Well over two thirds of its highly active users live in cities and towns, as opposed to townships – a proportion that rose from 69% to 72% from the first half to the second half of the year. This is an indication that those living in townships were less likely to have Internet access at home after lockdown forced them out of workplaces.

*Platform changes*

With the increasing demand for simple access to live video, Instagram Live is becoming a popular platform for both consumers and businesses to engage with their audiences. This feature has recently added support for an additional speaker during a live session, which enables a more natural two-way conversations – and drives increased viewership.

# Social Media Users In South Africa

## Used Instagram Yesterday And Today

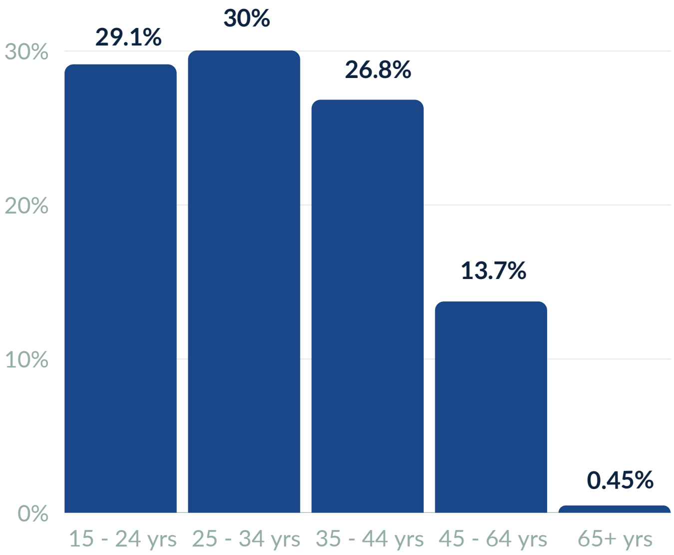
### 2020 - H1

**21.3%** Total Instagram Users

56.7% female

43.3% male

Age of Users



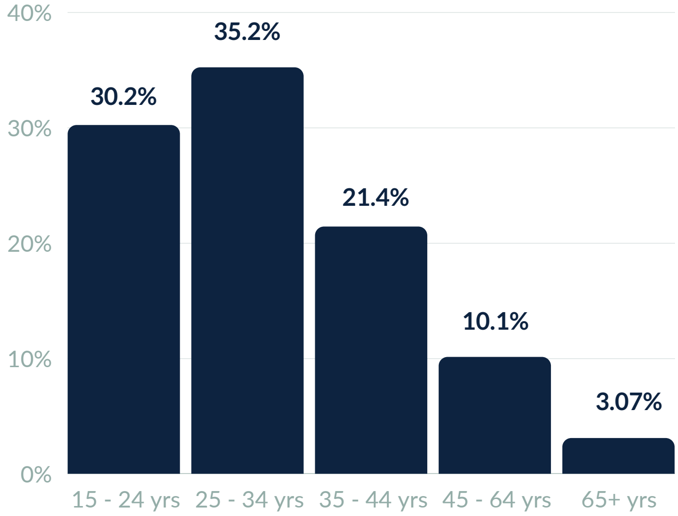

### 2020 - H2

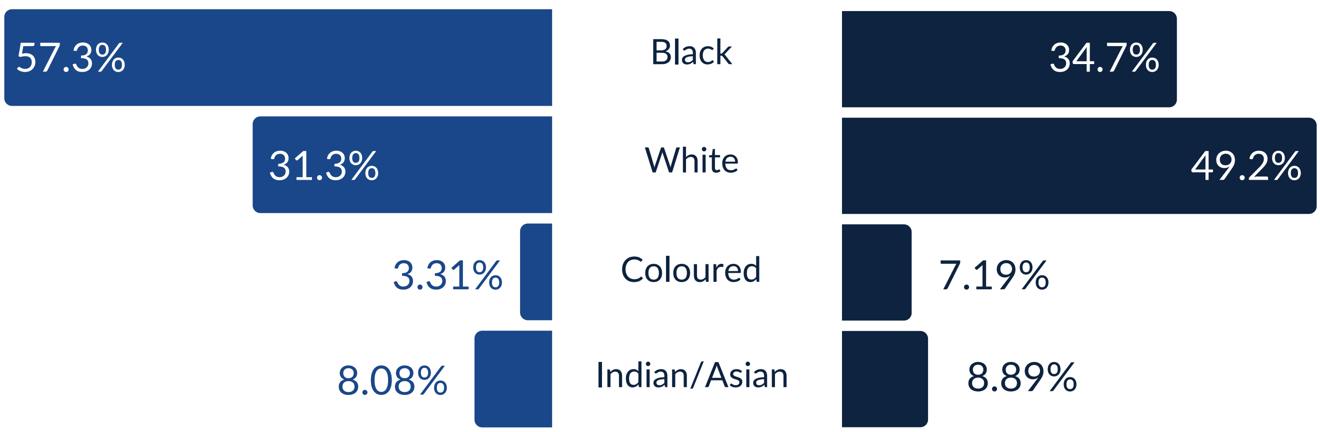
**25.4%** Total Instagram Users

43.1% female

56.9% male

Age of Users

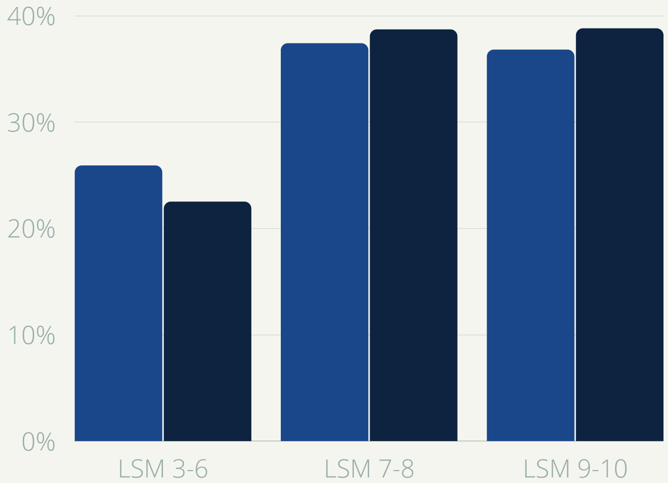


# Social Media Users In South Africa

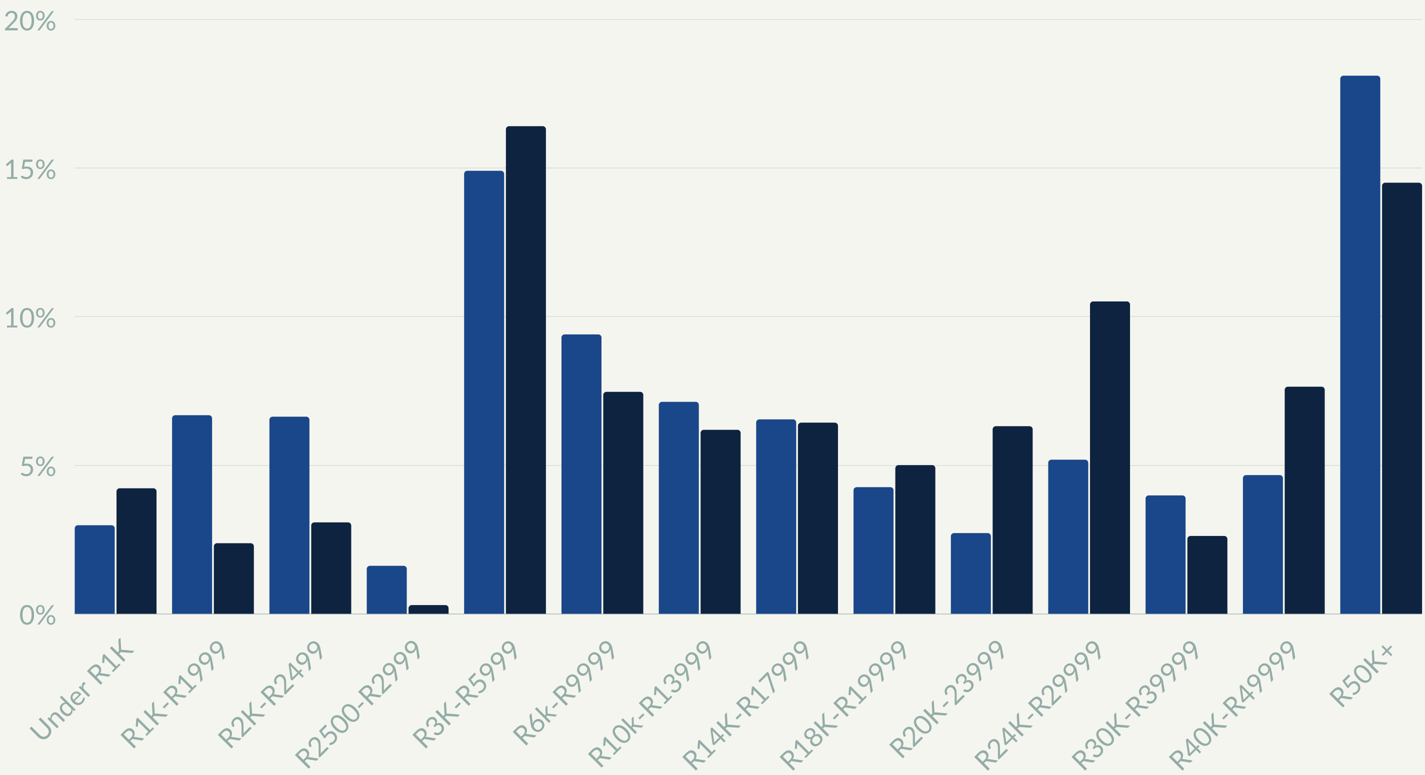
## Used Instagram Yesterday And Today

2020 - H1 | 2020 - H2




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 H1 | 25.9% | 37.4% | 36.8% |
| 2020 H2 | 22.5% | 38.7% | 38.8% |

### Level of Income

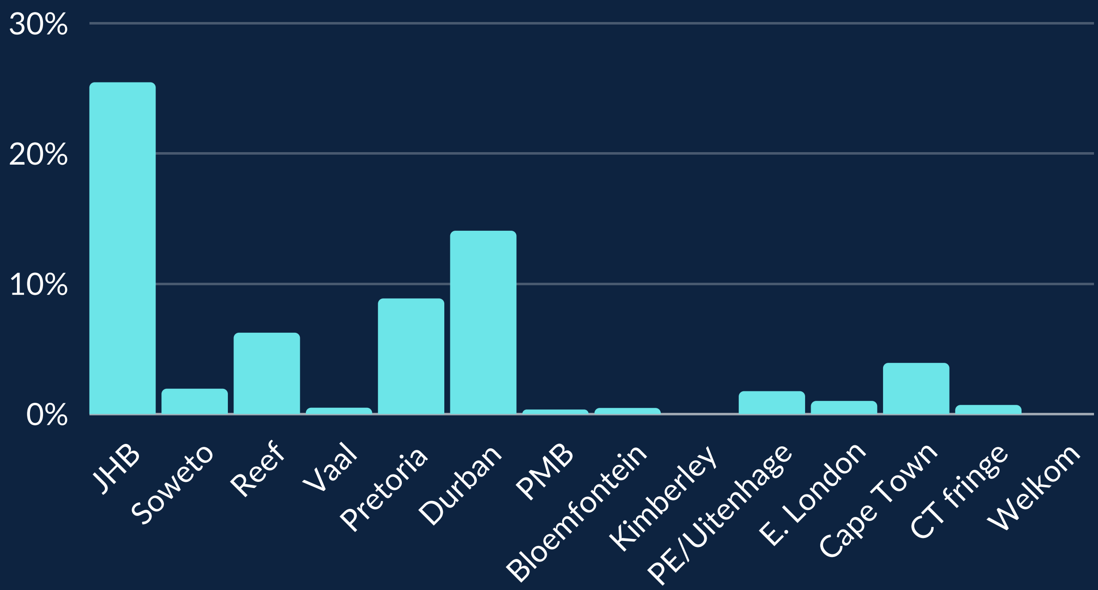



| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 2.97% | 6.67% | 6.62% | 1.6% | 14.9% | 9.39% | 7.12% | 6.53% | 4.25% | 2.71% | 5.18% | 3.97% | 4.66% | 18.1% |
| 2020 H2 | 4.21% | 2.37% | 3.07% | 0.29% | 16.4% | 7.46% | 6.18% | 6.42% | 4.99% | 6.3% | 10.5% | 2.61% | 7.63% | 14.5% |

# Social Media Users In South Africa

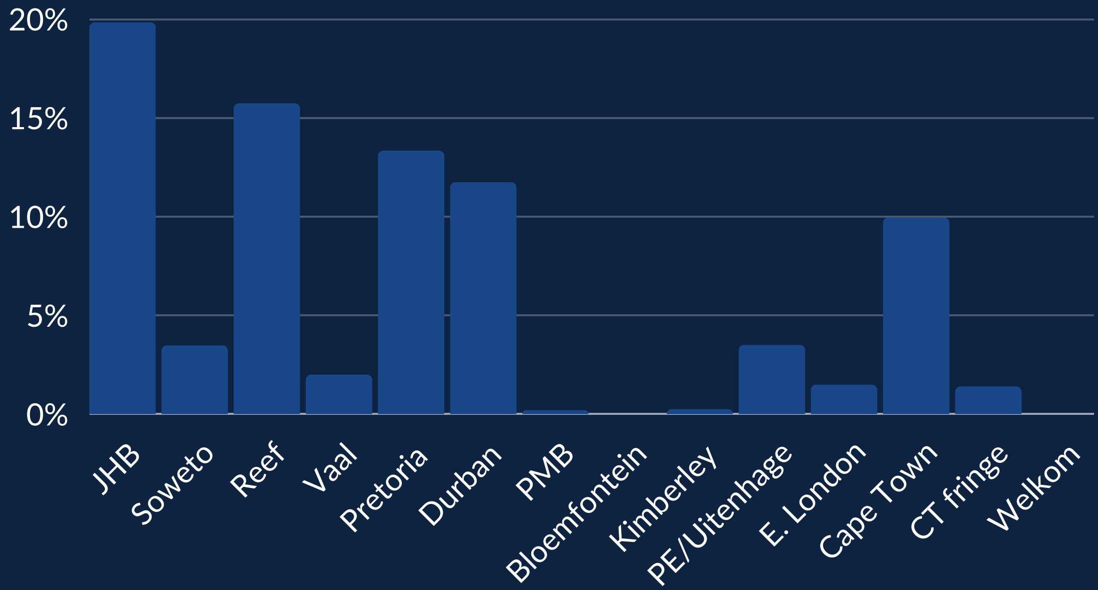
## Used Instagram Yesterday And Today

2020 - H1 | 2020 - H2 | City/Town | Township




City/Town 68.9%

Township 30.5%




City/Town 72.2%

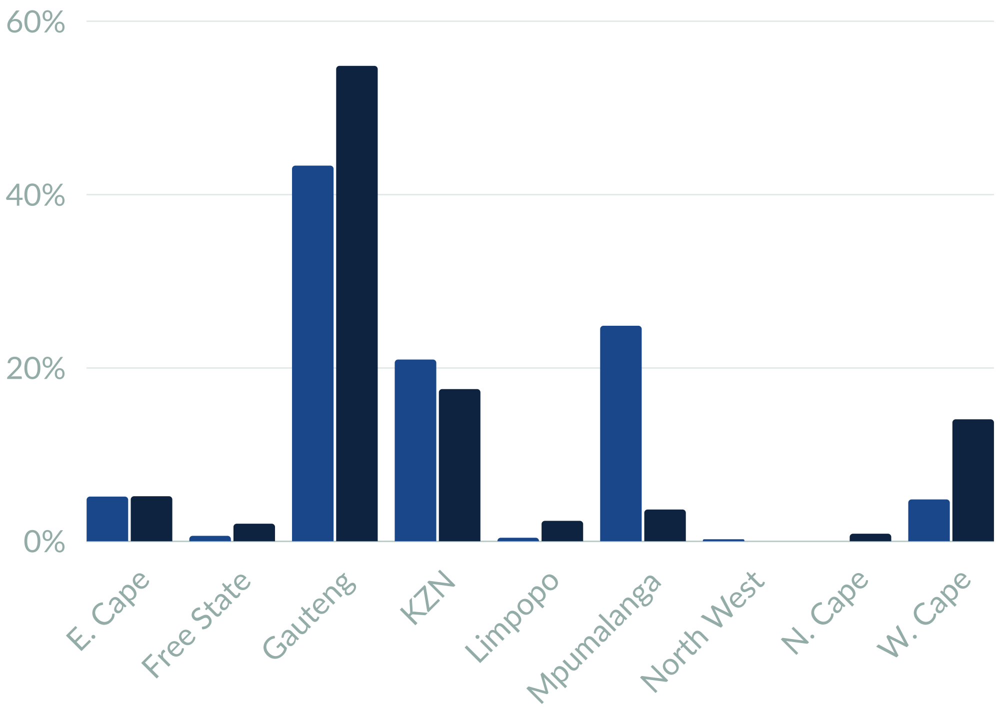
Township 26.6%

| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | Cape Town | Cape Town (fringe) | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 25.4% | 1.87% | 6.17% | 0.41% | 8.8% | 0.27% | 0.27% | 0.39% | 0% | 1.68% | 0.93% | 3.85% | 0.62% | 0% |
| 2020 H2 | 19.8% | 3.43% | 15.7% | 1.95% | 13.3% | 11.7% | 0.15% | 0% | 0.2% | 3.45% | 1.44% | 9.91% | 1.35% | 0% |

# Social Media Users In South Africa

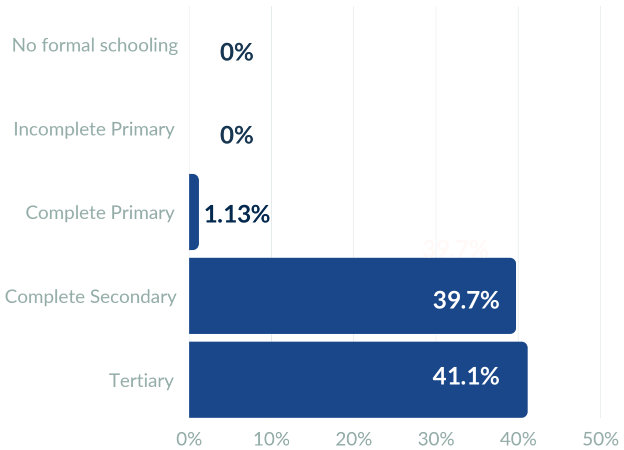
## Used Instagram Yesterday And Today

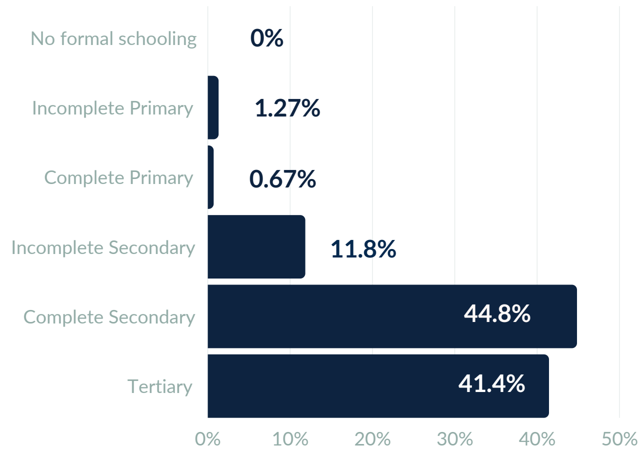
2020 - H1 | 2020 - H2




| | 2020 H1 | 2020 H2 |
|---|---|---|
| Eastern Cape | 5.08% | 5.12% |
| Free State | 0.6% | 1.95% |
| Gauteng | 43.3% | 54.8% |
| KZN | 20.9% | 17.5% |
| Limpopo | 0.39% | 2.28% |
| Mpumalanga | 24.8% | 3.65% |
| North West | 0.08% | 0% |
| Northern Cape | 0% | 0.72% |
| Western Cape | 4.8% | 14% |

## Level of Education



## INSTAGRAM AUDIENCE OVERVIEW

The potential audience that marketers can reach by using adverts on Instagram

**5.4 MILLION**

The potential audience that Facebook reports can be reached with adverts on Instagram

**12.1%**

Instagram's potential advertising audience compared to the total population aged 13+

**+3.8%**

+200 thousand

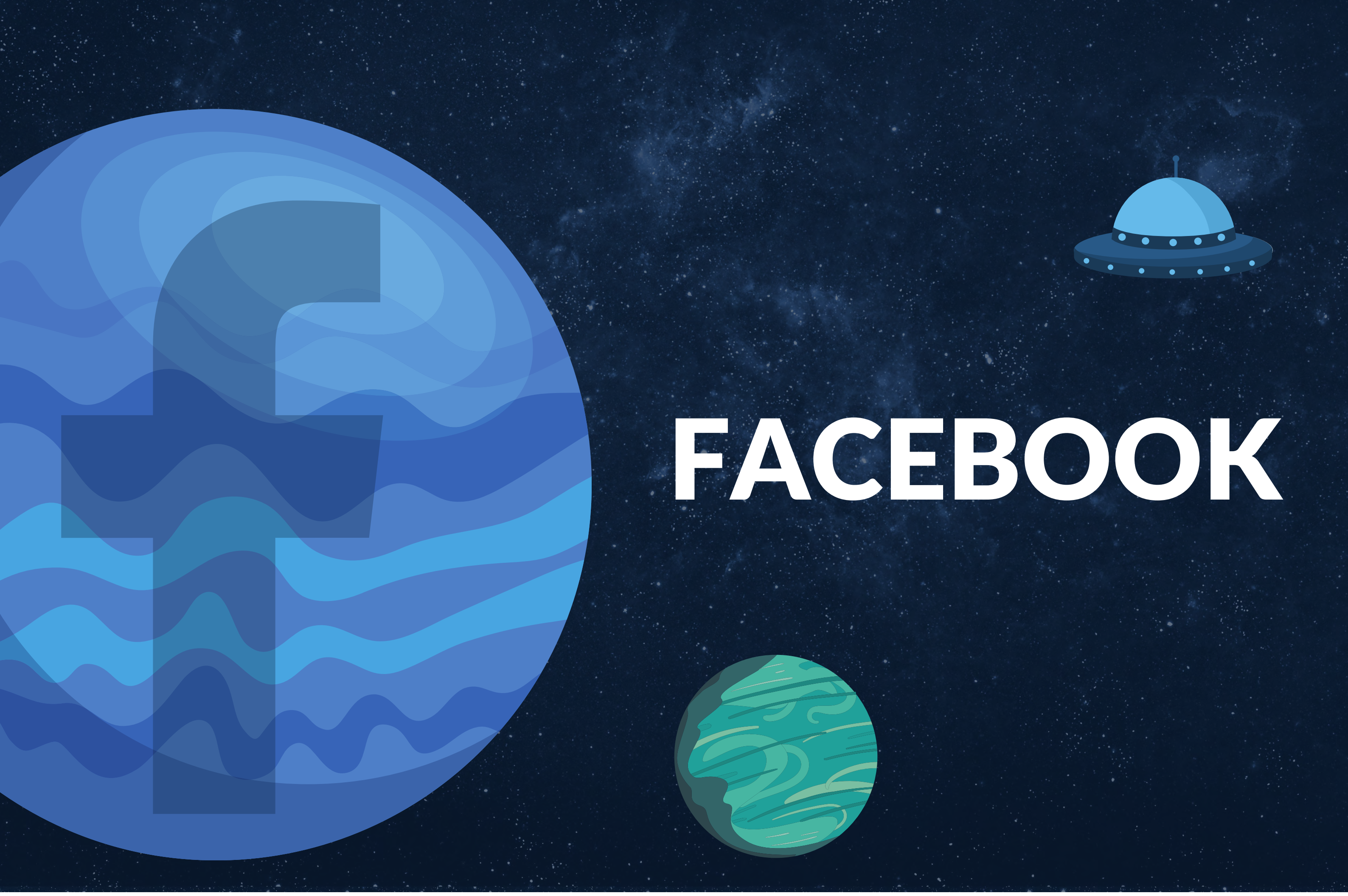
Quarter-on-quarter change in Instagram's advertising reach

**53.7%**

Percentage of its ad audience that Instagram reports is female

**46.3%**

Percentage of its ad audience that Instagram reports is male



# FACEBOOK

Facebook remains South Africa's most popular social network, with 27 million South Africans users, of which 18-million users are exclusively mobile. This means almost half of all South Africans use Facebook, and one in three use it only on mobile devices. Add those who are using it across multiple devices, and it becomes clear that mobile usage dominates social media usage.

The substantial growth in the user base, with a million more South Africans coming onto the platform every quarter, is driven by a combination of the pandemic inducing people to turn to social media, and of the growing feature set being rolled out by Facebook.

The age groups that used the platformfollow a bell curve, peaking in the 35-44 year group. However, it apparent from comparing the age groups between the first half and second half of the year that the age profile flattened, reflecting the beginning of the same kind of normalisation across age groups that had previously been witnessed in the online retail space. Major metros like Johannesburg, Pretoria, Durban, and Cape Town tend to have the highest level of penetration in Facebook usage, which indicates a continuing digital divide between rural and urban Internet access.

*Platform changes:*

One of the top growth factors for the platform in the past year was the addition of Stories, with the upcoming global release of Live Audio streams likely to make an impact in the coming year. Both were released in direct response to the growing features of Snapchat and Houseparty, and the emergence into prominence of Clubhouse. These multimedia-rich features add a newexperience for users outside the traditional timeline, in turn creating huge potential for advertisers on the platform.

# Social Media Users In South Africa

## Used Facebook Yesterday And Today

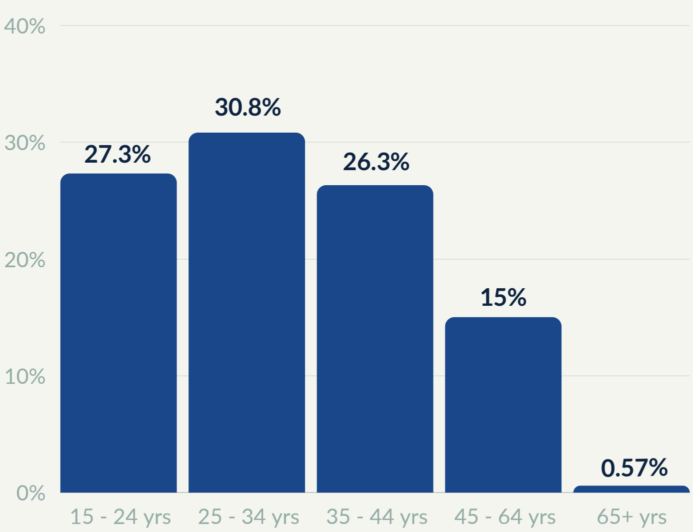
### 2020 - H1

**61.3%** Total Facebook Users

57.3% female

42.7% male

Age of Users



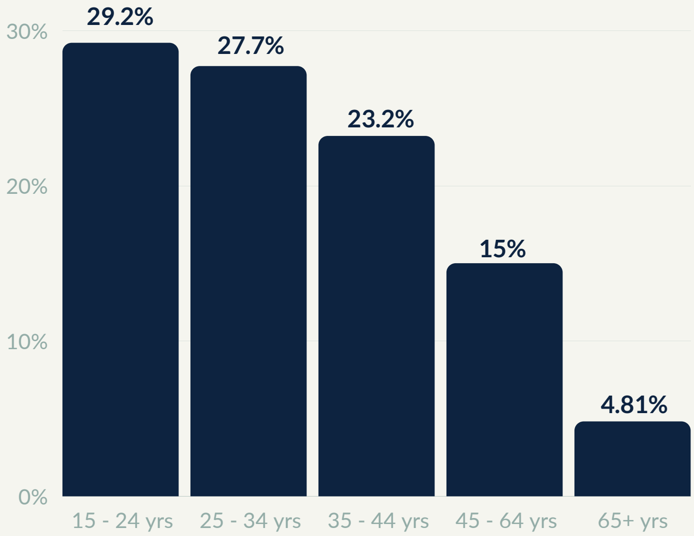

### 2020 - H2

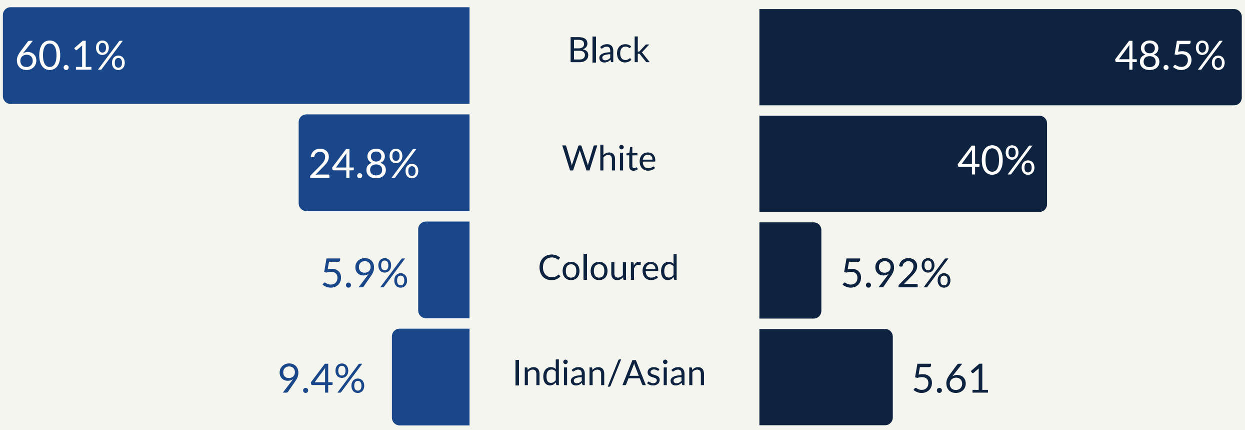
**63.2%** Total Facebook Users

38.6% female

61.4% male

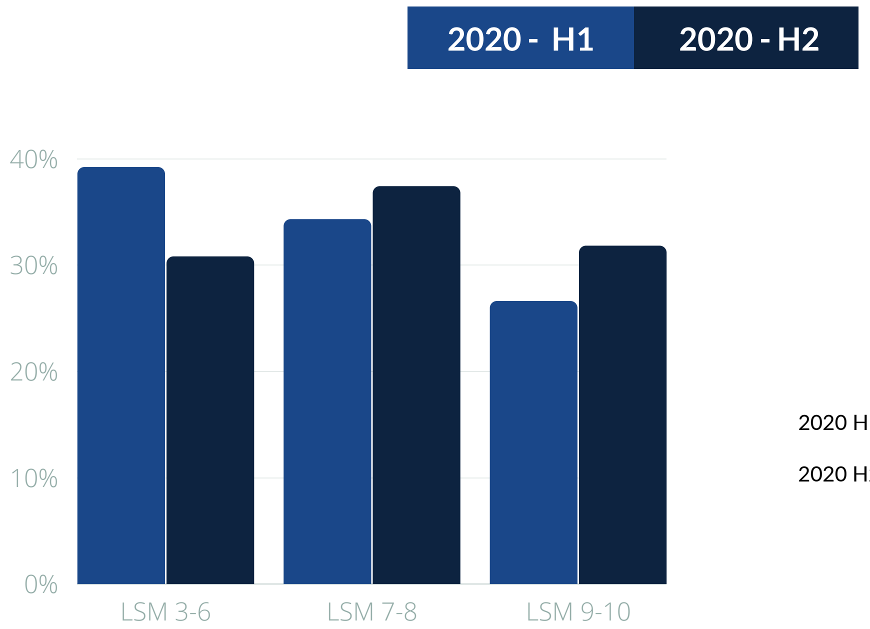
Age of Users



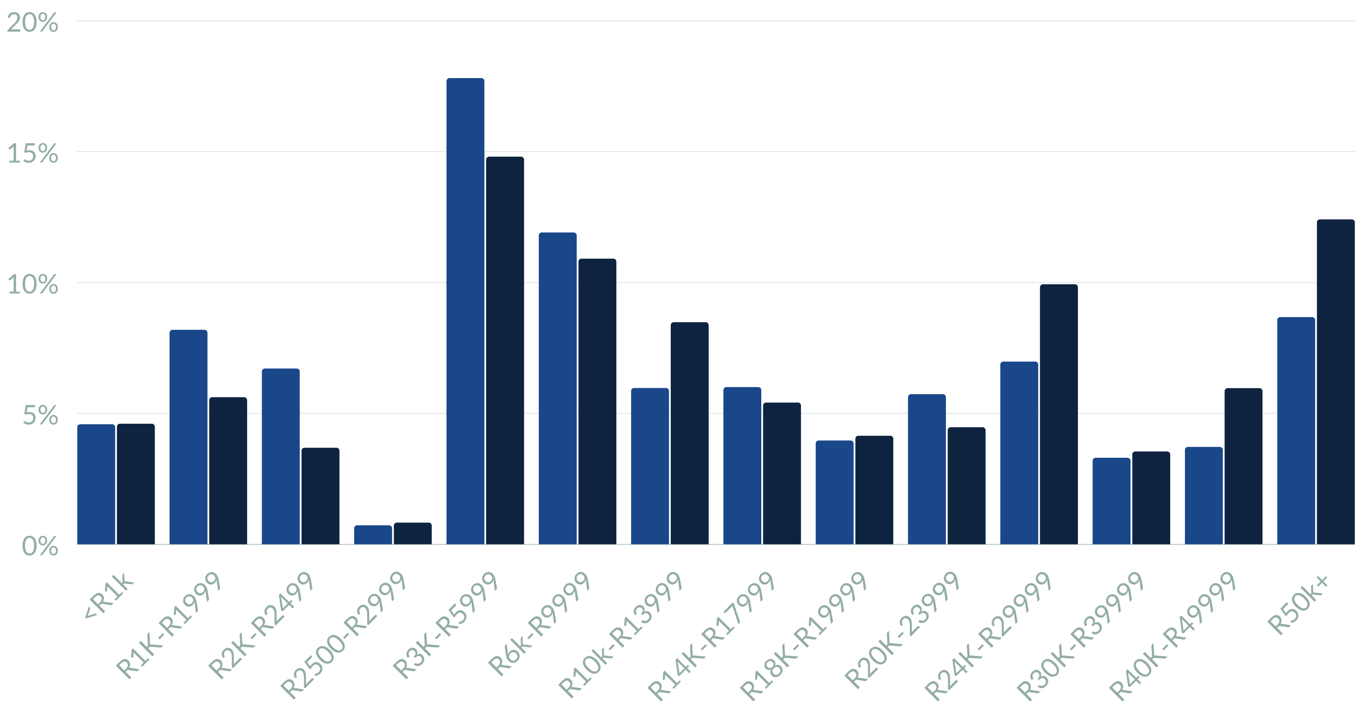
# Social Media in South Africa

## Used Facebook Yesterday And Today




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 H1 | 39.2% | 34.3% | 26.6% |
| 2020 H2 | 30.8% | 37.4% | 31.8% |

## Level of Income

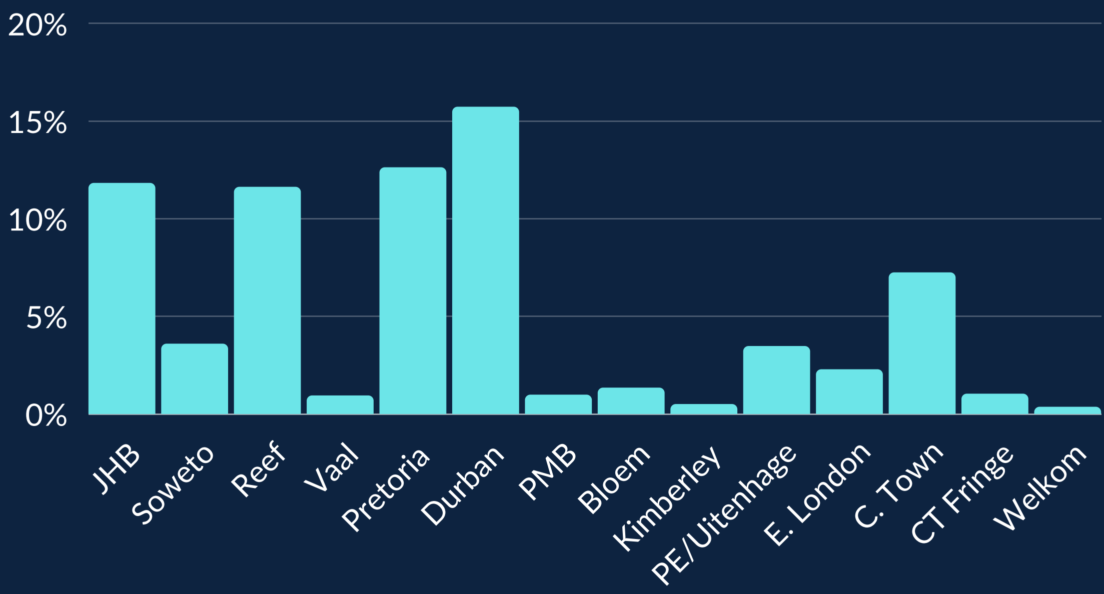



| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 4.57% | 8.18% | 6.70% | 0.71% | 17.8% | 11.9% | 5.96% | 5.99% | 3.95% | 5.72% | 6.97% | 3.29% | 3.71% | 8.67% |
| 2020 H2 | 4.59% | 5.61% | 3.68% | 0.81% | 14.8% | 10.9% | 8.47% | 5.40% | 4.13% | 4.46% | 9.92% | 3.53% | 5.95% | 12.4% |

# Social Media Users In South Africa

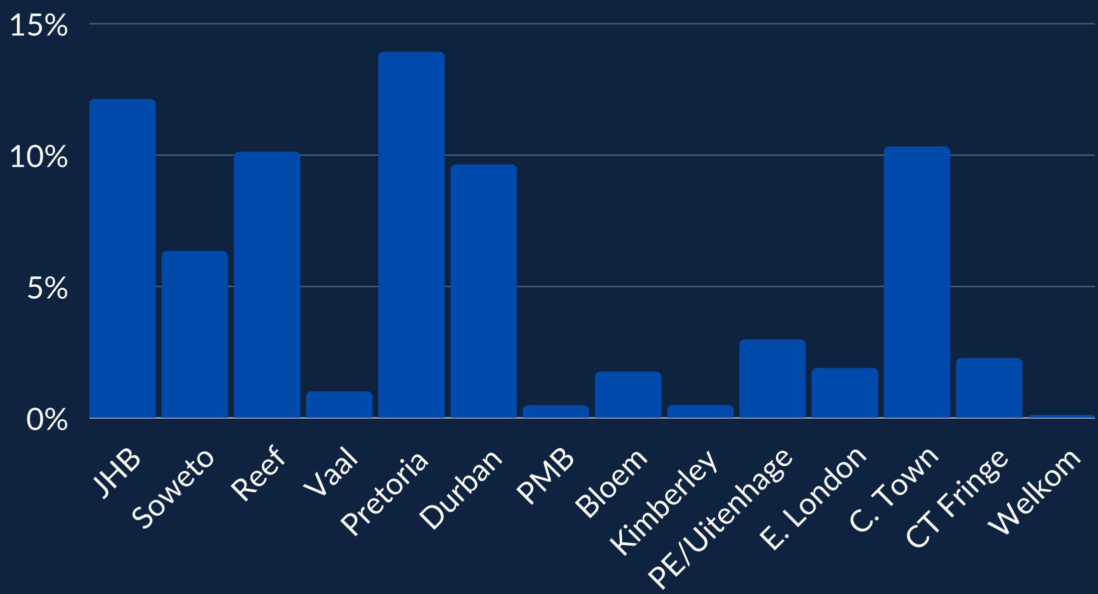
## Used Facebook Yesterday And Today

2020 - H1 | 2020 - H2 | City/Town | Township




City/Town 61.8%

Township 38.2%



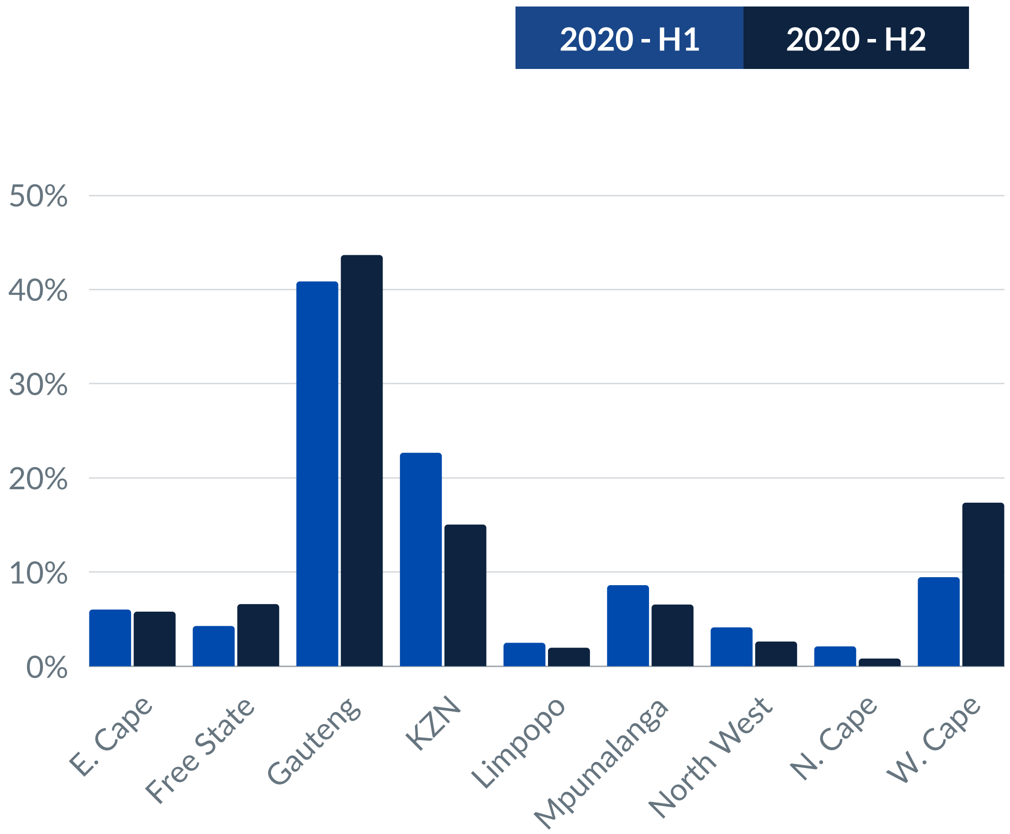

City/Town 61.9%

Township 38.1%

| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | Cape Town | Cape Town (fringe) | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 11.8% | 3.57% | 11.6% | 0.92% | 12.6% | 15.7% | 0.96% | 1.32% | 0.48% | 3.45% | 2.26% | 7.22% | 1.01% | 0.34% |
| 2020 H2 | 12.1% | 6.32% | 10.1% | 0.98% | 13.9% | 9.62% | 0.45% | 1.73% | 0.46% | 2.96% | 1.87% | 10.3% | 2.25% | 0.08% |

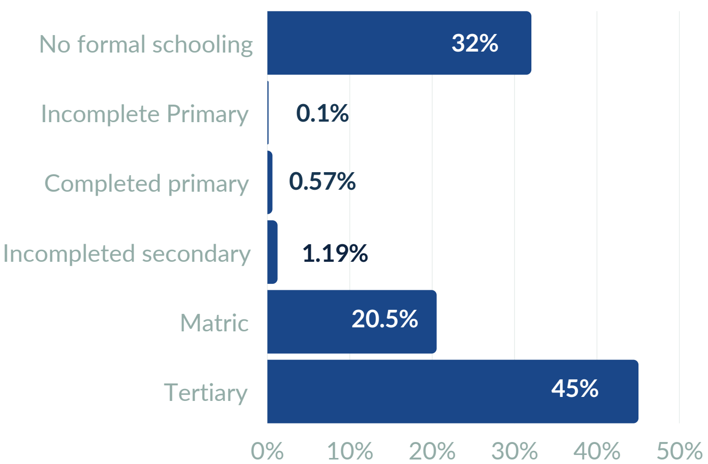
# Social Media Users In South Africa

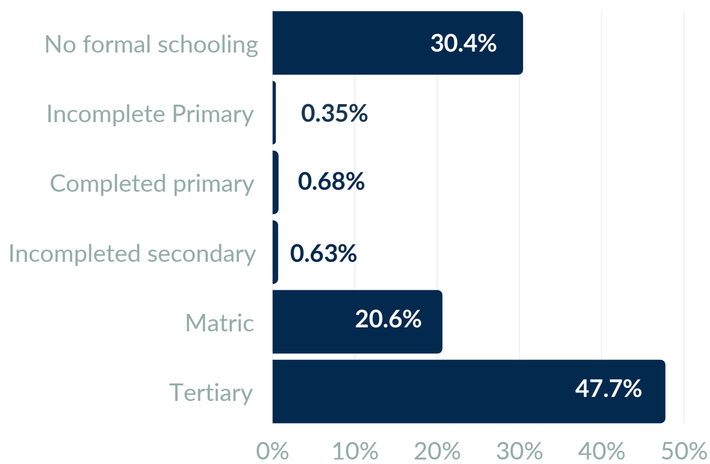
## Used Snapchat Yesterday And Today




| | 2020 H1 | 2020 H2 |
|---|---|---|
| Eastern Cape | 5.95% | 5.73% |
| Free State | 4.23% | 6.53% |
| Gauteng | 40.8% | 43.6% |
| KZN | 22.6% | 15% |
| Limpopo | 2.42% | 1.91% |
| Mpumalanga | 8.54% | 6.5% |
| North West | 4.06% | 2.58% |
| Northern Cape | 2.04% | 0.79% |
| Western Cape | 9.42% | 17.3% |

## Level of Education

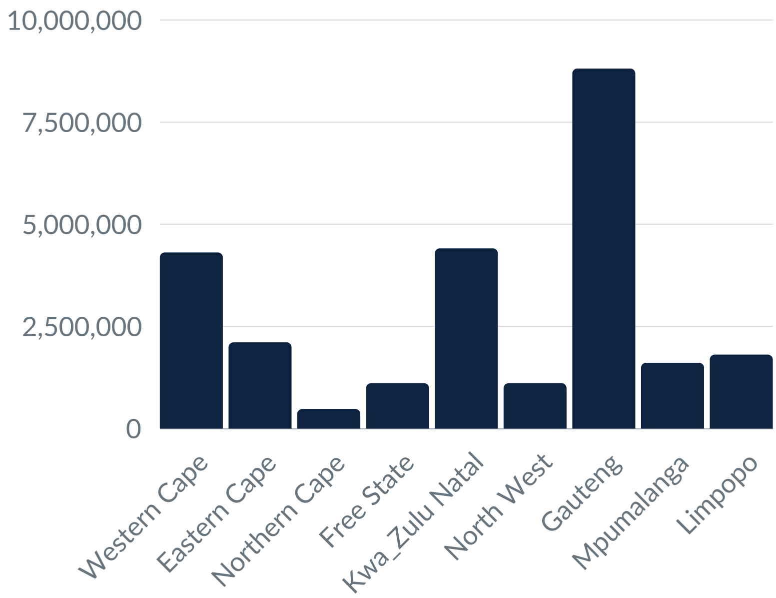


# SA DEMOGRAPHICS

**Official data from Facebook**

## Population
58 558 270

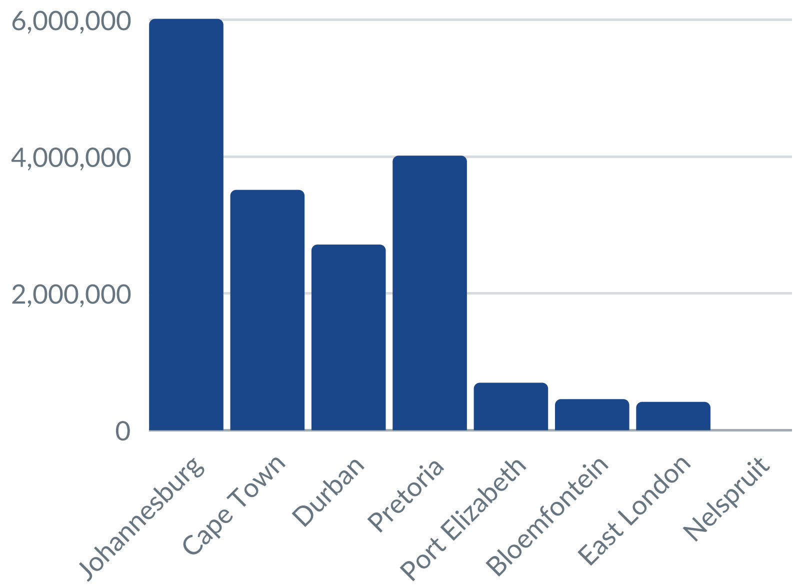



## Users by Province

| | 2021 |
|---|---|
| Western Cape | 4.3 million |
| Eastern Cape | 2.1 million |
| Northern Cape | 0.47 million |
| Free State | 1.1 million |
| Kwa-Zulu Natal | 4.4 million |
| North West | 1.1 million |
| Gauteng | 8.8million |
| Mpumalanga | 1.6 million |
| Limpopo | 1.8 million |

## City Breakdown

| | 2021 |
|---|---|
| Johannesburg | 6 million |
| Cape Town | 3.5 million |
| Durban | 2.7 million |
| Pretoria | 4 million |
| Port Elizabeth | 0.68 million |
| Bloemfontein | 0.440 million |
| East London | 0.40 million |
| Nelspruit | 0.33 million |




**26M**
users in South Africa

**18M**
on mobile

**31%**
of SA population is on Facebook

Android **19M** users

Apple/iOS **1M** users

Windows **33K** users

Smart Phone **20M** users

Tablet **17M** users

Feature Phone **78K** users

Chrome **4.8M** users

Opera **460K** users

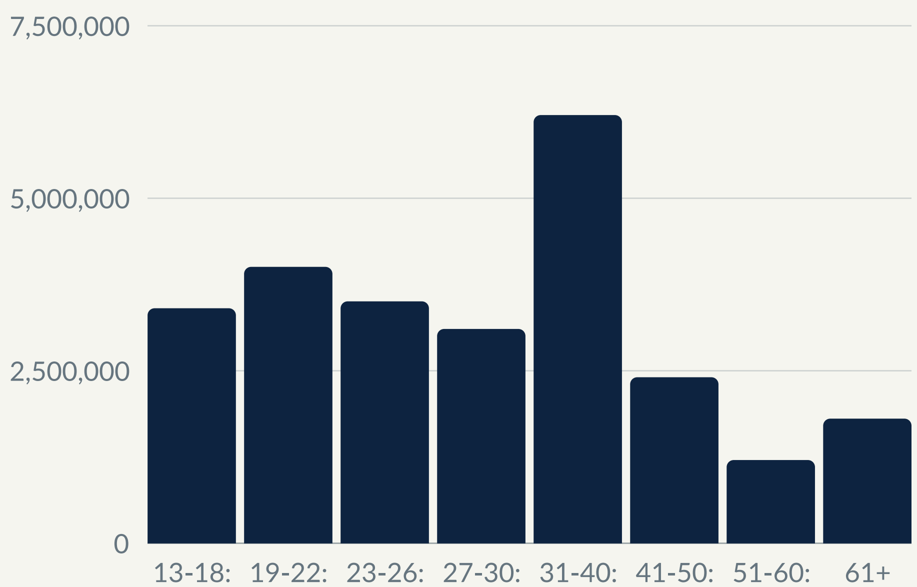
Safari **290K** users

Edge **120K** users

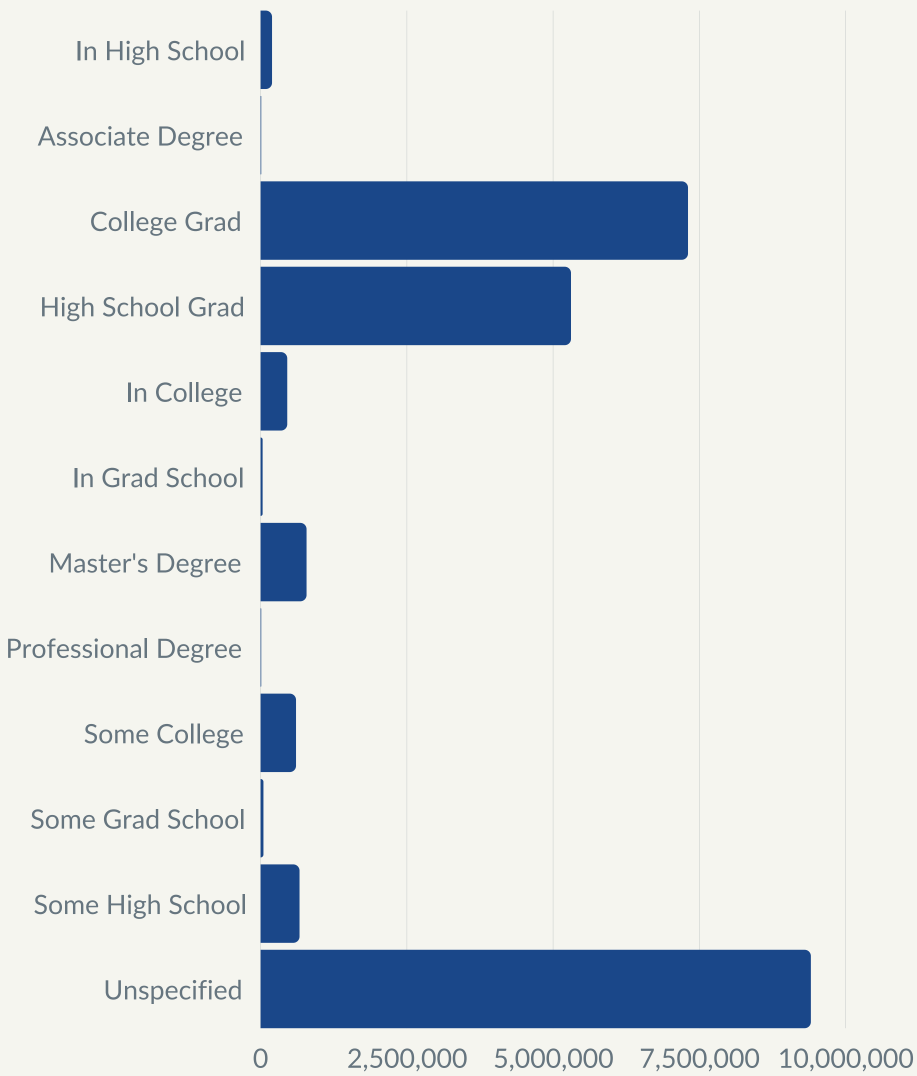
Firefox **76K** users

IE **30K** users

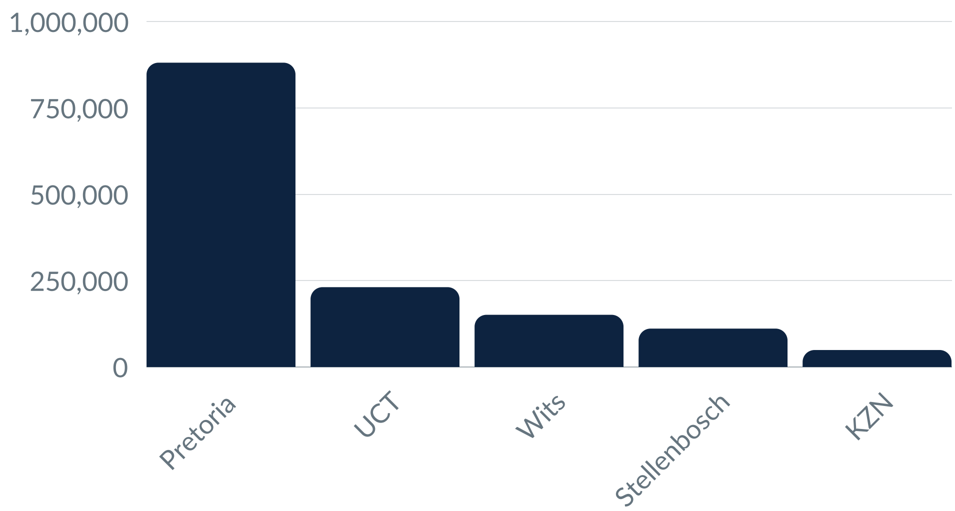
## Age of Users



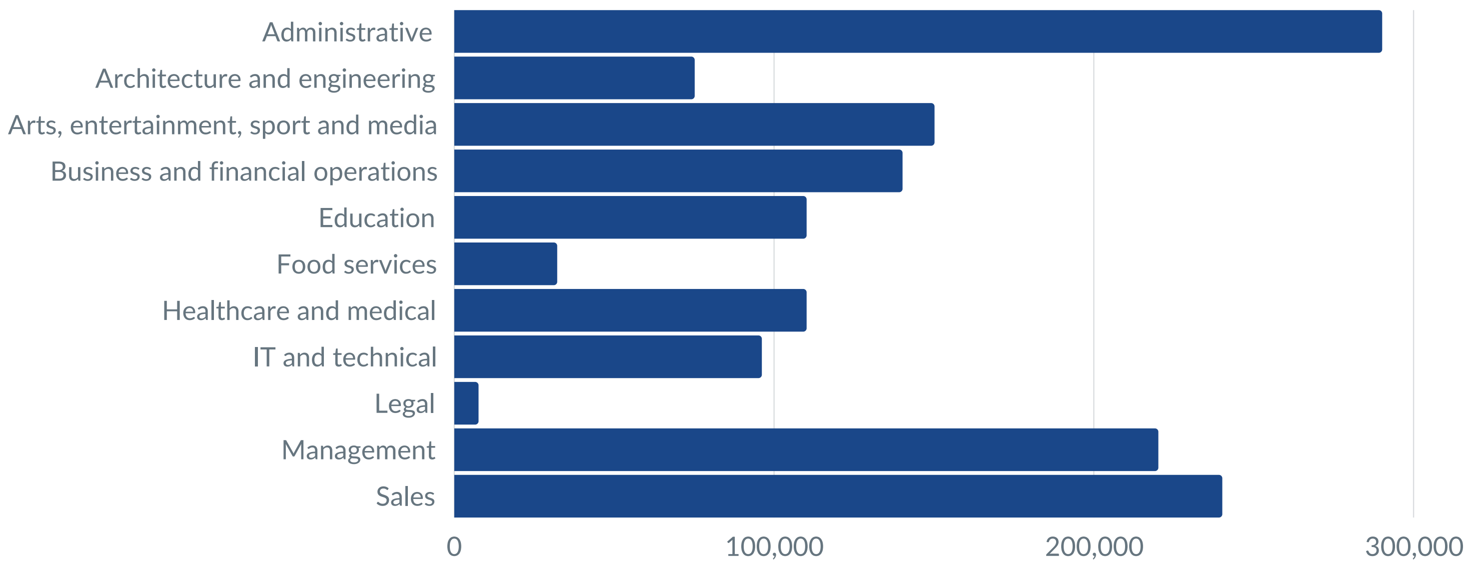

## Level of Education



## Top Universities




## Work Industries




## General Interests of SA Facebook Users

| | | | | | |
|---|---|---|---|---|---|
| Business & Industry | 18m | Sports | 15m | Vehicles | 9.3m |
| Entertainment | 18m | Food & Drink | 14m | Current Events | 9.2m |
| Hobbies & Activities | 18m | Arts & Music | 14m | Home & Garden | 9.2m |
| Shopping & Fashion | 16m | Family & Relationships | 14m | Fitness & Wellness | 8.7m |
| Sports & Outdoors | 15m | Politics & Social Issues | 11m | Pets | 7.6m |
| Technology | 15m | Travel | 10m | Outdoor Recreation | 5.8m |

## FACEBOOK AUDIENCE OVERVIEW

The potential audience that marketers can reach by using adverts on Facebook

**23 MILLION**

The potential audience that Facebook reports can be reached with adverts on Facebook

**51.4%**

Facebook's potential advertising audience compared to the total population aged 13+

**+4.5%**

+1 million

Quarter-on-quarter change in Facebook's advertising reach

**52.2%**

Percentage of its ad audience that Facebook reports is female

**47.8%**

Percentage of its ad audience that Facebook reports is male

# TIKTOK

TikTok remains the fastest growing social platform in South Africa, driven by a simple user interface. It is estimated to have grown from 5-million users to 9-million in 2020.

Swiping up and down to view content that fills an entire portrait-oriented screen makes it inviting and almost addictive to use. This, coupled with strong South African content creators, makes TikTok one of the social media gems that's expected to keep growing as it reaches more South Africans.

From pre-lockdown to lockdown, TikTok's strongest growth came from black South Africans, increasing the proportion of black users from 44% to 61%, largely driven by strong personalities and engaging content. Other population groups saw a decrease over lockdown.

The platform also gained more users from the 25 – 34 (26% to 39%) and 35 – 44 (26% to 35%) age groups. Despite being a data heavy video platform, it flattened the LSM curve over lockdown, with more lower LSM groups and fewer higher LSM groups using it frequently over lockdown, compared to pre-lockdown. This shows the app's entertainability for those repeatedly returning to it while stuck indoors over lockdown. While the proportion of users in cities and towns versus townships is one of the highest of all social networks, it began to spread to rural areas during lockdown. In rural areas, TikTok started at a mere 7% and doubled in proportion to 19% during lockdown.

As with Snapchat users historically, the large proportion of users with incomplete secondary school education, coupled with a young audience, suggests the app is being used by those in secondary school and those who just finished school.

*Platform changes*

TikTok's feature set has grown rapidly in a short time, adding a similar live interface to Instagram Live, which allows users to broadcast to their audiences directly from their smart device. Businesses can take advantage of this feature once they have created enough of a following.

# Social Media Users In South Africa

## Used TikTok Yesterday And Today

### 2020 - H1

**5.7%**
Total TikTok Users

73.1% female

26.9% male

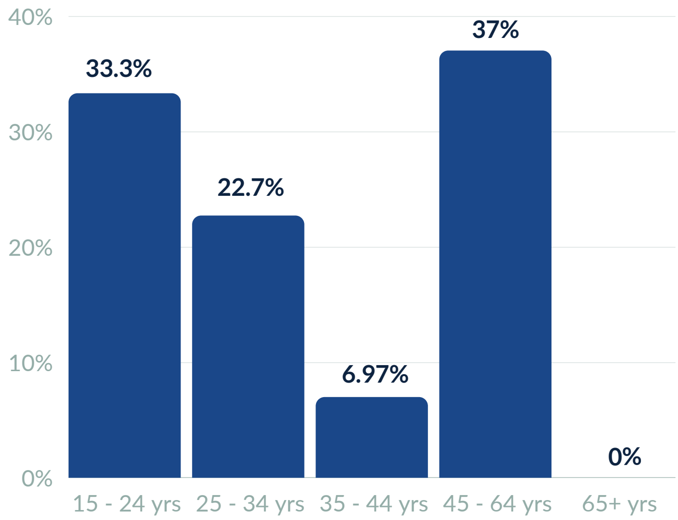
### 2020 - H2

**9.23%**
Total TikTok Users

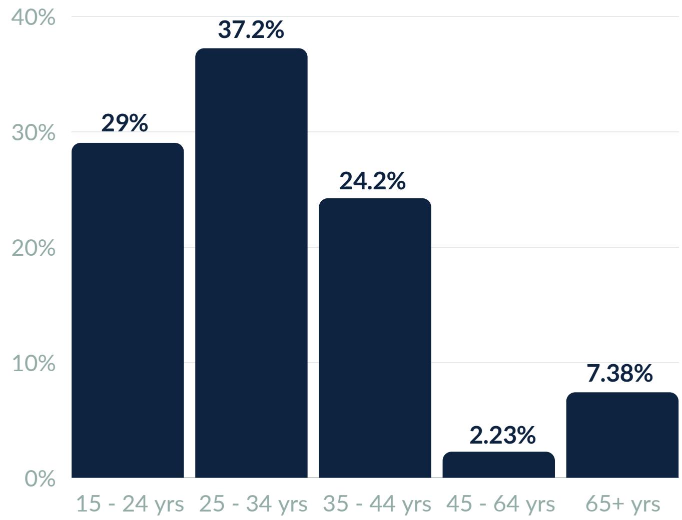
45.4% female

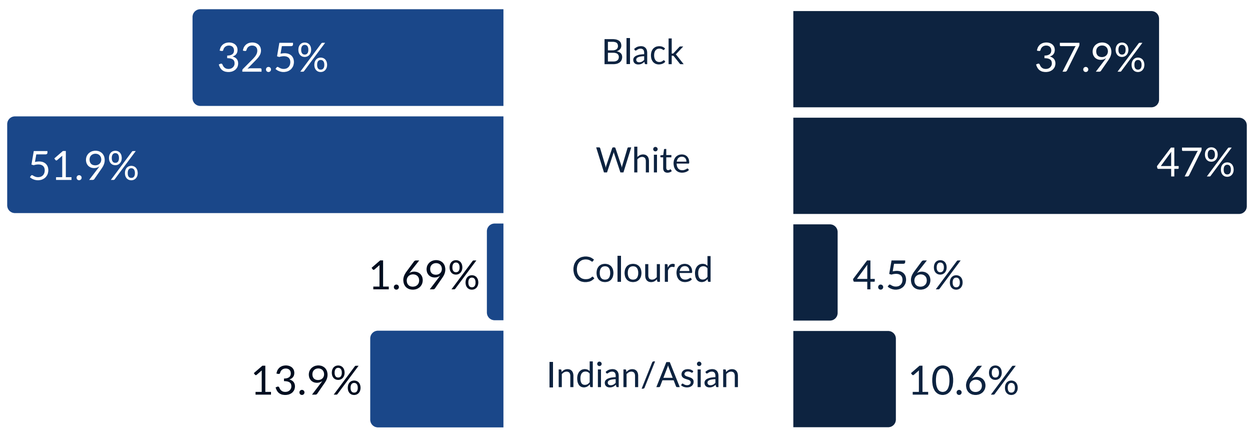
54.6% male

#### Age of Users (2020 - H1)




#### Age of Users (2020 - H2)

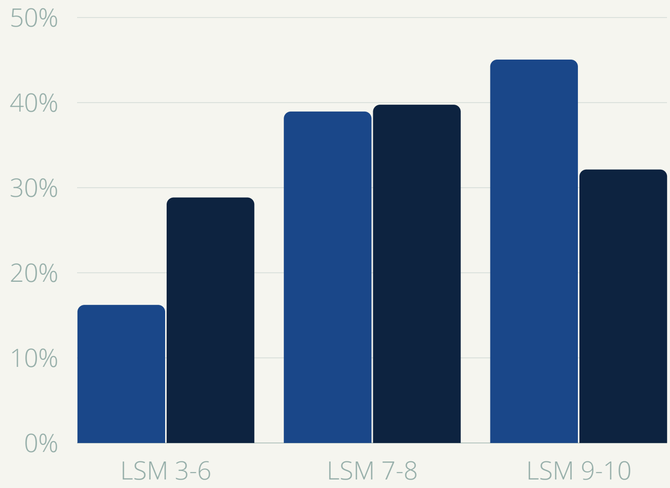


# Social Media Users In South Africa

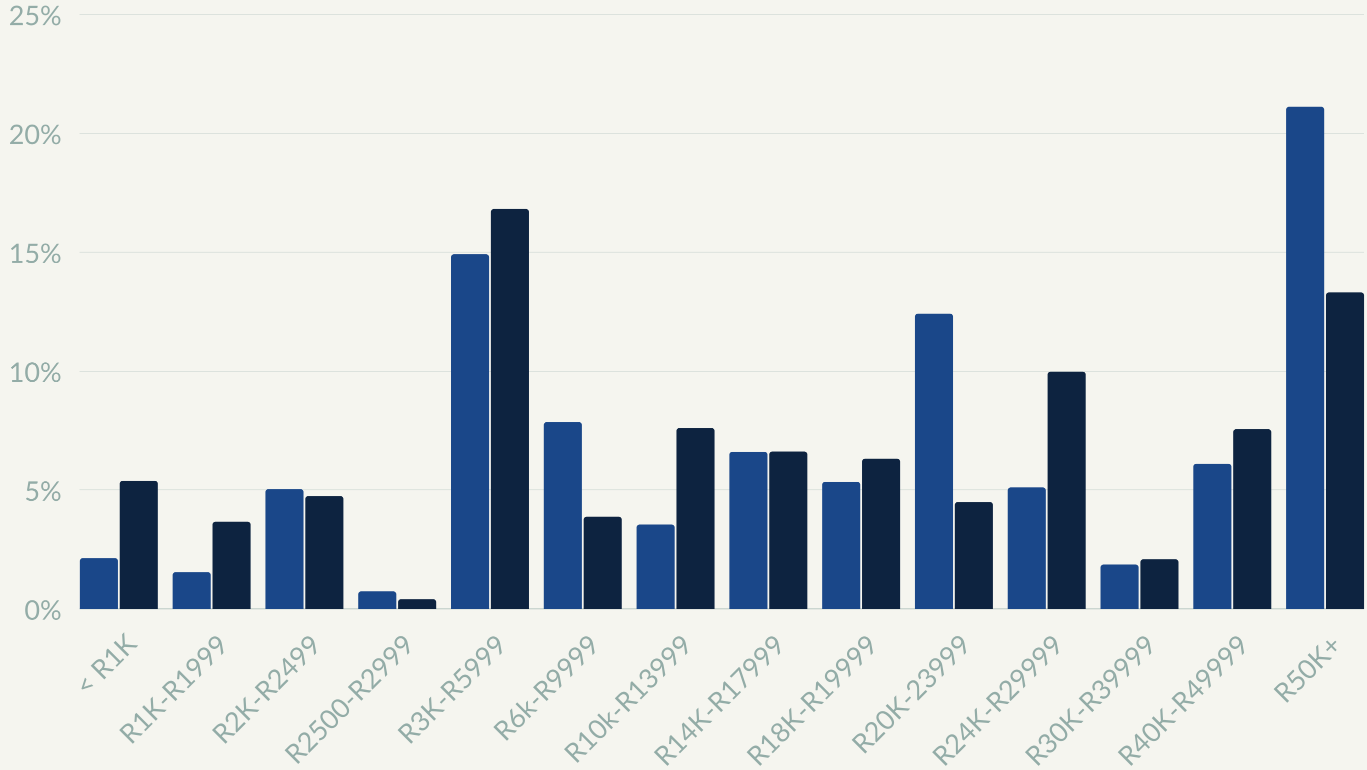
## Used TikTok Yesterday And Today

2020 - H1 2020 - H2




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 - H1 | 16.2% | 38.9% | 45% |
| 2020 - H2 | 28.2% | 39.7% | 32.1% |

### Level of Income

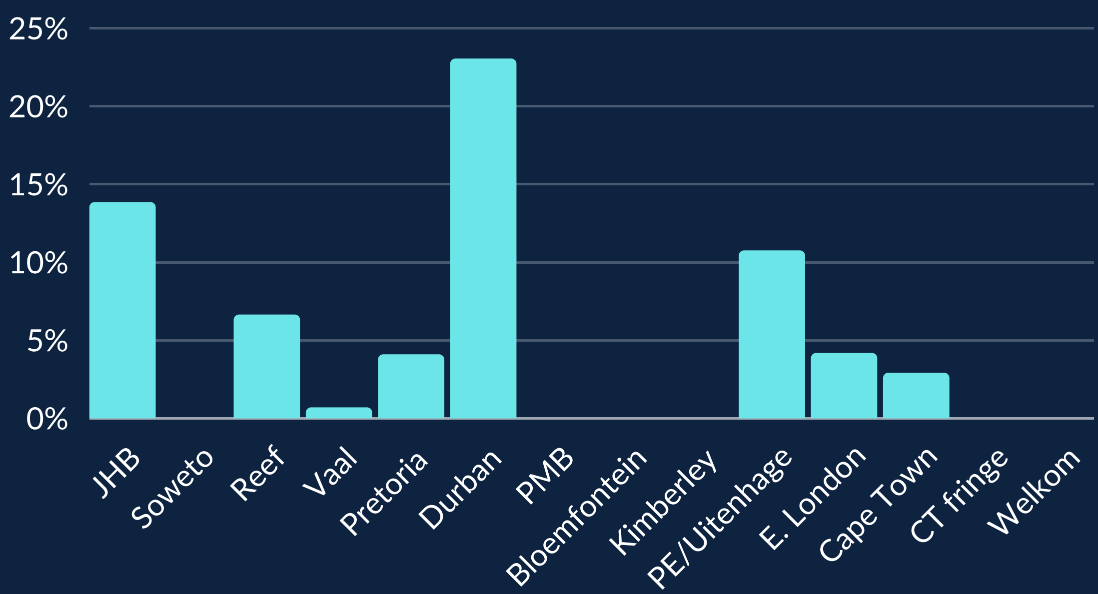



| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 - H1 | 2.13% | 1.54% | 5.02% | 0.72% | 14.9% | 7.84% | 3.54% | 6.59% | 5.33% | 12.4% | 5.1% | 1.85% | 6.09% | 21.1% |
| 2020 - H2 | 5.37% | 3.65% | 4.73% | 0.4% | 16.8% | 3.87% | 7.59% | 6.6% | 6.3% | 4.49% | 9.96% | 2.07% | 7.54% | 13.3% |

# Social Media Users In South Africa

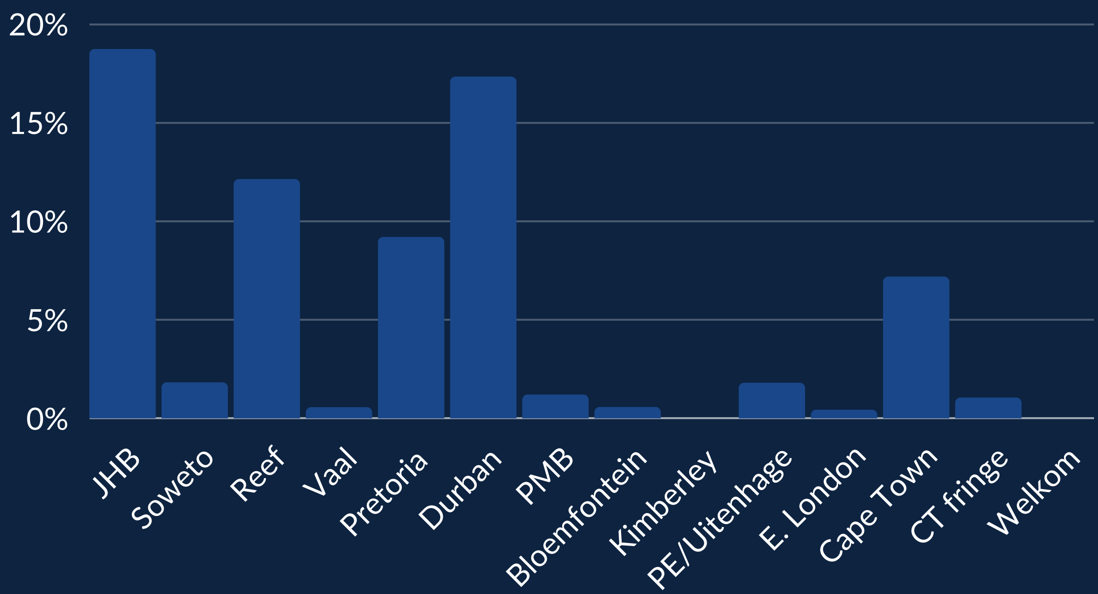
## Used TikTok Yesterday And Today

2020 - H1 | 2020 - H2 | City/Town | Township




City/Town 91.9%

Township 8.1%




City/Town 80.4%

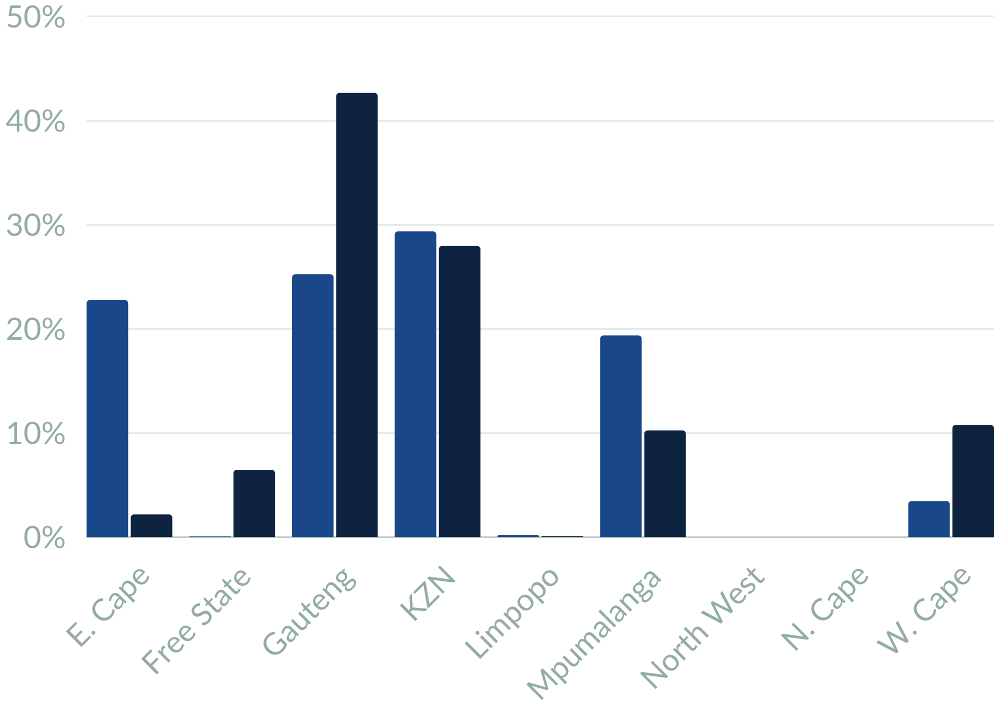
Township 19.6%

| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | Cape Town | Cape Town (fringe) | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 13.8% | 0% | 6.29% | 0.64% | 4.04% | 23% | 0% | 0% | 0% | 10.7% | 4.31% | 2.86% | 0% | 0% |
| 2020 H2 | 18.7% | 1.78% | 12.1% | 0.52% | 9.16% | 17.3% | 1.16% | 0.53% | 0% | 1.76% | 0.39% | 7.15% | 1.01% | 0% |

# Social Media Users In South Africa

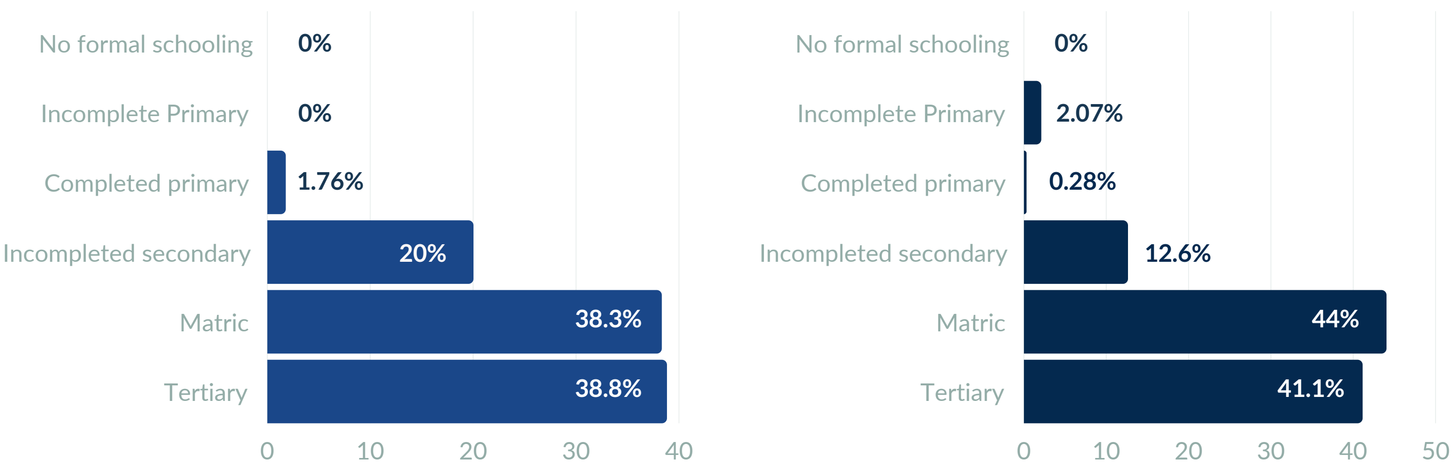
## Used TikTok Yesterday And Today

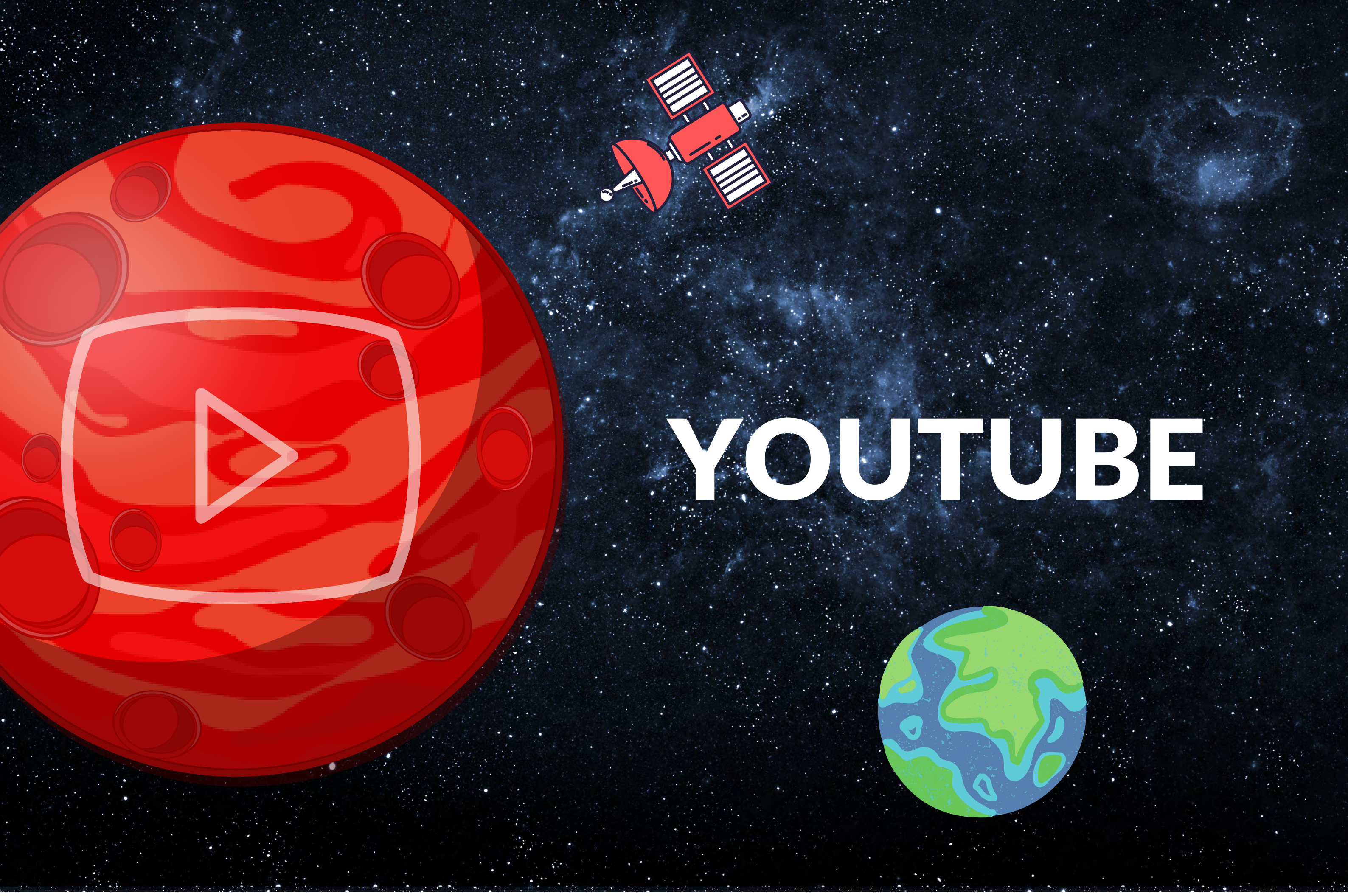
2020 - H1 | 2020 - H2




| | 2020 H1 | 2020 H2 |
|---|---|---|
| Eastern Cape | 22.7% | 2.16% |
| Free State | 0.05% | 6.38% |
| Gauteng | 25.2% | 42.6% |
| KZN | 29.3% | 27.9% |
| Limpopo | 0.12% | 0.05% |
| Mpumalanga | 19.3% | 10.2% |
| North West | 0% | 0% |
| Northern Cape | 0% | 0% |
| Western Cape | 3.43% | 10.7% |

## Level of Education





# YOUTUBE

Google's video sharing platform, YouTube, has seen a significant increase in viewership. According to Google itself, it potentially reaches around 24-million South Africans. According to our data, 15.87 million South African adults are actively using the platform.

While there is little innovation outside of its video platform offering, it has proven to be a popular alternative to paid platforms like Netflix and Showmax. Especially during the pandemic lockdown, it became a viable source of video entertainment for those who did not have adequate broadband for streaming services.

However, in terms of regular usage of the platform, the LSM mix did not change significantly, suggesting that this most data-heavy of all social media platform may still be prohibitively expensive for lower income users to access on a day-to-day basis.

YouTube doubled the proportion of 65+ users over lockdown, jumping from 2% to just under 5%. This may be a knock-on effect of this group becoming more tech savvy via social distancing measures. Other age groups above 35 experienced a dip in YouTube usage.

While there is a slight shift toward more YouTube users in rural areas (from 19% to 21%), the shift is not as dramatic as for other video sharing platforms like TikTok.

As data prices are driven down, the viewership of YouTube is likely to increase. It is likely that, as new feaures are

*Platform changes*

YouTube is one of the strongest platforms for advertisers, since ads play before, during, and after video content, with the potential of showing a viewer up to 5 ads in a 10-minute segment of video. For this reason, the platform can reach around 51.9% of South Africans with ads, compared to the total adult population. The only factor to limit its advertising strength is YouTube Premium, a paid service for YouTube users who want to eliminate advertising.

YouTube is also planning new monetisation tools, such as an "applause" feature that allows users to tip creators, and an integrated shopping tool to allow viewers to shop directly from channels they visit.

# Social Media users In South Africa

## Used YouTube to watch online videos In The Last Year

### 2020 - H1

**28.2%**
Total YouTube Users

44.3%
female

55.7%
male

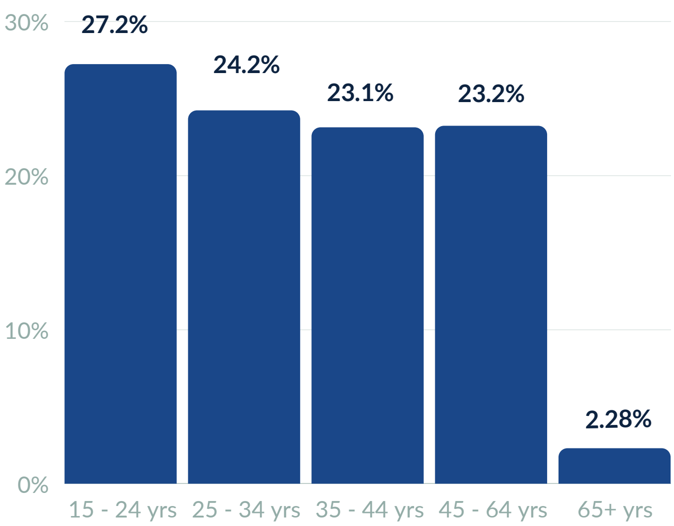
### 2020 - H2

**37.3%**
Total YouTube Users

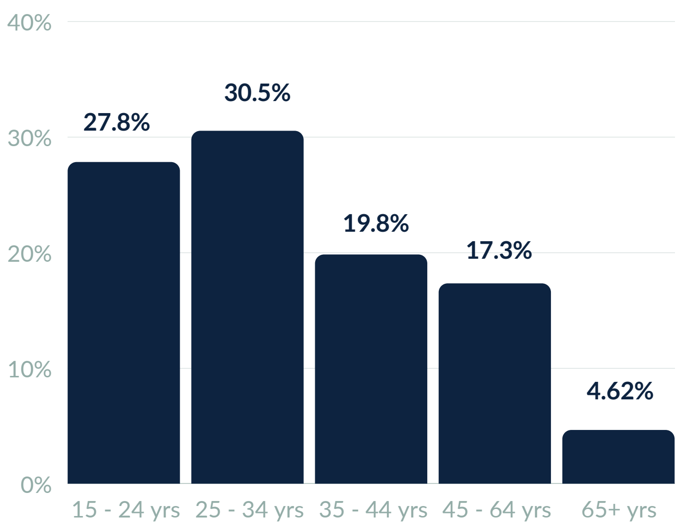
43.6%
female

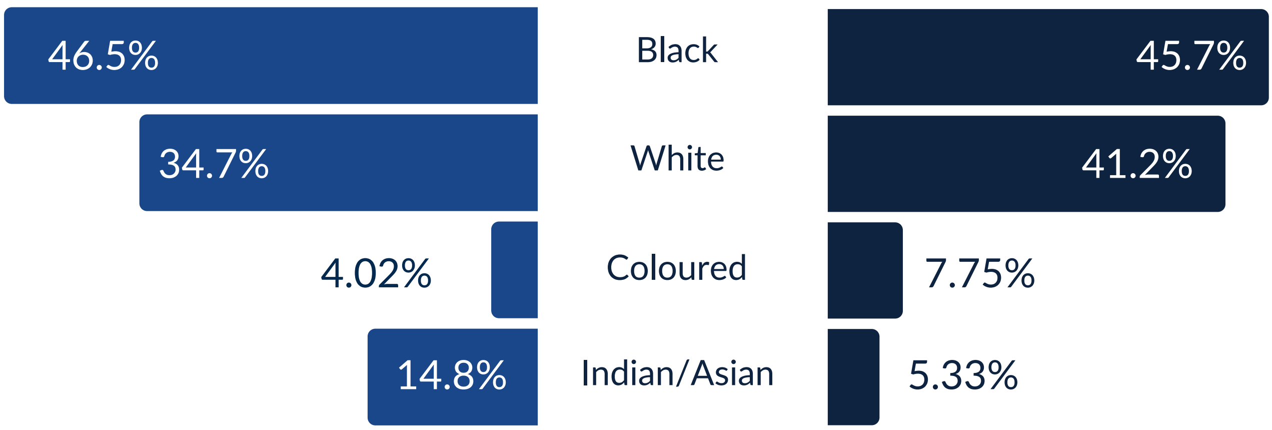
56.4%
male

#### Age of Users




#### Age of Users

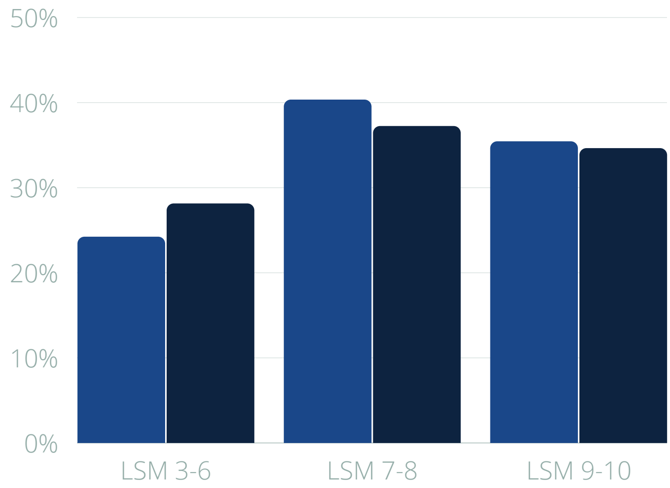


# Social Media Users In South Africa

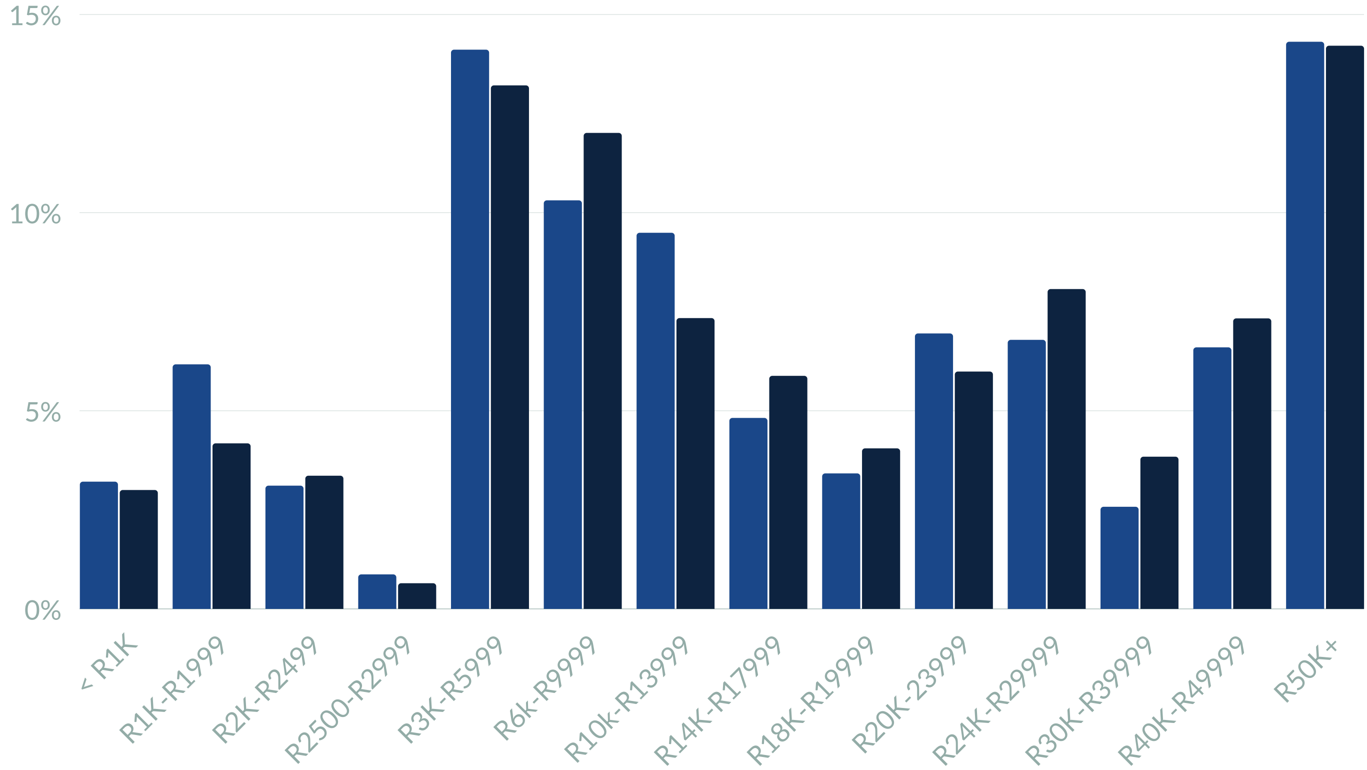
## Used YouTube Yesterday And Today

2020 A | 2020 B




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 - H1 | 24.2% | 40.3% | 35.4% |
| 2020 - H2 | 28.1% | 37.2% | 34.6% |

### Level of Income

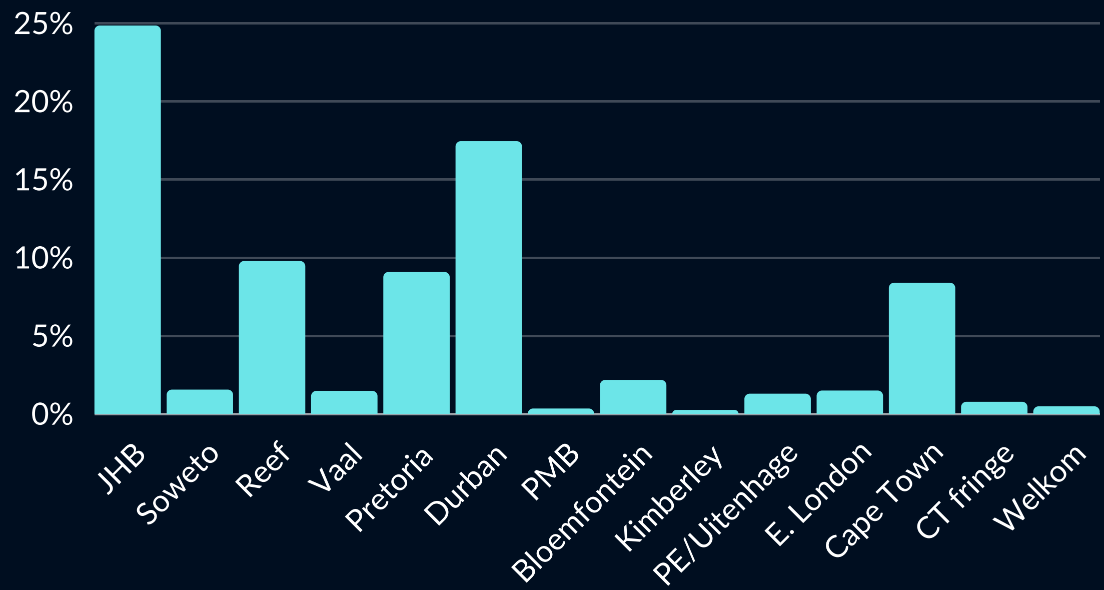



| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 - H1 | 3.22% | 6.16% | 3.10% | 0.86% | 14.1% | 10.3% | 9.48% | 4.81% | 3.41% | 6.94% | 6.78% | 2.57% | 6.59% | 14.3% |
| 2020 - H2 | 2.99% | 4.17% | 3.35% | 0.64% | 13.2% | 12% | 7.33% | 5.87% | 4.04% | 5.98% | 8.06% | 3.83% | 7.32% | 14.2% |

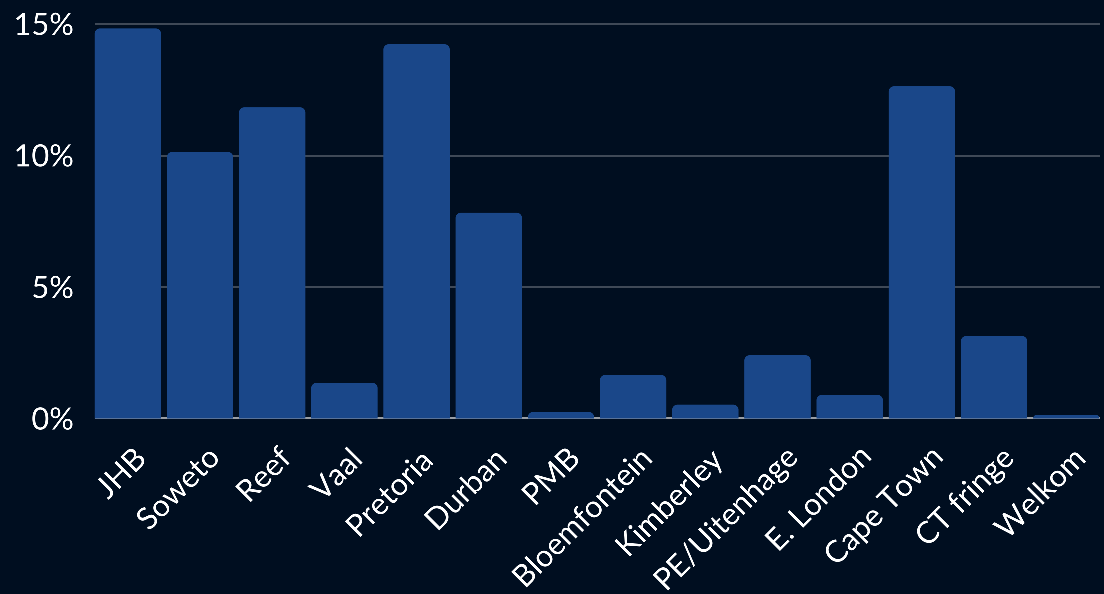
# Social Media Users In South Africa

## Used YouTube Yesterday And Today

2020 - H1 | 2020 - H2 | Metro Area | Non Metro Area




Metro Area: 81.3%
Non Metro Area: 18.7%



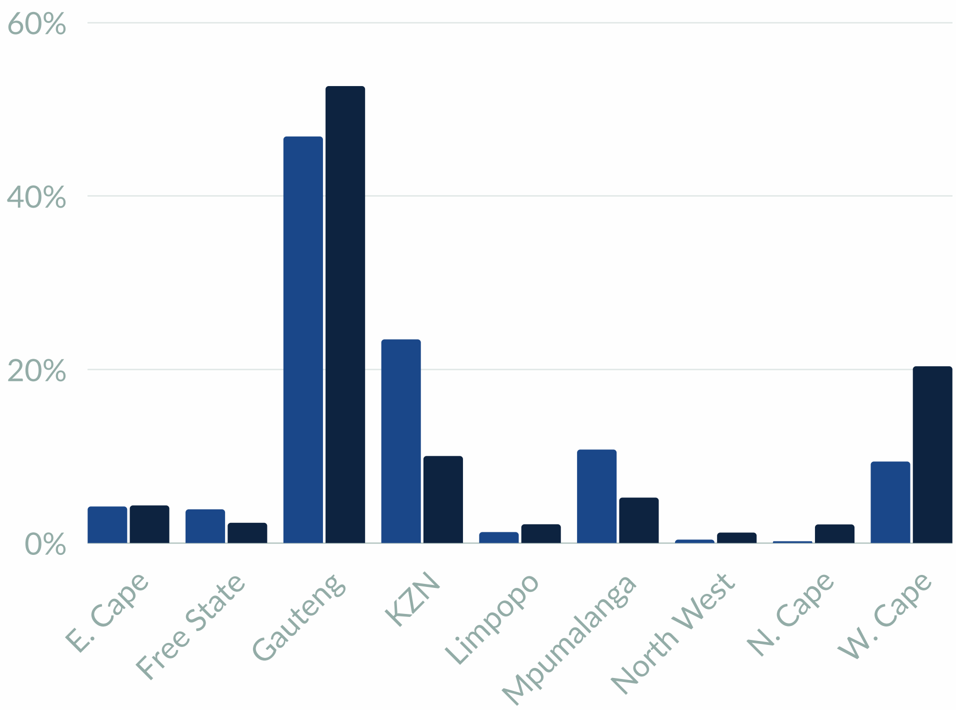

Metro Area: 78.6%
Non Metro Area: 21.4%

| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | Cape Town | Cape Town (fringe) | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 24.8% | 1.50% | 9.73% | 1.42% | 9.03% | 17.4% | 0.29% | 2.12% | 0.20% | 1.24% | 1.44% | 8.34% | 0.72% | 0.43% |
| 2020 H2 | 14.8% | 10.1% | 11.8% | 1.32% | 14.2% | 7.79% | 0.21% | 1.62% | 0.49% | 2.37% | 0.86% | 12.6% | 3.10% | 0.10% |

# Social Media Users In South Africa

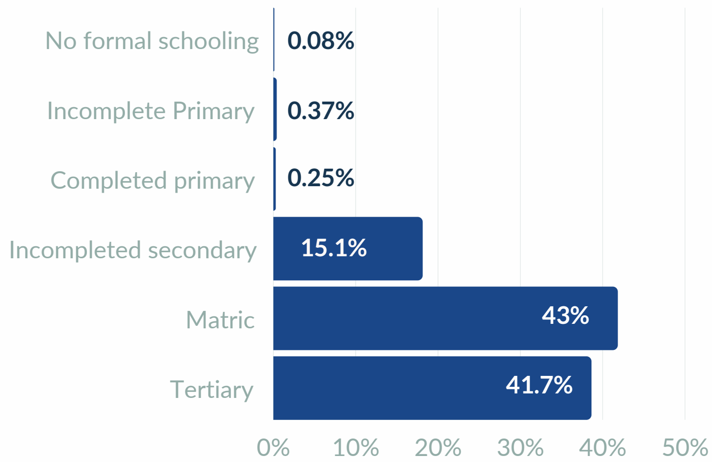
## Used YouTube Yesterday And Today

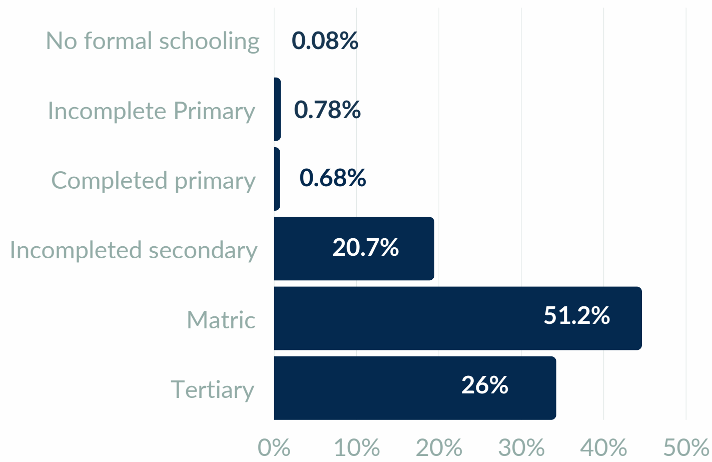
2020 - H1 | 2020 - H2




| | 2020 H1 | 2020 H2 |
|---|---|---|
| Eastern Cape | 4.14% | 4.26% |
| Free State | 3.81% | 2.29% |
| Gauteng | 46.8% | 52.6% |
| KZN | 23.4% | 10% |
| Limpopo | 1.22% | 2.09% |
| Mpumalanga | 10.7% | 5.20% |
| North West | 0.37% | 1.13% |
| Northern Cape | 0.20% | 2.07% |
| Western Cape | 9.36 | 20.3% |

## Level of Education



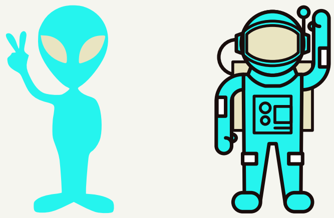



## YOUTUBE AUDIENCE OVERVIEW

The potential audience that marketers can reach by using adverts on YouTube

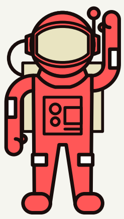
**24 MILLION**

The potential audience that Google reports can be reached with adverts on YouTube



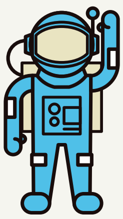
**51.9%**

YouTube's advertising audience aged 18+ compared to the total population aged 18+



**49.3%**

Percentage of its ad audience that YouTube reports is female



**50.7%**

Percentage of its ad audience that YouTube reports is male

# LINKEDIN

LinkedIn, the Microsoft owned business-focused social network, grew strongly in 2020, from 7.5-million the previous year to 8.4-million users. While there is only a small gap between male and female users – 3.3-million versus 2.9-million users of those whose genders were specified – it is in the active use of the platforms that a gender disparity becomes clear. In the measure of highly active users (last 2 days), only 31% of users were female. The genders balance out when the measure moves to recent use (last month).

Of those who used the platform recently, the 15-24 and 25-34 age groups have the highest usage at just under 40% and just under 30% respectively. This indicates strong awareness of the platform as a job-seeking mechanism for those entering the workforce.

During the pandemic, a small shift of LinkedIn usage occurred from cites and towns to townships, with the latter increasing from 34% to 36.3% between the first half and second half of the year.

While this is not highly significant, it does suggest a response to townships being harder hit by pandemic-driven job losses. This may also be a factor of a new job seeker platform that launched on LinkedIn over lockdown (see below), inviting more unemployed and early-career users on board.

Most LinkedIn users have completed secondary school, with the largest post-pandemic shift being towards those who completed secondary school, rising from 32% to 37%.

*Platform changes*

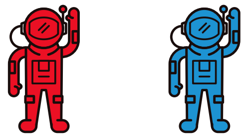
LinkedIn's new feature set for job seekers is a powerful pull for unemployed South Africans looking for work. On the platform, job seekers can send out multiple job applications with minimal effort and remain in contact with recruiters via LinkedIn's chat functionality. It's new live streaming feature, while prohibitively tied up in red tape to enable, is also an option for advertisers to get their B2B messages across.

# Social Media Users In South Africa

## Used LinkedIn Yesterday And Today

### 2020 - H1

**4.19%**
Total LinkedIn Users

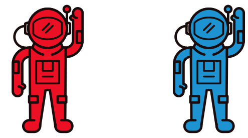


30.5% female

69.5% male

### 2020 - H2

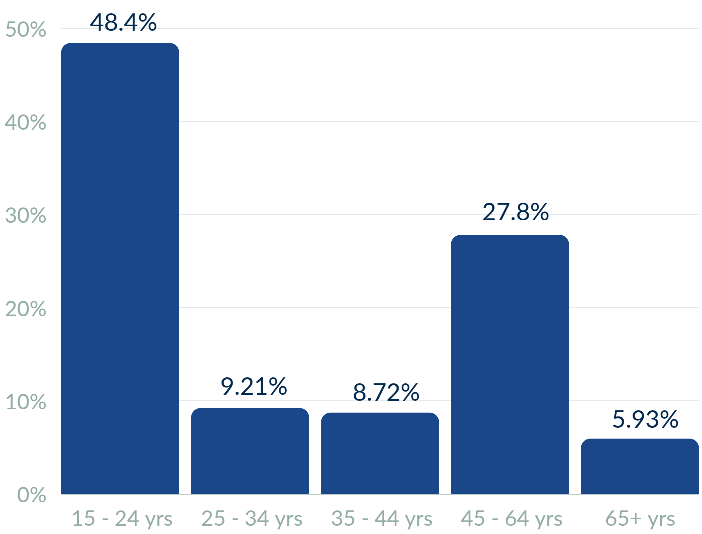
**13%**
Total LinkedIn Users



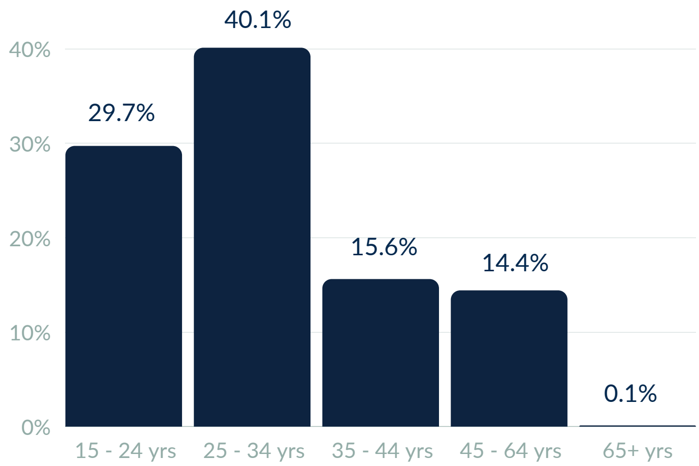
31.1% female

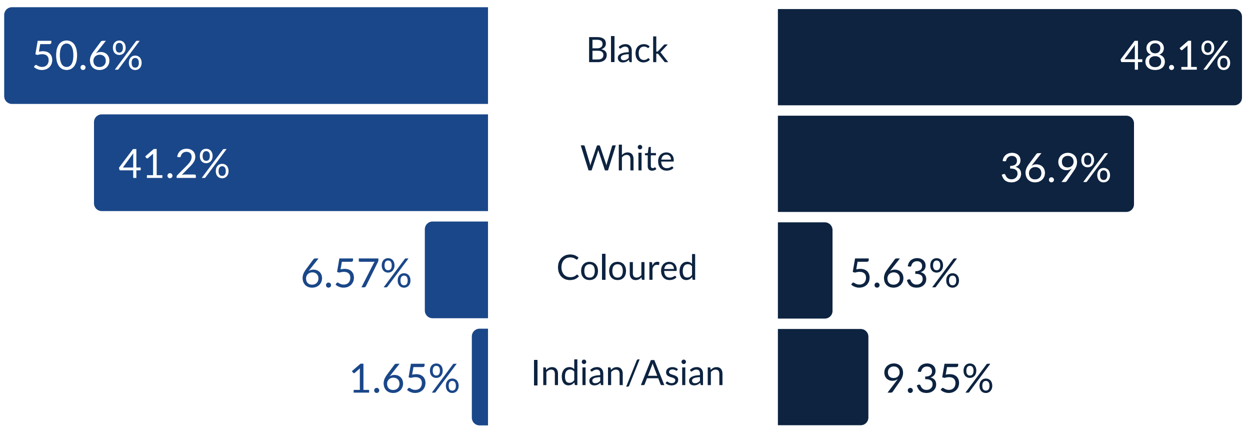
68.9% male

Age of Users




Age of Users

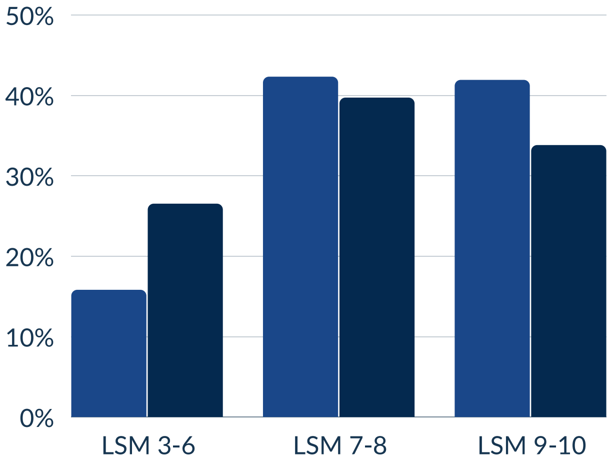


# Social Media Users In South Africa

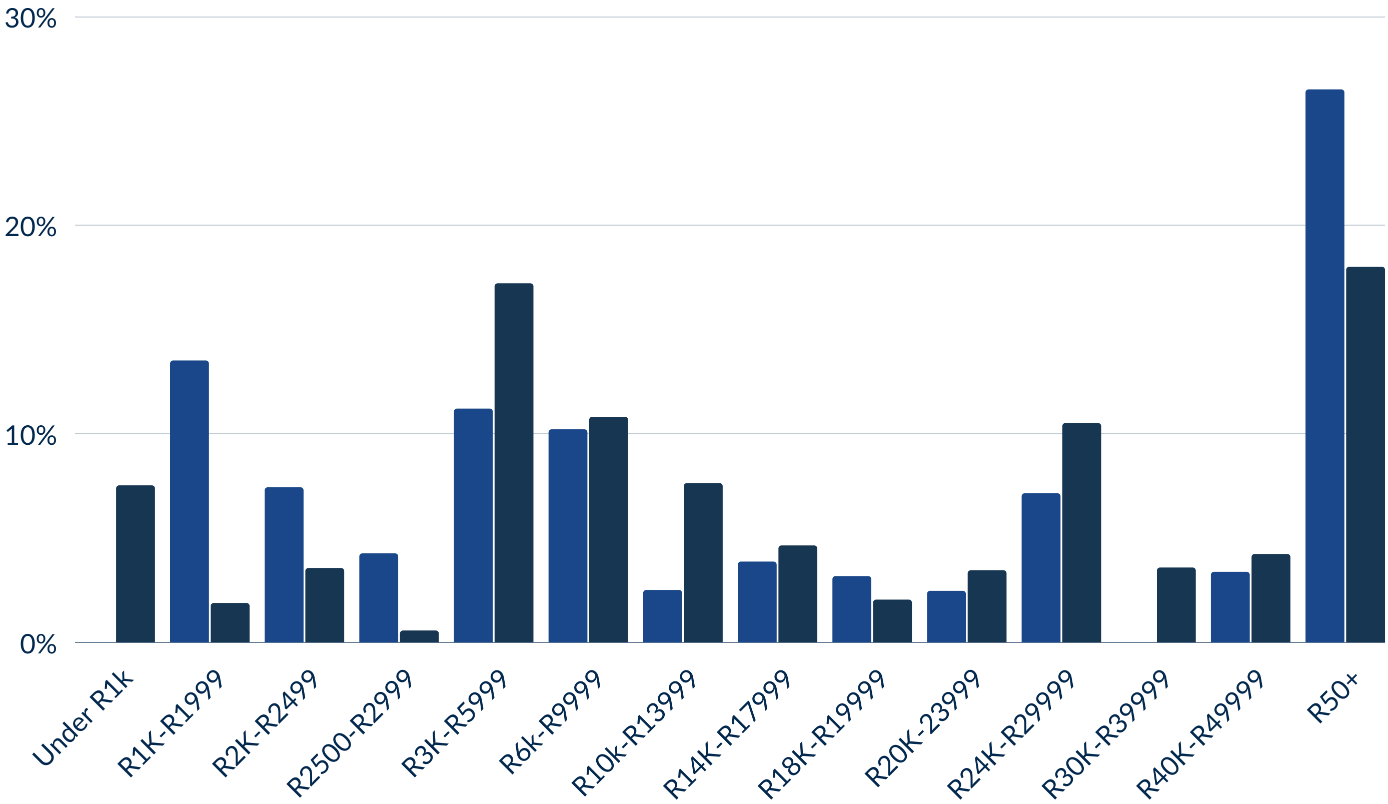
## Used LinkedIn Yesterday And Today

2020 - H1 | 2020 - H2




| | LSM 3-6 | LSM 7-8 | LSM 9-10 |
|---|---|---|---|
| 2020 H1 | 15.8% | 42.3% | 41.9% |
| 2020 H2 | 26.5% | 39.7% | 33.8% |

### Level of Income

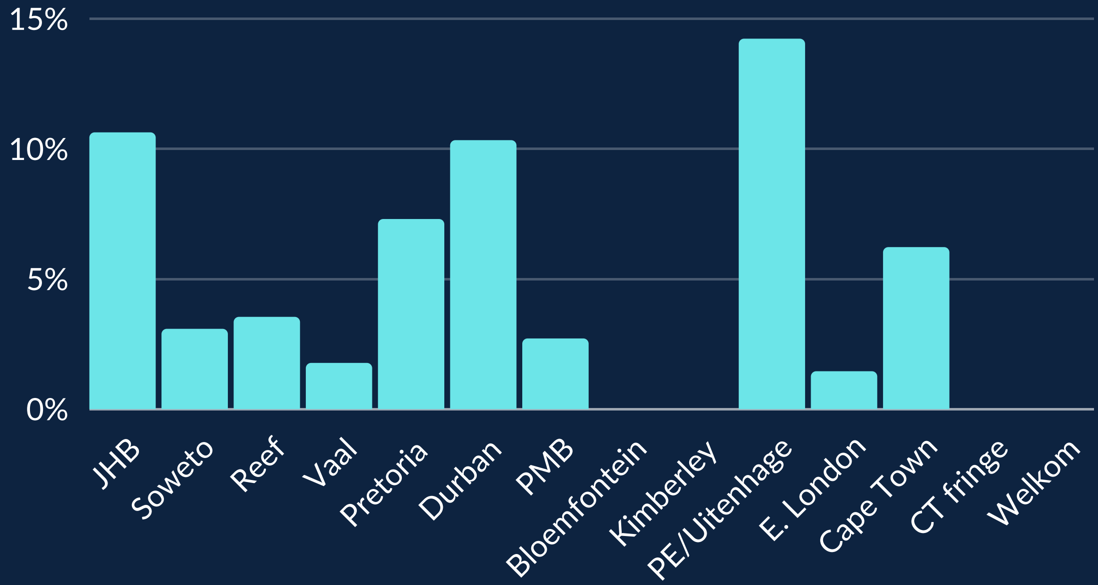



| | < 1k | 1-2k | 2-2.5k | 2.5-3k | 3-6k | 6-10k | 10-14k | 14-18k | 18-20k | 20-24k | 24-30k | 30-40k | 40-50k | 50k+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 - H1 | 0% | 13.5% | 7.42% | 4.25% | 11.2% | 10.2% | 2.51% | 3.86% | 3.16% | 2.46% | 7.14% | 0% | 3.37% | 26.5% |
| 2020 - H2 | 7.49% | 1.89% | 3.56% | 0.57% | 17.2% | 10.8% | 7.62% | 4.63% | 2.04% | 3.44% | 10.5% | 3.55% | 4.22% | 18% |

# Social Media Users In South Africa

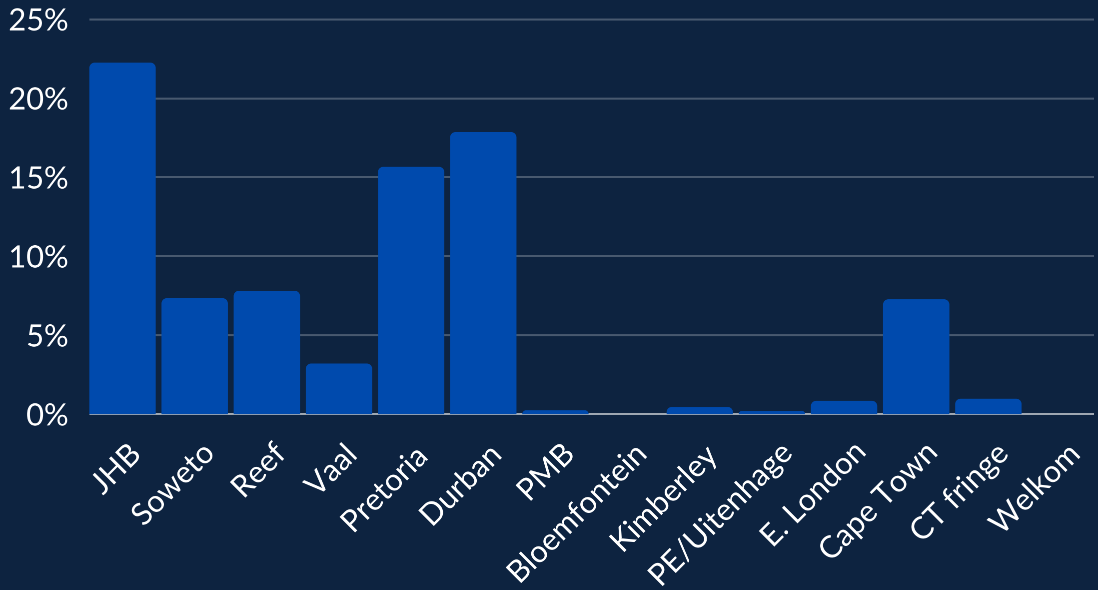
## Used LinkedIn Yesterday And Today

2020 - H1 | 2020 - H2 | City/Town | Township




64.1%

34%




62.3%

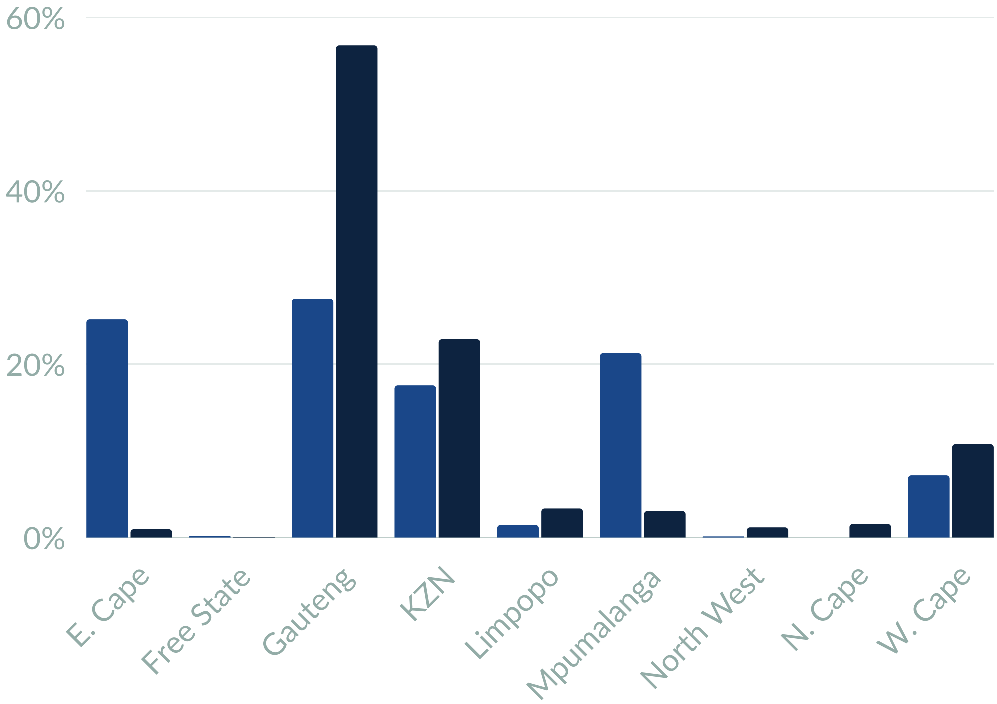
36.3%

| | JHB | Soweto | Reef | Vaal | Pretoria | Durban | PMB | Bloemfontein | Kimberley | PE/Uitenhage | E. London | Cape Town | Cape Town (fringe) | Welkom |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2020 H1 | 10.6% | 3.05% | 3.51% | 1.74% | 7.27% | 10.3% | 2.68% | 0% | 0% | 14.2% | 1.42% | 6.19% | 0.% | 0% |
| 2020 H2 | 22.2% | 7.28% | 7.75% | 3.14% | 15.6% | 17.8% | 0.18% | 0% | 0.39% | 0.14% | 0.78% | 7.21% | 0.91% | 0% |

# Social Media Users In South Africa

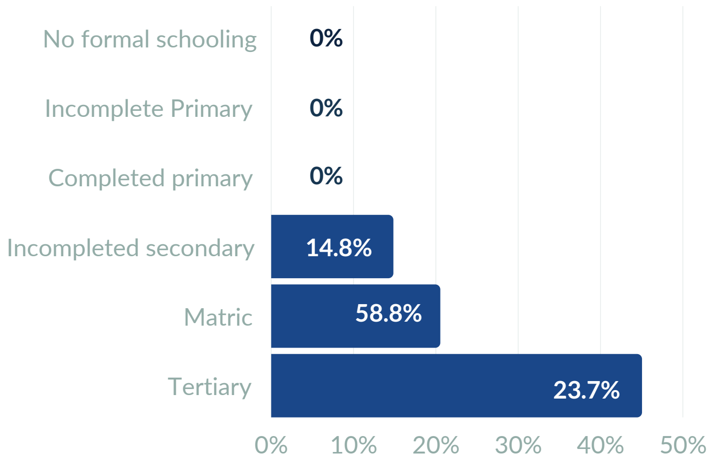
## Used LinkedIn Yesterday And Today

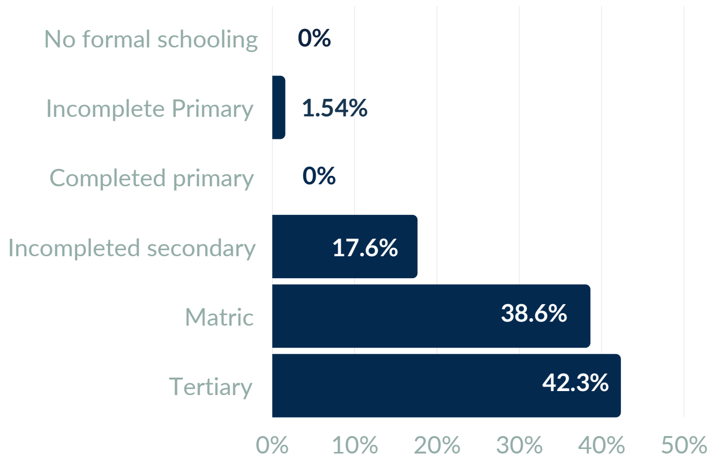
2020 - H1 | 2020 - H2




| | 2020 H1 | 2020 H2 |
|---|---|---|
| Eastern Cape | 25.1% | 0.96% |
| Free State | 0.05% | 0.02% |
| Gauteng | 27.5% | 56.7% |
| KZN | 17.5% | 22.8% |
| Limpopo | 1.42% | 3.28% |
| Mpumalanga | 21.2% | 3.05% |
| North West | 0.12% | 1.1% |
| Northern Cape | 0% | 1.42% |
| Western Cape | 7.13% | 10.7% |

## Level of Education

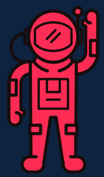


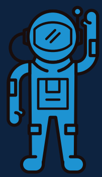
# SA DEMOGRAPHICS

**Official Data from LinkedIn**

## 8 400 000
## LinkedIn Users

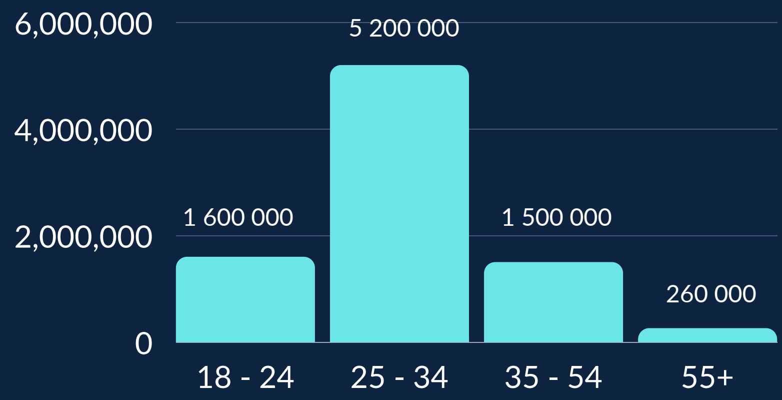


2.9M
female

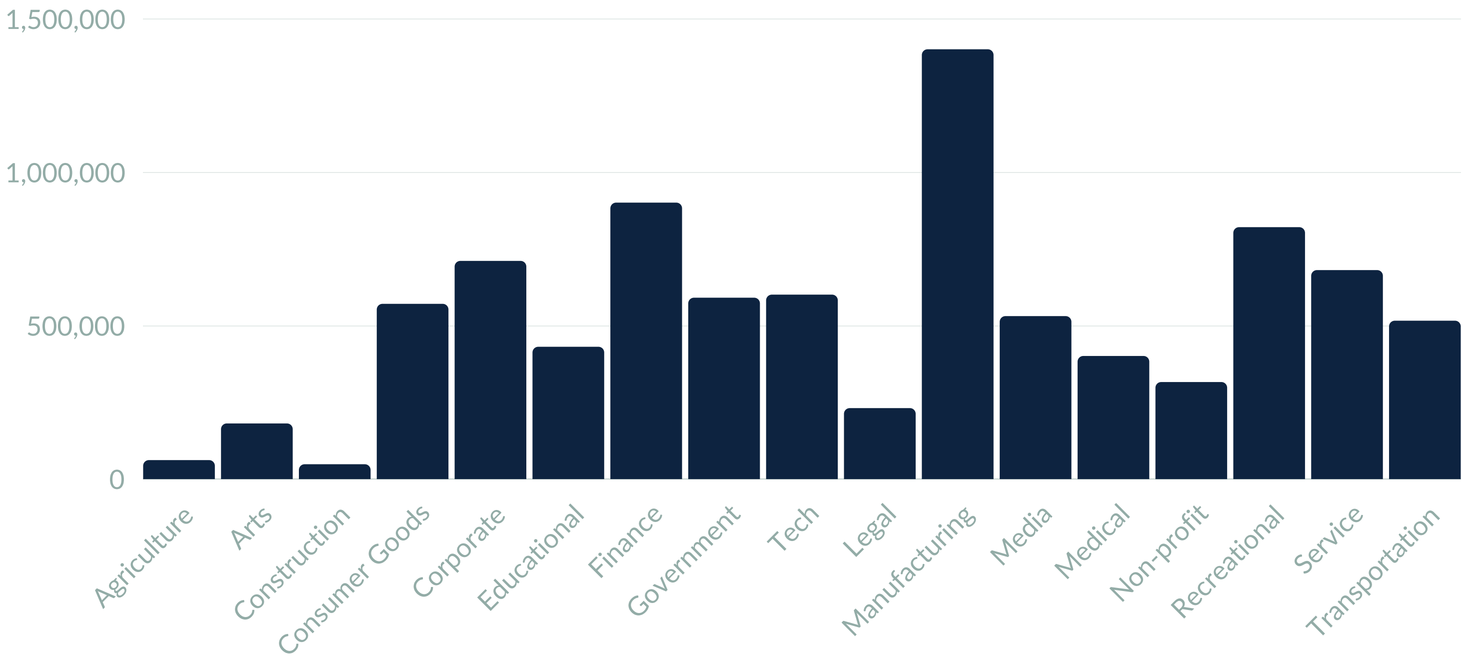


3.3M
male

### Age of Users



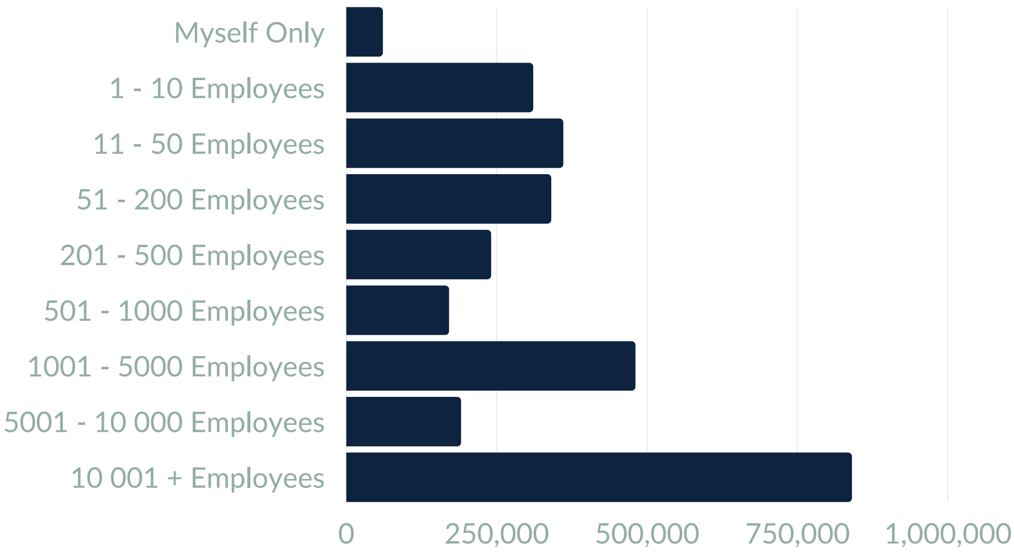

### Work Industries




| Agriculture | Arts | Construction | Consumer Goods | Corporate | Educational | Finance | Government |
|---|---|---|---|---|---|---|---|
| 60 480 | 180 000 | 47 000 | 570 000 | 710 000 | 430 000 | 900 000 | 590 000 |

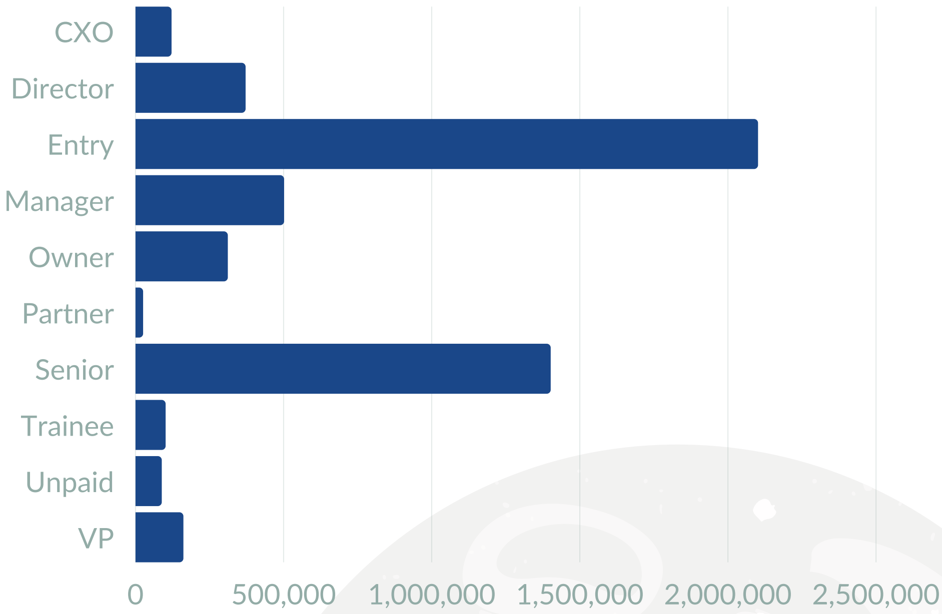
| Legal | Manufacturing | Media | Medical | Non-profit | Recreational | Service | Tech | Transportation |
|---|---|---|---|---|---|---|---|---|
| 230 000 | 1 400 000 | 530 000 | 400 000 | 315 000 | 820 000 | 680 000 | 600 000 | 515 000 |

## Company Size




| | |
|---|---|
| Myself Only | 60 000 |
| 1 - 10 | 310 000 |
| 11 - 50 | 360 000 |
| 51 - 200 | 340 000 |
| 201 - 500 | 240 000 |
| 501 - 1000 | 170 000 |
| 2001 - 5000 | 480 000 |
| 5001 - 10 000 | 190 000 |
| 10 001+ | 840 000 |

## Seniority



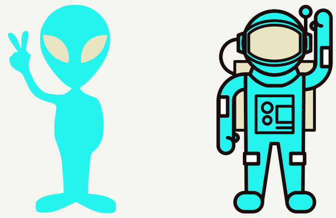

| | |
|---|---|
| CXO | 120 000 |
| Director | 370 000 |
| Entry | 2 100 000 |
| Manager | 500 000 |
| Owner | 310 000 |
| Partner | 24 000 |
| Senior | 1 400 000 |
| Trainee | 100 000 |
| Unpaid | 87 000 |
| VP | 160 000 |

## TWITTER AUDIENCE OVERVIEW

The potential audience that marketers can reach by using adverts on Twitter

**8.3 MILLION**

The potential audience that LinkedIn reports can be reached with adverts on LinkedIn



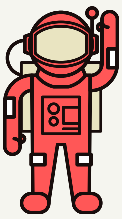
**21%**

LinkedIn's potential advertising audience compared to the total population aged 18+

**+2.5%**

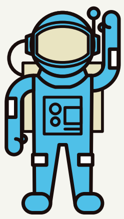
-50 thousand

Quarter-on-quarter change in LinkedIn's advertising reach



**46.8%**

Percentage of its ad audience that LinkedIn reports is female



**53.2%**

Percentage of its ad audience that LinkedIn reports is male

## INSTANT MESSAGING

# WHATSAPP VS TELEGRAM VS SIGNAL

A REVIEW OF SOUTH AFRICAN MEDIA COVERAGE IN RELATION TO WHATSAPP'S ANNOUNCEMENT OF NEW TERMS AND CONDITIONS AS WELL AS MENTIONS OF RIVALS SIGNAL AND TELEGRAM

# METHODOLOGY & DISCLAIMERS


Research period – Media Coverage from January – May 2021

Data collected from South African online news channels, newspapers, magazines, radio, and television stations

748 unique media items analysed (articles and broadcast clips).

For analytical categorization purposes, some media items are duplicated – creating a total of 1108 media items or data points (e.g. an item where Telegram, Signal, and WhatsApp were mentioned would be duplicated 3 times to accommodate each platform)

263 unique media sources featured coverage

The research does not purport to represent every single media mention of the WhatsApp privacy concerns or migration to Signal and Telegram - which may have occurred during the period. It does however represent a robust view of events in the media landscape during the period.

# JANUARY 2021

WhatsApp announces new changes to its terms and conditions on Wednesday, 6 January 2021 - and says its users will have to agree to let Facebook collect WhatsApp data, including user phone numbers, contacts' phone numbers and location. It sets 8 February 2021 as a deadline for users to agree, or they would lose access to the app.

This created an immediate global backlash with even big global influencers such as NSA whistle-blower Edward Snowden and Elon Musk among those who recommended users switch services, Musk tweeting: “Use Signal.“ Many disgruntled users starts downloading rival apps Telegram and Signal which sees massive spikes - 64 million downloads for Telegram in January 2021(vs 29 million in December) and 51 million new downloads for Signal (compared to 1.2 million in December 2020).

The issue sees major discussions in the South African media landscape with 405 articles, news or actuality discussions being identified in the month

With many legal, technology and business experts giving their opinions on the matter. Mentions of Telegram and Signal naturally also spike during this period.

Despite the WhatsApp terms and conditions changes which dominates the headlines, it is not the only story around the messaging service to be discussed in South African media.

WhatsApp also plans to de-platform GovChat, South Africa's official citizen engagement platform, which now approached the Competition Tribunal for an urgent interdict to halt Facebook’s plans to remove it from WhatsApp due to an alleged violation of the contractual terms of use. The Competition Tribunal then releases an order for an interim arrangement until it issues its decision in the interim relief application by GovChat.

# FEBRUARY 2021

The initial media storm calms down during February 2021 – although still seeing considerable media coverage. WhatsApp clarifies the new terms and conditions and says the changes will not allow the company to read personal conversations, rather that it will make it easier for users to contact businesses.

The issue also appears in political circles with the Democratic Alliance (DA), saying it would request that Facebook be summoned to Parliament to account on several matters, including the protection of the digital privacy of South African users.

# MARCH 2021

The Information Regulator (IR) communicates with Facebook South Africa, outlining its concerns about the social media platform's privacy policy as it relates to South Africa. The regulator says it is disturbed that European Union (EU) citizens, protected by the General Data Protection Regulation (GDPR) will receive much higher privacy protection than users in South Africa.

Advocate Pansy Tlakula, chairperson of the IR, says the regulator is concerned as South Africa's POPI Act is similar to the European legislation – yet different terms and conditions are enforced on South African users.

# APRIL 2021

A variety of topics are discussed in the media. Though the privacy concerns due to the WhatsApp changes still features, news reports that GovChat has been granted interim relief by the Competition Tribunal against WhatsApp and Facebook, halting its removal from the WhatsApp for a period of six months. This after WhatsApp and Facebook claimed that GovChat is violating its terms of service.

The month also saw reports about a hacker offering data on more than 500 million Facebook users though Facebook said it was old data and the issue had been resolved in 2019 already.

Zimbabwe's First Capital Bank further announces the launch of Alisa, an innovative WhatsApp banking chatbot that uses machine learning and cognitive computing technologies to provide various banking services and transaction capabilities.

# MAY 2021

Despite the looming new deadline to accept the updated terms and conditions by 15 May 2021, the issue sees relatively low further discussions.

South African media also report on the Hamburg Commissioner for Data Protection and Freedom of Information (Germany) imposing a three-month ban on Facebook collecting user data from WhatsApp accounts and referred the case over to the European Data Protection Board, an independent body that enforces rules throughout the EU.

Most media coverage however focused on the Information Regulator (IR) and WhatsApp having failed to reach an agreement for the privacy policy in South Africa to be revised to the standard used for countries in the European Union.

The Information Regular insists that the POPI Act has a privacy regime that is comparable to the EU regime and therefore believes WhatsApp should adopt the EU policy in South Africa. The IR further also announced that it asked the portfolio committee on justice and correctional services to request Facebook South Africa and WhatsApp to appear in parliament.

The month ends with some more challenges for WhatsApp as it files a lawsuit against the Indian government – seeking to block regulations that would compel them to break privacy protections.

Some reports still note Signal's growth at WhatsApp's expense.

**"MOST MEDIA COVERAGE HOWEVER FOCUSED ON THE INFORMATION REGULATOR (IR) AND WHATSAPP HAVING FAILED TO REACH AN AGREEMENT FOR THE PRIVACY POLICY IN SOUTH AFRICA TO BE REVISED TO THE STANDARD USED FOR COUNTRIES IN THE EUROPEAN UNION."**

n Sum of media coverage

# TIMELINE - MAJOR EVENTS

90 **10-14TH JANUARY 2021**

After WhatsApp announces new privacy terms and conditions on 6 January 2021 local media starts reporting the news. Major spikes in coverage occur from 10-14 January 2021 as a myriad of news platforms discusses the issue and how people are downloading Signal and Telegram as alternative messaging platforms.

44 **22nd JANUARY 2021**

Major reporting on the Competition Tribunal releasing an order for an interim arrangement until it issues its decision in the interim relief application against WhatsApp and Facebook by government's GovChat WhatsApp-based citizen platform. Some further reports compare the different messaging platforms. Media also reports on WhatsApp backtracking its decision to enforce new privacy policies from the 8 February 2021. WhatsApp has now giving users until 15 May 2021 to familiarize themselves with the new policy before making a decision. It also says there is much misinformation about the new terms and conditions.

28 **5th march 2021**

The Information Regulator (IR) in South Africa said that it was concerned about the new WhatsApp policy changes facing users who ignored Facebook`s terms by the new 15 May deadline. The regulator has written to the parent company, Facebook, regarding changes that could see South African users being kicked off WhatsApp. The IR says this is in line with the existing Protection of Personal Information Act rules. The regulator has also contacted Facebook South Africa and raised its concerns about the company's privacy policy.

11 **29th march 2021**

The Competition Tribunal prohibits Facebook, WhatsApp and Facebook SA from off-boarding GovChat from the messaging service, despite Whatsapp claiming that GovChat "repeatedly refused to comply" with its terms of service.

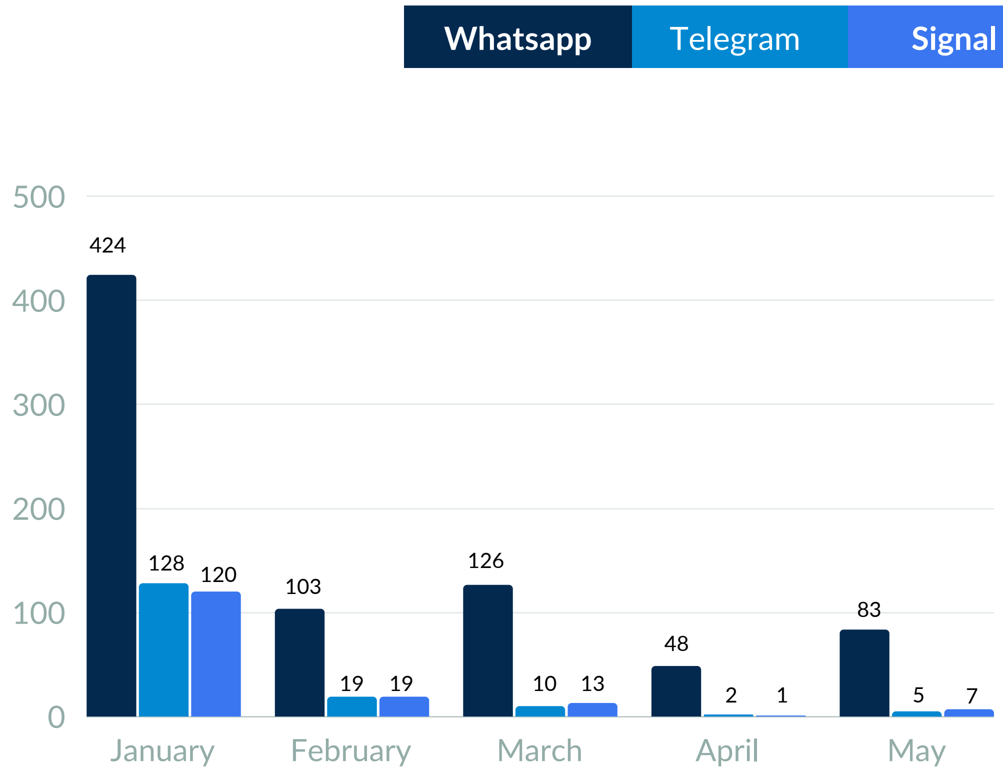
17 **14th may 2021**

The Information Regulator of South Africa says it will be taking further action regarding the WhatsApp privacy policy changes. It said that it had requested the company to revise its policy for SA to match the EU policy. Reports on Facebook founder Mark Zuckerberg celebrating his 37th birthday today – many are criticizing him due to privacy issues. The new WhatsApp terms and conditions become effective on 15 May 2021.

14 **27th may 2021**

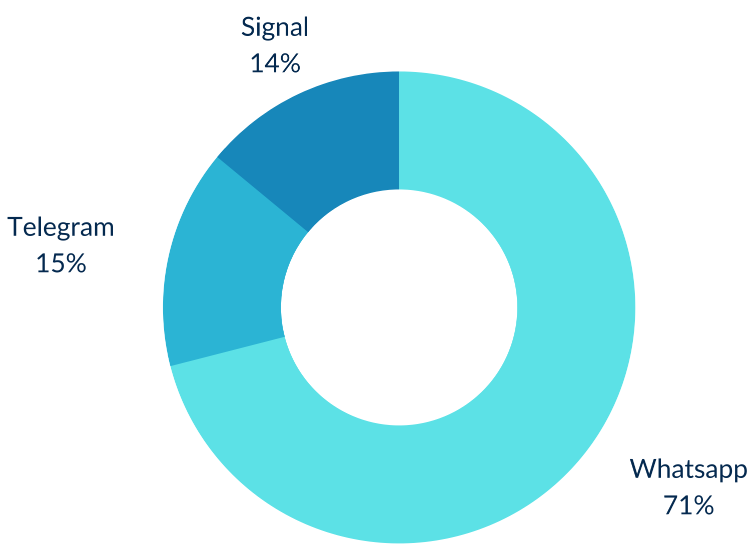
WhatsApp files a legal complaint against the Indian government seeking to block regulations experts say would compel it to break privacy protections.

# TIMELINE COMPARISON OF MESSAGING PLATFORM MENTIONS




| | Whatsapp | Telegram | Signal |
|---|---|---|---|
| January | 424 | 128 | 120 |
| February | 103 | 19 | 19 |
| March | 126 | 10 | 13 |
| April | 48 | 2 | 1 |
| May | 83 | 5 | 7 |

# SHARE OF COVERAGE




| Whatsapp | Telegram | Signal |
|---|---|---|
| 71% | 15% | 14% |

# NOTABLE COMMENTATORS FEATURED IN THE MEDIA

**ADVOCATE PANSY TLAKULA**
(CHAIRPERSON OF THE INFORMATION REGULATOR OF SOUTH AFRICA)

**PIETER GELDENHUYS**
FUTURIST AND DIRECTOR
INSTITUTE FOR TECHNOLOGY STRATEGY AND INNOVATION

**TOBY SHAPSHAK**
JOURNALIST AND COMMENTATOR

**ROSS SAUNDERS**
DATA PRIVACY SPECIALIST

**ALISTAIR FAIRWEATHER**
PLAIN SPEAK TECHNOLOGY

**ADVOCATE RIAN SCHOEMAN**
HEAD OF LEGAL
LAWTRUST

**THABISO MOLOI**
AUTHOR
BANDWITH BLOG

**TUMISANG NDLOVU**
JOURNALIST

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**JAN VERMEULEN**
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REFRAMED

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OF WASPA

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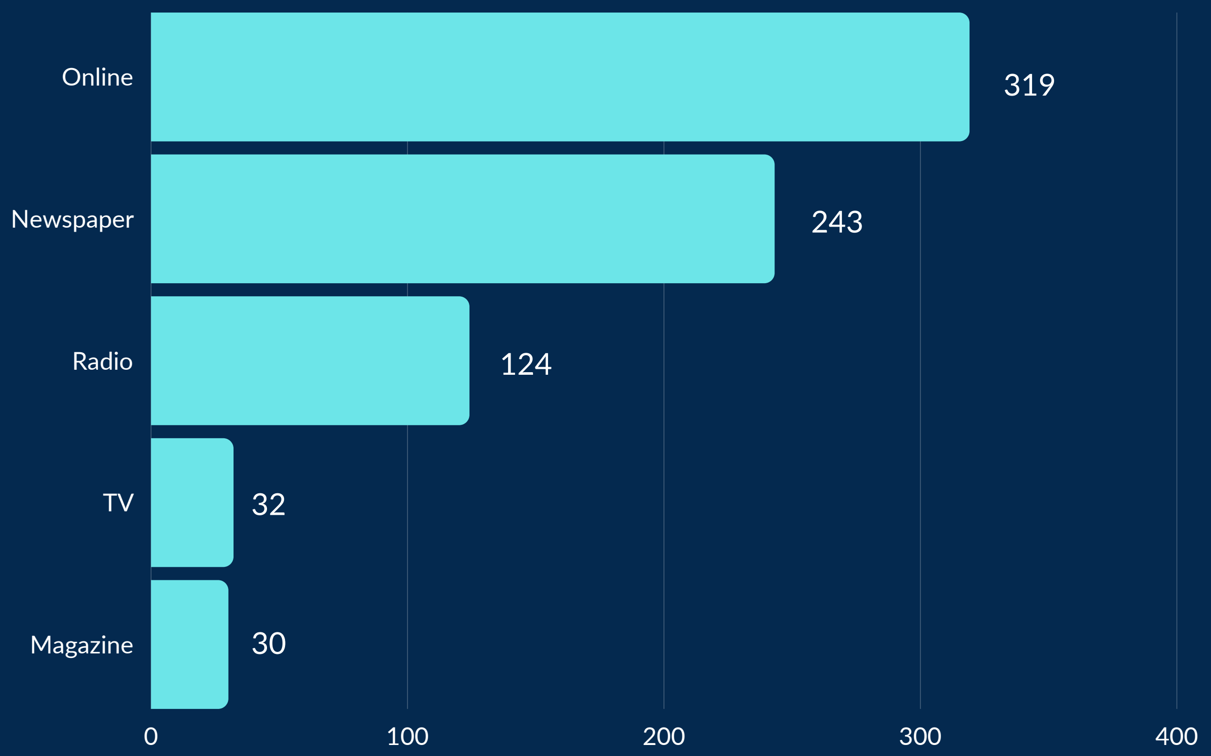
## MEDIA TYPES (UNIQUE ITEMS)




| Online | Newspaper | Radio | TV | Magazine |
|---|---|---|---|---|
| 319 | 243 | 124 | 32 | 30 |

Online media reported most on the WhatsApp privacy concerns and subsequent growth in downloads for rival services Telegram and Signal. MyBroadBand and ITWeb following developments quite extensively.

Print media also featured the story widely, with publications such as Avusa's Business Day and Financial Mail, and Independent's Cape Argus, The Mercury, and The Herald reporting developments.

Television news channels such as ENCA and Newzroom Afrika, as well as talk radio stations (Power FM, 702, Cape Talk, SAFM and RSG) also followed the story.

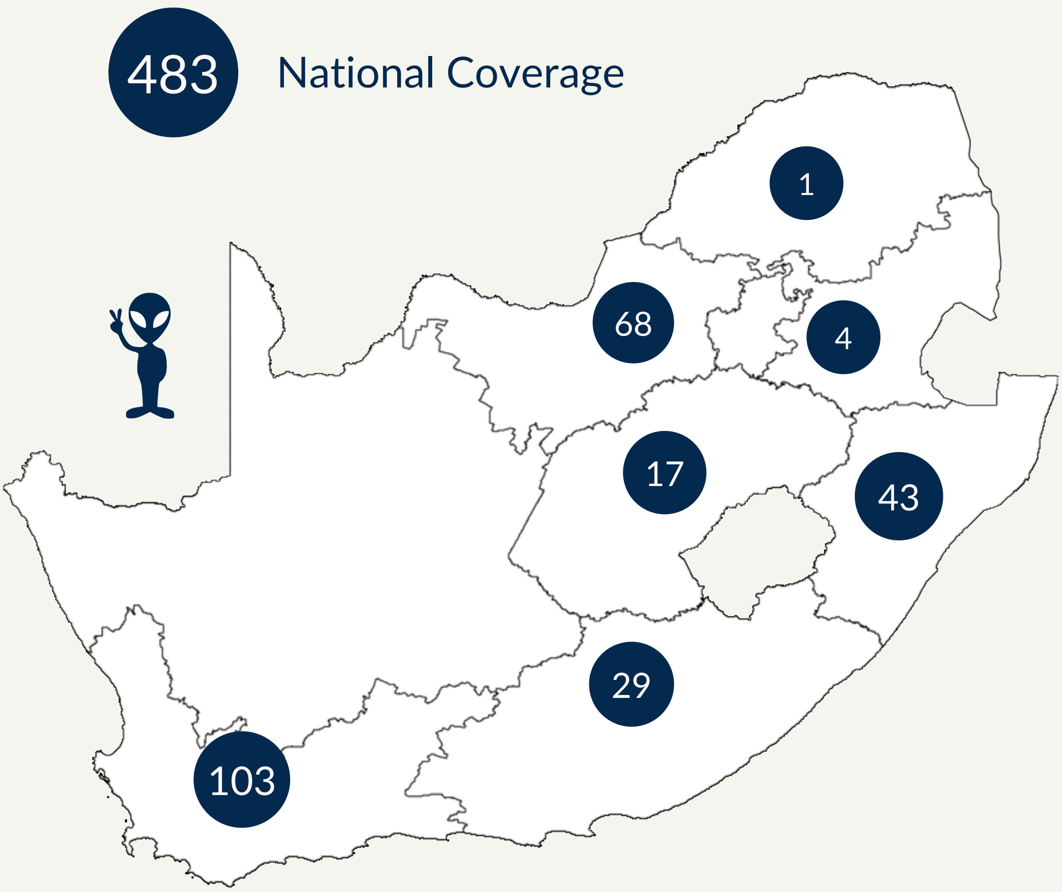
# NATIONAL VS REGIONAL COVERAGE (UNIQUE ITEMS)

The vast majority of WhatsApp, Signa and Telegram-related coverage featured in national media (with websites also considered national media due to web access).

Western Cape, Gauteng and Kwa-Zulu Natal regional media also featured most strongly – with regional sources such as Die Burger, Cape Times, Cape Talk (Western Cape), Gauteng-based Pretoria News, 702, Power FM and KwaZulu Natal's The Mercury and The Witness reporting widely.

It is interesting to note that though major daily publications reported on the issue, many community-based newspapers around the country also reported on the privacy changes.

Oudtshoorn Courant, Mossel Bay Advertiser, The Lowvelder, George Herald, Breederivier Gazette, Newcastle Express, Graaff Reinet Advertiser, Pimville Urban News, just to name a few, are some of the regional community media which featured coverage.




| | SUM |
|---|---|
| **South Africa** | 483 |
| Western Cape | 103 |
| Gauteng | 68 |
| Kwazulu Natal | 43 |
| Eastern Cape | 29 |
| Free State | 17 |
| Mpumalanga | 4 |
| Limpopo | 1 |

# TOP 5 MEDIA SOURCES

**TV**

| | |
|---|---|
| ENCA | 12 |
| Newzroom Afrika | 8 |
| kykNET | 3 |
| ETV | 2 |
| SABC3 | 2 |

**Radio**

| | |
|---|---|
| Power FM | 18 |
| Radio 702 | 17 |
| Cape Talk | 16 |
| SAFM | 12 |
| RSG | 11 |

**Newspapers**

| | |
|---|---|
| Business Day | 23 |
| Cape Argus | 10 |
| The Mercury | 9 |
| The Herald | 7 |
| The Star | 7 |

**Online**

| | |
|---|---|
| MyBroadband | 16 |
| ITWeb | 16 |
| South Africa Today | 11 |
| IOL | 8 |
| News24 | 8 |

**Magazines**

| | |
|---|---|
| Financial Mail | 7 |
| Brainstorm | 3 |
| Security Focus | 2 |
| Kuier | 1 |
| De Rebus | 1 |

## WORD CLOUD

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world wide worx

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YOUKNOW

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