The Infinite Dial®
South Africa
Study Overview

- The Infinite Dial is the longest-running survey of digital media consumer behavior in America.

- The Infinite Dial South Africa report mirrors the Infinite Dial U.S. reports, which have been undertaken annually since 1998 by Edison Research, and cover a wide range of online digital media topics.

- The premier Infinite Dial South Africa report explores the penetration of online digital audio and social media in South Africa, as well as the online platforms and technologies that South Africans are using.

- This study is designed to allow for direct comparisons between the South African and U.S. markets.
Study Methodology

- In July of 2019, Edison Research conducted face-to-face interviews with 1,510 people aged 15 and older

- Sample population consists of those living within the major metro areas, covering the upper 2 of the 3 SEM Supergroups (or upper 3 of the 5 SEM Clusters), referred to hereafter as “Major Metro Commercial Population”

- Data weighted to reflect the gender, age, and race of this population
Devices & Technologies
Smartphone Ownership in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% OWNING A SMARTPHONE

- Total 15+: 88%
- Age 15-34: 93%
- Age 35-54: 88%
- Age 55+: 74%
Smartphone Ownership

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% OWNING A SMARTPHONE

- USA 2015: 71%
- USA 2016: 75%
- USA 2017: 81%
- USA 2018: 83%
- USA 2019: 84%
- South Africa 2019: 88%
Smartphone Ownership

German, Canadian, Australian, and USA total populations 18+; South African major metro commercial population 18+

% owning a smartphone

- Germany 2019: 80%
- Canada 2019: 82%
- Australia 2019: 89%
- USA 2019: 83%
- South Africa 2019: 87%
Smart Speaker Awareness in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% AWARE OF ANY SMART SPEAKER BRAND

- Total 15+: 24%
- Age 15-34: 33%
- Age 35-54: 22%
- Age 55+: 4%
Smart Speaker Awareness

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% AWARE OF ANY SMART SPEAKER BRAND

- Germany 2019: 65
- Canada 2019: 65
- Australia 2019: 81
- USA 2019: 78
- South Africa 2019: 23
Listening to AM/FM Radio in the Last Week in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO AM/FM RADIO IN LAST WEEK

AM/FM RADIO INCLUDES OVER-THE-AIR, ONLINE, AND TELEVISION

- Total 15+: 68%
- Age 15-34: 63%
- Age 35-54: 71%
- Age 55+: 76%
Listening to AM/FM Radio in the Last Week

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENING TO AM/FM RADIO IN LAST WEEK

AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

USA 2019: 68%
South Africa 2019: 68%
Listening to AM/FM Radio in the Last Week

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% LISTENING TO AM/FM RADIO IN LAST WEEK

AM/FM RADIO INCLUDES BOTH OVER-THE-AIR AND ONLINE

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
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<td>Canada 2019</td>
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<td>84</td>
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<tr>
<td>USA 2019</td>
<td>69</td>
</tr>
<tr>
<td>South Africa 2019</td>
<td>68</td>
</tr>
</tbody>
</table>
Radio Listening at Home on Non-Radio Devices in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO RADIO WHILE AT HOME USING A MOBILE PHONE, COMPUTER, OR TV

- **Total 15+**: 44%
- **Age 15-34**: 56%
- **Age 35-54**: 43%
- **Age 55+**: 17%

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Radio Listening at Home on Non-Radio Devices in South Africa

Australian Total Populations 18+; South African Major Metro Commercial Population 18+

% Listening to Radio While at Home Using a Mobile Phone, Computer, or TV

Australia 2019: 21%
South Africa 2019: 44%
Importance of Keeping Up-To-Date with Music in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

“How important is it to you to keep up-to-date with music?”

- Very important: 42%
- Somewhat important: 33%
- Not at all important: 25%
Sources Used Most Often to Learn about Music in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

- AM/FM radio: 58%
- YouTube: 14%
- Music TV channels: 6%
- Friends/Family: 15%
- Other: 7%
Monthly Online Audio Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
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<tr>
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<td>Age 15-34</td>
<td>55</td>
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<tr>
<td>Age 35-54</td>
<td>34</td>
</tr>
<tr>
<td>Age 55+</td>
<td>9</td>
</tr>
</tbody>
</table>
Monthly Online Audio Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENING TO ONLINE AUDIO IN LAST MONTH

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

USA 2012: 38%
USA 2013: 45%
USA 2014: 46%
USA 2015: 53%
USA 2016: 57%
USA 2017: 61%
USA 2018: 63%
USA 2019: 66%
South Africa 2019: 39%
Monthly Online Audio Listening

Germany, Canadian, Australian, and USA total populations 18+; South African major metro commercial population 18+

% Listening to Online Audio in Last Month

Online Audio = Listening to AM/AM/FM/DAB+ radio stations online and/or listening to streamed audio content available only on the Internet; does not include YouTube for music.

<table>
<thead>
<tr>
<th>Country</th>
<th>2019 Percent</th>
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<tbody>
<tr>
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<td>Canada</td>
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<tr>
<td>USA</td>
<td>66</td>
</tr>
<tr>
<td>South Africa</td>
<td>39</td>
</tr>
</tbody>
</table>
Weekly Online Audio Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% LISTENING TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

Total 15+ 32
Age 15-34 44
Age 35-54 27
Age 55+ 9
Weekly Online Audio Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENING TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET

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<thead>
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<th>USA 2014</th>
<th>USA 2015</th>
<th>USA 2016</th>
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<th>USA 2018</th>
<th>USA 2019</th>
<th>South Africa 2019</th>
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Weekly Online Audio Listening

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% LISTENING TO ONLINE AUDIO IN LAST WEEK

ONLINE AUDIO = LISTENING TO AM/AM/FM/DAB+ RADIO STATIONS ONLINE AND/OR LISTENING TO STREAMED AUDIO CONTENT AVAILABLE ONLY ON THE INTERNET; DOES NOT INCLUDE YOUTUBE FOR MUSIC

- Germany 2019: 35%
- Canada 2019: 51%
- Australia 2019: 54%
- USA 2019: 59%
- South Africa 2019: 32%
In-Car Media
Audio Sources Used in Car in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+ WHO HAVE DRIVEN/RIDDEN IN CAR IN LAST MONTH

% USING AUDIO SOURCE IN CAR

- Radio: 65%
- CD player: 49%
- Owned digital music: 32%
- Online audio: 10%
- Podcasts: 10%
Audio Sources Used in Car

USA Population 18+; South African Major Metro Commercial Population 18+ Who Have Driven/Ridden in a Car in Last Month

% Using Audio Source in Car

- **Radio**: 65% (South Africa 2019), 81% (USA 2019)
- **CD player**: 49% (South Africa 2019), 43% (USA 2019)
- **Owned digital music**: 32% (South Africa 2019), 45% (USA 2019)
- **Online audio**: 10% (South Africa 2019), 28% (USA 2019)
- **Podcasts**: 10% (South Africa 2019), 26% (USA 2019)
Audio Source Used Most Often in Car in South Africa

South African Major Metro Commercial Population 18+; Driven/Ridden in a Car in Last Month; Use Any Audio Source in Car

% Using Audio Source Most Often in Car

- Radio: 45%
- CDs: 29%
- Digital music files: 23%
- Online audio: 3%

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Online Audio Listening in Car Through Mobile Phone in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO OWN A MOBILE PHONE

% EVER LISTENED TO ONLINE AUDIO IN A CAR THROUGH A MOBILE PHONE

- Total 15+: 15
- Age 15-34: 23
- Age 35-54: 13
- Age 55+: < 1%
In-Dash Information and Entertainment Systems

USA POPULATION 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+ WHO HAVE DRIVEN/RIDDEN IN A CAR IN LAST MONTH
% OWNING IN-DASH INFORMATION AND ENTERTAINMENT SYSTEM IN CAR

<table>
<thead>
<tr>
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<th>USA</th>
<th>USA</th>
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</table>

#InfiniteDial
Podcasting Awareness in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% AWARE OF PODCASTING

- Total 15+: 22%
- Age 15-34: 25%
- Age 35-54: 24%
- Age 55+: 13%
Podcasting Awareness

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% AWARE OF PODCASTING

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<td>56</td>
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<td>64</td>
<td>71</td>
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</table>

South Africa 2019
Podcasting Awareness

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% AWARE OF PODCASTING

Germany 2019: 33%
Canada 2019: 63%
Australia 2019: 84%
USA 2019: 70%
South Africa 2019: 23%
Podcast Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% EVER LISTENED TO A PODCAST

- Total 15+: 19%
- Age 15-34: 25%
- Age 35-54: 16%
- Age 55+: 8%
Podcast Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+
% EVER LISTENED TO A PODCAST

<table>
<thead>
<tr>
<th>Year</th>
<th>USA 2008</th>
<th>USA '09</th>
<th>USA '10</th>
<th>USA '11</th>
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</tr>
</tbody>
</table>
Podcasting Listening

German, Canadian, Australian, and USA total populations 18+; South African major metro commercial population 18+

% ever listened to a podcast

- Germany 2019: 32%
- Canada 2019: 49%
- Australia 2019: 31%
- USA 2019: 50%
- South Africa 2019: 19%
Monthly Podcast Listening in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)
% LISTENED TO A PODCAST IN LAST MONTH

- Total 15+: 10
- Age 15-34: 14
- Age 35-54: 8
- Age 55+: 4
Monthly Podcast Listening

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% LISTENED TO A PODCAST IN LAST MONTH

<table>
<thead>
<tr>
<th>Year</th>
<th>USA 2008</th>
<th>USA '09</th>
<th>USA '10</th>
<th>USA '11</th>
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</table>

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Monthly Podcast Listening

GERMAN, CANADIAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% LISTENED TO A PODCAST IN LAST MONTH

- Germany 2019: 16%
- Canada 2019: 36%
- Australia 2019: 22%
- USA 2019: 32%
- South Africa 2019: 10%
Composition of Monthly Podcast Listeners

**South African Major Metro Commercial Population 15+**

- Men: 50%
- Women: 50%

**Monthly Podcast Consumers 15+**

- Men: 59%
- Women: 41%
Composition of Monthly Podcast Listeners

**SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+**

- Age 15-34: 64%
- Age 35-54: 28%
- Age 55+: 8%

**MONTHLY PODCAST CONSUMERS 15+**

- Age 16-34: 66%
- Age 35-54: 27%
- Age 55+: 7%
Composition of Monthly Podcast Listeners

TOTAL MONTHLY HOUSEHOLD INCOME

SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

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<tr>
<th>Income Range</th>
<th>Percentage</th>
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</tr>
<tr>
<td>R1,000 - R5,999</td>
<td>29%</td>
</tr>
<tr>
<td>R6,000 - R9,999</td>
<td>22%</td>
</tr>
<tr>
<td>R10,000 - R19,999</td>
<td>11%</td>
</tr>
<tr>
<td>R20,000 - 29,999</td>
<td>8%</td>
</tr>
<tr>
<td>R30,000 or more</td>
<td>9%</td>
</tr>
</tbody>
</table>

MONTHLY PODCAST CONSUMERS 15+

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
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</thead>
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<td>Less than R1,000</td>
<td>5%</td>
</tr>
<tr>
<td>R1,000 - R5,999</td>
<td>13%</td>
</tr>
<tr>
<td>R6,000 - R9,999</td>
<td>18%</td>
</tr>
<tr>
<td>R10,000 - R15,999</td>
<td>17%</td>
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<tr>
<td>R16,000 - R19,999</td>
<td>8%</td>
</tr>
<tr>
<td>R20,000 - 29,999</td>
<td>15%</td>
</tr>
<tr>
<td>R30,000 or more</td>
<td>25%</td>
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Composition of Monthly Podcast Listeners

- South African Major Metro Commercial Population 18+
- Monthly Podcast Consumers 18+

<table>
<thead>
<tr>
<th>Education Level</th>
<th>South African Major Metro Commercial Population 18+</th>
<th>Monthly Podcast Consumers 18+</th>
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<td>High school</td>
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<td>Some university</td>
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<td>14</td>
</tr>
<tr>
<td>University</td>
<td>6</td>
<td>24</td>
</tr>
</tbody>
</table>
Number of Podcasts Listened to in Last Week in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO LISTENED TO PODCAST IN LAST WEEK; 6%

South African weekly podcast listeners averaged **four podcasts** in the last week.
Device Used Most Often to Listen to Podcasts in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

- Smartphone/Tablet/other mobile device: 71%
- Computer: 15%
- Other: 3%
- Don’t Know: 11%
Podcast Listening Locations in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

% HAVE EVER LISTENED TO A PODCAST IN LOCATION

- At home: 74%
- At work: 24%
- While walking around/on foot: 22%
- In a car, bakkie, or truck: 21%
- While riding a mini-bus taxi: 16%
- While using a taxi service: 13%
- At a gym/while working out: 8%
- While riding a train: 5%
Location Where Podcasts are Most Often Listened to in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

- At home: 66%
- At work: 11%
- Walking around/on foot: 3%
- In a vehicle: 4%
- Other: 5%
- Don't Know: 11%
“Think about the audio podcast episodes you listen to. Do you typically listen to...?"
South African Radio Podcast Listening

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO EVER LISTENED TO A PODCAST

“Do you listen to any podcasts by South African radio stations or South African radio personalities?”

Yes
61%

No
39%
Social Media
Social Media Usage in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)

% USING SOCIAL MEDIA

- Total 15+: 82%
- Age 15-34: 94%
- Age 35-54: 83%
- Age 55+: 51%

#InfiniteDial

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Social Media Usage

GERMAN, AUSTRALIAN, AND USA TOTAL POPULATIONS 18+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 18+

% USING SOCIAL MEDIA

Germany 2019: 75
Australia 2019: 84
USA 2019: 79
South Africa 2019: 82
Social Media Brand Usage in South Africa

TOTAL SAMPLE (SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+)
% CURRENTLY USE SOCIAL MEDIA BRAND

- WhatsApp: 79%
- Facebook: 64%
- Instagram: 25%
- Twitter: 19%
- Snapchat: 12%
- Pinterest: 7%
- LinkedIn: 7%
Social Media Brand Usage

USA TOTAL POPULATION 15+; SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+

% CURRENTLY USE SOCIAL MEDIA BRAND

- **WhatsApp**: 19% (South Africa 2019), 79% (USA 2019)
- **Facebook**: 64% (South Africa 2019), 63% (USA 2019)
- **Instagram**: 25% (South Africa 2019), 38% (USA 2019)
- **Twitter**: 19% (South Africa 2019), 20% (USA 2019)
- **Snapchat**: 12% (South Africa 2019), 29% (USA 2019)
- **Pinterest**: 7% (South Africa 2019), 31% (USA 2019)
- **LinkedIn**: 7% (South Africa 2019), 22% (USA 2019)
Social Media Brand Used Most Often in South Africa

BASE: SOUTH AFRICAN MAJOR METRO COMMERCIAL POPULATION 15+ WHO USE SOCIAL MEDIA

Total 15+
- WhatsApp: 78
- Facebook: 18
- Instagram: 3
- Twitter: 1

Age 15-34
- WhatsApp: 71
- Facebook: 24
- Instagram: 3
- Twitter: 2

Age 35-54
- WhatsApp: 86
- Facebook: 12
- Instagram: 2

Age 55+
- WhatsApp: 89
- Facebook: 9
- Instagram: 2
Observations

• Radio usage continues at a high level in South Africa, in cars and in general
Observations

• The audio space is extremely dynamic with many new forms of audio being used on many devices – especially mobile phones
Observations

• The South African digital audio market lags several years behind the USA and the other surveyed countries on most measures
Observations

• Podcasting is just getting going in South Africa

• The audience to date is highly educated and higher income
Observations

• Digital audio is likely to grow, perhaps rapidly
• There are many opportunities for players in the space, or outside entrants, to power that transition
The Infinite Dial®
South Africa