

Profiling the social media user in South Africa

 By [Juanita Pienaar](#)

29 Oct 2018

[Arthur Goldstuck](#) presented the SA social media landscape report at Marketing Mix's Social Media Landscape Briefing 2019 a few weeks ago and in the second part of his presentation, he discussed what the South African social media user looks like.



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What's happening in the app stores

To profile the South African social media user, Goldstuck wanted to show us what apps are being downloaded by South Africans. This information gives you context as to where significant growth and activity will take place in social media.



#SML18: How SA brands are approaching social media

Juanita Pienaar 24 Oct 2018



Google Play app store

GOOGLE PLAY TOP APP CHARTS

#	Free	Paid	Grossing
1	 WhatsApp Messenger WhatsApp Inc.	 Minecraft Mojang	 Candy Crush Saga King
2	 YouTube Go Google	 Hitman Sniper SQUARE ENIX	 Toon Blast Peak Games
3	 SHARE.it SHARE.it	 Farming Simulator 18 Giant Software	 Tinder Match Group
4	 Facebook Lite Facebook	 Roberts Multimedia Birds of SA Gibson	 Gardenscapes Playrix
5	 Messenger Facebook	 The Wonder Weeks Domus Technica	 Clash of Clans Supercell
6	 Opera Mini Opera Software	 Torque Pro (OBD 2 & Car) Ian Harkin	 Google Drive Google
7	 Messenger Lite Facebook	 Carb Wise Carb Wise	 Lord's Mobile: Battle... IGG
8	 Instagram Instagram	 Gear Navigation SmartWatchStudios	 Billionaire Casino Slots Huge Games
9	 Capitec Remote Banking Capitec Bank	 CamFoPlan Tasmanic	 Homescapes Playrix
10	 Word Link Wuzzle	 Assassin's Creed Identity Ubisoft	 King of Avalon: Dragon... FunRus

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The free downloads data shows the vast majority of the apps are either social media or apps that help reduce data use. YouTube Go, for example, came from nowhere and was only launched in the last year, and already there is massive demand for it because it reduces data overheads and data-use substantially, within the apps themselves. Facebook Lite and Messenger show that there is huge demand amongst people who can't afford data to use the light and free-to-use options.

Opera Mini is also a browser that reduces the use of data significantly. Instagram is another indicator in the social media user base in South Africa. Then there's also the Capitec app, the one bank that is included into the top downloads. It again speaks to the changing nature of the social media user base and the mobile base user in South Africa. As you can see, the lower end of the market, which is predominantly Capitec's user base, is coming into the data environment quite strongly.

The top paid app currently is Minecraft and it remains one of the top mobile games in the world, but when it comes to top grossing apps, it's Candy Crush and Toon Blast. Dating app, Tinder is at number 3.

IOS app store

iOS TOP APP CHARTS

#	Free	Paid	Grossing
1	 WhatsApp Messenger WhatsApp Inc.	 Full Fitness: Exercise Workout Health Agents	 Tinder Match Group
2	 Instagram Instagram	 The Wonder Weeks Dorus Technica	 Netflix Netflix
3	 Messenger Facebook	 PlantSnap Plant Identification PlantSnap	 Toon Blast Peak Games
4	 YouTube Google	 Forest - Stay Focused Cyro Games	 Candy Crush Saga King
5	 Facebook Facebook	 Minecraft Mojang	 Fortnite Epic Entertainment
6	 Gmail Google	 Heads Up! Warner Bros	 LinkedIn LinkedIn
7	 SHARE.it SHARE.IT	 Plague Inc. Ndemic Creations	 Homescapes Playrix
8	 Snapchat Snap	 Evoland Playdigious	 Gardenscapes Playrix
9	 Truecaller Truecaller	 BPT - Bear Focus Timer IDEAMP	 Scanner App BPMobile
10	 Discovery Discovery Ltd.	 Facetune Lightricks	 Deezer Deezer

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In the IOS app store, on the free app side, you don't see the light apps. You don't see YouTube Go or Facebook Lite or Opera Mini here. What you do see is Discovery, which tells you where Discovery's user base primarily plays. In fact, Goldstuck says when Discovery does their own surveys, they find that they have a high proportion of iPhone users and therefore their development tends to be iPhone-biased. So the mindset at Discovery is very much geared towards the upper end of the market.

The other interesting free downloaded app on iOS is Snapchat. What this is telling us is that Snapchat is big, but is mostly used by more affluent kids.

Goldstuck says the top grossing apps on iOS are the most interesting because you see the real world application of the phrase, 'Netflix and Chill' - the top two spots are occupied by Tinder and Netflix. LinkedIn also makes the list, which shows that the users tend to be at the upper end of the market, since they are willing to pay for their LinkedIn accounts.

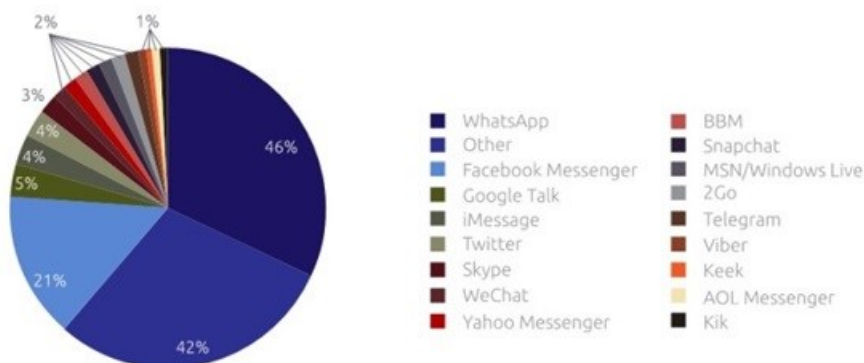
Insights from user bases and user trends

Instant message providers

What is very clear from the data collected with regards to instant message providers is the dominance of WhatsApp, but

also how significant Facebook Messenger is in the high-end space. Initially, Facebook Messenger was seen as clunky and WhatsApp as far simpler and far more effective, but along with the light version of Facebook and the zero-rating of Facebook Lite and Messenger, massive growth was experienced by Messenger.

THE INTERNET Currently used Instant Message Providers



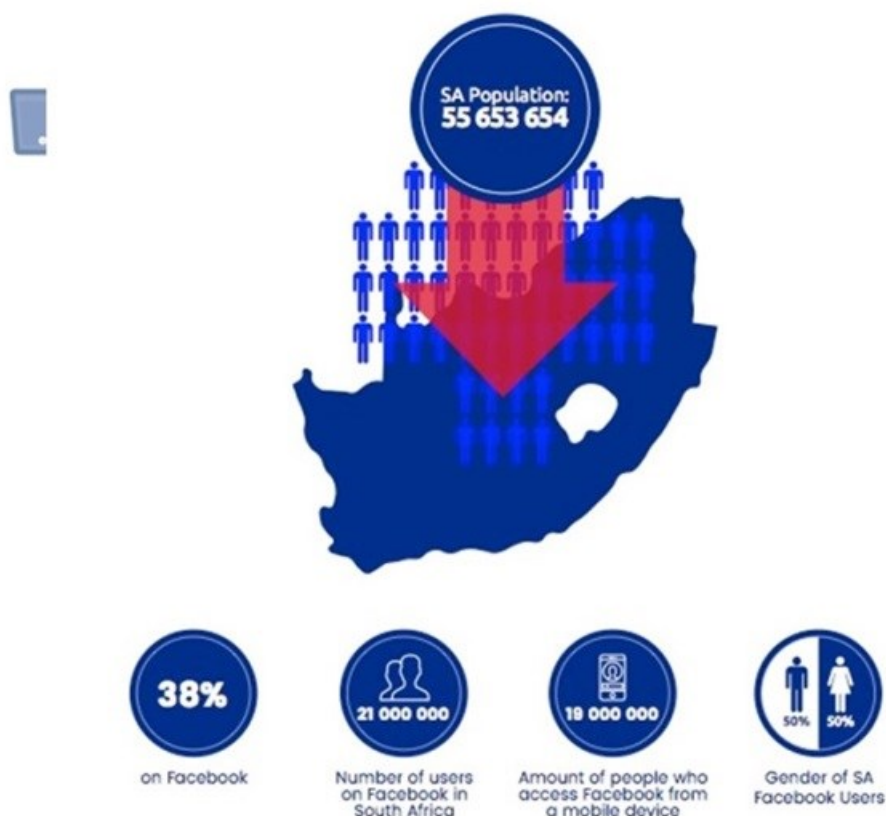
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Age penetration per instant messaging tool showed that the younger you are, the more likely you are to use instant messaging and the older you are, the more likely you are to use SMS.

Facebook

Facebook numbers in South Africa showed 21,000,000 users and 38% penetration. This shows the impact that Facebook can have on social discourse in this country and therefore also its responsibility in this country.



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Goldstuck then moved on and showed us demographics in terms of regional breakdown which indicated that the number of Facebook users in Johannesburg is substantially bigger. What's interesting is to see the dramatic growth in the smaller centres, Port-Elizabeth, Bloemfontein, East London and Nelspruit. This speaks to the greater penetration of Facebook thanks to Facebook Lite and Messenger.



Facebook reaches 29% usage in South Africa, 97% by brands

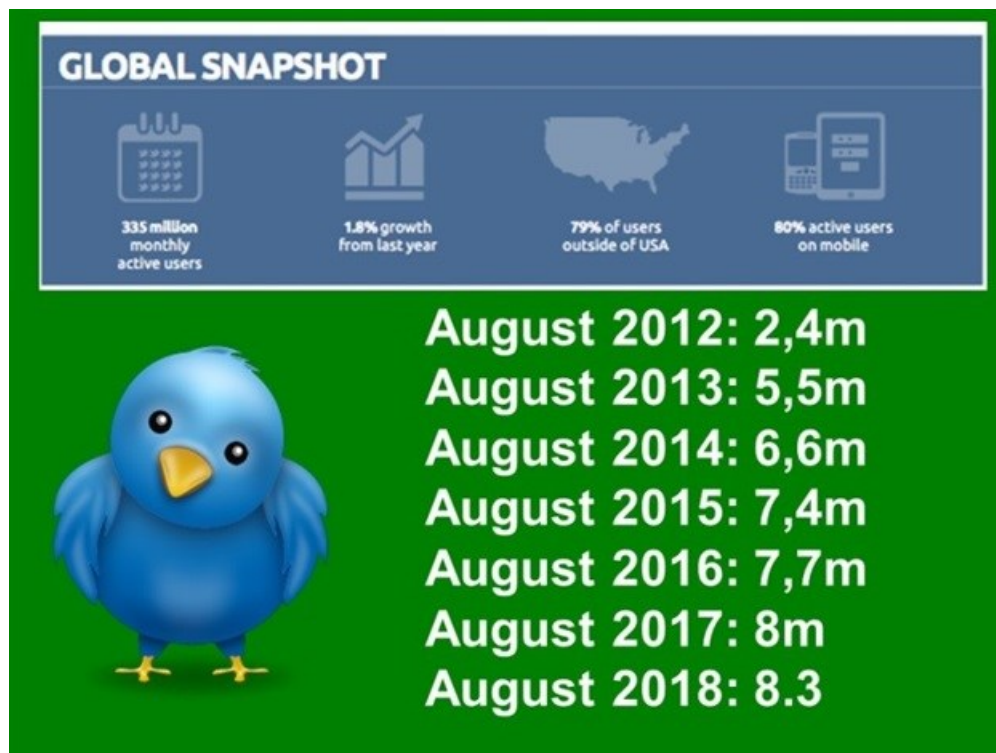
21 Sep 2017



Moving on to the age breakdown and age growth trend - this showed that the youth market (13-18) was still very strong Facebook users. The highest penetration is in the 31-40 bracket. These stats show that the youth have not abandoned Facebook, and certainly not in the mass market. You might find that the more affluent youth have moved over to Snapchat and Instagram, but overall the youth market in SA was still significant.

Twitter

Twitter has recently deleted millions of accounts. For some reason, this has hammered their share price because all they could see was reduced numbers. But what we should actually see in this is a platform with great integrity because of fewer fake users.



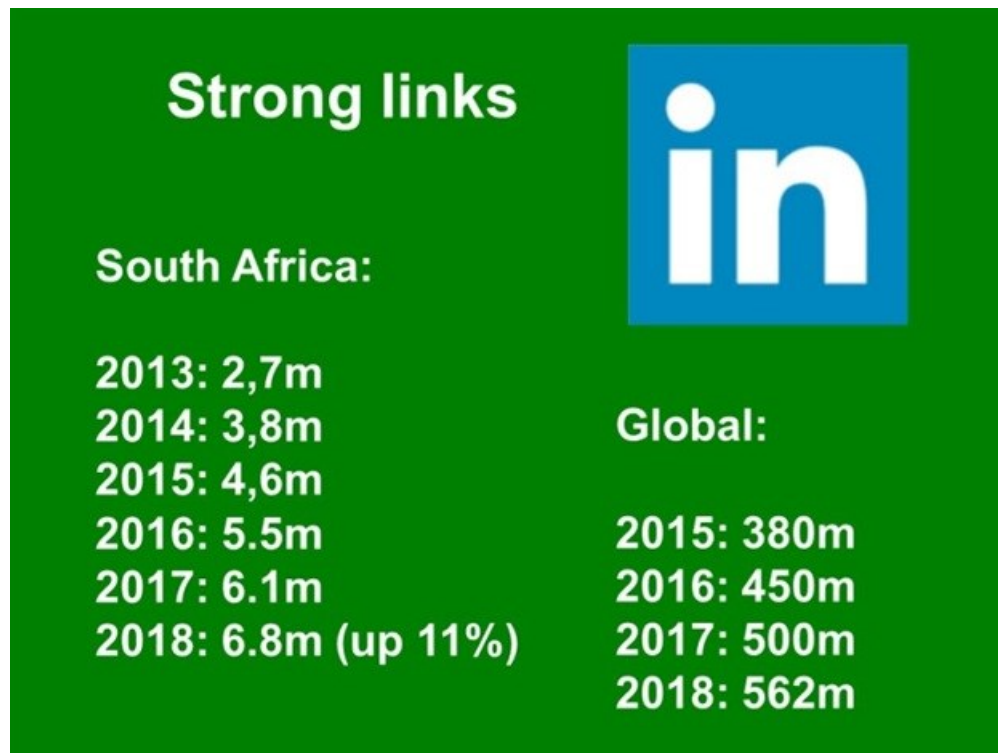
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What is most interesting to note looking at the Twitter numbers is the proportion of Twitter users outside of the United States. 79% (4 out of 5) of Twitter users are outside of the USA. So, when you see a substantial falling within the USA with the overall user base having grown by almost 2%, it tells you that outside the US, growth is still quite strong. South Africa follows that same trend, not as strong as in Instagram-type numbers, but certainly stronger in terms of the perception that Twitter is declining.

LinkedIn

LinkedIn's growth in SA is on par with the way it's been growing internationally. 6.8 million users, in terms of user base, brings LinkedIn very close to the Twitter and YouTube user bases in South Africa. The problem with LinkedIn is that the level of highly active users is relatively low compared to other platforms. People don't come back to LinkedIn every day.



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From the demographics presented, Goldstuck concluded that most of LinkedIn's growth happens with users that work for SMEs. What that means is that small businesses are catching up to the power and utility of LinkedIn as a professional network.

Previously, just a year ago, LinkedIn was still very male-oriented: 2 million to 1.6 million. In 2018 it turned out that a significant number of new users were female. So, there was a significant number of new female members than male: 600,000 to 400,000. But in terms of overall numbers, there are still more males than females.

Instagram



South Africa

2013: 680 000

2014: 1,1m

2015: 2,68m

2016: 3,5m

2017: 3.8m

2018: 6.6m (up 73%)

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Instagram has shown substantial growth since last year. The last time it delivered such dramatic growth results was in 2015 when it more than doubled. It's up 73% in the past years, and there are a lot of factors behind that growth:

- Greater use of awareness
- Greater use of brands
- Mass promotion by brands across Instagram
- The commercialisation of Instagram
- The ability of video on Instagram / live stories

Instagram, as a platform, has evolved significantly for the consumer but even more significantly for the marketer. Marketers are pushing their customers to Instagram in a big way because they find it such an effective way to reach those customers. It is also seen as a powerful tool for public relations.

Arthur Goldstuck's presentation formed part of the research that was shared at the Social Media Landscape Briefing 2019 in Cape Town on 18 October. If you have any questions, you can contact him via email on arthur@worldwideworx.com and follow him on [Facebook](#), [Twitter](#) and [Instagram](#). You can also follow World Wide Worx on [Facebook](#) and [Twitter](#).

ABOUT JUANITA PIENAAR

Juanita is the editor of the marketing & media portal on the Bizcommunity website. She is also a contributing writer.

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